



Kwong Lung Enterprise (8916 TT/TW)

Investor Presentation



Apr 2021



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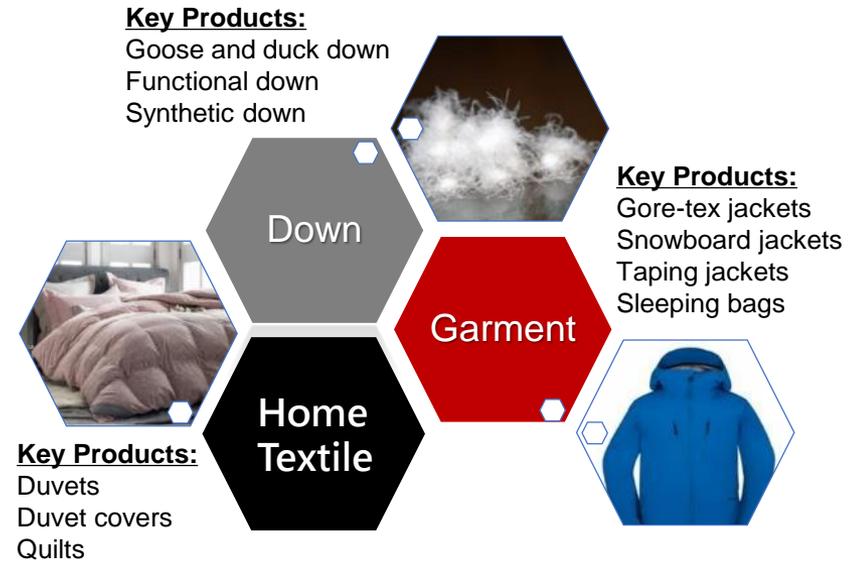
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Company Background

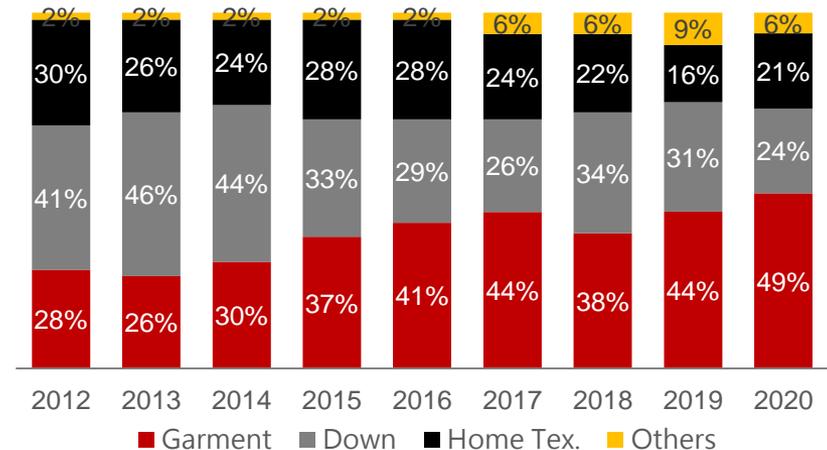


Who we are and why invest us?

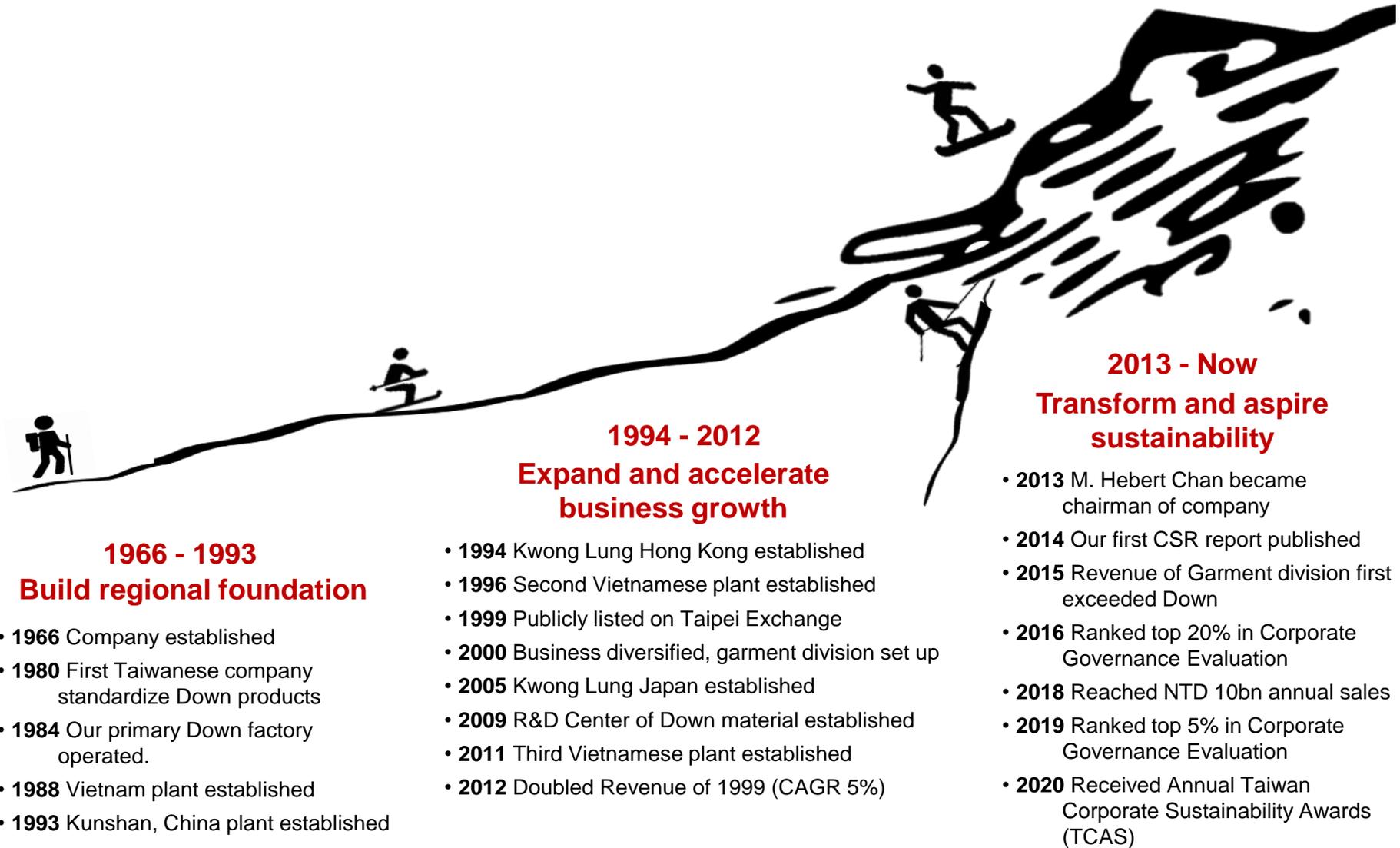
- We are a global-scaled Down textile manufacturer, vertically-integrated outdoor wear, sports garment and home textiles.
- We have over 50 years' deep experiment of Down material, with strong research, development and production capability.
- With full ability to meet customers' ESG and quality requirements, we have established long-term partnerships with many leading outdoor wear enterprises over the world.
- We see the huge potential in sportswear market, as the increasing popularity of outdoor activities and larger demands of functional apparels. We have fine strategy and advantages to step in rapidly, under the yet fundamental base and the future expansions.
- We committed to return our earnings generously back to our shareholders. We paid over 70% of our earnings in cash during the past five years.



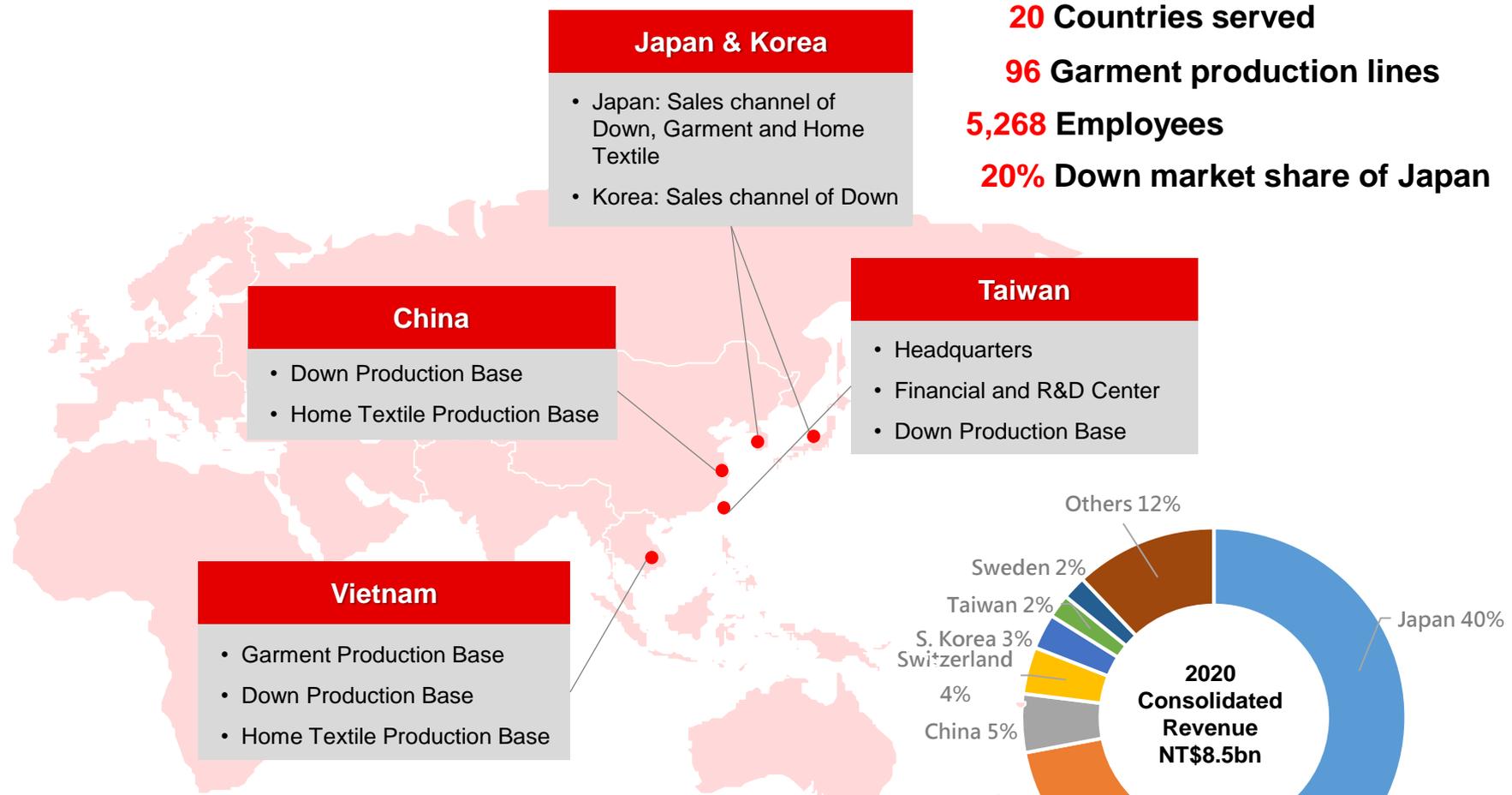
Structure of Kwong Lung's annual sales - consolidated



Milestones of Group



Our Global Strategy



Each Garment plant in Vietnam specializes unique category to maximum our productivity

- BO HSING : High-end products, like seamless taped jackets and Gore-Tex jackets.
- MEKO : Down jackets and sleeping bags
- DONG NAI : Casual Garment

Our competitive strengths



High-tech R&D Capability

we have ability to offer our clients diverse (customized) products, such as waterproof, insulated Down and so on.



Fine Patterning Skills

With over 20 years' experience of garment design and patterning, we can offer the professional advise and customized produce project.



Elastic Produce Management

We can provide one-stop services to our customers, supporting their multiple sales and marketing goals



Traceable Product & Safety

We are the first Down manufacturer of world received bluesign®, reached its strict standards of safety and environmental health. We also certified by RDS and DownPass.

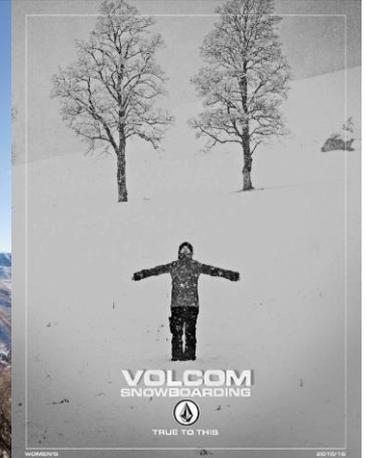


Deep Customers Relationship

Providing high quality product to our customers, we have earned deep trust from our global clients with long-term partnerships.

Our international Garment clients

BURTON  **Marmot** **mont-bell**  **Columbia** **VOLCOM**

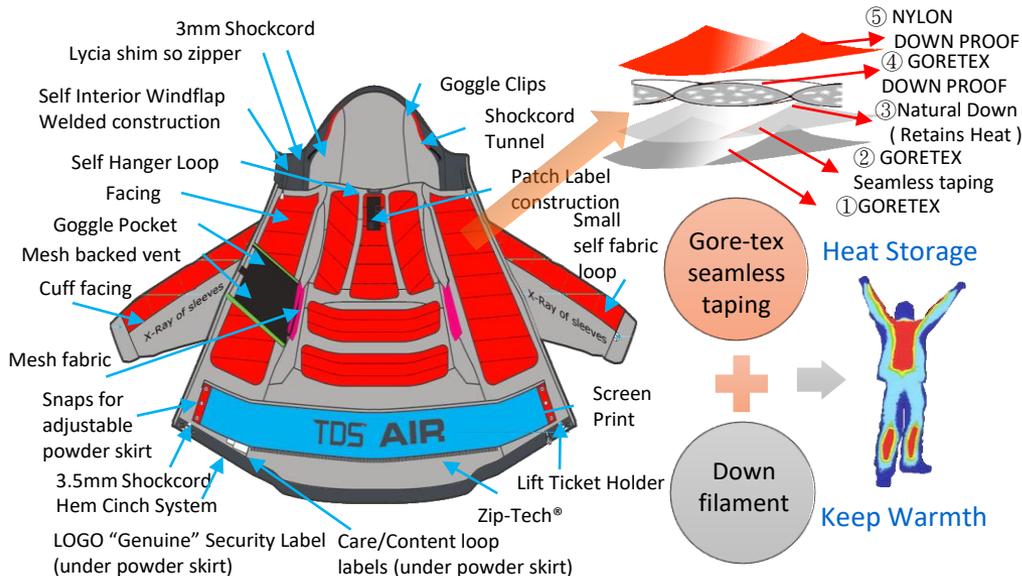


Our Functional Jackets, with high entry barrier

High-end outdoor GORE-TEX taping jacket



High-end functional down jacket



Highly functional 3D spacer structure

3D spacer mesh fabric Down
Heat passing through

Normal down jacket
The stitches are squeezed or sealed

- Allows down material to expand, hence more warmth.
- Using mesh fabric as spacer allows heat passing through, creating an uniformed layer of warmth.

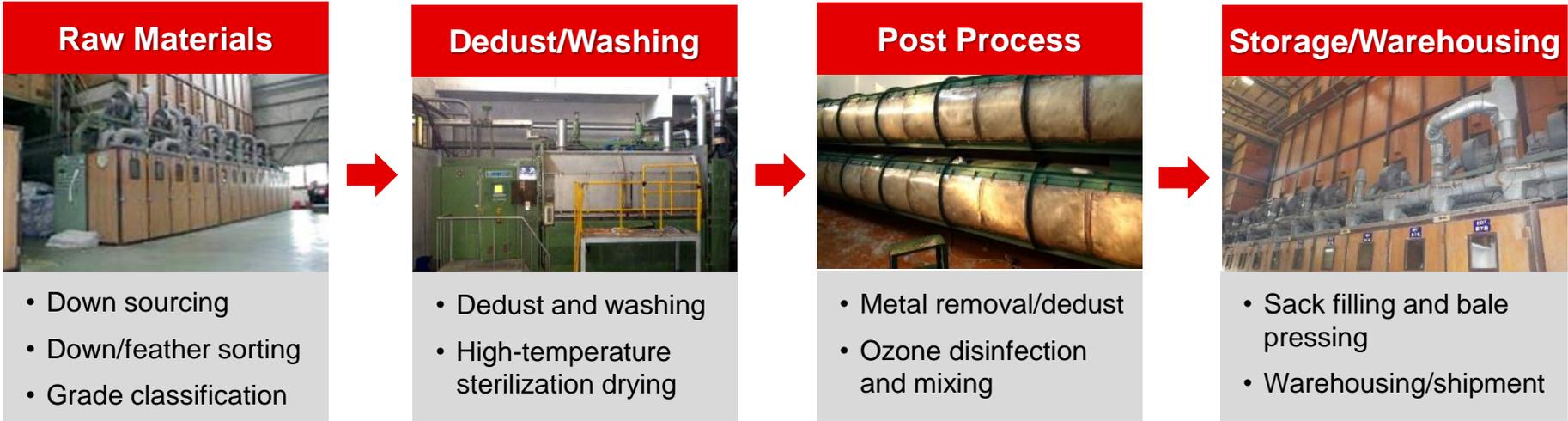
- Down materials are not able to expand in a squeezed space.
- Hence, heat could not pass through,, creating cold spot.

3D cutting on sleeve structure

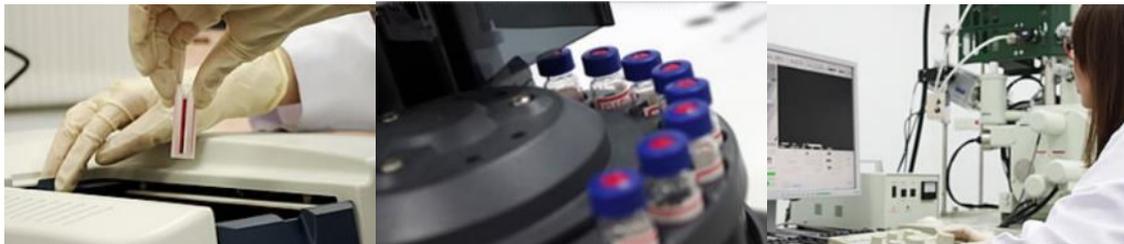
- Ergonomic design
- Larger stretch
- More comfort during activities

Our Down & Feather business

High-tech production facilities



Strict product testing ensure the highest quality



Ultra-structure analysis of fiber ensure none damage in down

Chemicals trace analysis detect residual chemical, vapor or odor remaining in product

Micro-biological test monitoring pathogenic bacteria on down

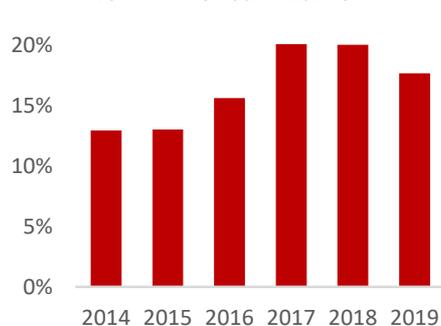
Safety and user experience promise



Our Advantages in Down Business

1 Influential share of non-China supply and High bargaining ability

Share of Down supply in European & North American Market



- We own 18% market share of down supply in Europe and North America.
- Our shares of non-China supply allow us to well fulfill our customers needs.
- Our shares of non-China supply give us higher price bargaining ability.

2 Customers of World famous Brands



3 Ability to avoid risk of single country



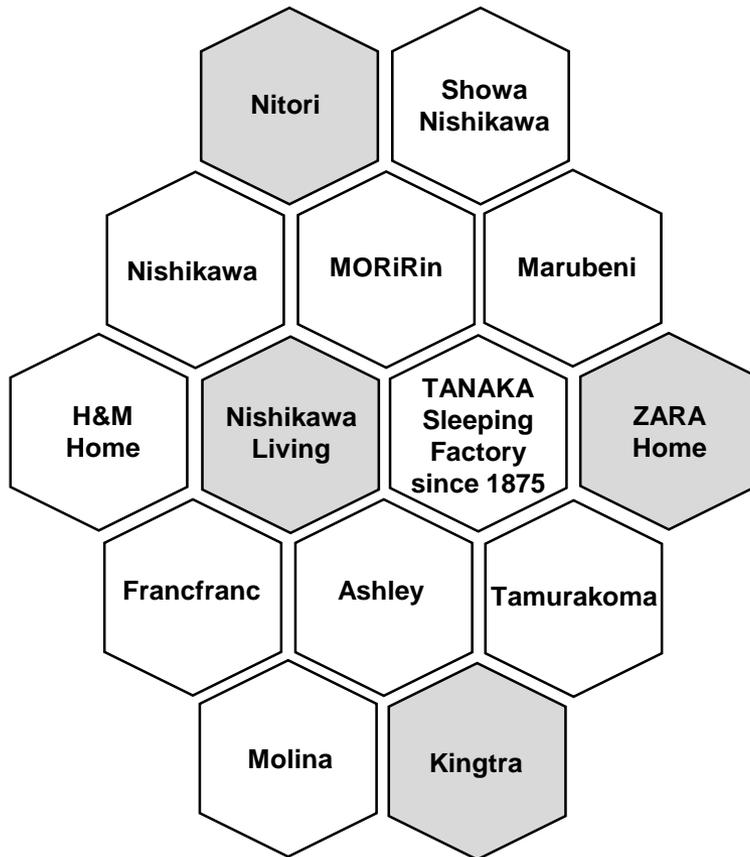
- Multi-regional sources of good supply.
- No matter met the bird flu in China at 2013, nor the recent doubt over Chinese Down feather, we can always offer stable Down resources to our customers.

4 High-tech Functional materials Design



Our Home Textiles Business

Strong customer portfolio



Diverse bedding product offerings



Bed Sheet Set

Flat sheet, fitted sheet and pillow cases



Fashion Bedding

Comforters, bed in bag, quilts and coverlets, decorative pillows



Utility Bedding

Comforters, bed in bag, quilts and coverlets, decorative pillows



Functional Bedding

Quilt cover and pillow cover

Focus on two aspects of Innovation

New Materials

Eco-friendly

Pollution Reduce

Dye with colored masterbatch to reduce extra steps in after process.



Waste Reuse

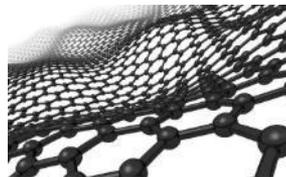
Produce comforters which are made of coconut fiber.



Stuffing Quality Improve

Graphene Use

Through nanotechnology, improving capability of insulation, anti-bacteria, UV-protection, and anti-fire



Other new materials

- Quick-dry polyester staple fiber
- Polyester fiber filler with thermal and moisture wicking function



MOISTURE WICKING/
QUICK DRY



THERMAL HEAT RETENTION

Product Design

Ergonomic Design

- Fit the market demand under human-base orient, with numerous testing and adjustments.
- Using different stuffing according to the unique requirement of supporting.
- PCM Temperature Regulating Down Comforter



Bedding pattern design

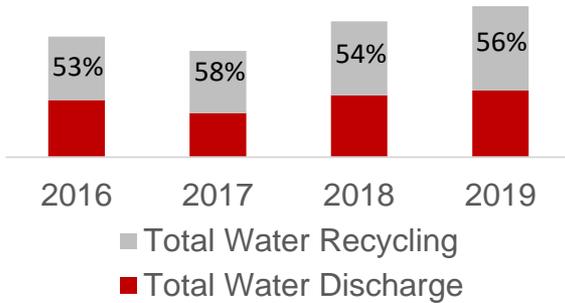
- Whether color splash, floral print or geometric patterns, we understand consumer preferences and stay on top of the trends



CSR as inseparable part of our Operations

Water Recycling

Water Consumption in Taiwan



Waste Recycling

Category (Ton)	Residue	Sludge
2016	0.44	176.7
2017	0.44	99.94
2018	0.48	113.63
2019	0.19	159.31

Social Services

- **Winter Wear Support :**
For the underprivileged groups.
- **Vietnamese Children Care :**
School lunchbox and necessities.
- **Industry-Academy Cooperation :**
Internship program for future generations.

Corporate Governance

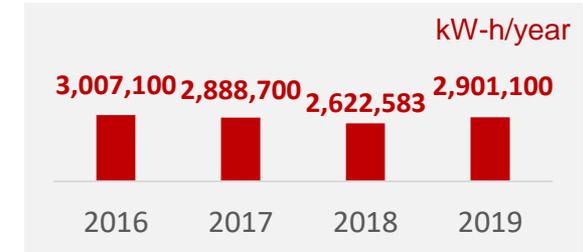
- 2019 Ranked top 5% in Corporate Governance Evaluation
- 2020 Set up CG Officer position
- 2014 First ESG report published



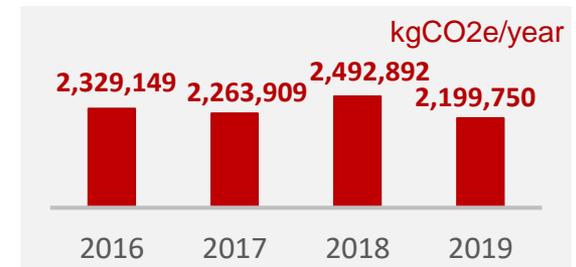
Employee Care

- 34% employee turnover rate in Vietnam, lower than industrial average (40%).
- The participant of the healthcare course increase 30% and participation hours increase 249% in 2019.

Total Electricity Consumption



Total Carbon Emissions



Green production



- Bluesign certificate
- Responsible Down Standard
- ISO50001 certificate
- Oeko-Tex Standard 100
- Higg Index
- Global Recycle Standard certificate

Our Goals & Strategies



ROE-Orient, enhance Shareholder's Value

1. Enhance proportion of high-margin Garment business

- ✓ Seeking growth from core consumers
- ✓ Clear market penetration strategy
- ✓ Balance peak and low seasons



ROE growth

2. Optimizing efficiencies and manufacturing costs control

- ✓ TPI drives
- ✓ Intelligent Manufacturing Plan
- ✓ E-Workflow

3. Maintain the most appropriate capital structure

Seeking growth from core consumers

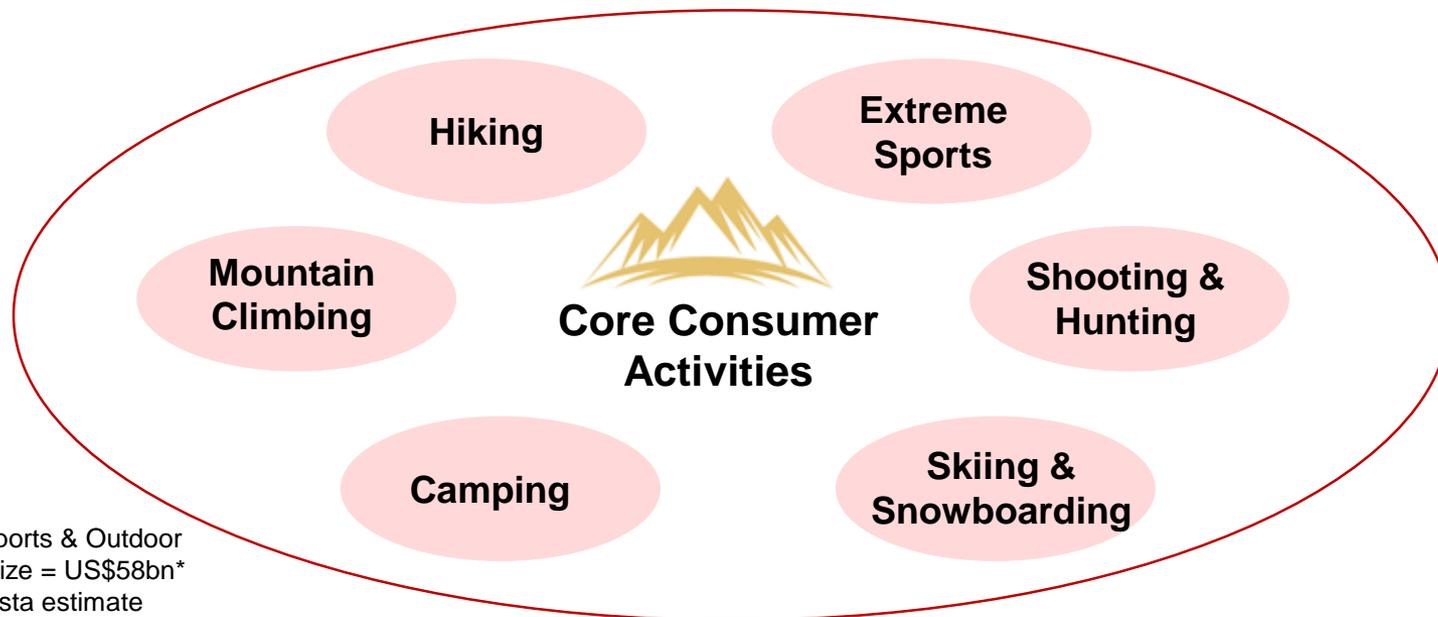
Few professional OEM/ODMs in high-end functional garment field – Our opportunity

- Enter market segment which match the core consumers' preferences and the need of outdoor activities

- From the now existing partnership to explore the potential clients

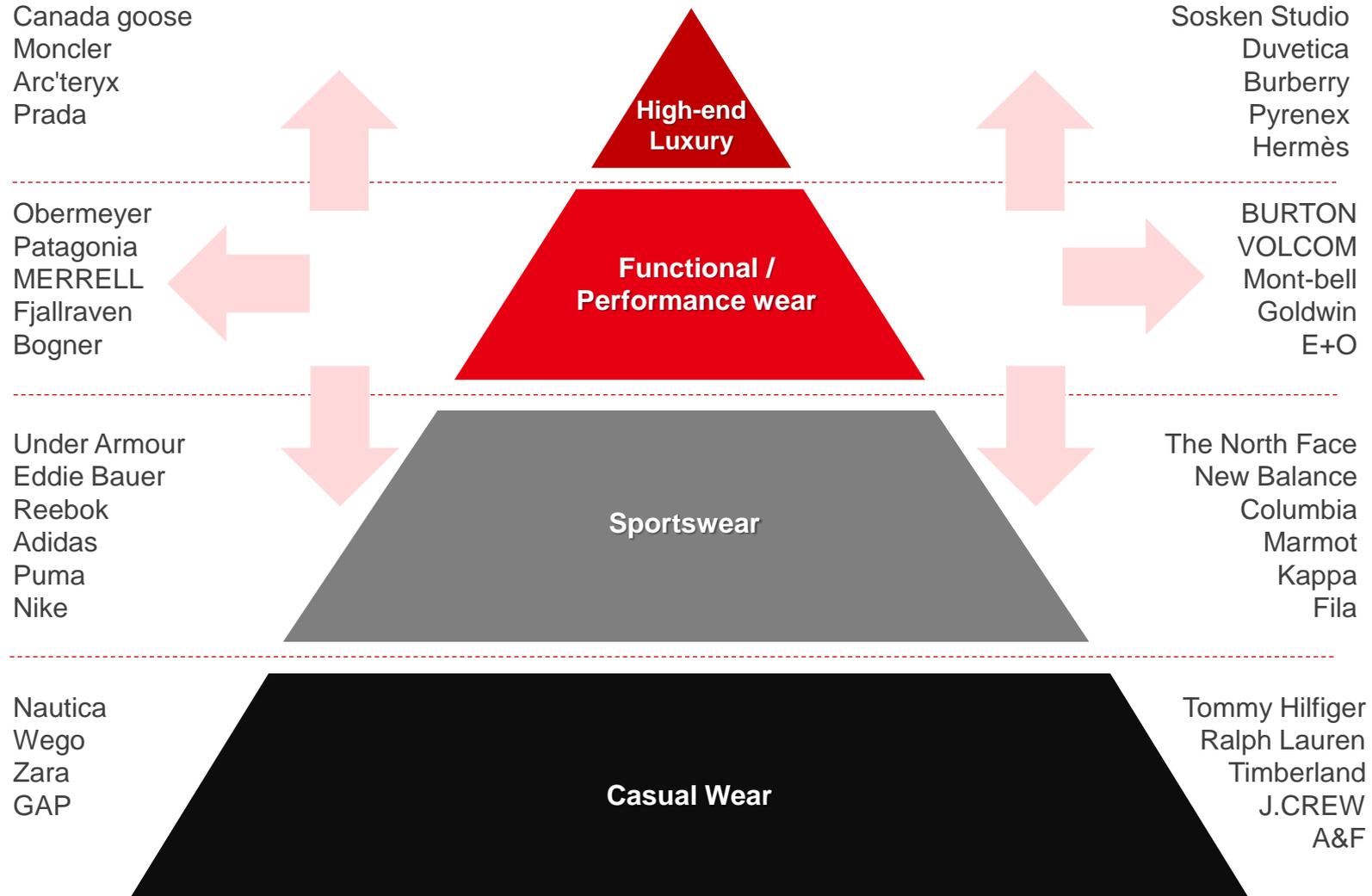
- Contain specialists with deep knowledge of end consumer market and know-how to penetrate in.

- Collaborate with brands similar to our core spirits: **authenticity, relentless innovation, and differentiation**



Global sports & Outdoor Market Size = US\$58bn*
 *Statista estimate

Clear market penetration strategy



Capacity Expansion Plan

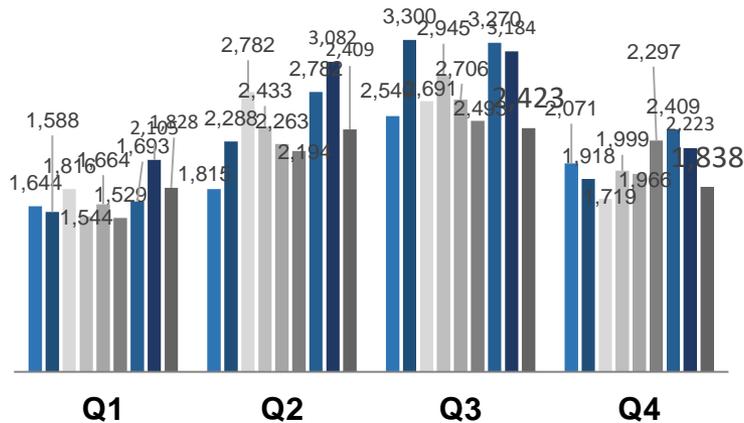


2021-2022 Capacity expansion plan of BUs

BU	Region	Existing factory #	Type	Existing product line	2021 Estimated product line expansion	2021 Estimated totaled product line	2022 Estimated product line expansion	2022 Estimated totaled product line
Garment	Vietnam	4	Sewing	68	10	78	10	88
		Outsourcing	-	28	-	28	-	28
	Total	4		96	10	106	10	116
Home textile	China	1	Sewing	2	0	2	0	2
	Vietnam	3	Sewing	8	0	8	6	14
	Total	4		10	0	10	6	16
Down	Taiwan	1	Mixing thread	5	0	5	0	5
	China	1	Mixing thread	5	-3	2	0	2
	Vietnam	1	Mixing thread	6	0	6	0	6
	Total	3		16	-3	13	0	13

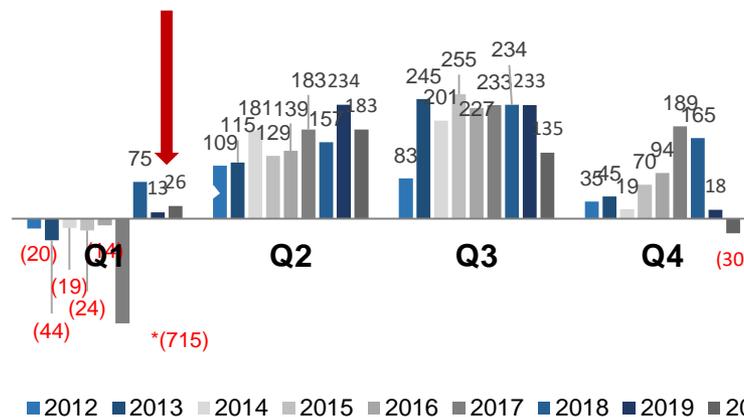
Balance Peak and Low Seasons

Revenue
(NT\$ mn)



Our 1Q19 operating profit turned profit thanks to our effort in balancing seasonality

Earnings
(NT\$ mn)



- As our main goods are seasonal down products for autumn and winter, the raw materials are generally prepared in the late year. With mass production beginning in the following early year, the majority of shipments will commence from June to October.
- Revenue figures are typically lowest in 1Q, and 3Q will be peak of shipments in general.
- We post losses in 1Q due to low revenue figures, while profit in 2Q as revenues increased, as the typical cycle of Down industry.
- To balance the seasonal gap, we began to improve our production pipeline with the early preparation. We aim to have our customers issue pre-orders to reduce the production pressure during peak season and ensure on-time delivery.
- Also, we began to expand other product categories such as spring/summer goods and sleeping bag.
- We have successfully reversed the losses in 1Q19 and further **expanded the profit in 1Q20**.

*Note: In 1Q17, our Vietnam plant suffered a fire accident, our earnings are positive mainly due to one-time non-operating income in 1Q18. (insurance claim from our fire incidence in Vietnam and gain from asset disposal)

Key initiatives

Materials

- Develop qualified local suppliers in Vietnam and expand the share of local procurement
- Regularly review suppliers and implement scorecard plan
- Use commonality of productions and bargaining to cost control

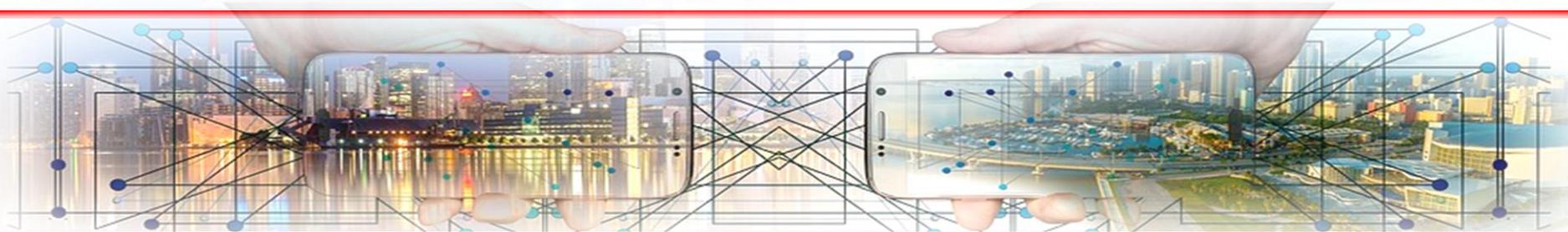
Direct labor cost

- Improve productivity and enhance quality with Total Production Innovation (TPI)
- Accelerate learning curves with well-designed training and analyze production sections
- Continue investing the automation

Manufacturing cost

- Contain manufacturing management professions from other industries and introduce advanced factory management
- Promote qualified local talents as managers and deepen communication with local power

Intelligent Manufacturing Plan



We initiated a 4-stage Intelligent Manufacturing Plan in 2019, target to finish implementation over next 3-5 years. The intelligent Manufacturing Plan is expected to significantly improve our operating margin.

1st Stage



MES System Implement

- Instant production reporting system
- Smart shipping



2nd Stage

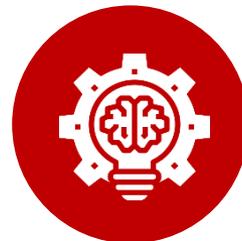


MES System PLUS

- Process semi-automation
- Product traceability system
- Production equipment alarm traceability system



3rd Stage

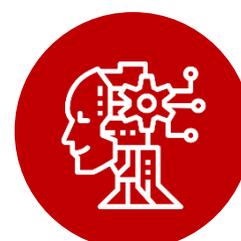


Smart Manufacturing

- Equipment prediction & maintain system implement
- Consumables life prediction
- Factory power monitor system



4th Stage

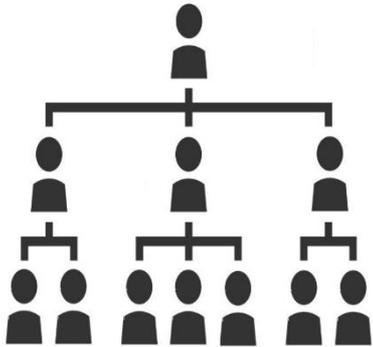


Intelligent Manufacturing

- Order output schedule and quality prediction system
- Complete the construction of the control center
- Green energy factory
- World Class Maker

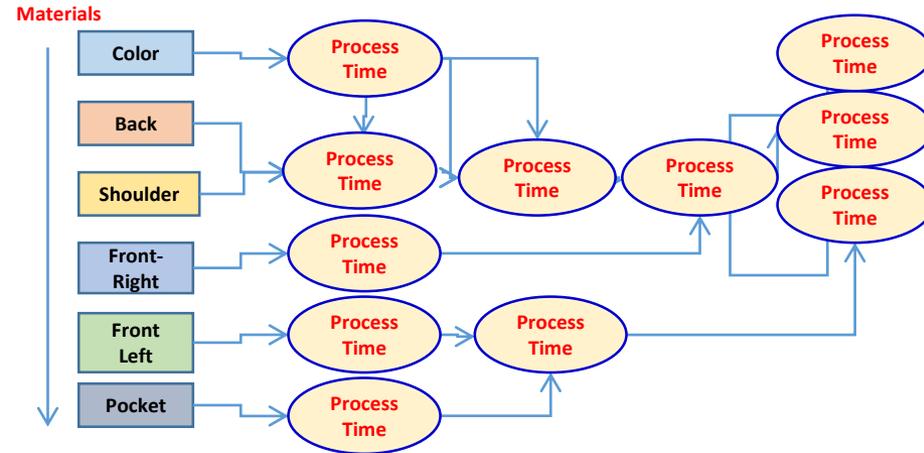
Current TPI in 1 – 2 stage

1 A Group-wide implementation

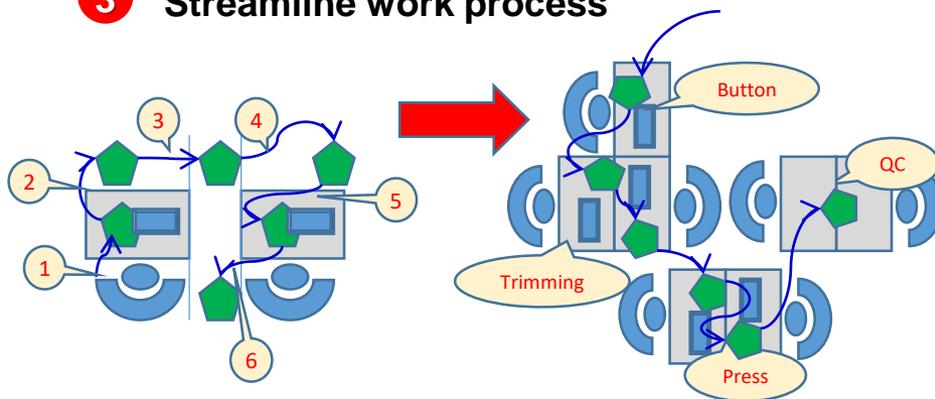


- Extends from Chairman, senior managers, plant managers, to line operators.
- From the bottom up, with comprehensive training for each new employee.
- All employees are assigned to innovate and improve upon current production techniques.
- Each employees is incentivized to meet the targets.

2 Fine division of work structures



3 Streamline work process



- Minimum handling (remove non-value-added procedures)
- Minimum time need
- Allows defect feedback

4 Real-time monitoring and improvement

本日生產力

組別	客戶	訂單號	Style NO	IE值	投入工時	產出工時	產出件數	生產力%
FP2包裝組	ZNR	1810-0057	M194280	1.94	124.16	133.0	64	93

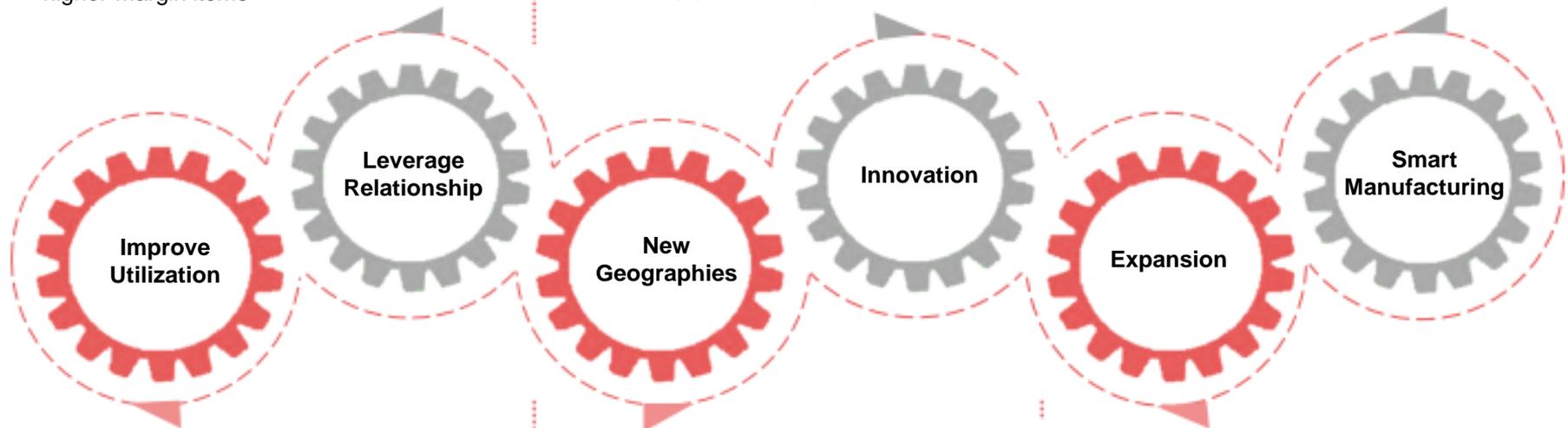
Our Goal and Strategy

Short-term

- Leverage existing partnership to further grow our market share
- Expand our portfolio of products to include higher-margin items

Mid-to-long-term

- Focusing on innovation and develop value-added products (i.e. high-end co-branding products)
- Adopt smart manufacturing in all aspects to enhance operation efficiency and embrace customization trend



- Standardize patterning procedures with new technology, improve product development efficiency, and optimize capacity utilization.
- Improve operational efficiencies and minimize the production lead-time with TPI program.
- Promote the purchase process and accuracy with AI intelligence.

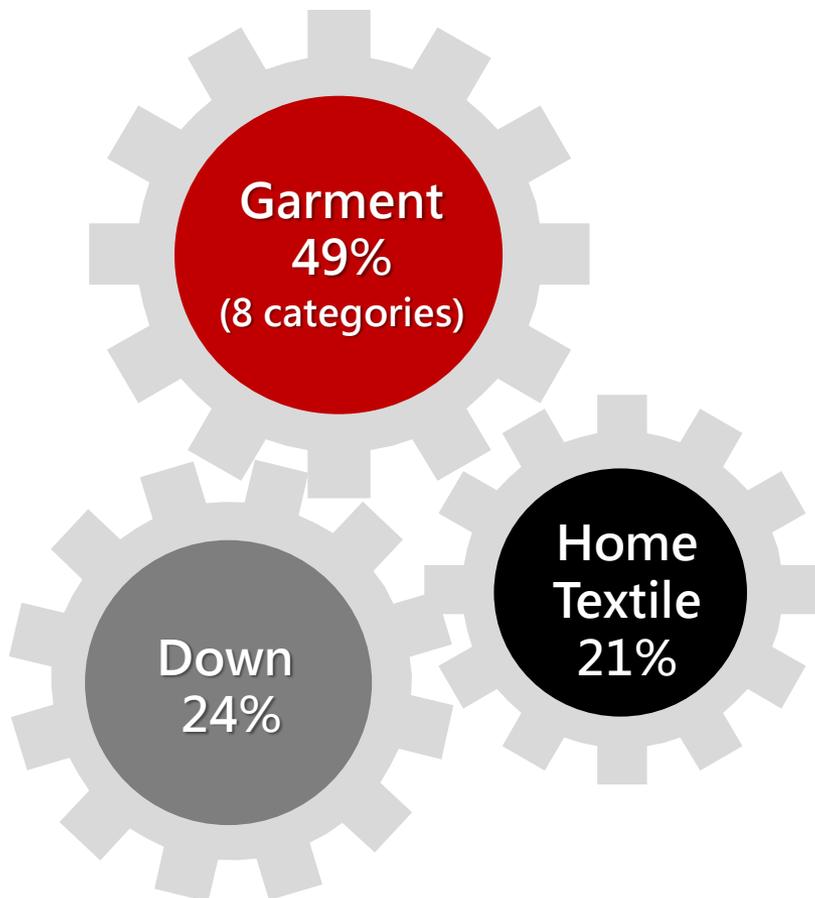
- Consolidate current market position and target new markets to diversify customer base geographically for further expansion
- Expand our business through organic growth and strategic inorganic opportunities
- Asset optimization and disposal the idle.

To become trustful partner of top global apparel brands and fashion houses

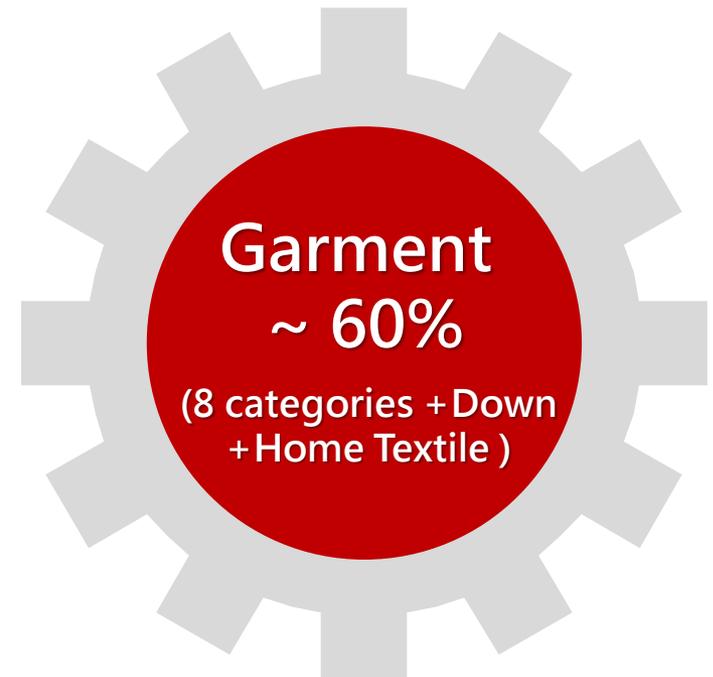
From Garment-orient to Garment manufacturer

- Cultivate 10 new grand customers of Garment in next 5 years.
- Operating profit contribution from garment business over 80% (2020: 95%) 、 operating profit margin of the company up to 12% (2020:9%) following .

sales breakdown (2020)

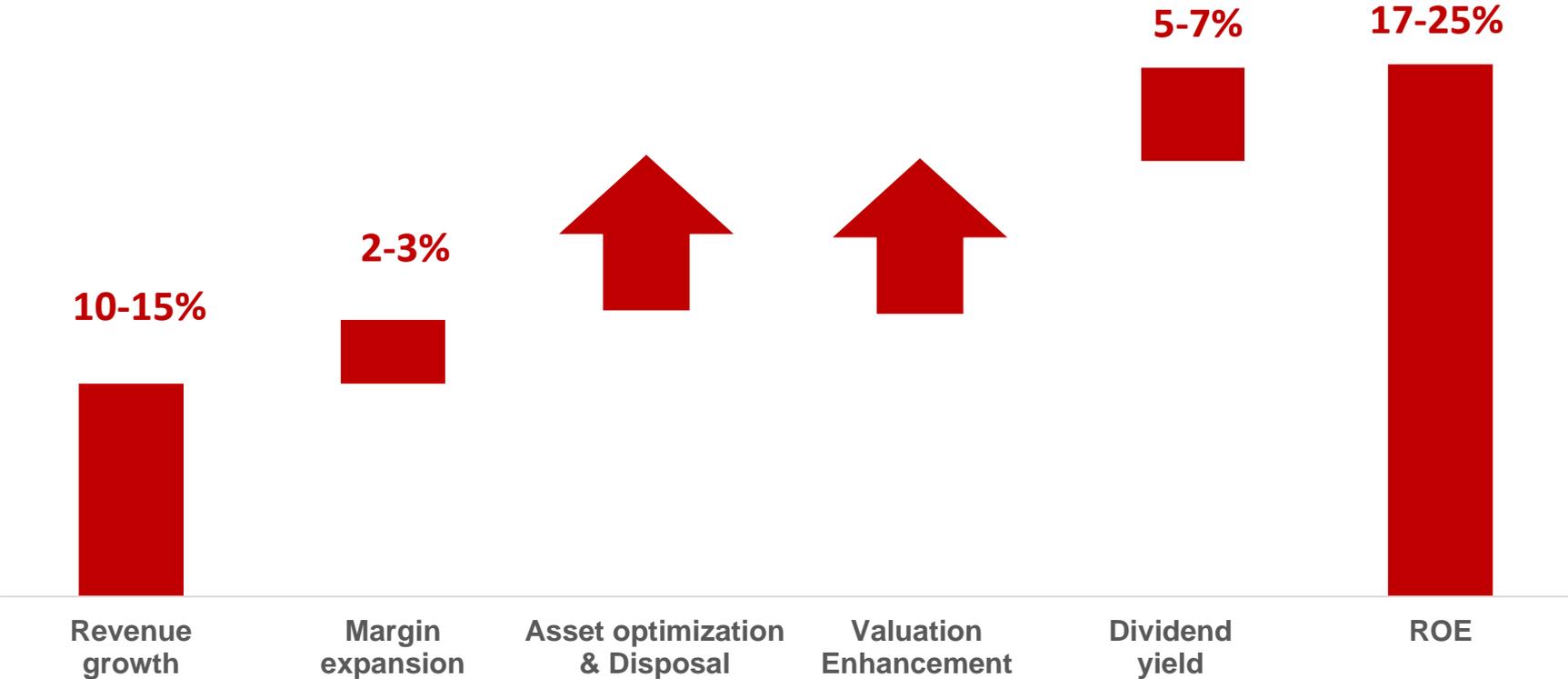


sales breakdown (3-5years)



Providing higher return to our shareholders

Our Goal

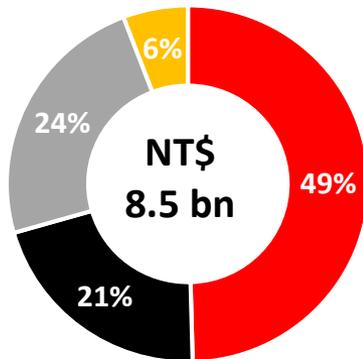




Financial Performance

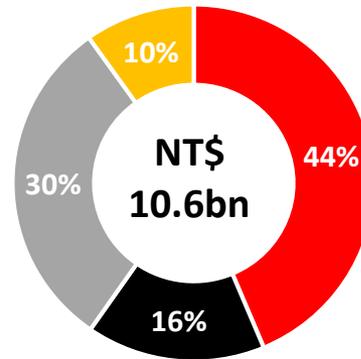
Revenue and Profit Structure (2020 v.s. 2019)

2020 REVENUE

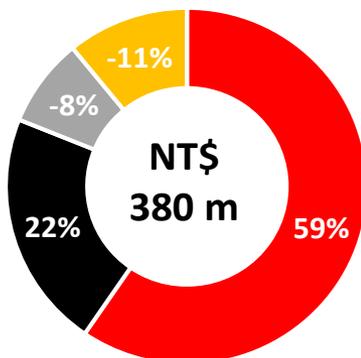


■ Garment ■ Home textile ■ Down ■ Others

2019 REVENUE

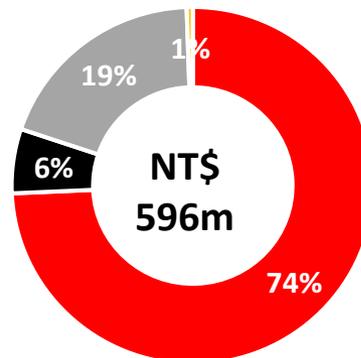


2020 Net Profit



■ Garment ■ Home textile ■ Down ■ Others

2019 Net Profit



Garment Division



Revenue NT\$ 4.2bn (- 9% YoY)
Net Profit NT\$ 364 m (-18% YoY)

Due to clients inventory adjustment, tight freight capacity under the pandemic and NT\$ appreciation, annual revenue of Garment decrease 9% YoY, Net profit lower 18%

Home Textile Division



Revenue NT\$ 1.8 bn (+ 5% YoY)
Net Profit NT\$ 132 m (+280% YoY)

Under the teleworking trend of Japan, the need of houseware products surged, second semi-annual revenue of home textile grow 26% YoY. Gross margin rate has great rebound, with the lower cost of down material

Down and Feather Division

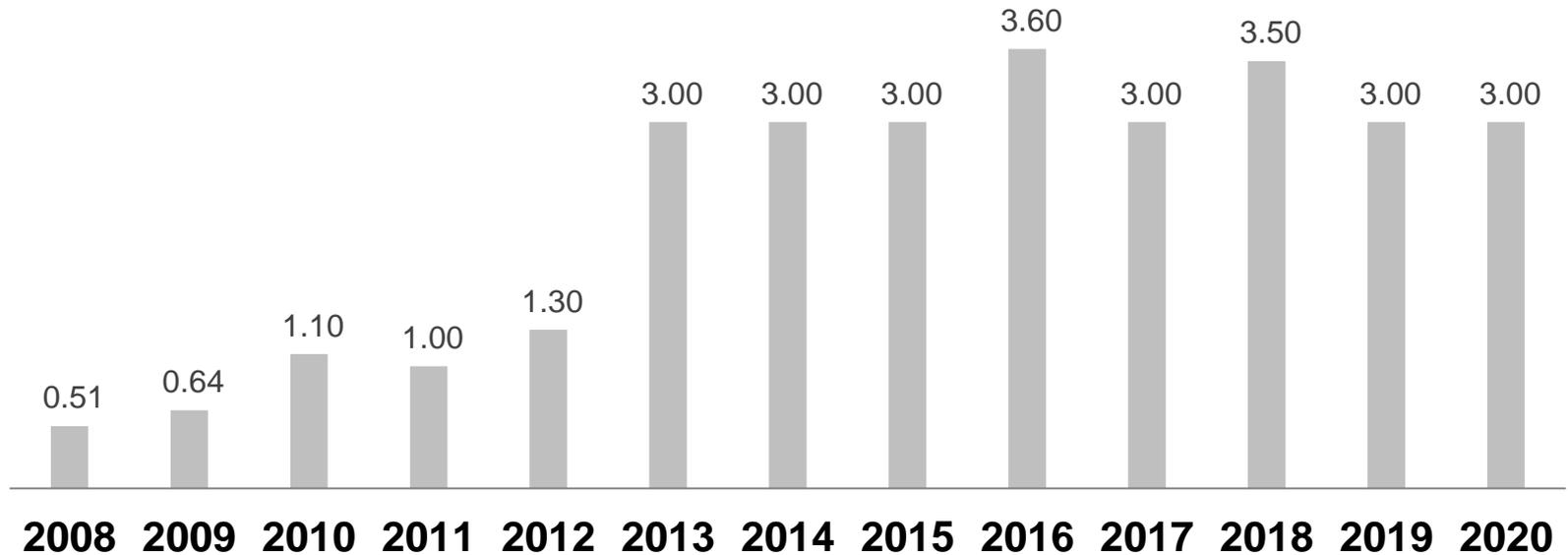


Revenue NT\$ 2.0 bn (- 38% YoY)
Net Profit NT\$ -49 m (- 143% YoY)

Revenue and profit decreased, as the result of low market price of Down and reform strategy of the Group.

Dividend policy

Cash Dividends, Payout Ratio and Dividend yields (2008-2020)



Payout ratio (%)



Dividend yields (%)



*Note: Cash yield is calculated based on Kwong Lung's closing share price on 2021/3/17.

Income Statement Highlights

NT\$m	2015	2016	2017	2018	2019	2020	YoY(%)					
							2015	2016	2017	2018	2019	2020
Revenue	8,920	8,599	8,513	10,154	10,594	8,499	(1.0)	(3.6)	(1.0)	19.3	4.3	(19.8)
Gross Profit	1,404	1,385	1,237	1,352	1,438	1,171	2.7	(1.4)	(10.7)	9.3	6.4	(18.6)
Operating Expenses	(921)	(886)	(879)	(1,003)	(843)	(791)	4.9	(3.9)	(0.7)	14.1	(15.9)	(6.1)
Operating Profit	483	499	357	349	596	380	(1.3)	3.4	(28.4)	(2.2)	70.4	(36.1)
Non Operating Income/(Loss)	27	12	(408)	379	15	37	75.7	(54.3)	(3,382.5)	-	(96.0)	146.7
Pretax Income	510	512	(51)	728	611	417	1.0	0.3	(109.9)	-	(16.1)	(31.7)
Tax Expenses	(80)	(66)	(59)	(96)	(112)	(103)	(34.9)	(17.9)	(10.5)	63.0	16.4	(8.0)
Net Income to Parent	431	447	(118)	618	488	344	12.9	3.7	(126.5)	-	(21.1)	(29.4)
Basic EPS (NT\$)	4.1	4.2	(1.1)	5.7	4.1	2.3	2.3	2.4	(126.3)	-	(28.6)	(44.4)
Key Financial Ratios (%)												
Gross Margin	15.7	16.1	14.5	13.3	13.6	13.8						
Operating Expense Ratio	10.3	10.3	10.3	9.9	8.0	9.3						
Operating Margin	5.4	5.8	4.2	3.4	5.6	4.5						
Effect Tax Rate	15.8	12.9	-	13.2	18.4	24.7						
Net Margin	4.8	5.2	(1.4)	6.1	4.6	4.1						

Notes:

- In 2017, we suffered a fire accident at our Vietnam plant.
- Our gross and operating margins dropped in 2018 due to 1) high proportion of Down business, 2) higher inventory costs of Down business due to lost of low cost inventories in the fire accident 2017, 3) one-off expenses of production sites adjustment following the fire incidence.
- In 2018, we received one-off non-operating income from insurance claim and one-off asset disposal. Exclude the one-off non-operating income of NT\$310m in 2018 (insurance claim from our fire incidence in Vietnam and gain from asset disposal), our net profit in 2019 grew over 50% YoY.
- EPS dropped at 2019 was mostly caused by CB conversion, and without comp base from insurance claim and one-off asset disposal as 2018. (15% dilution from CB conversion)
- Due to Agency transaction, we issue the recognition under the principle of IFRS15 in 2020, as well as overall classification of income figures, the affected profit was NTD 643 million.

Balance Sheet Highlights

NT\$m	2015	2016	2017	2018	2019	2020	YoY(%)					
							2015	2016	2017	2018	2019	2020
Total Assets	6,050	6,212	6,615	7,031	7,571	7,513	4.2	2.7	6.5	6.3	7.7	(0.77)
Cash	489	797	510	794	881	1,070	48.0	62.9	(36.1)	55.8	11.0	21.5
AR & NR	954	952	1,033	1,048	981	924	27.8	(0.3)	8.6	1.4	(6.4)	(5.8)
Inventories	2,510	2,249	2,251	2,619	2,373	1,725	(18.3)	(10.4)	0.1	16.3	(9.4)	(27.3)
Fixed Assets	1,296	1,254	1,589	1,574	1,505	1,877	14.8	(3.2)	26.7	(1.0)	(4.3)	24.7
Total Liabilities	2,748	2,705	3,758	2,931	2,479	2,575	1.8	(1.5)	38.9	(22.0)	(15.4)	3.9
AP & NP	709	583	798	788	548	693	(27.5)	(17.8)	37.0	(1.3)	(30.5)	26.5
Total Equity	3,302	3,507	2,857	4,100	5,092	4,938	6.3	6.2	(18.5)	43.5	24.2	(3.0)
Key Financial Ratios (%)												
A/R Days	34.3	39.9	42.0	36.9	34.5	40.4						
Inventory Days	133.7	118.7	111.3	99.6	98.1	100.7						
A/P Days	40.4	32.2	34.2	32.4	26.3	30.5						
Cash Conversion Days	127.6	126.4	119.1	104.1	106.4	110.6						
ROE (%)	13.5	13.1	(3.7)	18.0	10.7	6.3						
ROA (%)	7.3	7.3	(1.8)	9.1	6.7	4.2						
Debt ratio (%)	45.4	43.5	56.8	41.7	32.7	34.3						

Dividend Payout and Capex

(NT\$m)	2015	2016	2017	2018	2019	2020
Net profit	431	447	(118)	618	488	344
Dividend paid	319	390	328	387	392	
DPS (NT\$)	3.0	3.6	3.0	3.5	3.0	3.0
Payout ratio (%)	73.1	85.4	-	61.4	73.1	130
Dividend yield (%)	5.9	7.8	5.7	6.9	6.8	7.2
Capex	312	143	626	265	139	495

Notes:

1. Cash yield is calculated based on Kwong Lung's closing share price on 2021/3/17.



Industry Trends



COVID-19 Raise Demand of Outdoor Activities

- Due to CivicScience's survey, 43% of US residents over 13 years old tend to attend more outdoor activities afterward, under the social distancing concerned.
- The pandemic has led to an explosion of interest in bikes and biking. New York City Department of Transportation mentioned the rate of riding bicycles in the City has increased by 60%.
- The leading bicycle manufacturer such as Giant and Merida are optimistic for the future, with the strong demand sign.



V.F. Corporation

" We believe people will place greater value on exploring the outdoors after spending so much time in their homes and there will be an increased commitment to personal well-being and active lifestyles with health becoming a major new priority. "



Columbia Sportswear

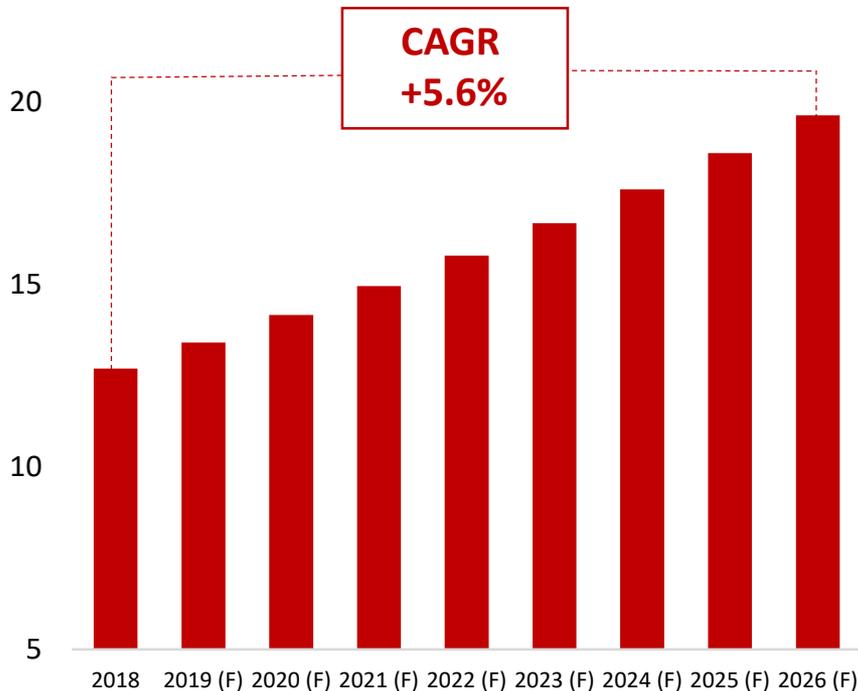
"It is clear that consumer interest in the outdoors has surged during the pandemic and we are well positioned to equip these adventurers with innovative products as they recreate responsibly."

- China, the first country face the pandemic, started to see the recovery for outdoor activities and travel since April after lockdown
- According to Pinduoduo, a local ecommerce player listed on NASDAQ, the sales of outdoor and tourism-related products on the platform have significantly increased after April. Promotions of the platform (around 20-30% discount) also stimulated the consumption.
 - ✓ Sneaker and sportswear sales increased triple times, especially Nike, Adidas, and Li Ning.
 - ✓ Disposable sheet, travelling bag sales increased double.
 - ✓ Sports-related equipment sales increased over 4 times, especially Nike, Adidas, Anta, Li Ning.

Trend of Global Brands Enter the Outdoor Wear Market

Increasing participation of outdoor activities and generational preference toward healthy lifestyle (as the Millennials) drive the growth of global outdoor wear market. According to AOI, half of the American population attended outdoor activity at least once in 2018.

Value of Outdoor Clothing Market, worldwide (USD bn)



Source: Statista

Increasing number of global apparel/sportswear brands (such as Adidas, VF) are paying more attention in outdoor/sport wear market. Higher number of investments are pouring into outdoor companies.



Adidas launched Adidas TERREX, an outdoor brand in 2017.



Walmart acquired Moosejaw in 2017 to expand product to active outdoor category.



V.F. Corporation (NYSE:VFC) announced acquisition of Icebreaker New Zealand, a retailer of Merino wool apparel for outdoor activities and sports in 2017.



“what we're also doing a much better job of now is actually continuing to build out our Fleece program, and adding on top of that, much better outerwear as we go into 2020.”-Patrik Frisk, CEO, 2020/2/11



“We continue to expand the key categories of bras and outerwear, with comps and outerwear being particularly strong.”-Calvin McDonald, CEO & Director, 2019/12/11



Goode Partners has made an investment in Marolina Outdoor, Inc., a manufacturer of fishing and hunting apparel in 2018.



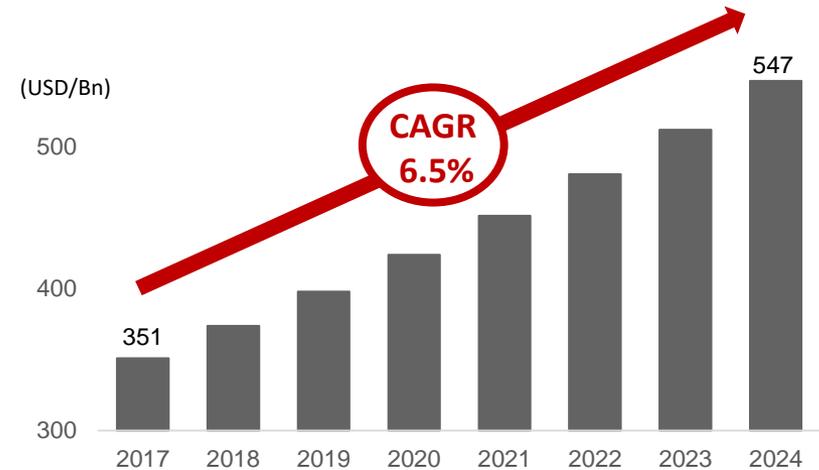
Kathmandu Holdings announced plans to acquire Oboz, an outdoor footwear and apparel manufacturer and retailer in 2018.

Overview of Outdoor/Snowboard Jacket Market

We believe the outdoor/snowboard demand will remain strong

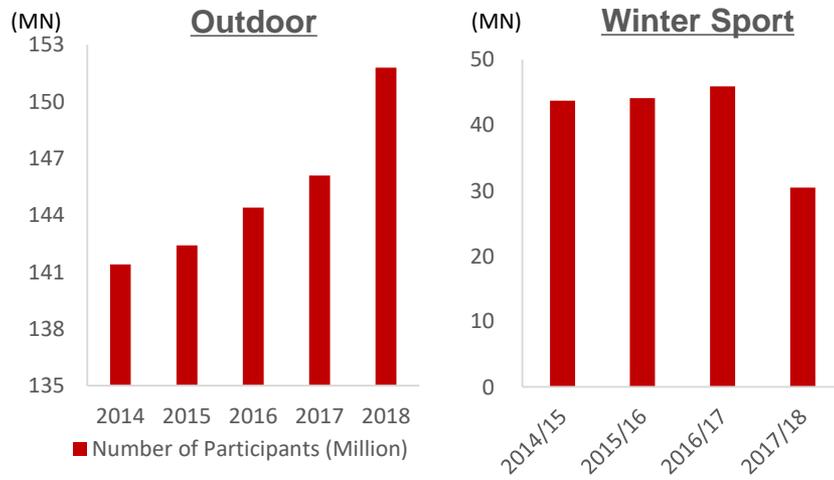
- Global Sportswear has reached USD 351bn market scale, expected to deliver 6.5% CAGR between 2017 and 2024.
- US, as the largest market of sportswear. With US outdoor and winter sport participation keeps going up, the market is expected to keep expanding in next couple years.
- Asia market also predicted to have a significant boost under economic growth and demographic dividend.
- As the market growth of outdoor sportswear keeps surpassing the casual fashion, the momentum of market growth is trustfully to remain strong.

Global Activewear Market



Source: businesswire

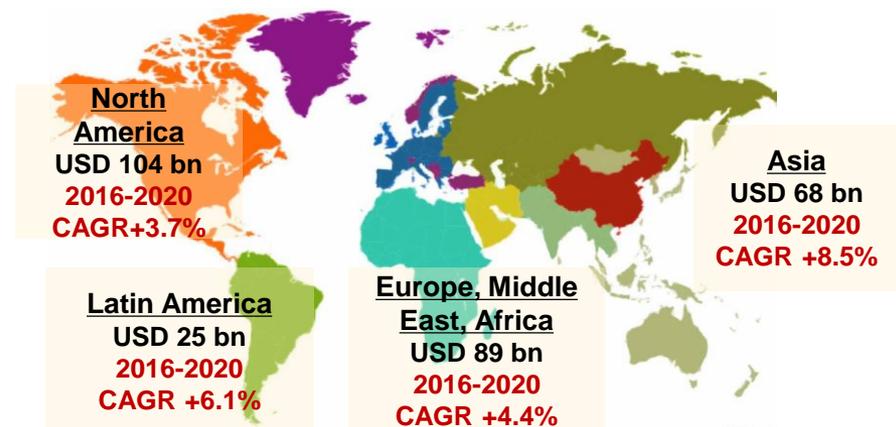
US Outdoor and winter sport Participation Trends



Source: Outdoor Foundation

*Note: 2014/15 means 2014/8-2015/3

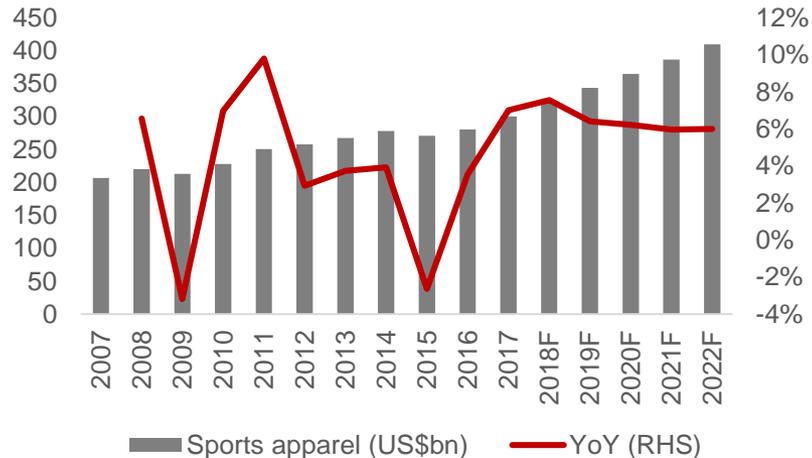
Sales of Global Sportswear by Region (2016)



Source: Euromonitor

Outdoor Wear Demand Driven by Industrial Growth

Global sports apparel market size



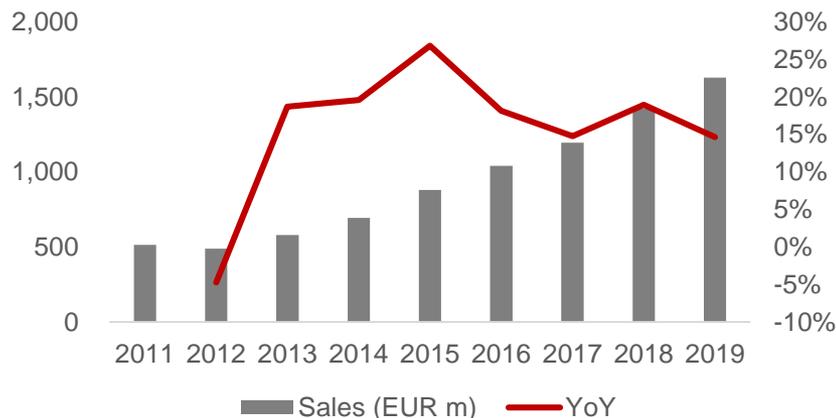
Source: Euromonitor

Global casual fashion apparel market size



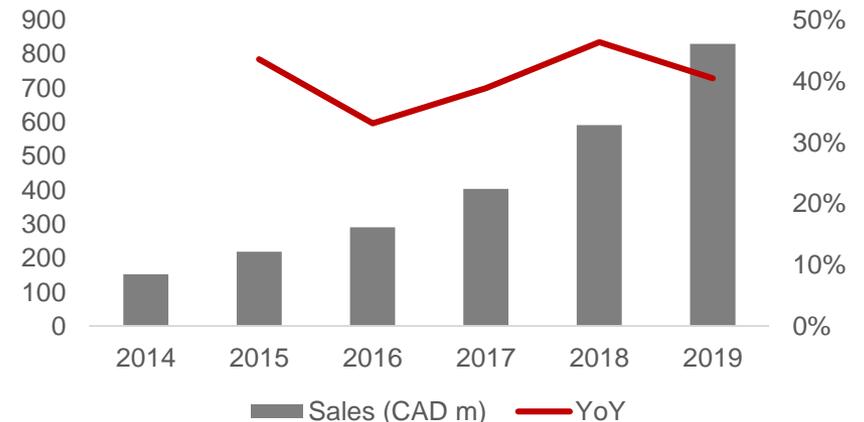
Source: Euromonitor

Moncler sales and YoY growth



Source: Bloomberg, Company data

Canada Goose sales and YoY growth



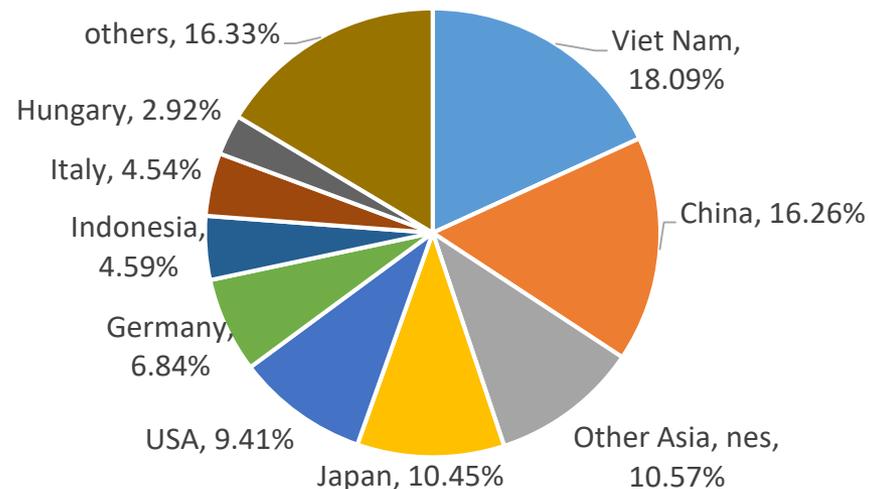
Source: Bloomberg, Company data

Overview of Down industry

Global Down market grow 7% CAGR in 2018-2026

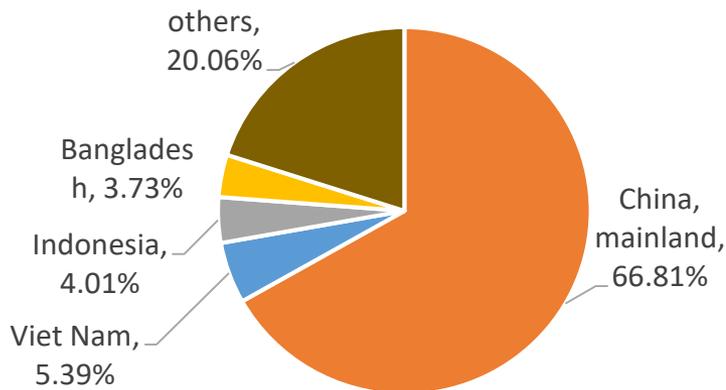
- According to the United Nations comtrade data, global import of down materials reached US\$1.63bn in 2019.
- Kwong Lung own amount 8% of global market in down materials, as the export number of US\$ 70m.
- According to FAO of United Nations, 66.8% of Duck and Geese down feather come from China.
- According to Transparency Market Research, the global down and feather market is expected to grow 7% CAGR between 2018-2026, reaching US\$8.2bn.

Global Down & Feather Import Country



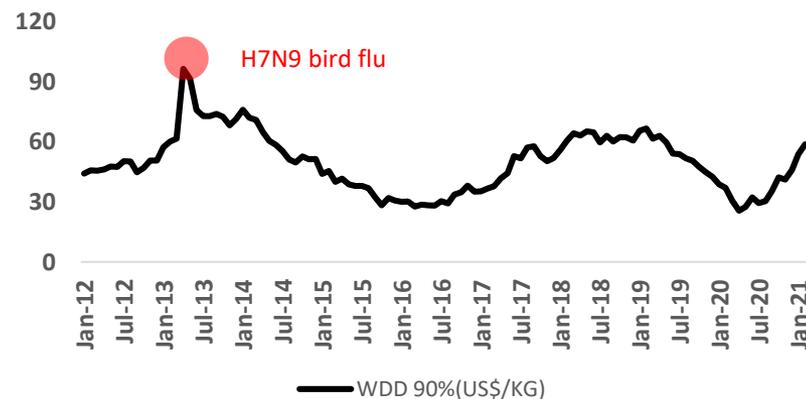
Source: United Nations Comtrade

Global Duck and Geese Farming Country



Source: FAO, United Nations

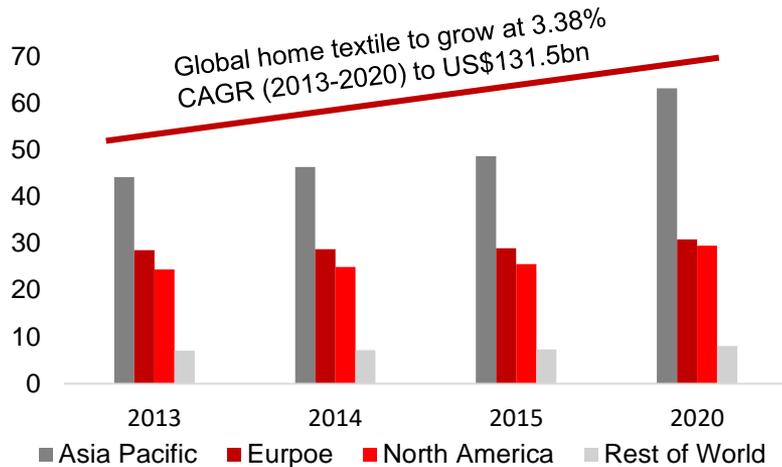
China Down Price Trends



Source: CN-down.com

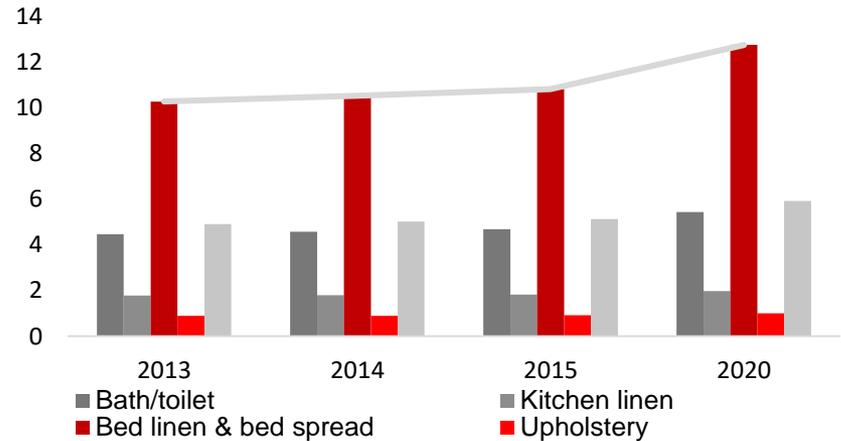
Overview of Home Textile Industry

Global home textile market by region (US\$bn)



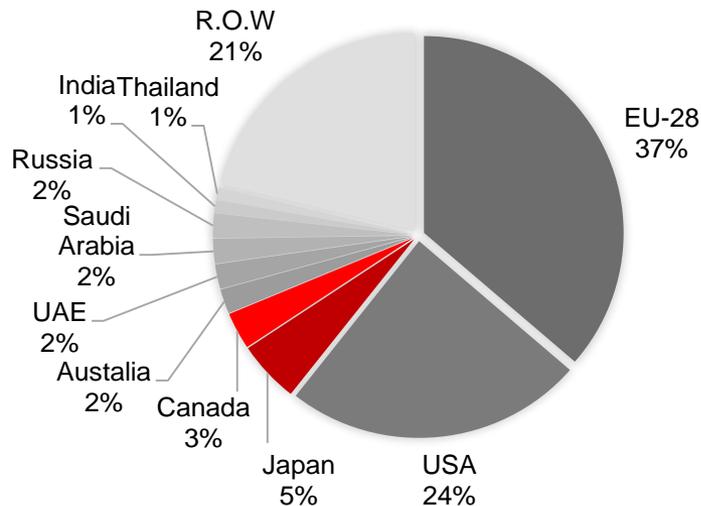
Source: Statista

Home textile market size in the US by category (U\$bn)



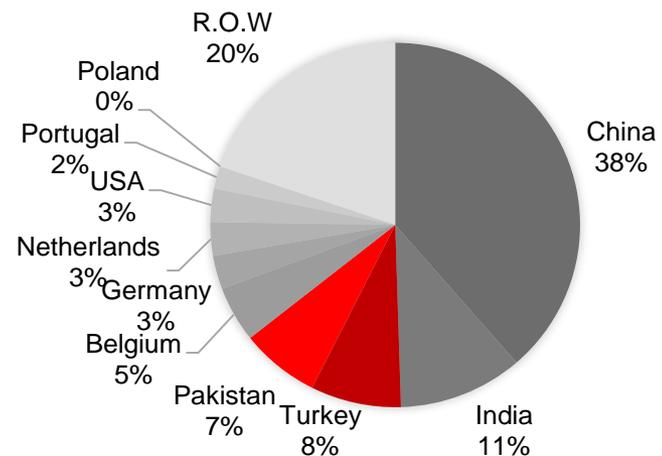
Source: Statista

Share of global home textile import (2017)



Source: United Nations Comtrade

Share of global home textile export (2017)



Source: United Nations Comtrade