TONG YANG GROUP

Tong Yang Industry

1319.TW 1319 TT

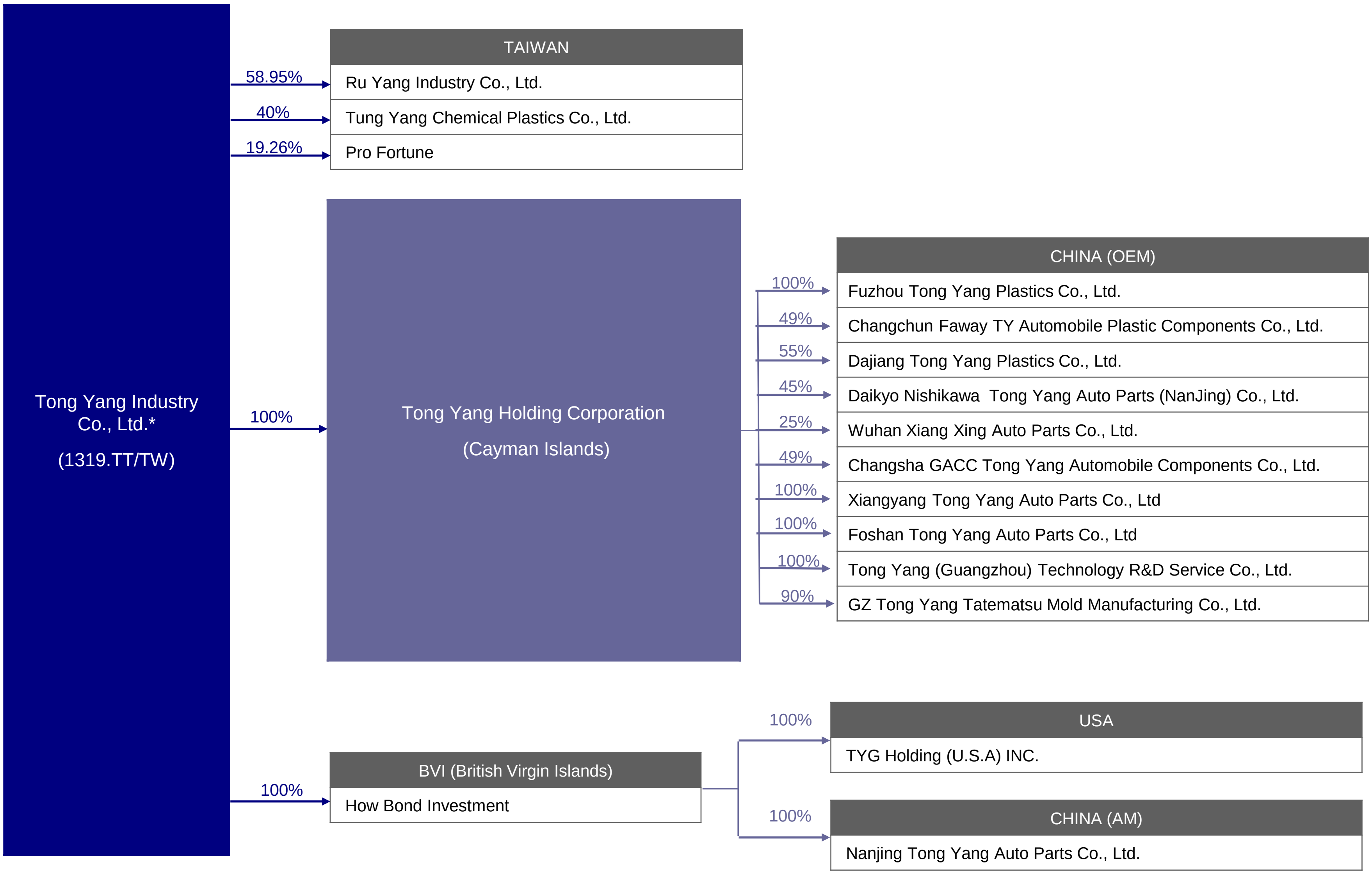
Investor Relations Presentation

Last Updated: 20th May 2025

Company Profile

Tong Yang Industry Company Limited	
Stock Code:	Reuters – 1319.TW Bloomberg – 1319 TT
History:	1952 – A plant was established by Founder Mr. Kao Wu 1967 – The plant was reorganized and named Tong Yang Industry Co. Ltd. 1994 – Tong Yang stocks went public in Taiwan 2010 – Merger with Taiwan KaiYih (effective on 1st September)
Capital:	NT$ 5,914,770,680 (591 mn shares in issue, NT$10 par value)
Area:	Tainan Plant – 744,550 SM (8,014,269 SF) Kuan Yin Plant – 19,990 SM (215,172 SF)
Number of Employees:	8,722 (Taiwan: 3,917; China: 4,684; Overseas Plants: 121)
Scope of Business:	Developing, manufacturing, and selling of vehicle parts and accessories
Management:	Mr. Michael (Pingteh Wu) – Honorary Chairman Mr. Raymond Wu – Chairman of the Board Mr. Crispin Wu – Chief Executive Officer

Corporate Structure



*The Wu family only owns stake in Tong Yang Industry Co., Ltd.

**Some percentages represent indirect shareholding, refer to financial report for details

Group Company Details

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			Holding	Tong Yang	Other Major Shareholders		Sales in 2022	Sales in 2023	Sales in 2024	
	Company	Main Product Line	Company	Stake (%)	Other Major Holders	Shareholding	(NT$ mn)	(NT$ mn)	(NT$ mn)	Consolidated
Taiwan	Ru Yang	OEM Instrument Panel	Tong Yang	58.95%	DNC (Japan)	41.05%	167.22	179.76	310.27	Y
Taiwan	Tung Yang Chemical	OEM Plastic coating	Tong Yang	40.00%	Nippon Paint (Japan)	60.00%	282.48	272.46	258.66	
Taiwan	Pro Fortune	AM Plastic parts	Tong Yang	19.24%	Others	70.00%	1,439.20	1,494.69	1,568.96	
China *	Fuzhou Tong Yang	OEM Plastic parts	Tong Yang	100.00%			545.40	233.93	449.93	Y
China *	Changchun Fawey Tong Yang **	OEM Plastic parts	Tong Yang	49.00%	First Auto Group	51.00%	15,533.81	17,571.15	17,425.19	
China *	Dajiang Tong Yang	OEM Plastic parts	Tong Yang	55.00%	Chongqing Dajiang Industry	45.00%	2,509.36	3,340.23	3,299.96	Y
China *	Daikyo Nishikawa Tong Yang***	OEM Plastic parts	Tong Yang	45.00%	DNC (Japan)	55.00%	1,117.55	1,371.81	1,673.44	
China *	Wuhan Xiang Xing	OEM Plastic parts	Tong Yang	25.00%	Huaxiang Company	75.00%	362.85	843.81	1,097.26	
China *	Changsha GACC Tong Yang	OEM Plastic parts	Tong Yang	49.00%	GAC Group	51.00%	685.56	687.43	491.13	
China *	Xiangyang Tong Yang	OEM Plastic parts	Tong Yang	100.00%			293.94	146.96	118.21	Y
China *	Foshan Tong Yang	OEM Plastic parts	Tong Yang	100.00%			750.21	507.40	444.82	Y
China *	Technology R&D Service	Technology R&D Service	Tong Yang	100.00%			34.17	51.12	101.72	Y
China *	GZ Tong Yang Tatematsu Mold	OEM Plastic coating	Tong Yang	90.00%	Tatematsu Mold Works	10.00%	239.11	277.36	183.13	Y
China *	Nanjing Tong Yang Auto Parts	AM Plastic parts	Tong Yang	100.00%			20.93	3.75	-	Y
	How Bond Investment	AM Plastic parts	Tong Yang	100.00%			934.66	913.81	967.71	Y

* Through TY Holding (Cayman), Tong Yang holds 100% of all the China investments

** Stake reduced to 49% in July 2010. Thus, not accounted into consolidated statements from Aug 2010 onwards

*** Stake reduced to 45% in Jan. 2012. Thus, not accounted into consolidated statements from Jan 2012 onwards

**** 5 NB painting companies in China were sold back to Nippon Paint (Japan) in Q4 2021

***** TYG Europe was sold in December 2022.

****** Dajiang YuChyang was sold in January 2023.

Product Line-up

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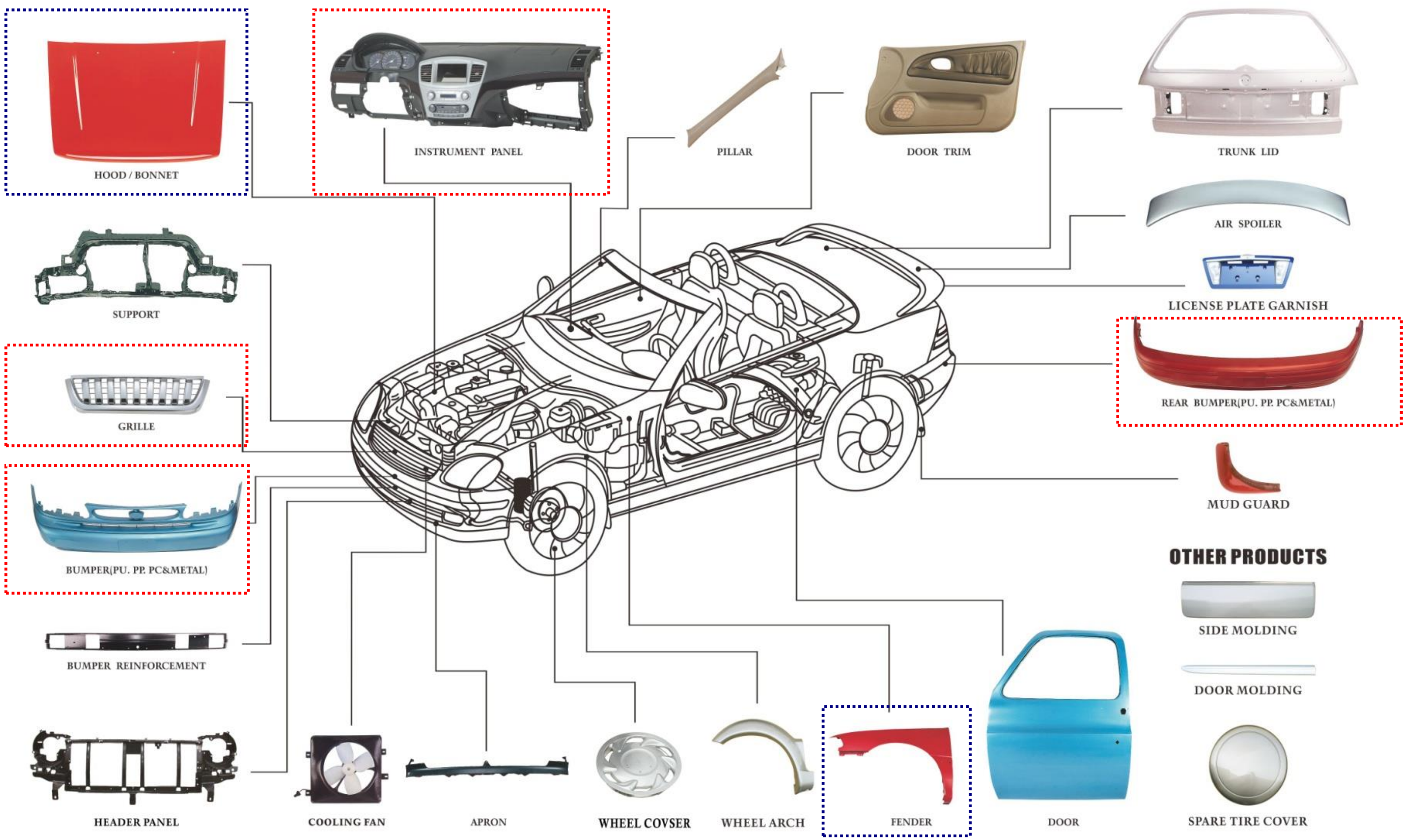

Plastic Products   Sheet Metal Products

Group Revenue and Profit Breakdown

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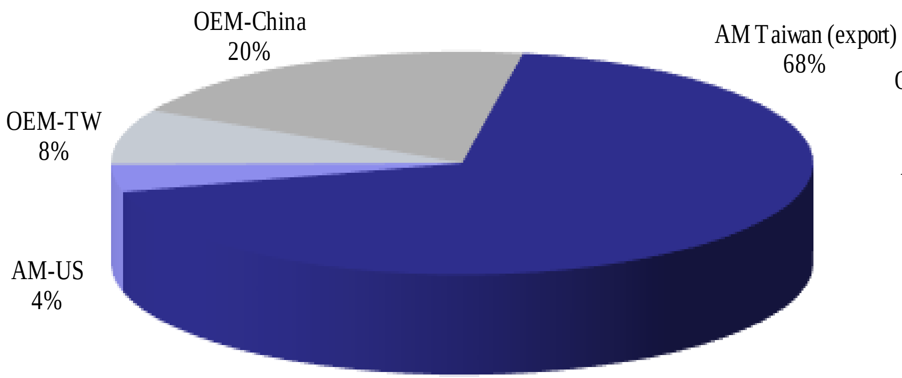
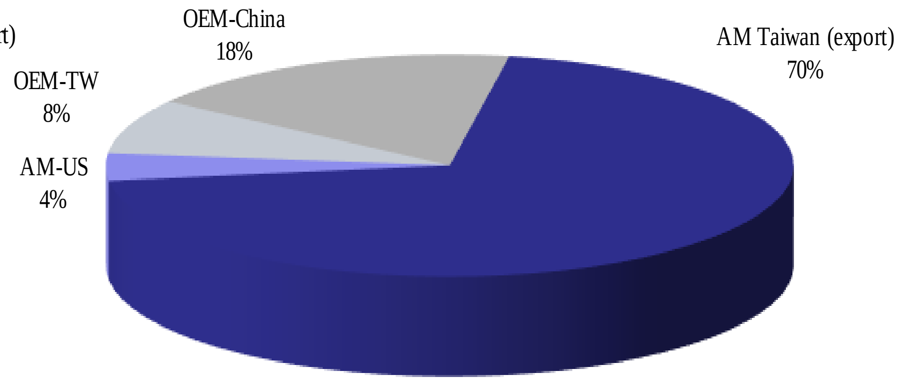
FY2023 Consolidated Revenue

AM is 72% & OEM is 28% of total sales

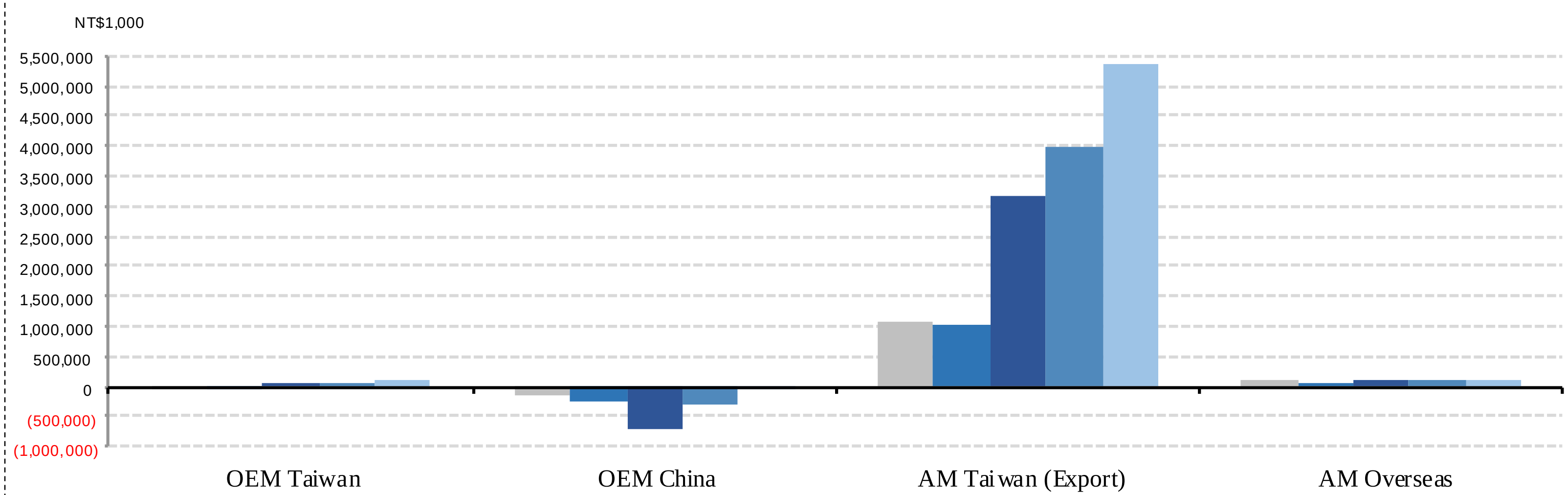


FY2024 Consolidated Revenue

AM is 74% & OEM is 26% of total sales



Profit Contribution (NIBT) Breakdown 2020-2024



*Under 2013 IFRS Accounting standard, consolidated profit contribution contains partial contribution from minorities

** AM China is included in AM Taiwan (export)

Replacement Market

Replacement Market Overview

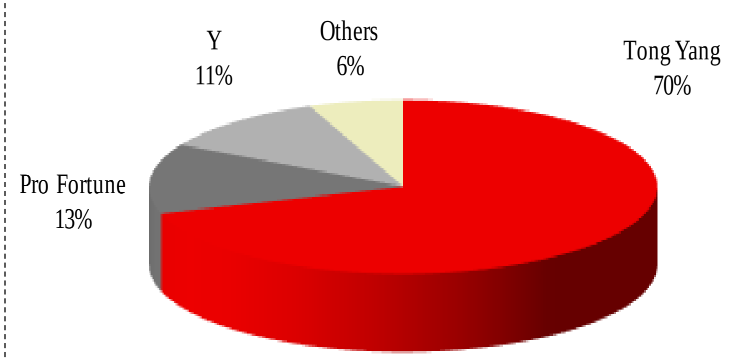
- The replacement market for collision parts is composed of OES and AM (non-branded) products
- Taiwanese producers combined supply 85% to 90% of the global AM collision parts
- Three main product lines: Plastic Parts, Sheet Metal Parts, Lamps
- AM distribution channel

Tong Yang → Distributor / Importer / Wholesaler → Body Shop / Garage / Independents

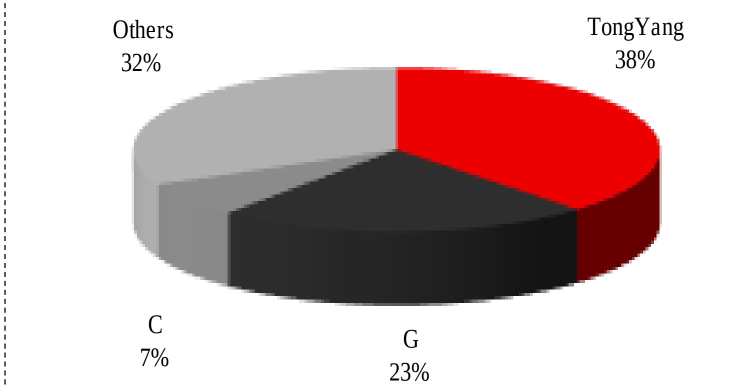
OES vs AM Replacement Market Application Ratio
(Plastic Products)

	Europe	USA	Taiwan
OES	70%	79%	20%
AM (non-branded)	30% ↑	21% ↑	80%

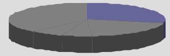
AM Plastic Parts Global Market Share



AM Sheet Metal Parts Global Market Share

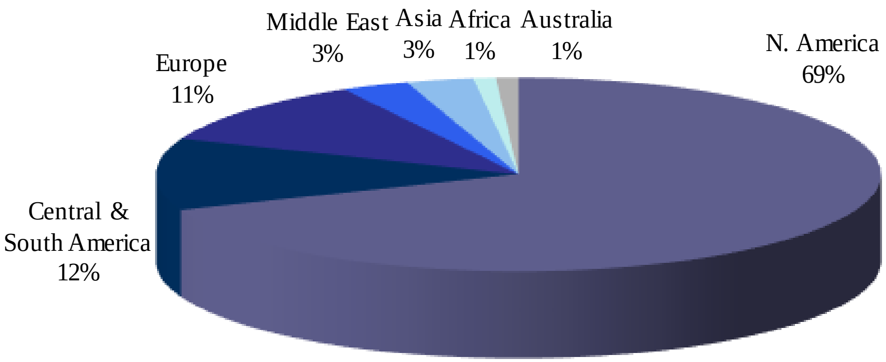


After Market (AM)

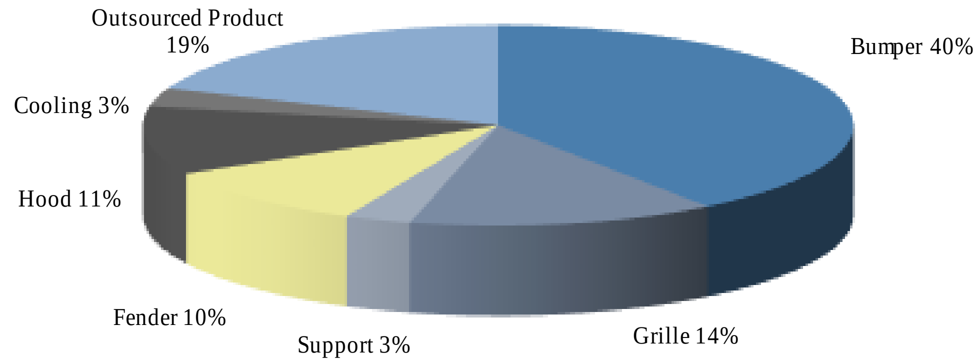


AM Sales is 74% of FY2024 Consolidated Revenue

AM Product Sales Region Breakdown FY2024

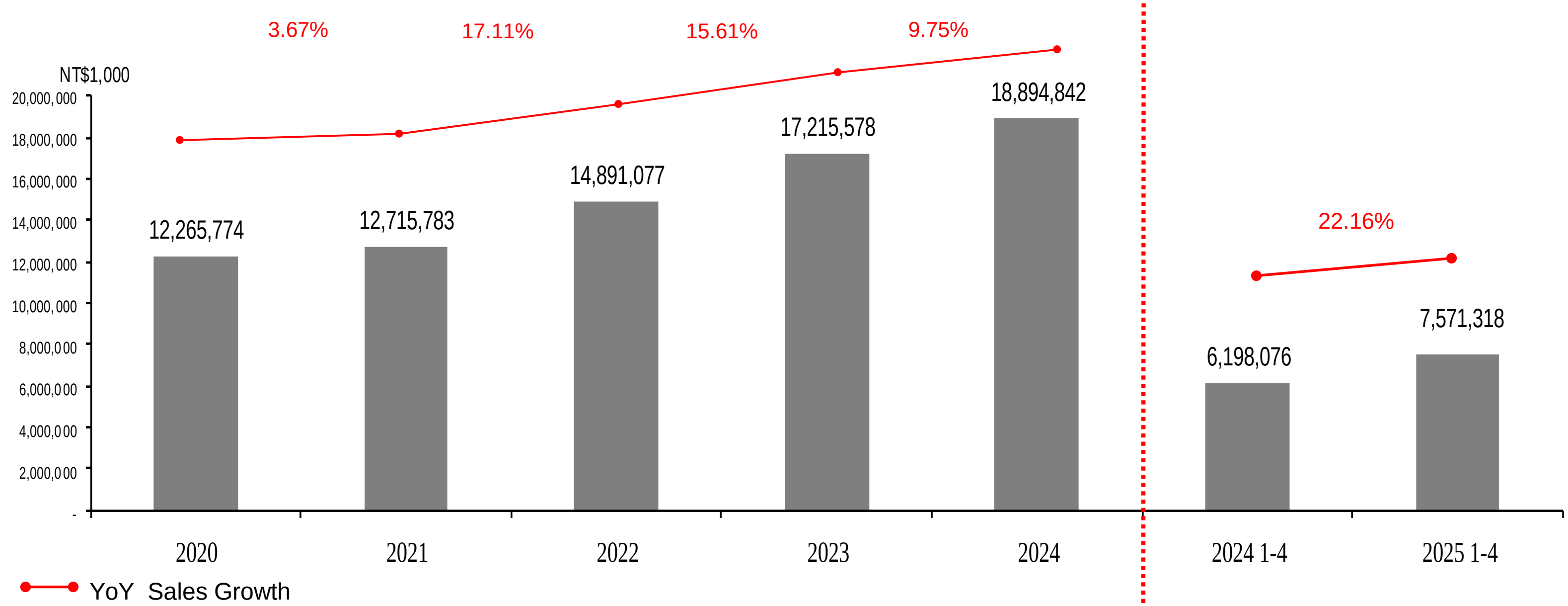


AM Product Mix Breakdown FY2024



AM Products

AM Products



AM Competitive Advantage & Overseas Strategy

AM Competitive Advantage

- The ability to offer a complete product line-up of collision parts is required to meet one-stop shopping demands. Tong Yang's tooling library are able to provide more than 25,000 product items, covering 80% of global car models
- Continuous capital expenditure of NT$ 1.8 billion developing new tooling sets annually.
- High capital costs and long development time of tooling sets: Cost to develop one tooling set is very high and development time takes at least 6 to 8 months.
- Limited available capacity of tooling plants: It is difficult for competitors to secure available tooling development capacity since Tong Yang occupies most of the production capacity.
- All major manufacturers have more than 20 years experiences in this industry and have accumulated thousands of moulds.

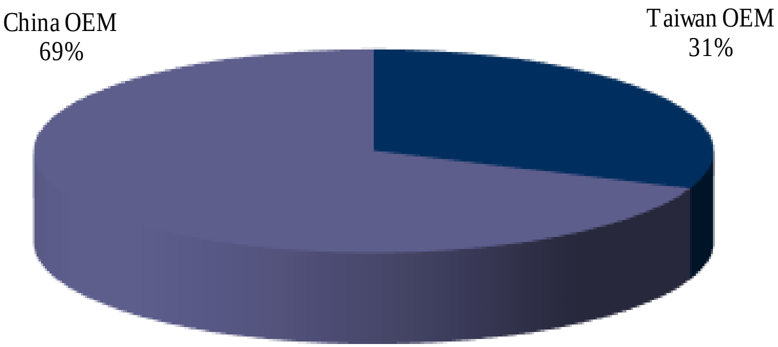
AM Overseas Strategy

- AM manufacturing plant in the US gives customers easier access to products
- Efficiently produce local car models
- Expansion of US production scale in response to changes in the macro environment
- Tong Yang has a competitive edge over existing local competitors, in mould development technology and years of experience in the AM industry.
- Waiting for the opportunity to enter China AM market

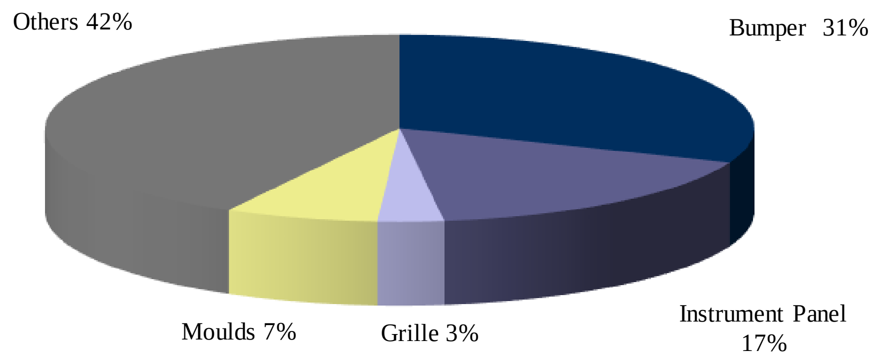
OEM

OEM Sales is 24% of FY2024 Consolidated Revenue

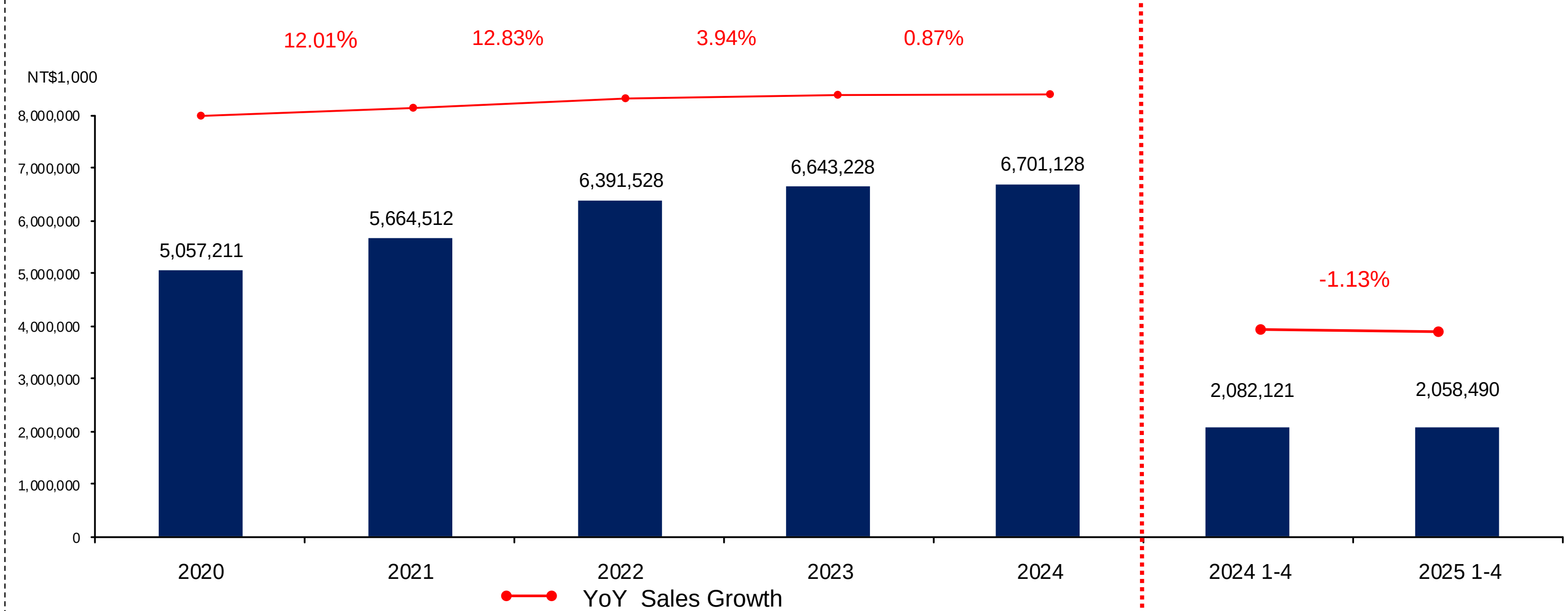
OEM FY2024



OEM Product Mix Breakdown FY2024



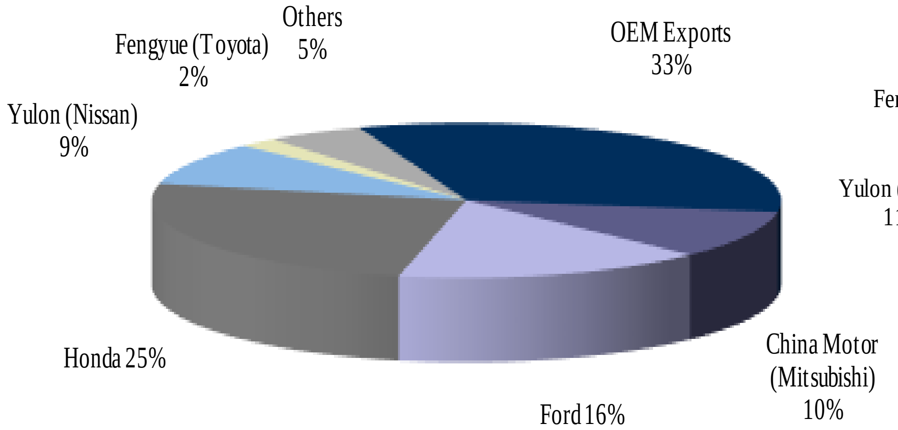
OEM Revenue



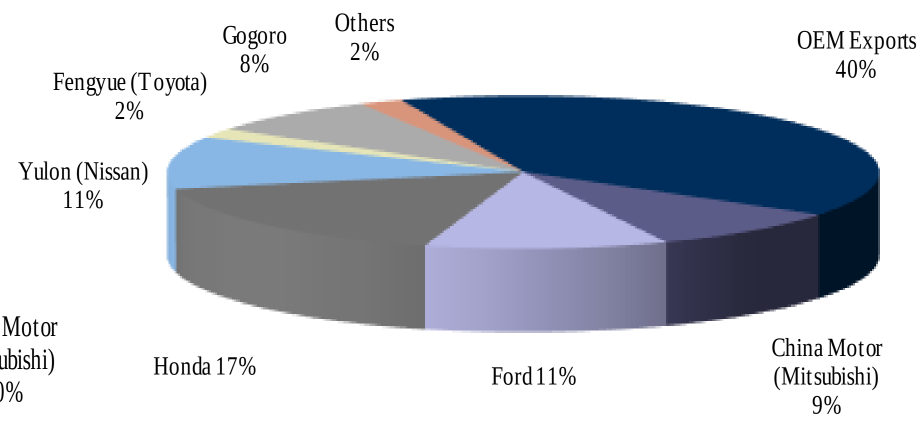
OEM Taiwan

OEM Taiwan Sales is 8% of FY2024 Consolidated Revenue

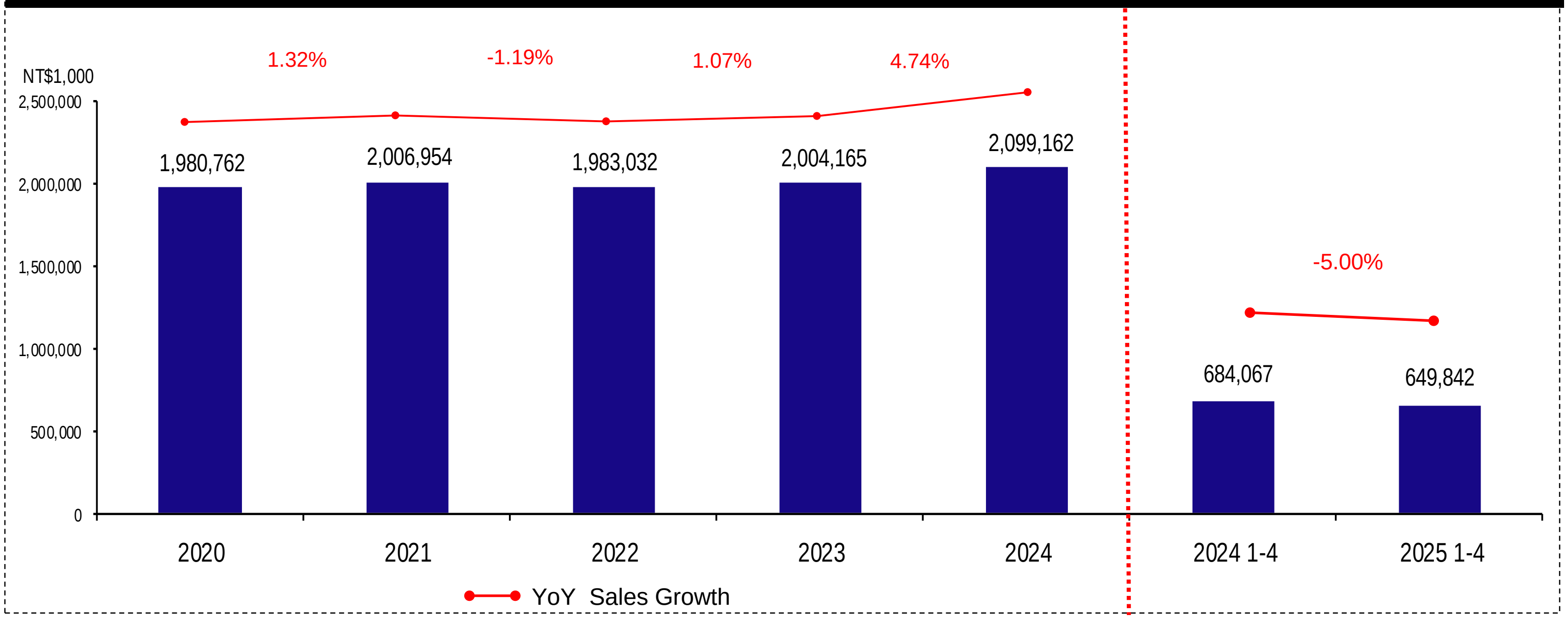
Taiwan OEM Customer Breakdown FY2023



Taiwan OEM Customer Breakdown FY2024



Taiwan OEM Revenue



China Operations I

- Tong Yang invested in China from 1994; currently it has 15 OEM and 1 AM plants in China
- The 16 operations have a combined total investment of USD 186.75 Million

OEM Plastic Component Plants

#	Company	Established	Location	Stake	Investment Amt	JV Partner	Customer
1	Fuzhou Tong Yang	1995	Fuzhou	100%	USD 35mn	-	Chery Motor, Changan Group
2-1	Changchun Faway Tong Yang	2003 2022	Changchun Green Intelligent Manufacturing Base	49%	USD 13.23mn	First Auto Group	First Auto Group， FAW-VW
2-2		2012	Foshan				
2-3		2017	Qingdao				
2-4		2017	Tianjin				FAW-Toyota
2-5		2022	Hefei				Volkswagen, NIO, Li Auto
2-6		2022	Shanghai				Tesla
3	Dajiang Tong Yang	2004	Chongqing	55%	USD 7.15mn	Chongqing Dajiang Industry	Changan Ford, Changan Motor

Investment Phase 1

Investment Phase 2

Investment Phase 5

China Operations II

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OEM Plastic Component Plants

#	Company	Established	Location	Stake	Investment Amt	JV Partner	Customer
4	Daikyo Nishikawa Tong Yang	2005	Nanjing	45%	USD 12.37mn	Daikyo Nishikawa	Changan Mazda, Changan Motor
5	Wuhan Xiang Xing	2007	Wuhan	25%	USD 3mn	Huaxiang Company	Dongfeng Auto, SAIC-GM Geely Motor
6	Changsha GACC Tong Yang	2011	Changsha	49%	USD 17.15mn	GAC Group	GAC Group
7	Xiangyang Tong Yang	2011	Xiangyang	100%	USD 46.5mn	-	First Auto Group
8	Foshan Tong Yang	2012	Guangzhou	100%	USD 18.5mn	-	GAC Toyota, GAC Honda Dongfeng Nissan , FAW- Volkswagen
9	GZ Technology R&D Center	2017	Guangzhou	100%	USD 1.9mn	-	TYG Subsidiaries, Car Makers

Investment Phase 3

Investment Phase 4

OEM Mould Plant

#	Company	Established	Location	Stake	Investment Amt	JV Partner	Customer
10	GZ Tong Yang Tatematsu	2005	Guangzhou	90%	USD 4mn	Tatematsu Mold Works	Japanese & Local Car Makers

AM Plastic Plant

#	Company	Established	Location	Stake	Investment Amt	JV Partner	Customer
1	Nanjing Tong Yang	2007	Nanjing	100%	USD 28mn		Local AM distributors

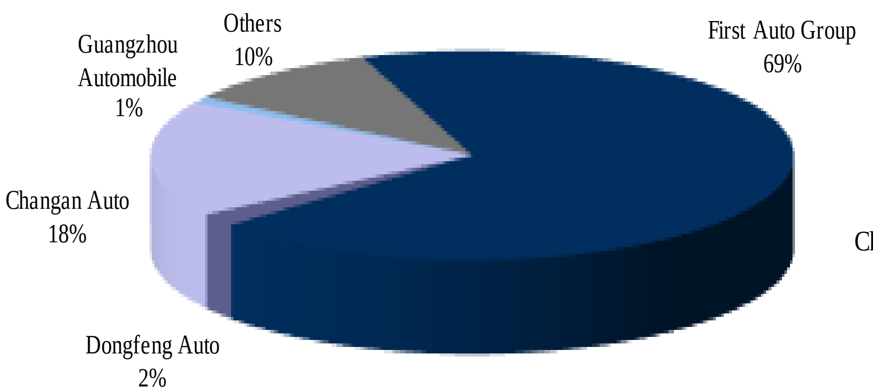
China Auto Sector

Unit: 1,000		FY2023	FY2024	YoY	2024	Tong Yang Plants							
Rank	Group/Company	Unit Sold	Unit Sold	%	Market Share %	Fuzhou TY	Fawer TY	Dajiang TY	Daikyo Nishikawa TongYang	Wuhan Xiangxing	Changsha GZ TY	Xiangyang TY	Foshan TY
1	BYD Auto Industry Co., Ltd.	3,020	4,270	41.4%	13.6%		☆						
2	SAIC Motor Corporation Limited	5,021	4,010	-20.1%	12.8%					☆			
3	Zhejiang Geely Holding Group Co., Ltd.	2,800	3,400	21.4%	10.8%					☆			
4	China FAW Group Corporation	3,440	3,200	-7.0%	10.2%		★					☆	☆
5	China Changan Automobile Group Co., Ltd.	2,553	2,683	5.1%	8.5%	☆		★	★				
6	Chery Automobile Co., Ltd.	1,880	2,604	38.5%	8.3%	☆							
7	Dongfeng Motor Group	2,421	2,480	2.4%	7.9%					☆			☆
8	Guangzhou Automobile Industry Group Co., Ltd.	2,505	2,000	-20.2%	6.4%						★		☆
9	Beijing Automotive Group CO.,Ltd.	1,708	1,700	-0.5%	5.4%								
10	Great Wall Motor Company Limited	1,230	1,233	0.2%	3.9%								
	Top 10 Companies Total Sales	26,578	27,580	3.8%	87.7%								
	Others	3,516	3,856	9.7%	12.3%								
	Market Total	30,094	31,436	**4.46%**									

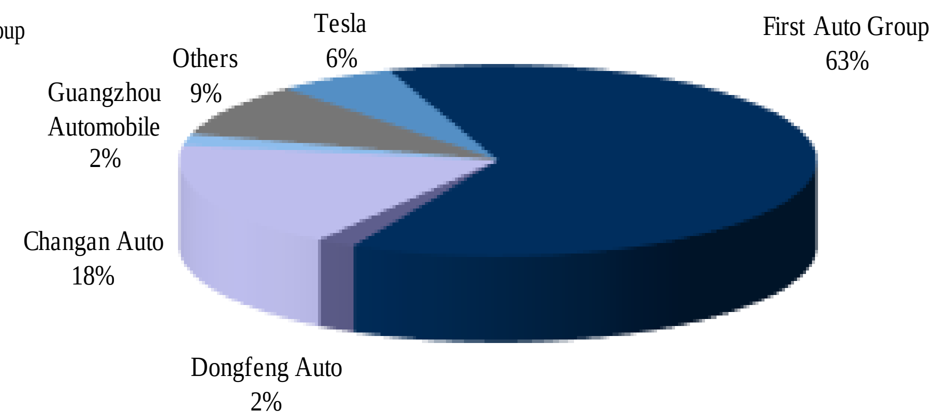
★ Main Supplier

OEM China Sales

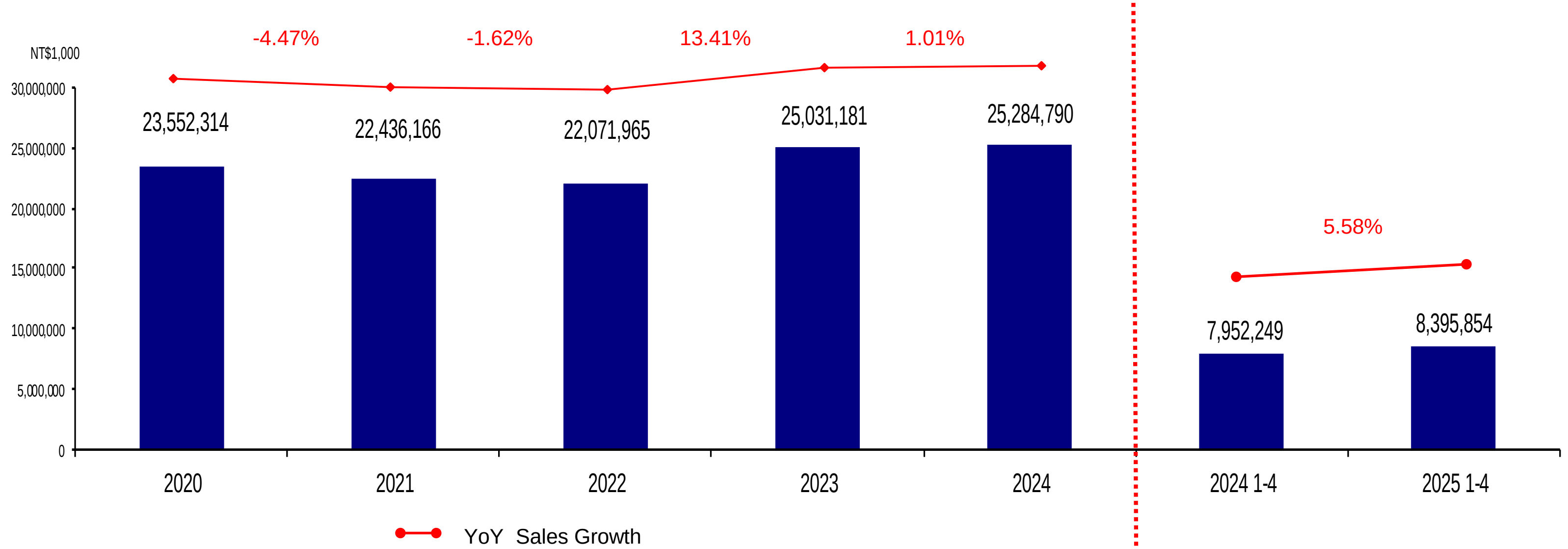
China OEM Customer Breakdown FY2023



China OEM Customer Breakdown FY2024



China OEM Sales (not consolidated)



* The same-period sales of the 5 NB painting companies that were sold back to Nippon Paint in 2021Q4 were removed for a same-basis sales comparison

Financials & Gross Margin

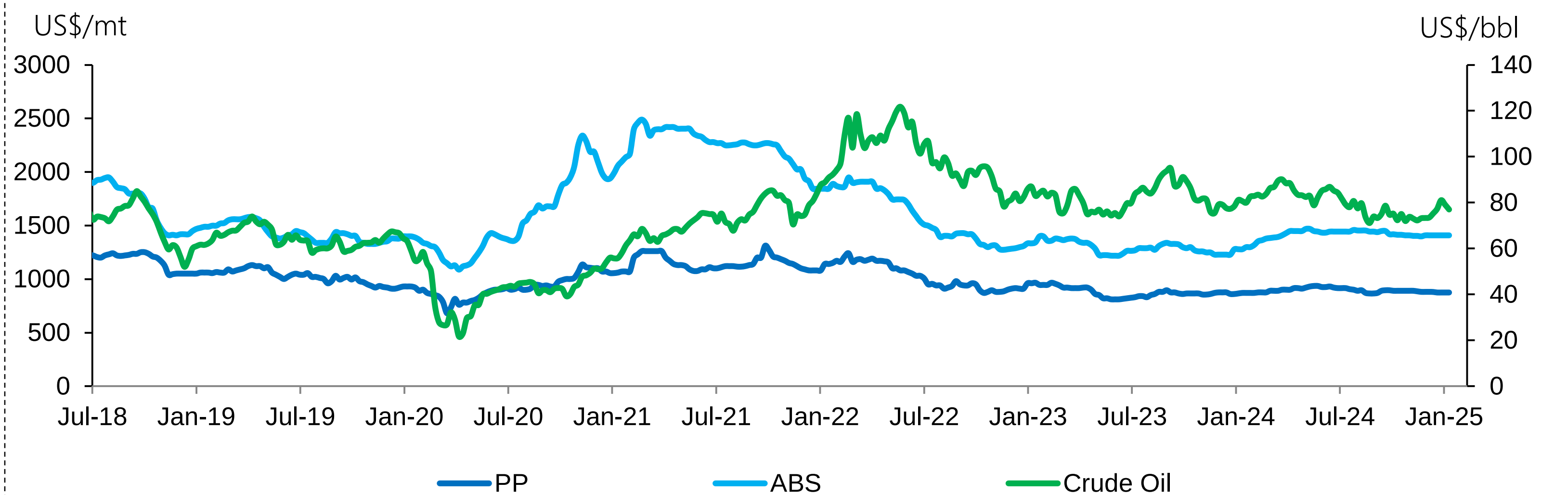
Year	NTD : 1000	AM	OEM	Consolidated (IFRS)
2020	Average Monthly Sales	1,022,148	421,191	1,443,339
	Share to Sales	70.82%	29.18%	100.00%
	Gross Margin	24.92%	7.70%	19.90%
2021	Average Monthly Sales	1,059,649	472,042	1,531,691
	Share to Sales	69.18%	30.82%	100.00%
	Gross Margin	23.88%	7.96%	18.97%
2022	Average Monthly Sales	1,240,923	532,401	1,773,324
	Share to Sales	69.98%	30.02%	100.00%
	Gross Margin	31.01%	6.38%	23.61%
2023	Average Monthly Sales	1,434,632	553,602	1,988,234
	Share to Sales	72.16%	27.84%	100.00%
	Gross Margin	36.98%	11.30%	29.83%
2024	Average Monthly Sales	1,574,570	558,427	2,132,998
	Share to Sales	73.82%	26.18%	100.00%
	Gross Margin	39.94%	14.71%	33.33%
		AM	OEM	Un-Audited Consolidated Margin (IFRS)
2025 1-4	Average Monthly Sales	1,892,830	514,622	2,407,452
	Share to Sales	78.62%	21.38%	100.00%
	Gross Margin	43.74%	17.25%	38.08%

Cost Breakdown & Raw Material Prices

Cost Breakdown

	2023			2024		
	AM	OEM	Overall	AM	OEM	Overall
Raw and other Materials	33.92%	49.20%	39.94%	34.07%	51.86%	40.88%
Semi -finished product	11.40%	16.42%	13.38%	11.55%	15.22%	12.96%
Labour and Overhead	11.06%	9.91%	10.61%	12.15%	9.19%	11.02%
Mould Depreciation	18.91%	0.01%	11.46%	17.41%	0.00%	10.74%
Other Manufacturing Expenses	24.71%	24.46%	24.61%	24.82%	23.73%	24.40%
Sum	100%	100%	100%	100%	100%	100%

ABS, Polypropylene (PP) & Crude Oil Prices



Strategic Direction

	OEM	AM
STRATEGY	Strengthen R&D, introduce new processing methods and improve mould development to shift toward Tier 1 supplier Deepen relationships with main car makers and customers.	Enhance and strengthen one-stop shopping service by integrating AM product supply chain and continuous mould development. Accelerate product certification and develop the market for certified products of insurance companies.
PRODUCT RANGE	Focus on higher value-added products, such as intelligent instrument panels, touch decorative panels, illuminated grille, front-end module and high-end mould products	Increase product mix (Active Grille Shutter, AGS, and fan set), product coverage and expand market share
MARKETS	Develop new overseas OEM and OES market Increase market share in Taiwan and China.	Cultivate AM market in the U.S. and Europe, where insurance systems are well developed and quality-oriented

Financials

Consolidated Income Statement

TONG YANG GROUP

Unit: NTD mn	1Q25 Amount	1Q25 %	4Q24 Amount	4Q24 %	3Q24 Amount	3Q24 %	2Q24 Amount	2Q24 %	1Q24 Amount	1Q24 %	2024 Amount	2024 %	2023 Amount	2023 %	2022 Amount	2022 %
Net Sales	7,291	100%	6,921	100%	6,315	100%	6,186	100%	6,174	100%	25,596	100%	23,859	100%	21,283	100%
COGS	(4,514)	-61.91%	(4,532)	-65.49%	(4,258)	-67.43%	(4,189)	-67.72%	(4,086)	-66.18%	(17,065)	-66.67%	(16,725)	-70.10%	(16,255)	-76.37%
Gross Profits	2,777	38.09%	2,389	34.51%	2,057	32.57%	1,997	32.28%	2,088	33.82%	8,531	33.33%	7,134	29.90%	5,028	23.63%
Op. Expenses	(1,003)	-13.76%	(1,053)	-15.21%	(878)	-13.90%	(910)	-14.71%	(877)	-14.20%	(3,717)	-14.52%	(3,389)	-14.21%	(3,094)	-14.54%
Op. Income	1,774	24.33%	1,336	19.30%	1,179	18.67%	1,087	17.57%	1,211	19.61%	4,814	18.81%	3,744	15.69%	1,935	9.09%
Investment Income	(49)	-0.67%	14	0.20%	(4)	-0.06%	43	0.70%	(60)	-0.98%	(8)	-0.03%	(6)	-0.03%	(31)	-0.15%
Non-Op. Income	153	2.10%	242	3.49%	(53)	-0.84%	188	3.03%	347	5.63%	724	2.83%	74	0.31%	697	3.28%
NIBT	1,878	25.76%	1,592	22.99%	1,122	17.77%	1,318	21.30%	1,498	24.26%	5,530	21.61%	3,812	15.98%	2,600	12.22%
Tax	(375)	-5.14%	(292)	-4.22%	(227)	-3.59%	(253)	-4.09%	(302)	-4.90%	(1,074)	-4.20%	(765)	-3.21%	(564)	-2.65%
NIAT	**1,503**	20.62%	**1,300**	18.77%	**895**	14.18%	**1,065**	17.22%	**1,196**	19.37%	**4,456**	**17.41%**	**3,047**	**12.77%**	**2,037**	**9.57%**
Parent	1,466	20.11%	1,281	18.51%	883	13.98%	1,041	16.83%	1,172	18.98%	4,377	17.10%	3,019	12.66%	2,151	10.11%
Minorities	38	0.52%	18	0.26%	13	0.20%	24	0.39%	24	0.38%	78	0.31%	28	0.12%	(115)	-0.54%
Pre-tax EPS	3.17		2.69		1.90		2.23		2.53		9.35		6.46		4.40	
EPS	2.48		2.17		1.49		1.76		1.98		7.40		5.10		3.64	

Consolidated Balance Sheet

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Unit: NTD mn	1Q25 Amount	1Q25 %	4Q24 Amount	4Q24 %	3Q24 Amount	3Q24 %	2Q24 Amount	2Q24 %	1Q24 Amount	1Q24 %	2024 Amount	2024 %	2023 Amount	2023 %	2022 Amount	2022 %
Cash	5,907	14.87%	4,737	12.37%	2,946	8.47%	5,684	15.55%	5,053	13.96%	4,737	12.37%	3,817	10.89%	2,344	6.99%
A/R	5,347	13.46%	5,099	13.32%	5,008	14.39%	4,955	13.56%	4,727	13.06%	5,099	13.32%	5,030	14.35%	4,159	12.4%
Inventory	3,080	7.75%	3,089	8.07%	3,059	8.79%	3,019	8.26%	2,887	7.98%	3,089	8.07%	2,687	7.67%	3,057	9.12%
Current Assets	14,646	36.86%	13,257	34.62%	11,314	32.51%	14,016	38.35%	13,364	36.93%	13,257	34.62%	12,106	34.54%	9,987	29.78%
Investments under Equity Method	2,429	6.11%	2,435	6.36%	2,426	6.97%	2,411	6.60%	2,474	6.83%	2,435	6.36%	2,471	7.05%	2,654	7.91%
Property, Plant, Equipment	19,374	48.76%	19,365	50.57%	19,115	54.92%	18,228	49.88%	18,291	50.54%	19,365	50.57%	18,374	52.43%	18,893	56.33%
Non-Current Assets	25,088	63.14%	25,035	65.38%	23,490	67.49%	22,528	61.65%	22,828	63.07%	25,035	65.38%	22,940	65.46%	23,553	70.22%
Total Assets	**38,734**	100%	**38,292**	100%	**34,804**	100%	**36,544**	100%	**35,191**	100%	**38,292**	100%	**35,046**	100%	**33,540**	100%
ST&LT Borrowings within 1 yr	836	2.11%	736	1.92%	836	2.40%	875	2.39%	945	2.61%	736	1.92%	916	2.61%	1,620	4.83%
A/P	5,409	13.61%	5,685	14.85%	4,847	13.93%	7,391	20.23%	5,475	15.13%	5,685	14.85%	5,728	16.34%	4,769	14.22%
Current Liabilities	6,949	17.49%	7,036	18.37%	6,264	18.00%	8,736	23.91%	6,924	19.13%	7,036	18.37%	7,052	20.12%	6,890	20.54%
Bonds Payable	-	0.00%	-	0.00%	-	0.00%	-	0.00%	-	0.00%	-	0.00%	-	0.00%	-	0.00%
LT Borrowings	1,042	2.62%	1,143	2.98%	1,154	3.31%	1,254	3.43%	1,354	3.74%	1,143	2.98%	1,452	4.14%	1,839	5.48%
Non-Current Liabilities	3,020	7.60%	3,100	8.10%	1,805	5.18%	1,894	5.18%	1,995	5.51%	3,100	8.10%	2,082	5.94%	2,385	71.1%
Total Liabilities	**9,969**	25.09%	**10,136**	26.47%	**8,069**	23.18%	**10,630**	29.09%	**8,919**	24.64%	**10,136**	26.47%	**9,134**	26.06%	**9,275**	27.65%
Common Stocks	5,915	14.89%	5,915	15.45%	5,915	16.99%	5,915	16.19%	5,915	16.34%	5,915	15.45%	5,915	16.88%	5,915	17.63%
Total Equity	**29,765**	74.91%	**28.156**	73.53%	**26,735**	76.82%	**25,914**	70.91%	**27.272**	75.36%	**28.156**	73.53%	**25.912**	73.94%	**24,265**	72.35%

Consolidated Cash Flow Statement

Unit: NTD mn	1Q25 Amount	4Q24 Amount	3Q24 Amount	2Q24 Amount	1Q24 Amount	2024 Amount	2023 Amount	2022 Amount
Operating Activities	1,967	2,633	1,554	983	2,016	7,186	7,087	5,592
Net Income	1,878	1,591	1,122	1,318	1,498	5,530	3,812	2,600
Dep. & Amortization	675	706	688	722	700	2,817	2,948	3,183
Investment Gain	49	(14)	4	(43)	60	8	6	31
Others	(636)	349	(262)	(1,014)	(242)	(1,168)	320	(222)
Investing Activities	(805)	(757)	(1,711)	(167)	(737)	(3,372)	(2,974)	(793)
LT Investments	0	0	0	7	0	7	0	1,454
Purchases/Disposal F.A.	(751)	(743)	(1,578)	(487)	(609)	(3,417)	(2,637)	(2,147)
Others	(54)	(14)	(133)	313	(128)	37	(337)	(100)
Financing Activities	(103)	(120)	(2,549)	(197)	(78)	(2,943)	(2,655)	(3,952)
S/L borrowing	(98)	(111)	(139)	(170)	(69)	(489)	(1,091)	(3,327)
Bonds Payable	0	0	0	0	0	0	0	0
Convertible bond	0	0	0	0	0	0	0	0
Dividends	0	0	(2,366)	0	0	(2,366)	(1,479)	(503)
Others	(5)	(9)	(44)	(27)	(9)	(88)	(85)	(122)
Cash at the beginning	4,737	2,946	5,684	5,053	3,817	3,817	2,344	1,454
Cash at the end period	5,907	4,737	2,946	5,684	5,053	4,737	3,817	2,344

TONG YANG GROUP

東陽事業集團 TONG YANG GROUP

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Thank you for your continued confidence and support in TYG. It is our great pleasure to provide you with important TYG investment information for your reference. We sincerely hope through transparent information disclosure, we will have the honor to invite you to grow with Tong Yang Group (1319.TW/1319TT).

As the pandemic comes under control, the shipping cost drops as well, promoting the market to recover. The consolidated revenue of the Company reached NT$21,282,606 thousand, which is a 15.79% growth compared to previous year. The consolidated net profit totaled NT$2,036,720 thousand, increasing 219.65% from the last year. In the coming year, the Company will continue to optimize production, enhance lightweight technology, promote lightweight products, and dedicate itself to the development of new products to meet the trend of new-energy vehicles, in hopes of advancing the overall competency and stabilizing AM/OEM vehicle component markets.

Under Investor Relations, we provide the following information：

1. Clear financial information
2. On-time release information in Taiwan Stock Exchange
3. Financial reports and monthly sales/earning information
4. Information on the shareholder's meeting and institutional conferences

If you have any questions or comments, please contact with us. Thank you again for visiting TYG's website.

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