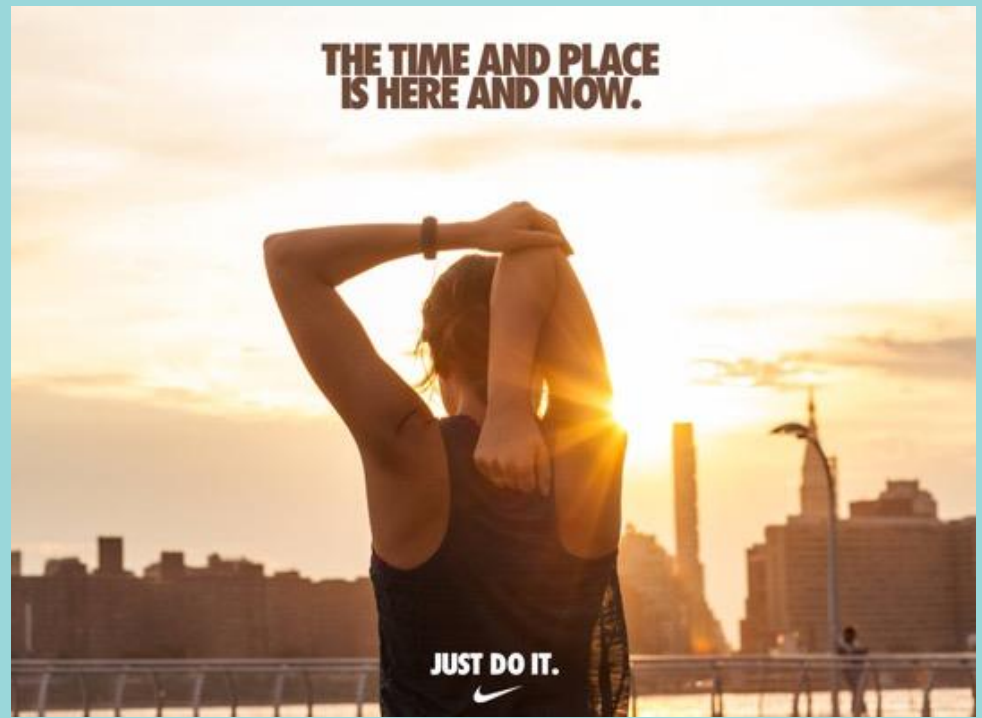




威宏控股股份有限公司
(8442 TT)

法人說明會 2023.5.10



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20Y↑

生產經驗

85億↑

2022年營收
YOY 58.69%

8,500↑ 140↑

全球員工人數 跨國生產線

7

跨國生產基地

80↑

全球知名品牌客戶

8442

台灣證券交易所上市



歷史沿革



1998-2006 創立及建立 區域基地



1998 - 宏盛集團位於中國廣東東莞前身為東莞 Honour Rich Limited，自1998年從事精品包袋的生產。

2003 - 新增客戶Nike

2004 - 成立東莞威保運動器材，主要生產運動護具、手套及配件。

2006 - 在江蘇省淮安建立新的生產基地。



2006-2017 公司加速業務 擴張

2006 - 新增客戶Kipling、Tumi、Decathlon

2008-09 - 新增客戶Under Armour and JR286

2011-13 - 獲得Nike頒發最佳穩定供貨獎項、最佳創新獎項及最佳品質供應商獎項。

2013-15 - 獲得JR286頒發最佳品質供應商獎項、最佳供應商獎項。

2014 - 新增客戶Longchamp

2014 - 更名為威宏控股股份有限公司

2014 - 正式與宏盛控股股份有限公司合併

2016 - 新增客戶Armani and Hugo Boss

2016 - 於台灣掛牌上市(8442 TT)

2015 - 2020 生產基地調 整

2016 - 成立柬埔寨宏盛

2016-17 - 逐步將生產基地由中國擴展至東南亞

2017 - 成立薩摩亞廣泰及其子公司廣泰貿易，主要負責行李箱之銷售業務。

2017 - 併購泰國TWT - TUMI箱包的主要供應商

2020 - 併購越南德御 - 主要生产專業運動包袋及高爾夫球袋，為NIKE運動包袋主要供應商

2021 - Beyond 鞏固領先地位 及永續發展

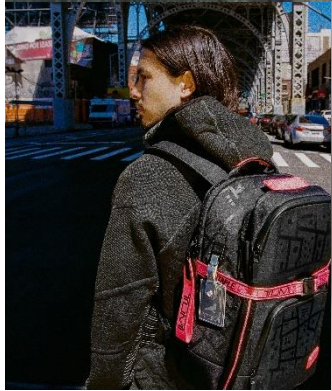
強化生產效率
分散布局風險
擴展客戶夥伴
奠基永續成長



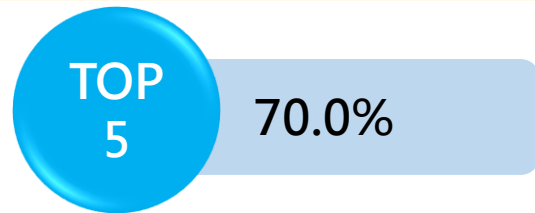
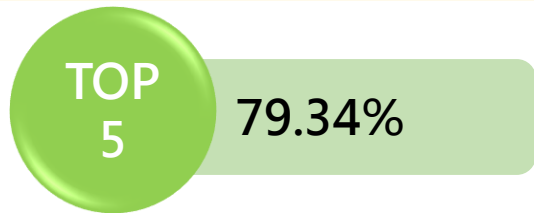
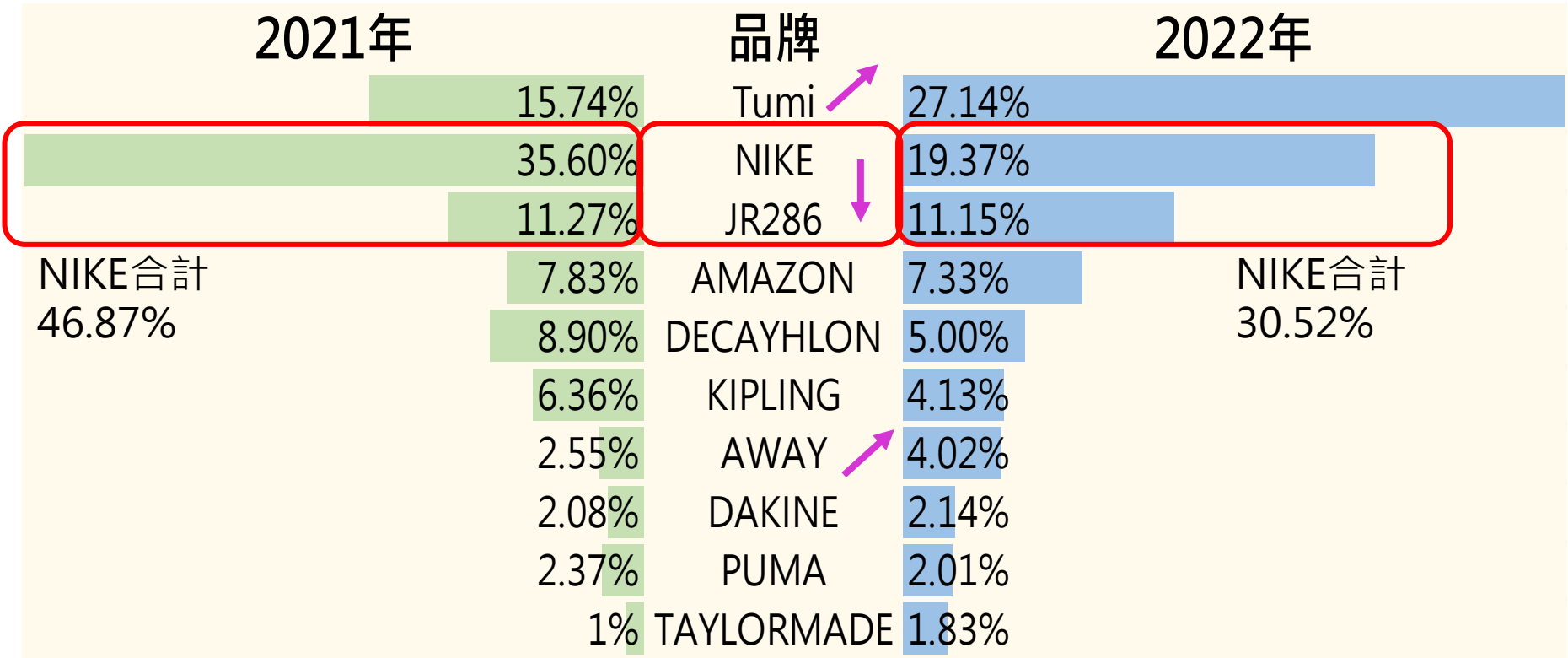
集團架構圖



主要客戶



主要客戶比重: 2021 vs. 2022



產品組成營收占比2022



13%

運動包袋及高爾夫球袋

YOY:13%

17%

旅行箱及商務包

YOY: 156%

7%

運動周邊商品

YOY:9%

25%

尼龍包袋及配件

YOY: 44%

7%

運動手套

YOY: 25%

2022
\$ 8,567,530
(YOY: 59%)

15%

運動護具

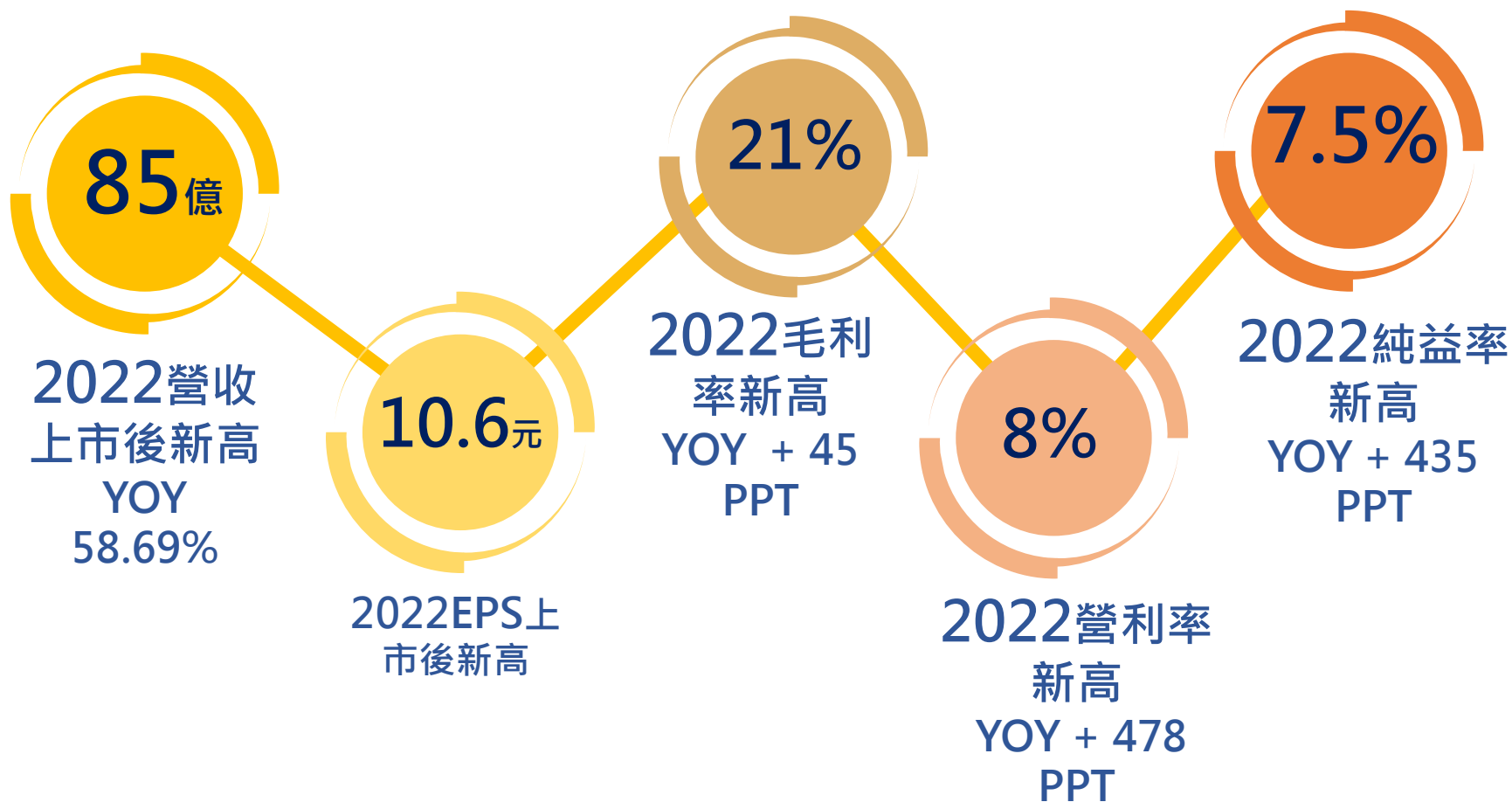
YOY:46%

16%

真皮包款及配件

YOY: 136%

新台幣千元

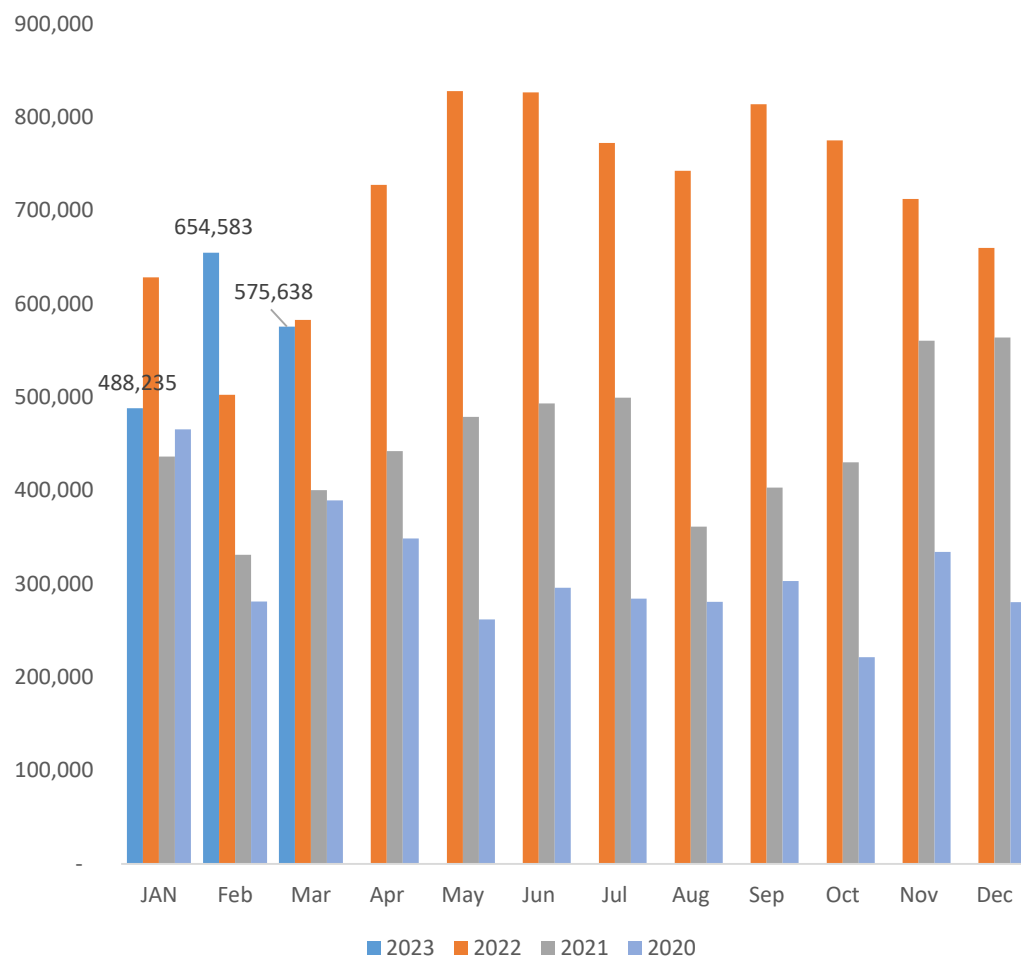


月營收表現



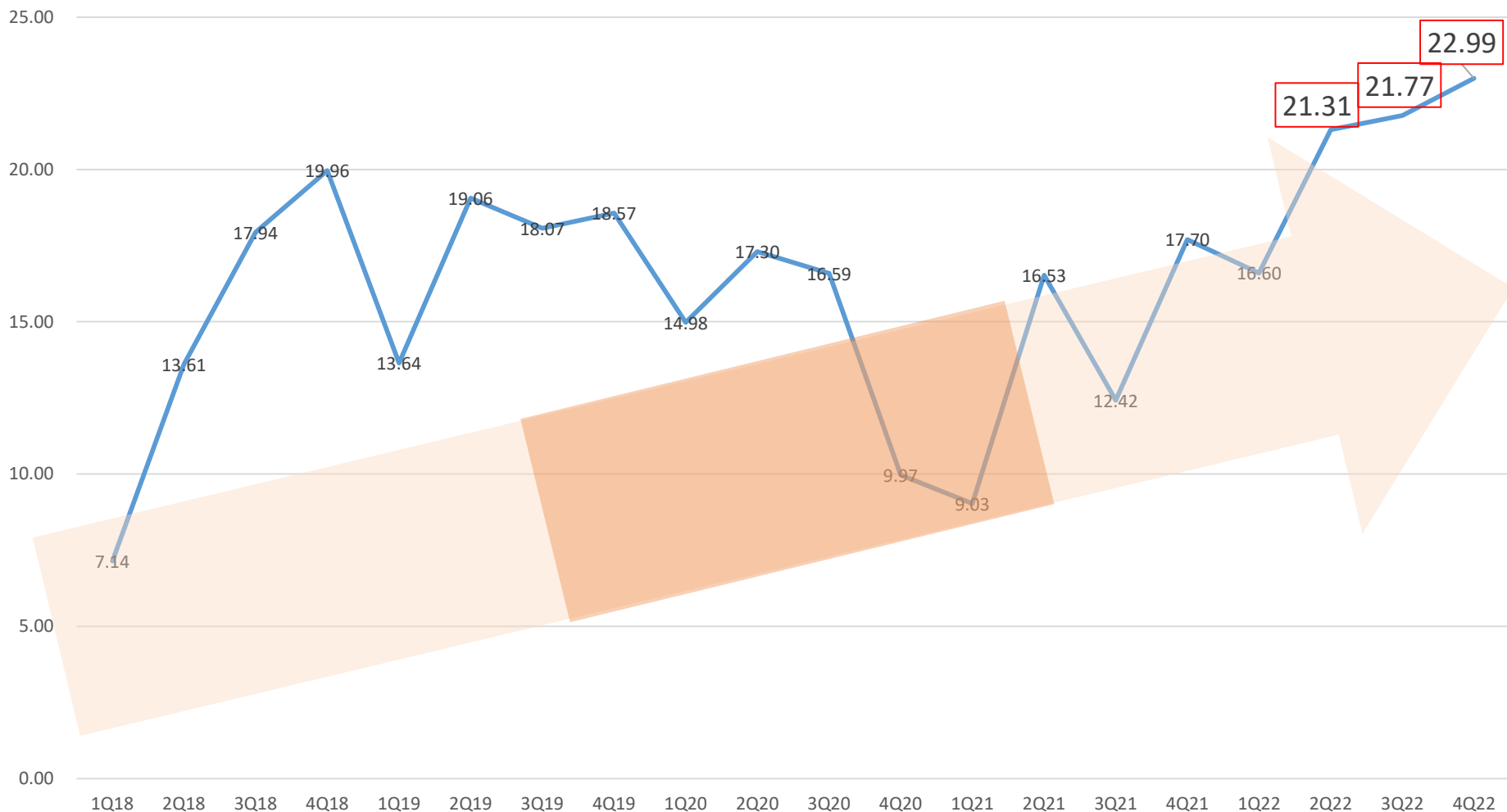
	2023	2022	2021	2020
JAN	488,235	628,299	436,365	465,309
Feb	654,583	502,452	331,062	280,843
Mar	575,638	582,559	400,487	389,326
Apr		727,512	442,003	348,470
May		827,982	478,925	261,707
Jun		826,501	493,224	295,751
Jul		772,258	499,506	284,144
Aug		742,442	361,070	280,645
Sep		813,844	402,938	302,801
Oct		775,033	430,275	221,301
Nov		712,442	560,352	334,076
Dec		659,816	563,944	280,186
TOTAL	1,718,456	8,567,530	5,400,151	3,744,559

YOY 59% YOY 44%



單位:新台幣千元

季毛利趨勢



- ◆ 生產基地多元化效益湧現，產能逐步開出後，毛利穩定提升。
- ◆ 2020-2021疫情衝擊營運，集團體質調整奠定永續發展基礎。

資產負債表



NT\$m	2019	2020	2021	2022	YoY (%)		
					2020	2021	2022
資產總額	4,522	3,632	5,026	6,608	(19.7)	38.4	31.5
現金	481	572	518	1,027	19.0	(9.5)	98.3
應收帳款&應收票據	1,236	700	1,493	2,028	(43.3)	113.1	35.8
存貨	841	699	1,048	1,163	(16.9)	50.0	11.0
固定資產	889	817	802	822	(8.1)	(1.9)	2.6
負債總額	2,663	1,957	3,342	4,232	(26.5)	70.7	26.6
應付帳款&應付票據	567	368	943	944	(35.1)	156.5	0.1
權益總計	1,858	1,675	1,684	2,377	(9.9)	0.6	41.1
重要財務比率 (%)							
應收帳款天數	63.8	93.1	73.1	75.3			
存貨週轉天數	58.5	86.9	67.9	59.8			
應付賬款周轉天數	36.7	52.7	51.0	51.0			
現金循環週期	85.6	127.3	90.0	84.1			
ROE (%)	13.6	(8.7)	4.5	31.3			
ROA (%)	4.9	(3.8)	1.7	10.9			
淨負債(現金)/股權 %	29.8	16.6	43.2	14.4			

綜合損益表



NT\$m	2019	2020	2021	2022	YoY (%)		
					2020	2021	2022
營業收入	6,458	3,742	5,400	8,539	(42.1)	44.3	58.1
營業成本	5,329	3,189	4,627	6,752	(40.1)	45.1	46.0
營業毛利	1,129	552	773	1,786	(51.1)	39.9	130.3
營業費用	(878)	(665)	(699)	(1,094)	(24.3)	5.2	56.4
營業利益	251	(112)	73	692	(144.9)	-	807.3
營業外收入及支出	(24)	(43)	11	11	76.0	-	36.7
稅前淨利	226	(155)	84	704	(168.7)	-	731.3
所得稅費用	(14)	2	(9)	(67)	-	-	622.0
淨利歸屬於母公司業主	212	(153)	75	636	(172.2)	-	744.9
稀釋後每股盈餘 (NT\$)	4.20	(2.56)	1.25	10.61	(161.0)	-	740.5
重要財務比率 (%)							
毛利率	17.5	14.8	14.4	20.9			
營業費用率	13.6	17.8	12.9	12.8			
營業利益率	3.9	(3.0)	1.4	8.1			
稅率	6.1	1.3	11.0	9.6			
淨利率	3.3	(4.1)	1.4	7.5			

股利發放和資本支出



(NT\$m)	2019	2020	2021	2022
淨利	212	(153)	75	636
現金股利	18	-	60	301
稀釋後每股現金股利(NT\$)	0.3	-	1	5
現金股利發放率	7.1%	-	80%	47%
現金股利殖利率	0.7%	-	1.7%	6.06%
資本支出	185	65	114	179
資本支出/營收	2.86%	1.7%	2.11%	2.1%