股票代號：2404

漢唐集成股份有限公司
法人說明會
United Integrated Services Co.
Investor Conference

2024/08/20

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- 漢唐集成公司簡介 (About UIS)
- 營運概況說明 (Operation)
- 財務狀況說明 (Financials)
- 業務展望 (Future Prospects)
- Q & A

Agenda

漢唐集成成立於1982年，為一以「全面性整合服務」方式，專業提供高科技產業建廠之系統集成服務公司；主要業務範圍包括高科技廠房各系統，包括電腦、控制、無塵室、機電、電信系統之施作與整合服務。

漢唐集成的工程系統完備，服務更講求以提供整體施作方式一次滿足客戶需求。針對高科技事業建廠所需之無塵室系統、機械系統、電氣系統、配管系統、製程支援系統、儀錶及控制系統、通訊系統、生命安全系統、門禁及安全管理系統、大宗及特殊氣體系統、超純水（UPW）及再生系統、超純水回收系統、廢水處理與製程化學品輸送，及二次配管路工程等系統，均囊括在漢唐集成的服務範圍內。

漢唐集成就以上各項系統提供從採購、施工、試車、移交、保固到維護保養的服務，過程中並實施深化業主需求、提高施工品質的服務，以科技方式整合以上各項系統工程，達成介面統一，使客戶完全無需擔憂各個不同系統之間的介面整合問題；漢唐集成是國內目前具備系統工程整合技術及能力且有實績有信譽的廠商，並獲得業主及業界多次的授獎及讚譽。

關於漢唐集成

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United Integrated Services Co., Ltd is a multidisciplinary engineering and construction company capable of overall systems coordination. We provide fully integrated design/build services to our clients in the high technology industry for their manufacturing facility needs.

Our scope of services includes high-tech factory construction, where clean-room systems, HVAC, electrical systems, instrumentation and control, process utilities, telecommunication systems, and tool hook-up are all vital components requiring total coordination.

UIS provides integrated services encompassing procurement, construction, testing, handover, warranty, and maintenance for all the aforementioned systems. Throughout the process, we deepen client requirements, enhance construction quality, and integrate these systems using technology, ensuring interface uniformity and eliminating concerns regarding integration issues between different systems.

In short, we strive to be a one-stop shop to satisfy our clients' every facility need. Our company is one of the few domestic firms with the technical expertise, capabilities, and achievements in system engineering integration, enjoying multiple awards and accolades from clients and the industry.

About UIS

UIS History 沿革

1982

漢唐科技工程有限公司成立
Company Established

1990

合併訊聯系統股份有限公司並更名為漢唐訊聯股份有限公司
Acquired United Information Systems

2000

申請掛牌上市
(股票代號 2404)
IPO

2002

中請更名為漢唐集成股份有限公司
Changed name to United Integrated Services Co.

2003

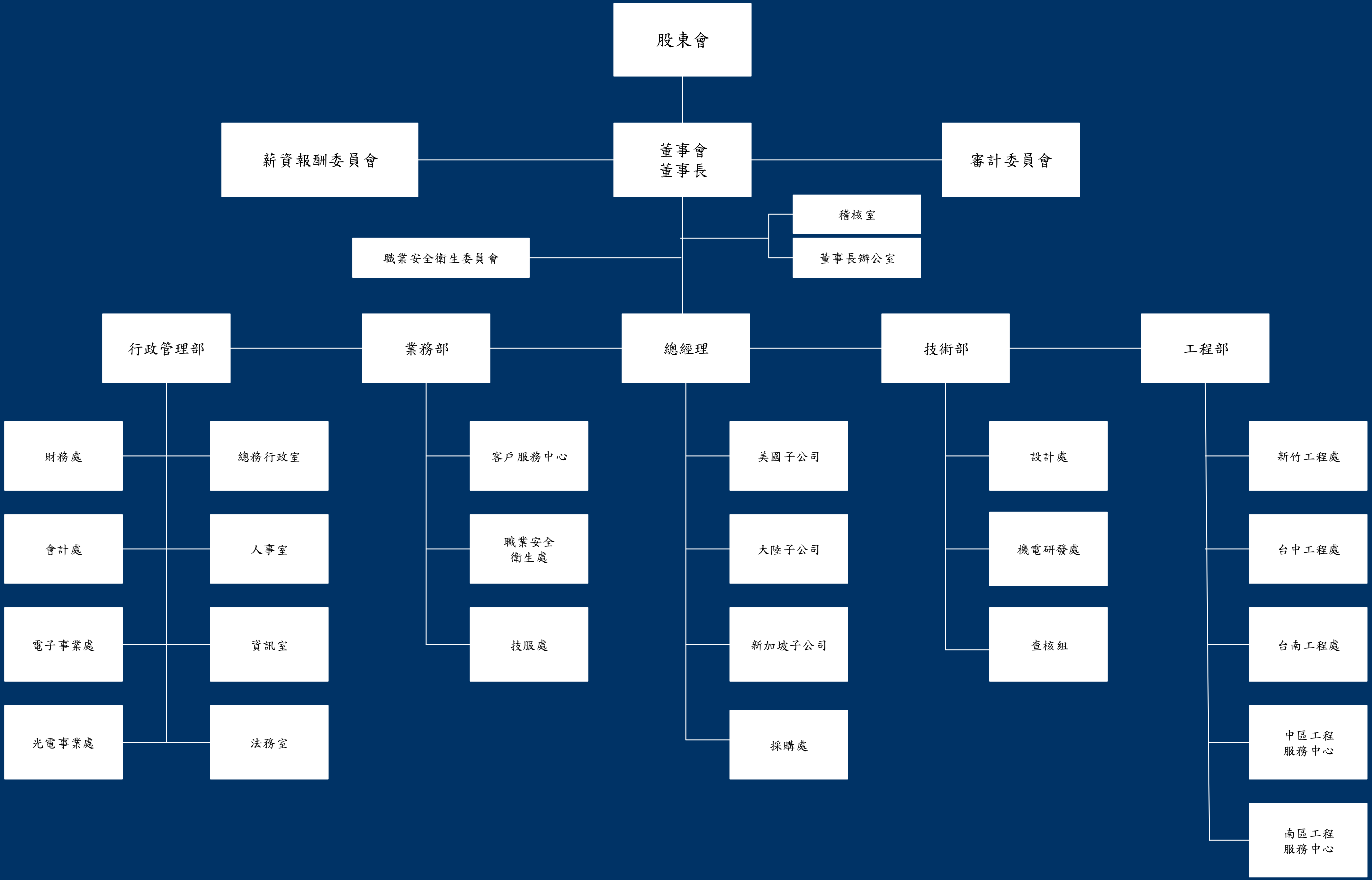
成立江西漢唐系統集成有限公司
Established UIS, Jiang Xi

2011

成立新加坡漢唐私人有限公司
Established UIS, Singapore

2020

成立美國漢唐集成公司
Established UIS USA



股東會

薪資報酬委員會

董事會
董事長

審計委員會

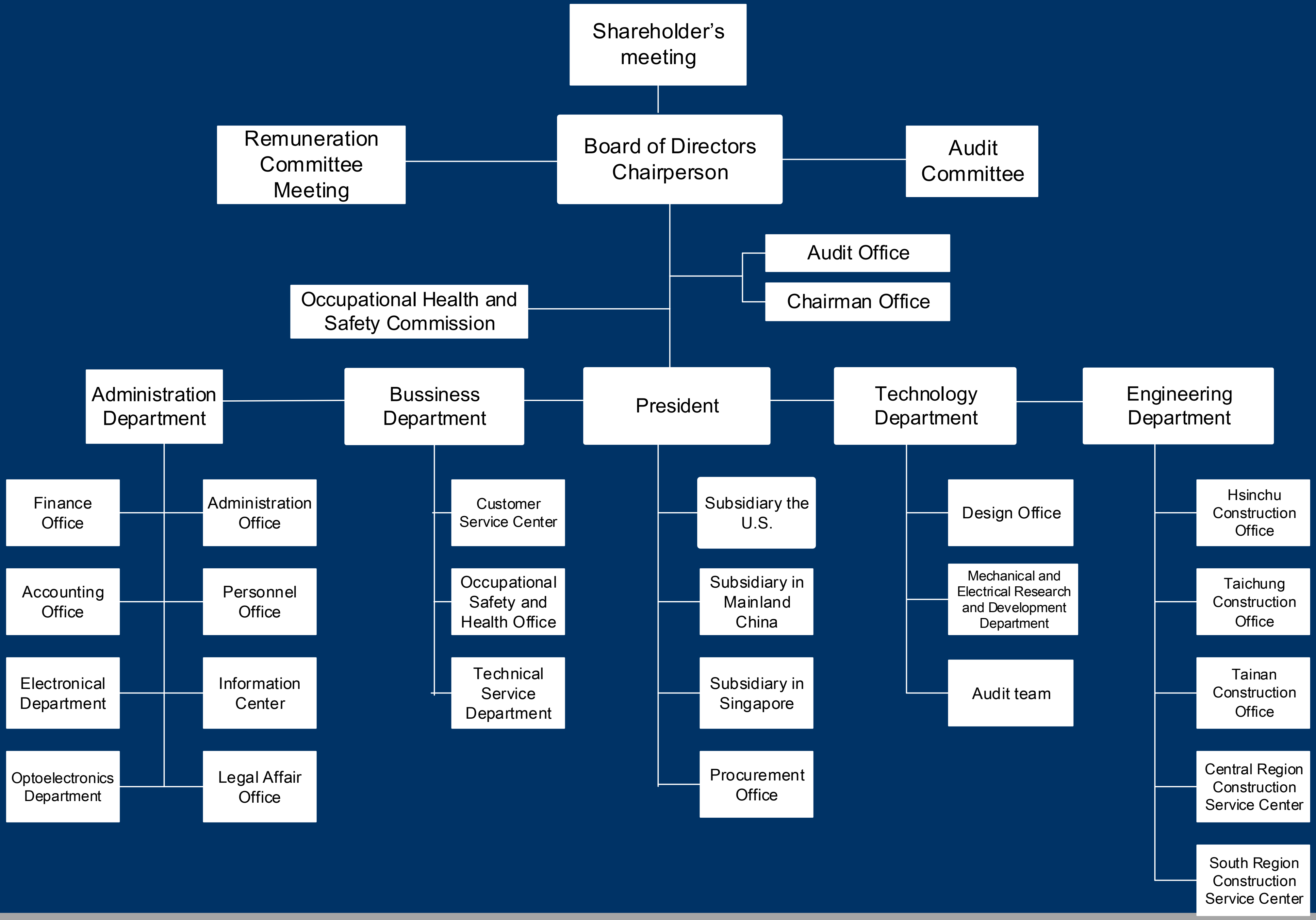
稽核室

董事長辦公室

職業安全衛生委員會

- 行政管理部
  - 財務處
  - 總務行政室
  - 會計處
  - 人事室
  - 電子事業處
  - 資訊室
  - 光電事業處
  - 法務室
- 業務部
  - 客戶服務中心
  - 職業安全衛生處
  - 技服處
- 總經理
  - 美國子公司
  - 大陸子公司
  - 新加坡子公司
  - 採購處
- 技術部
  - 設計處
  - 機電研發處
  - 查核組
- 工程部
  - 新竹工程處
  - 台中工程處
  - 台南工程處
  - 中區工程服務中心
  - 南區工程服務中心

UIS 公司組織表



Shareholder's meeting

Board of Directors Chairperson

Remuneration Committee Meeting

Audit Committee

Audit Office

Chairman Office

Occupational Health and Safety Commission

President

Administration Department

Bussiness Department

Technology Department

Engineering Department

Finance Office

Administration Office

Accounting Office

Personnel Office

Electronical Department

Information Center

Optoelectronics Department

Legal Affair Office

Customer Service Center

Occupational Safety and Health Office

Technical Service Department

Subsidiary the U.S.

Subsidiary in Mainland China

Subsidiary in Singapore

Procurement Office

Design Office

Mechanical and Electrical Research and Development Department

Audit team

Hsinchu Construction Office

Taichung Construction Office

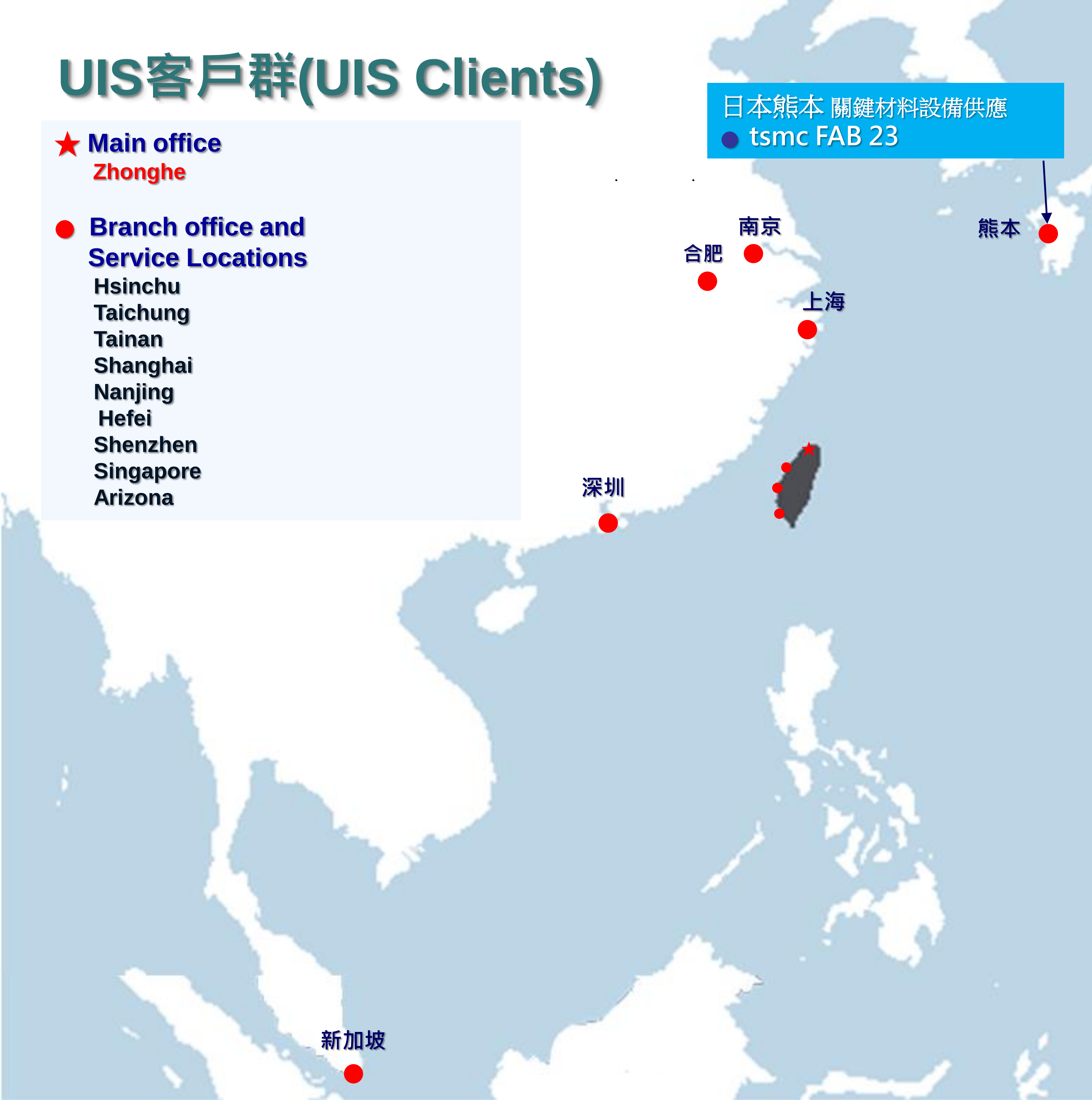
Tainan Construction Office

Central Region Construction Service Center

South Region Construction Service Center

UIS Organization

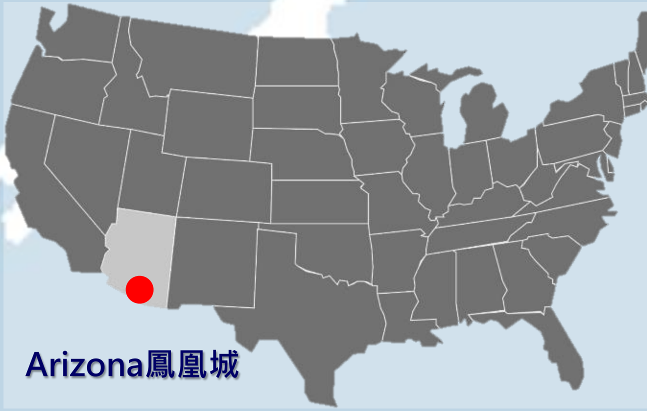
UIS客戶群(UIS Clients)



★ **Main office**
Zhonghe

● **Branch office and Service Locations**
Hsinchu
Taichung
Tainan
Shanghai
Nanjing
Hefei
Shenzhen
Singapore
Arizona

日本熊本 關鍵材料設備供應
● tsmc FAB 23



Hsinchu
● tsmc FAB 12 P5, P6,P7,P8
● tsmc FAB 20 P1- P2

Longtan
● QPM FAB C (TSMC BP03)

Taichung
● tsmc FAB 15 P1- P7
● Micron FAB A2,A3
● auo L8B FAB
● tsmc Solar
● auo Crystal
● Micron TCP2
● tsmc AP5B

Tainan
● tsmc FAB 14 P4- P7
● tsmc FAB 18 P1- P8

Kaohsiung
● ASE K22
● tsmc FAB 22 P1- P2

- 工程承包範圍
  Scope of Engineering
  - 無塵室工程
    Cleanroom
  - 機電工程
    Mech. / Elec. Engineering
  - 水氣化等特殊系統工程
    UPW / WWT / Gas / Chem. Systems
  - 監控系統工程
    I&C

- 服務範圍
  Scope of Services
  - 工程施工
    Construction
  - 售後服務
    After Sale Services

主要服務 Key Services

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半導體主要客戶

台灣積體電路製造股份有限公司

台積電三廠

台積電四廠

台積電六廠

台積電十二廠 P1, P2, P3, P4, P5, P6, P7,P8

台積電十四廠 P1, P2, P3, P4, P5, P6, P7

台積電十五廠 P1, P2, P3, P4, P5, P6,P7

台積電十八廠 P1,P2,P3,P4, P5, P6,P7,P8

台積電南京廠 F16P1 P2

台積電龍潭 BP03

台積電美國F21

台積日本F23（關鍵材料設備供應）

台積電二十廠 P1, P2

台積電二十二廠 P1, P2

台積電封測五廠 AP5B

華邦電子股份有限公司

華邦 FAB I , FAB II , FAB III , FAB IV

華邦 FAB CTSP, FAB 6C

旺宏電子股份有限公司

旺宏 FAB I , FAB II, FAB III

台灣美光記憶體股份有限公司

美光 FAB A1 A2 A3 TCP2 A3M2a

力晶半導體股份有限公司

力晶 FAB 8A , P3 , P4, P5

Taiwan Semiconductor Manufacturing Company Ltd.

- TSMC FAB III
- TSMC FAB IV
- TSMC FAB VI
- TSMC FAB XII P1, P2, P3, P4, P5, P6, P7,P8
- TSMC FAB XIV P1, P2, P3, P4, P5, P6, P7
- TSMC FAB XV P1, P2, P3, P4, P5,P6,P7
- TSMC FAB XVIII P1,P2, P3,P4,P5,P6,P7
- TSMC China Nanjing F16 P1,P2
- TSMC BP03
- TSMC USA F21
- TSMC F20 P1-P2
- TSMC F22 P1-P2
- TSMC AP5B

Winbond Electronics Corp

- Winbond FAB I , FAB II , FAB III , FAB IV
- Winbond FAB CTSP, FAB 6C

Macronix International Co., Ltd

- MXIC FAB I , FAB II, FAB III

Micron Memory Taiwan Co., Ltd.

- Micron FAB A1 A2 A3 TCP2 A3M2a

Powerchip Technology Corporation

- PSC FAB 8A , P3 , P4, P5

主要客戶FPD

友達光電股份有限公司

- 友達 FAB L3C
- 友達 FAB L3D (QDI Line I)
- 友達 FAB L4A
- 友達 FAB L5A
- 友達 FAB L5B
- 友達 FAB L5C
- 友達 FAB L5D (QDI Line II)
- 友達 FAB L6A
- 友達 FAB L6B (QDI Line III)
- 友達 FAB L7A, L7B
- 友達 FAB L8A, L8B

奇美電子股份有限公司

- 奇美 FAB 三廠
- 奇美 FAB 四廠
- 奇美 FAB 五廠
- 奇美 FAB 六廠
- 奇美 FAB 七廠
- 奇美 FAB 八廠

高通液晶顯示器股份有限公司

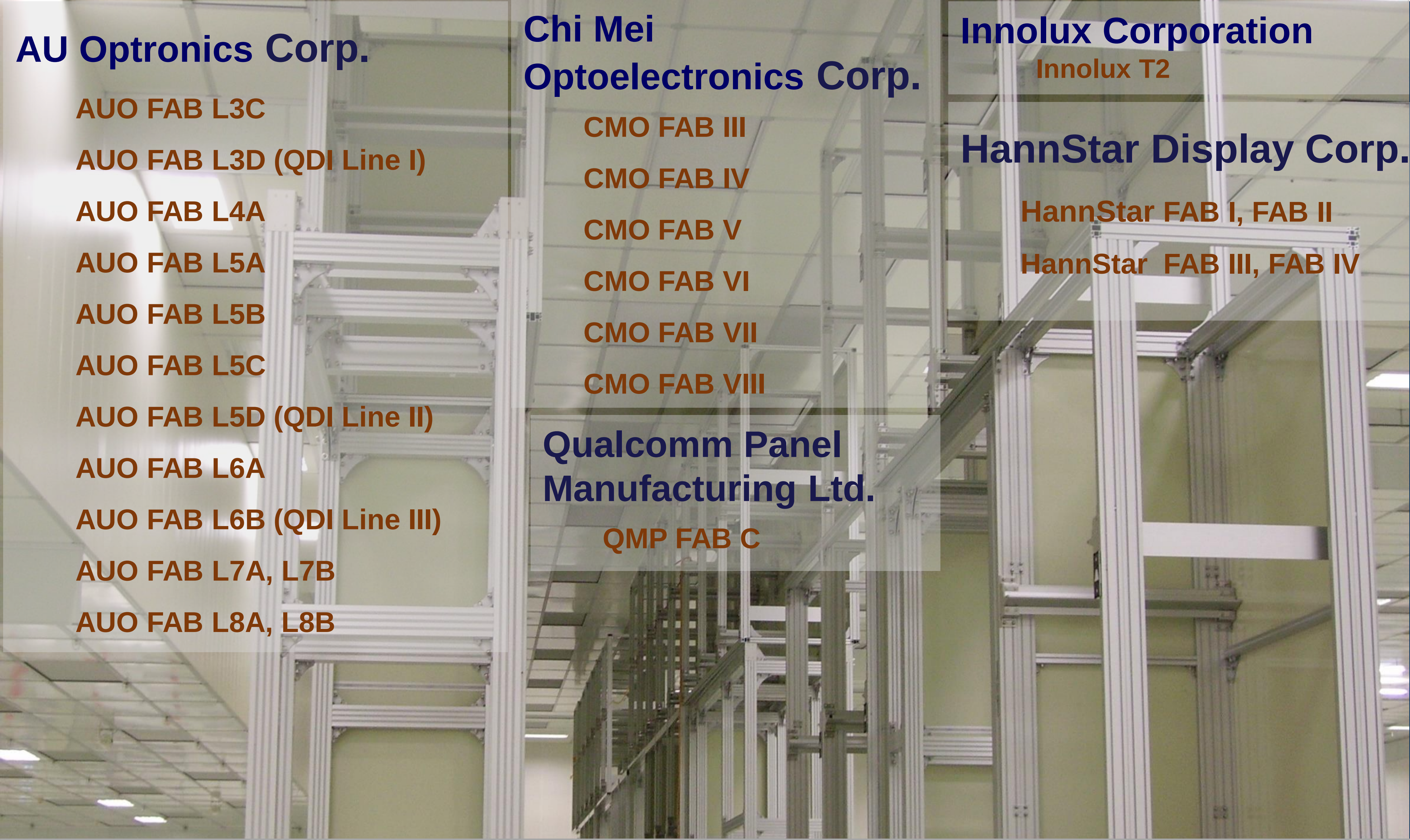
- 高通 FAB C

群創光電股份有限公司

- Innolux T2廠

瀚宇彩晶股份有限公司

- 瀚宇彩晶 FAB I, FAB II
- 瀚宇彩晶 FAB III, FAB IV



AU Optronics Corp.

- AUO FAB L3C
- AUO FAB L3D (QDI Line I)
- AUO FAB L4A
- AUO FAB L5A
- AUO FAB L5B
- AUO FAB L5C
- AUO FAB L5D (QDI Line II)
- AUO FAB L6A
- AUO FAB L6B (QDI Line III)
- AUO FAB L7A, L7B
- AUO FAB L8A, L8B

Chi Mei Optoelectronics Corp.

- CMO FAB III
- CMO FAB IV
- CMO FAB V
- CMO FAB VI
- CMO FAB VII
- CMO FAB VIII

Qualcomm Panel Manufacturing Ltd.

- QMP FAB C

Innolux Corporation

- Innolux T2

HannStar Display Corp.

- HannStar FAB I, FAB II
- HannStar FAB III, FAB IV

主要客戶FPD

近五年盈餘分配狀況
Income Statement

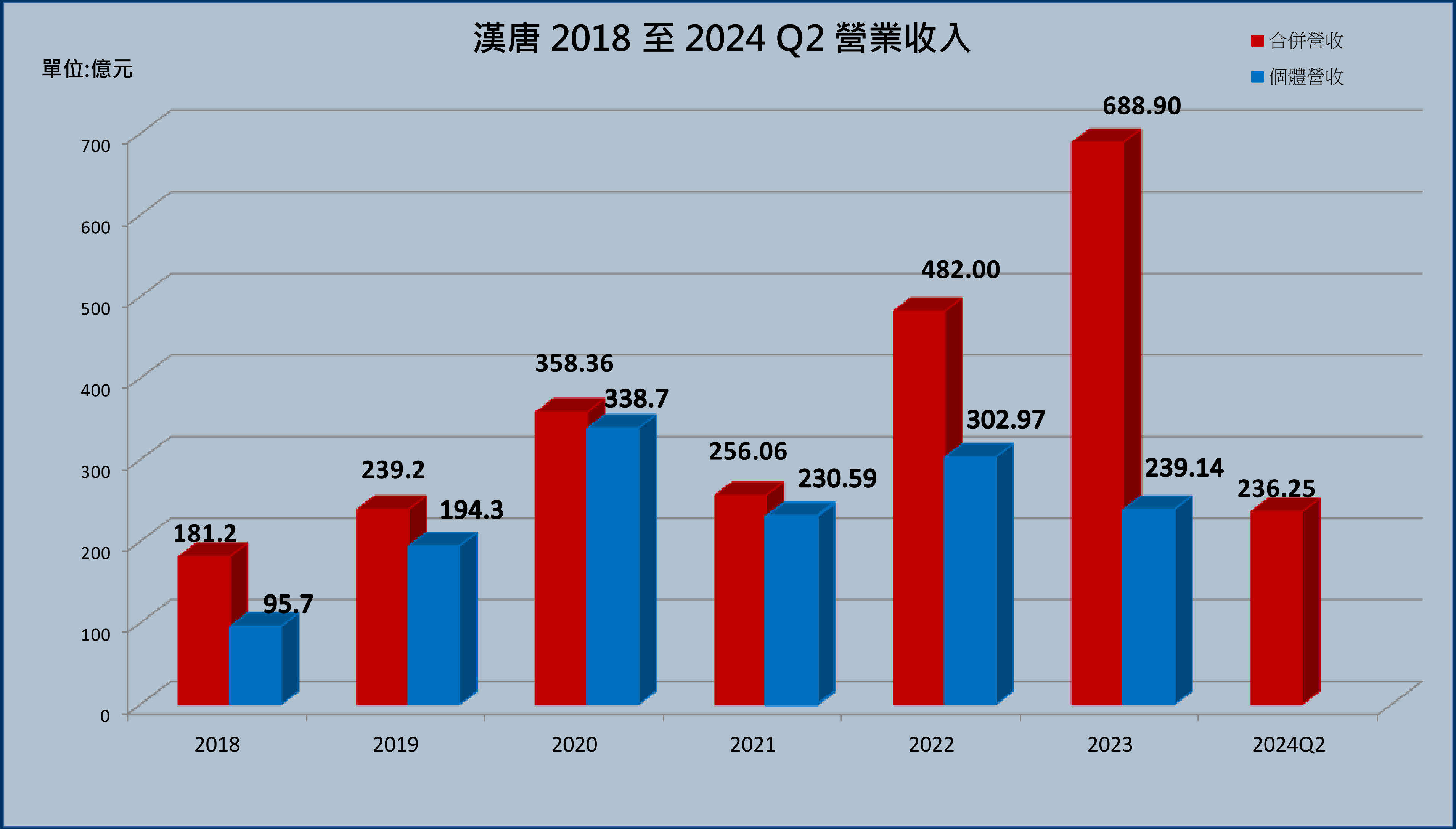
	108年 (2019)	109年 (2020)	110年 (2021)	111年 (2022)	112年 (2023)	113年Q2 (2024Q2)
營業收入(千元) Rev.(thousand)	23,920,633	35,836,642	25,606,141	48,200,310	68,889,680	23,625,149
毛利(千元) Gross Profit(thousnad)	4,351,240	5,684,146	4,086,636	6,718,724	7,531,191	3,058,549
毛利率 Gross Profit %	18.19%	15.86%	15.96%	13.94%	10.93%	12.95%
本期稅後損益(千元) EAT(thousand)	2,893,881	4,091,332	2,820,482	4,101,845	4,847,498	2,480,989
每股盈餘(元) EPS	14.77	21.16	14.53	21.25	24.82	13.15
現金股利(元) Cash Dividends	13.00	17.00	13.00	15.00	21.00	
股利發放率 Dividend Payout Ratio	88.02%	80.34%	89.47%	70.59%	84.61%	
負債佔資產比率 Debt Asset Ratio	62.15%	62.47%	58.88%	68.30%	73.25%	
流動比率 Current Ratio	137.42%	140.70%	143.61%	132.50%	128.24%	
純益率 Net Profit Margin	12.10%	11.42%	11.01%	8.51%	7.04%	

近五年營收 (Revenue)

Unit: NTD 100 million　單位：億元

🟦個體營收
Individual

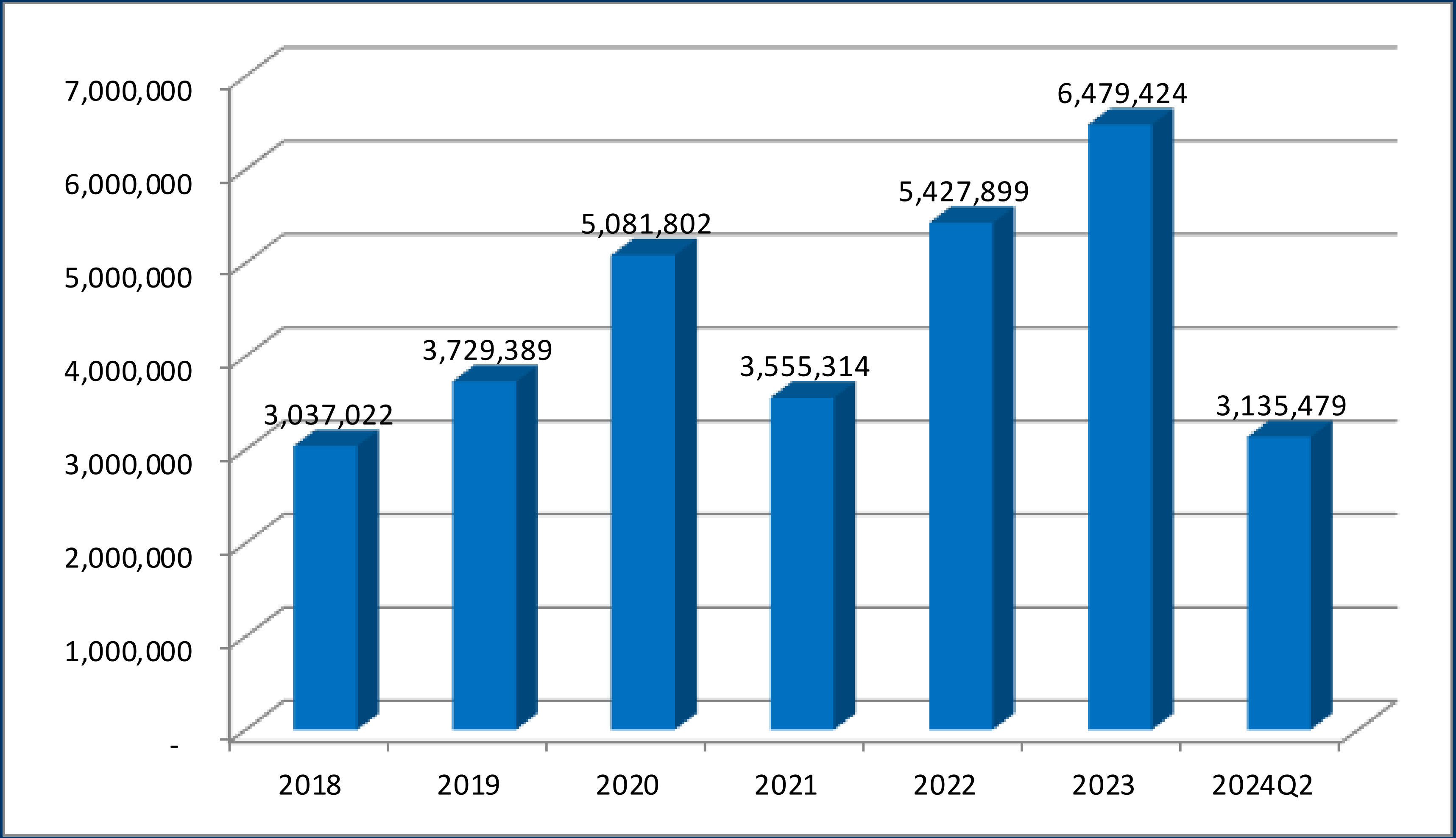
🟥合併營收
Consolidated



稅前淨利 (EBIT)

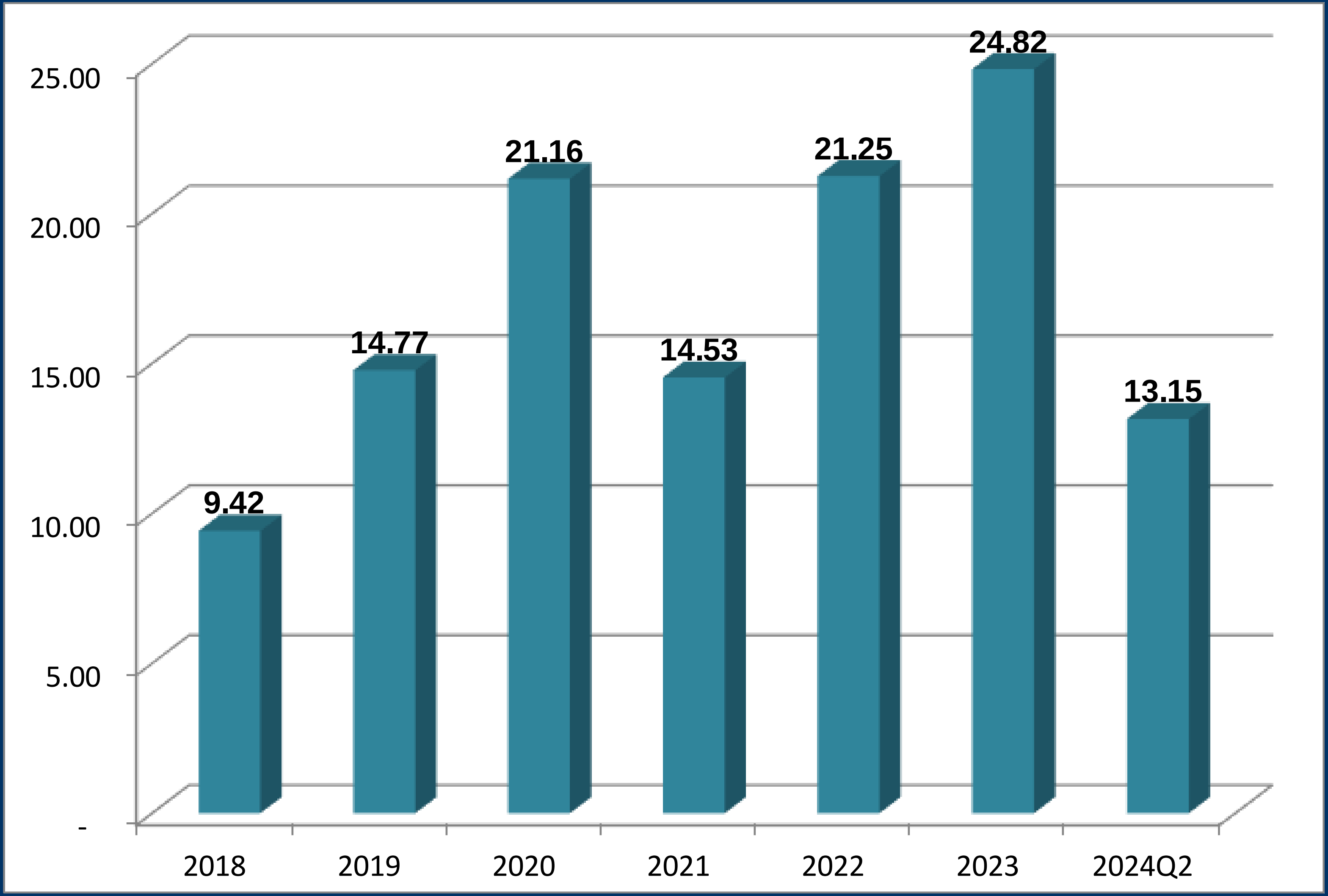
Unit: NTD thousand

單位：仟元



每股盈餘 (EPS)

Unit: NTD



累計接單狀況統計
Business in total

- 113年接單合約金額(1~07月份)

  2024 Contract Value　**NTD 39,760,023　仟元**

- 113年1月至07月累計營收

  Accumulated Rev.
  (from Jan. to July)　**NTD 27,619,441　仟元**

- 截至113年07月已簽約未認列之金額

  Accumulated
  Account Receivable
  (to July)　**NTD 64,563,572 仟元**

113年Q2合併資產負債表
2024 Q2 Consolidated Balance Sheet

單位:仟元
Unit: thousand

	113/6/30	112/12/31	112/6/30		113/6/30	112/12/31	112/6/30
現金及約當現金 Cash	10,530,043	9,385,681	11,447,782	銀行借款 Bank loan	6,823,533	3,230,043	2,257,115
				應付帳款 PA	7,740,592	8,336,995	6,939,923
合約資產 Contract assets-current	15,488,384	14,334,373	6,558,606	合約負債 Contract liabilities	19,369,153	19,402,155	18,366,378
其他流動資產 Others	22,185,480	18,692,949	21,474,994	其他流動負債 Others	6,158,915	2,102,864	5,383,284
流動資產合計 Total Current Assets	48,203,907	42,413,003	39,481,382	流動負債合計 Total Current Liabilities	40,092,193	33,072,057	32,946,700
不動產、廠房及設備 PPE	1,360,258	1,368,849	1,384,713	其他非流動負債 Others	998,617	963,671	781,866
其他非流動資產 Others	2,435,559	2,682,576	3,079,581				
非流動資產合計 Total Non-current Assets	3,795,817	4,051,425	4,464,294	負債總計 Total Liabilities	41,090,810	34,035,728	33,728,566
				股東權益總計 Total SE	10,908,914	12,428,700	10,217,110
資產總計 Total Assests	51,999,724	46,464,428	43,945,676	負債及權益總計 Total Liabilities+SE	51,999,724	46,464,428	43,945,676

113年Q2及112年合併損益表
2024 Q2 & 2023 Consolidated Income Statement

單位:仟元
Unit: thousand

	113年1月至6月 2024 Jan.~Jun.		112年1月至6月 2023 Jan.~Jun.		112年1月至12月 2023 Jan.~Dec.		111年1月至12月 2022 Jan.~Dec.	
營業收入 Revenue	23,625,149	100%	33,191,319	100%	68,889,680	100%	48,200,310	100%
營業成本 Cost	20,566,600	87%	29,415,425	88%	61,358,489	89%	41,481,586	86%
營業毛利 Gross Profit	3,058,549	13%	3,775,894	12%	7,513,191	11%	6,718,724	14%
營業費用 Operating expanses	660,262	3%	739,010	2%	1,469,682	2%	1,288,360	3%
營業淨利 Operating Income	2,398,287	10%	3,036,884	10%	6,061,509	9%	5,430,364	11%
營業外收入淨額 Net non-operating income	737,192	3%	299,138	-	417,915	-	(2,465)	-
稅前淨利 EBIT	3,135,479	13%	3,336,022	10%	6,479,424	9%	5,427,899	11%
所得稅費用 Income Tax	654,490	3%	931,125	3%	1,631,926	2%	1,326,054	3%
本期淨利 Net Income	2,480,989	10%	2,404,897	7%	4,847,498	7%	4,101,845	8%
本期淨利歸屬於母公司 Net Income (Parent company)	2,466,492	10%	2,364,542	7%	4,655,215	7%	3,999,485	8%
綜合損益屬於母公司 Composite Net Income (Parent Company)	2,396,762	10%	2,468,737	7%	4,528,791	7%	3,842,345	8%
基本每股盈餘 EPS	13.15		12.61		24.82		21.25	
稀釋每股盈餘 Diluted EPS	13.06		12.48		24.48		20.89	

若本簡報引述的財務資料，與已對外公告的財務報告有不符的情形，以已對外公告的財務報告的內容為主.

If there is any conflict between, or any difference in the financial information quoted in this presentation and the announced financial report, the announced financial report shall prevail

在一一三年，漢唐將持續受益於台積電與美光等主要業主的建廠計畫與資本支出。隨著一一二年的AI趨勢持續爆發，台積電的先進製程比重攀升，漢唐將持續深耕台積電的二奈米廠專案，同時積極步入台積電CoWoS先進封裝廠建造領域，以拓展我們的技術領域與建廠經驗。

在記憶體市場方面，隨著DRAM需求有望改善，以及AI應用的發展，AI伺服器建置與高頻寬記憶體(HBM)的需求將持續增加。因此，美光對於建廠的計畫與投資亦有望回溫。其台中A3 Module 2A廠在今年6月底已移交給業主，現在正積極進機，顯示美光重視在台投資，漢唐將積極跟進未來的建廠及擴廠專案。

綜上所述，我們對於一一三年的展望持樂觀態度。隨著AI技術的快速發展，以及對記憶體市場的樂觀期待，相信這將為漢唐帶來更多的機會。雖因去年認列美國營收導致基期較高，不過隨著目前客戶加大投資的市場情況，今年應可超過前年營收。我們將繼續以積極進取的態度全力迎接挑戰，確保在快速變化的市場中保持領先地位。

In 2024, UIS will continue to benefit from the construction plans and capex of major clients such as TSMC and Micron. With the explosive growth of AI trends in 2023, the proportion of TSMC's advanced processes is climbing, and UIS will continue to deepen its involvement in TSMC's 2nm project while actively entering TSMC's CoWoS advanced packaging plant construction field to expand our technical expertise and construction experience.

In the memory market, with the anticipated improvement in DRAM demand and the development of AI applications, the demand for AI servers and high-bandwidth memory (HBM) will continue to increase. Therefore, Micron's construction plans and investments are also expected to recover. Its A3 Module 2A plant in Taichung was handed over to the owner at the end of June this year and is now actively moving in, demonstrating Micron's commitment to investing in Taiwan. UIS will actively follow up on future construction and expansion projects.

In summary, we hold a positive outlook for 2024. With the rapid development of AI technology and the optimistic expectations for the memory market, we believe this will bring more opportunities for UIS. Although last year’s high base was due to revenue recognition in the U.S., we expect this year's revenue to surpass the level of the year before last, given the current market situation with customers increasing their investments. We will continue to approach challenges with a proactive attitude, ensuring that we remain at the forefront in a rapidly changing market.

Thank You

Q & A