

Advantech in Perspective

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ADVANTECH

Mission

Enabling an Intelligent Planet

Revenue

USD \$1.76 Billion (2019)

Market Cap

USD \$8.1 Billion (Aug 2020)

Service Field

Industry 4.0, Industry IoT,

Embedded Computing,

Smart City (Medical, Retail, Logistics)

Serve Worldwide IoT Solution Integrators



Advantech's Key Milestones Across Two Decades (2010-2030)

Enabling an Intelligent Planet
as Corporate Vision

2010

Introduce WISE-PaaS

LEAP Challenge
for Reaching US\$ 2B

2020

2030

2017

Next Stage Globalization:
Globally Integrated Regional Competence (GIRC)

2013

Reach US \$ 1B

2018

Kickoff Phase II Biz

Phase III:
Co-Creation Joint Ventures with AIoT DFSIs

2020

Announce
WISE-PaaS Marketplace 2.0
for De-Coupled I.App & Edge SRP

2025

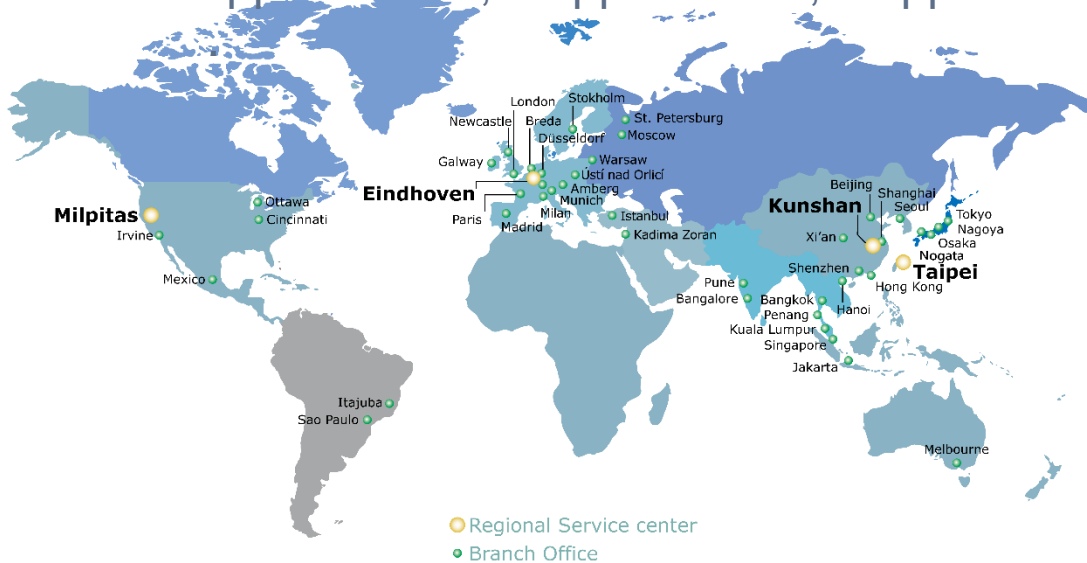
Target to Reach 1000+ WISE-PaaS VIPs,
1000+ I.Apps on Marketplace

Worldwide Presence

3 Manufacturing Sites
4 Logistics Centers

14 Service Centers
27 Countries

America	Europe	China	Taiwan	N. Asia & SAP
540pp	530pp	3,400pp	3,100pp	670pp



Geography Exposure and Opportunities

Others

US\$107.3mn, -16% YoY

N. Asia & Intercon

US\$330.6mn, 43% YoY

- Diversified Focus Sectors
- Business Development
- Domestic Partner Alliance

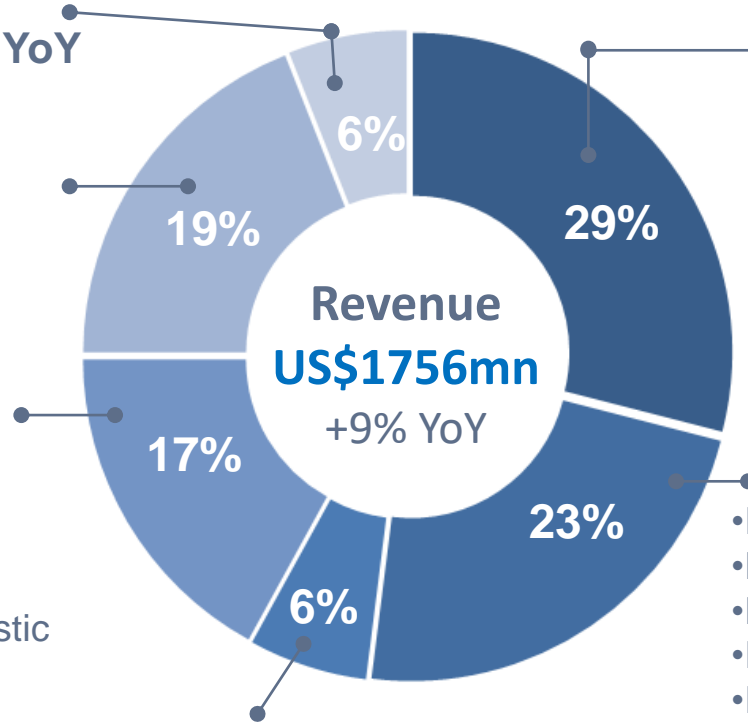
Europe

US\$300.9mn, -2% YoY

- Embedded Market Expansion
- Industry 4.0
- Intelligent Hospitality and Logistic

Taiwan

US\$100.5mn, -7% YoY



North America

US\$507.4mn, +14% YoY

- Networks & Communications
- Embedded Market Expansion
- Infrastructures Refreshment
- Industrial Automation

China

US\$409.4mn, +2% YoY

- Industry 4.0
- Environment & Energy
- Embedded Market
- Infrastructures Upgrade
- Intelligent Hospitality and Logistic

Best Taiwan Global Brands 2019

Interbrand

01



-4% 1,549 \$m

02



+3% 1,532 \$m

03



+5% 937 \$m

04



+0% 604 \$m

05



+11% 556 \$m

06



+7% 481 \$m

07



-3% 446 \$m

08



+6% 428 \$m

09



-3% 405 \$m

10



+7% 379 \$m

11



+8% 354 \$m

12



+2% 312 \$m

13



+16% 304 \$m

14



+12% 297 \$m

15



-4% 288 \$m

16



+3% 229 \$m

17



+5% 147 \$m

18



-9% 125 \$m

19



+18% 115 \$m

20



New 100 \$m

Year	Rank	Brand Value (USD M)
2003	11	N/A
2004	10	195
2005	11	N/A
2006	12	N/A
2007	13	232
2008	10	299
2009	12	204
2010	12	197
2011	10	241
2012	11	260
2013	12	260
2014	10	323
2015	7	386
2016	6	436
2017	6	484
2018	5	500
2019	5	556



World Market Share Industrial PCs

Supplier	Ranking	%
Advantech	1	34.0%
Siemens	2	9.0%
Beckhoff	3	6.0%
IEI Technology	4	4.0%
Kontron	5	3.5%
Other Suppliers		43.5%

Advantech IPC WW Market Share

34%



Nikkei Asia 300 Company

- Asia300実力企業ランキング(2018年7月)
全体：25位
うち、台湾企業：5位



	COMPANY (Country)		
1	Largan Precision (Taiwan)	21	CK Asset Holdings (China/Hong Kong)
2	HCL Technologies (India)	22	ITC (India)
3	Bumi Serpong Damai (Indonesia)	23	China Overseas Land & Investment (China/Hong Kong)
4	Tencent Holdings (China/Hong Kong)	24	Eclat Textile (Taiwan)
4	Taiwan Semiconductor Manufacturing Co. (TSMC) (Taiwan)	25	Advantech (Taiwan)
6	Kweichow Moutai (China/Hong Kong)	26	Baidu (China/Hong Kong)
7	Celltrion (South Korea)	27	SK Hynix (South Korea)
8	Alibaba Group Holding (China/Hong Kong)	28	Naver (South Korea)
9	Tata Consultancy Services (India)	29	Dabur India (India)
10	Airports of Thailand (Thailand)	30	Henderson Land Development (China/Hong Kong)
11	Hartalega Holdings (Malaysia)	31	Telekomunikasi Indonesia (Indonesia)
12	Guangzhou Automobile Group (China/Hong Kong)	32	Asian Paints (India)
13	Infosys (India)	33	Vedanta (India)
14	Zee Entertainment Enterprises (India)	33	Godrej Consumer Products (India)
15	Catcher Technology (Taiwan)	35	LG Household & Health Care (South Korea)
16	Vietnam Dairy Products (Vinamilk) (Vietnam)	36	Hero MotoCorp (India)
17	Anhui Conch Cement (China/Hong Kong)	37	Nanya Technology (Taiwan)
18	Central Pattana (Thailand)	38	Gudang Garam (Indonesia)
19	Tambang Batubara Bukit Asam (Indonesia)	39	AirAsia (Malaysia)
20	Maruti Suzuki India (India)	40	Chongqing Changan Automobile (China/Hong Kong)

Control Magazine Top 50 Global Automation Company

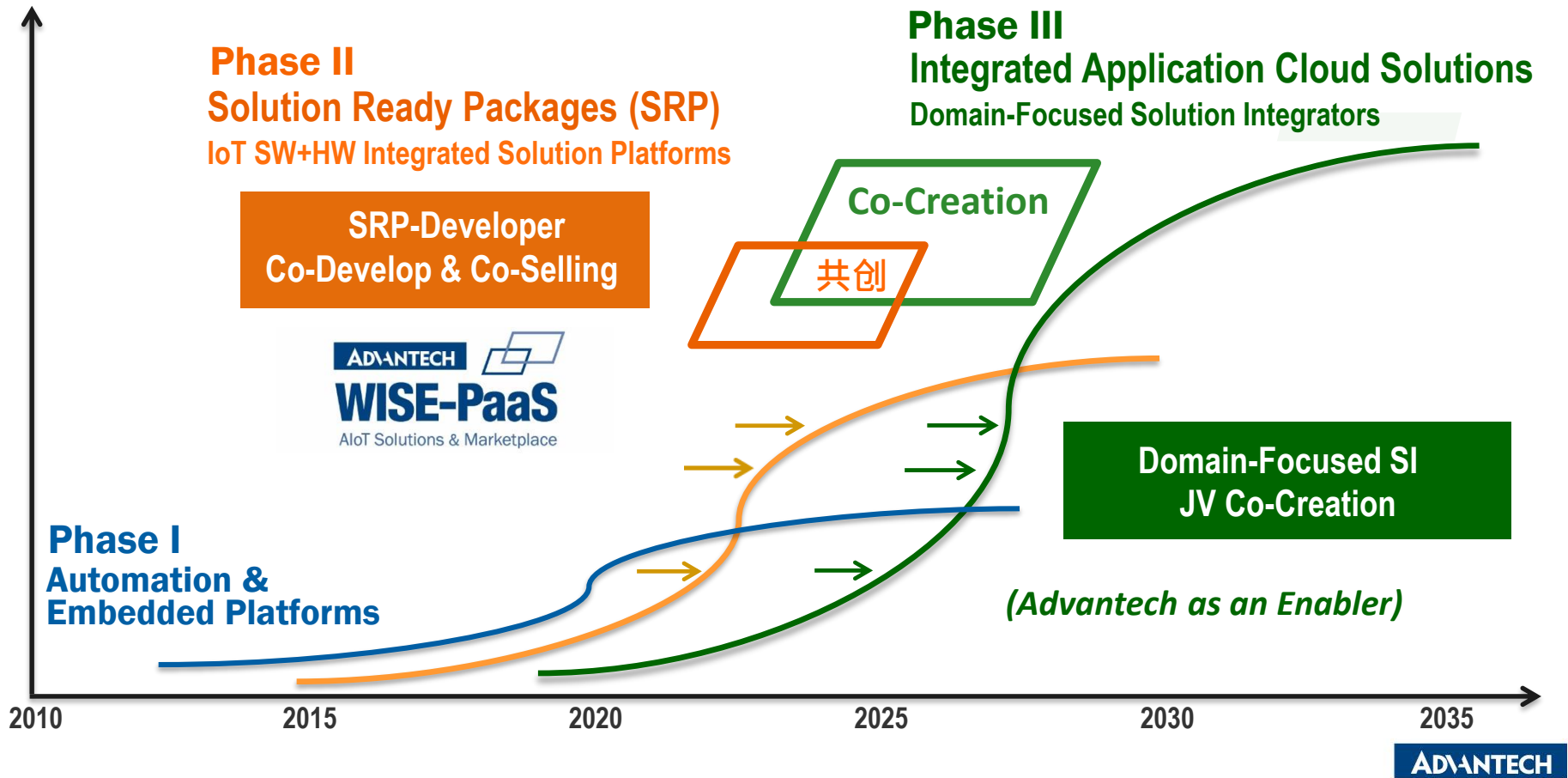


- **Top 21** Global Automation Company
- **Top 16** N. American Automation Vendors
- The **only** company from Great China
- **No. 5** in Asia

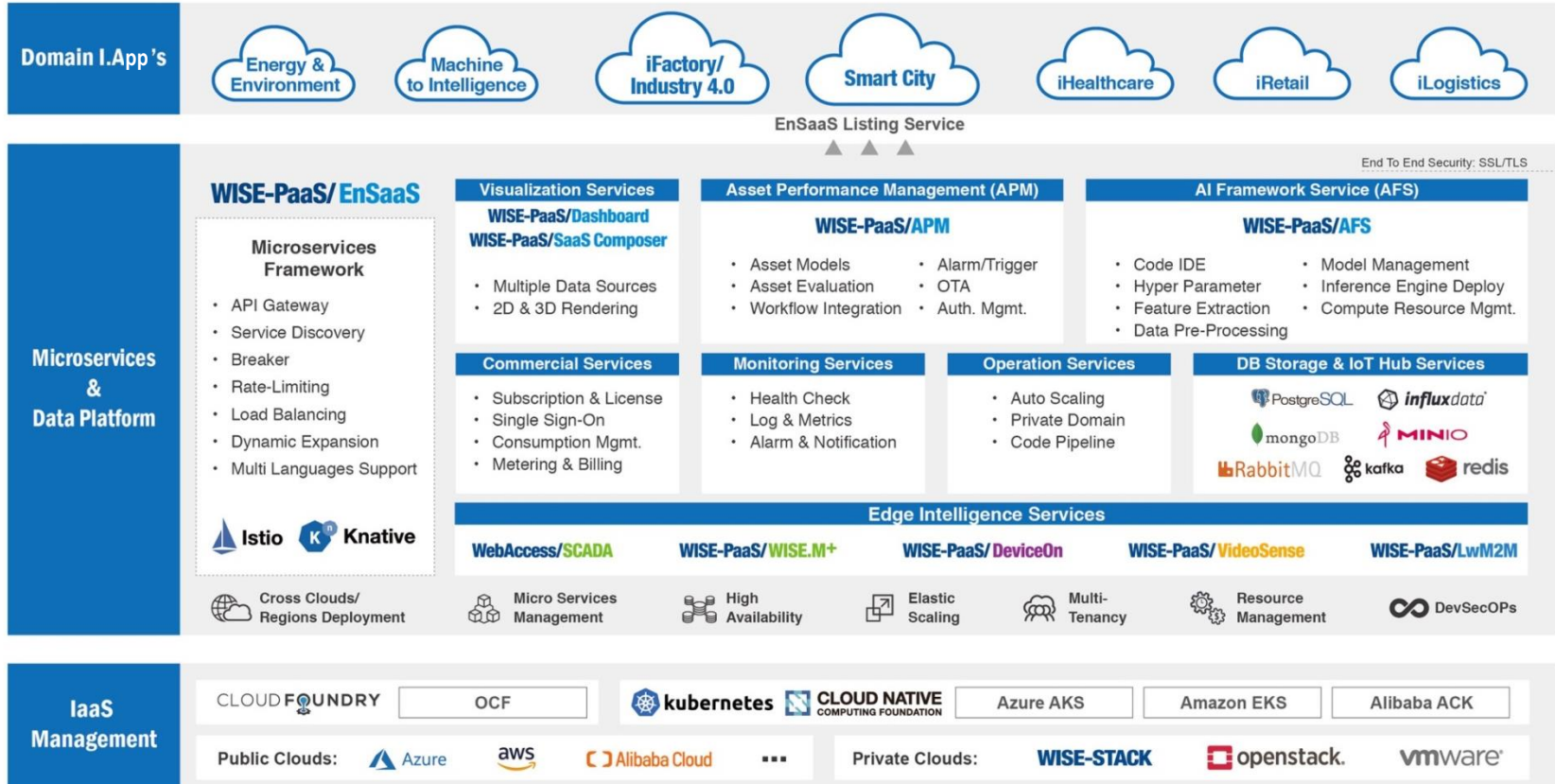
*2018 ranking released in 2019

Top 50 Global Automation Vendors 2018 Worldwide Revenue (US\$ millions)		
1	Siemens	\$13,699.1
2	Emerson	\$11,668.0
3	ABB	\$9,970.0
4	Schneider Electric	\$7,311.2
5	Rockwell Automation	\$6,721.7
6	Mitsubishi Electric	\$4,071.1
7	Honeywell	\$3,672.2
8	Fortive (Danaher)	\$3,655.1
9	Yokogawa Electric	\$3,509.1
10	Omron	\$3,163.1
11	GE	\$3,083.2
12	Ametek EIG	\$3,029.0
13	Endress+Hauser	\$2,888.2
14	Phoenix Contact	\$2,800.0
15	IMI	\$2,133.0
16	MKS Instruments	\$2,075.1
17	Spectris	\$1,985.4
18	Sick AG	\$1,925.6
19	FANUC	\$1,886.1
20	Festo	\$1,837.1
21	Advantech	\$1,783.3

Advantech AIoT Long Term Co-Creation Business Model



WIESE-PaaS 4.0 Architecture with Microservices & I.App

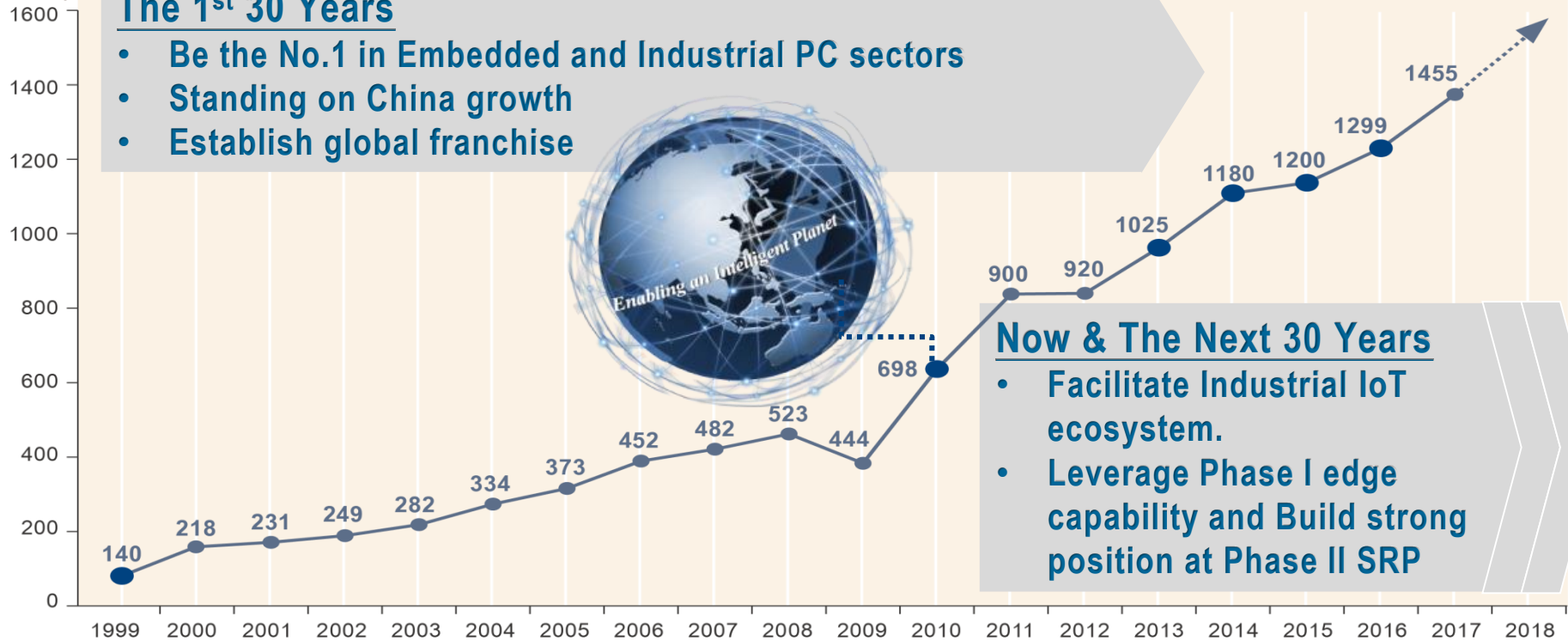


The 1st 30 Years and the Next 30 Years

Revenue (USD\$M)

The 1st 30 Years

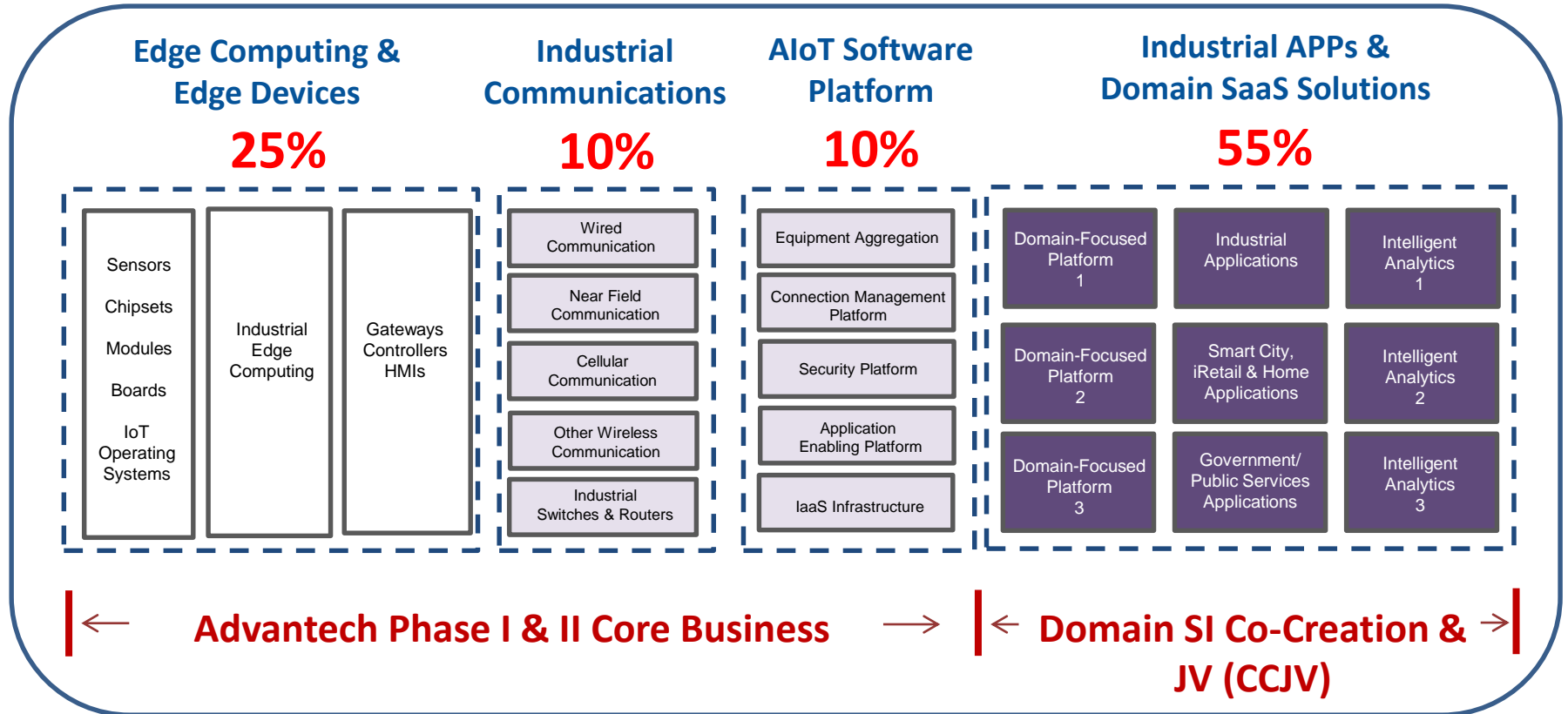
- Be the No.1 in Embedded and Industrial PC sectors
- Standing on China growth
- Establish global franchise



Now & The Next 30 Years

- Facilitate Industrial IoT ecosystem.
- Leverage Phase I edge capability and Build strong position at Phase II SRP

AIoT Industry Value Chain and Market Size



About Advantech Europe



Advantech Europe Service Center

Eindhoven, Netherlands



Area:

• 7,500 M2

CTOS Capacity/month

- System: 9,000 sets
- SBC: 5,000 sets

W/H Capacity/month

- 2,500 pallets
- Handling 3000 Delivery Notes

Warsaw, Poland



Area:

• 1,862+ 520 M2

CTOS Capacity/month

- 300 sets
- Max Capacity: 2,500 sets

W/H Capacity/month

- 360 Pallets
- Max. 1,000 Pallets

RMA

• 1,300 RMAs

- Invest in operations head (COO) to drive operational excellence
- Effective and efficient P2P & O2C through digital transformation
- Smart facility and industry 4.0 service center as IOT demo site

Standard BTO/CTO

- Standard BTOS
- Customized CTOS
- Processes Control
- Flexible, Fast, Quality delivery


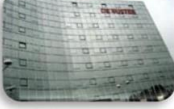














ODM/ OEM Project

- Project Management
- SLA (service level agreement) Management
- Customer Focus Team setup
- WISE-Stack cloud platform integration center

Advantech Europe Human Resources

Advantech Europe have around **500** employees, **10** countries from **35** nationalities and **14** sites

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AEU-HR



Co-Creating the Future of the IoT World

