



# Taiwan's Global Supply Chains

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\*Special thanks to Jose Ponce, Juan Madrigal  
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# Executive Summary

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- **Taiwan is a hub of global supply chains which faces the challenges of manufacturing to meet new global sustainability regulations and requirements such as the:**
    - I. The US Securities & Exchange Commission ESG Rules to Enhance and Standardize Climate-Related Disclosures coming into force December 31, 2023,
    - II. EU Carbon Border Adjustment Mechanism (border carbon taxes coming into force by January 1, 2026),
    - III. China's new Emissions Trading Scheme ("ETS") which will expand coverage to different industrial sectors in the next 5 years coming into force in 2027
    - IV. Multiple global supply chains' net-zero emissions requirements coming into force in 2030-2040 (e.g. Apple, Amazon, Meta, and Google)
    - V. RE100 commitments by various MNC supply chains coming into force by 2050
    - VI. UK's Carbon Tax
  - **The Taiwan Government can only support 20% zero-carbon energy by 2027**
  - **Taiwan government fails to replace 80% of fossil fuel energy with zero-carbon sources**
  - **Therefore, Taiwan's enterprises and supply chains must migrate to secure zero-carbon energy**
  - **China is on its way to becoming the green factory floor of the world by achieving 86% zero-carbon on their energy mix by 2060, if not earlier**
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# Introduction

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- **Taiwan is a major global exporter with a huge economic turnover. Many tens of thousands of Taiwan enterprises are part of the world's major global supply chains (i.e., Apple, Amazon, Meta, Microsoft) in consumer electronics, technology and industry. Taiwan enterprises are part of the world's major global supply chains, and few are stand alone; they are all globally connected and inter-dependent.**
  - **Taiwan's supply chains expanded globally over the previous three decades and are now operating everywhere. As a result, in order to stay globally competitive, Taiwan enterprises/supply chains must adapt to meet many/every diverse national, regional and market regulatory sustainability compliance systems in order to:**
    - Maintain compliance and competitiveness to continue to integrate with the global supply chains which are increasingly strict in enforcing supply chain, ESG/Equator Principles/IFC Performance Standards and other sustainability criteria.
    - Successfully compete for bank financing by adopting best international banking practices from many markets to continue to qualify for evolving international bank financing requirements such as the Equator Principles and IFC Performance Standards
    - Adopt best practices and implement actual effective operational improvements across the full (global not just the limited number of Taiwan) spectrum of sustainability criteria; much more than on-paper "check the box" reporting, in order to successfully compete for investors and cooperators in the world market.
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# Introduction

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- Adopt best practices and implement solutions that will position their businesses to meet and comply with ALL the global requirements needed to access every potential market globally (including Climate Change) that they will certainly face in the future. These transcend the limited coddled limited infant industry criteria set by the Taiwan government, which doesn't promote global competitive resiliency.
- They must be ready in the real world and not be restricted by the *de minimis* mindset and limited imagination and experience of bureaucrats and regulators, who have failed to anticipate the scope and pace of waves of changes that threaten life as we know it. The waves include: (i) Inflation, (ii) Geo-political generated stress, (iii) COVID-19 and future global pandemics, (iv) Supply chain disruption, and (v) Climate Change
- Positioning the business is like preparing to survive and compete successfully at the champion level. It is different than being complacent and settling to meet the minimum standards. Companies need to prepare for new sustainability challenges.

# Timeline of Upcoming Global Market Sustainability Regulatory Compliance Systems

2023 Year End

Jan 1, 2026

~2027

2030

2040

2050

New 2023-year end US Securities & Exchange Commission ESG Rules to Enhance and Standardize Climate-Related Disclosures

EU Carbon Border Adjustment Mechanism (border carbon taxes coming into force)

China's new Emissions Trading Scheme ("ETS") which will expand coverage to different industrial sectors in the next 5 years

Multiple global supply chains' net-zero emissions requirements by 2030:

- Apple (400,000)
- Google (1,080,000)
- Meta (630,00)

Multiple global supply chains' net-zero emissions requirements by 2040:

- Amazon (170,000)

RE100 commitments by various MNC supply chains by 2050

# The Total Amount of Companies in Taiwan in Global Supply Chains

|        | The Top 4 Companies | 15 Industry Associations | 30 Science and Industrial Parks | Total      |
|--------|---------------------|--------------------------|---------------------------------|------------|
| Tier 1 | 228                 | 165,216                  | 10,872                          | 176,316    |
| Tier 2 | 22,800              | 1,652,160                | 108,720                         | 21,672,480 |
| Tier 3 | 2,280,000           | 16,521,600               | 1,087,200                       | 19,888,800 |
| Total  | 2,303,028           | 18,338,976               | 1,206,792                       | 23,837,676 |

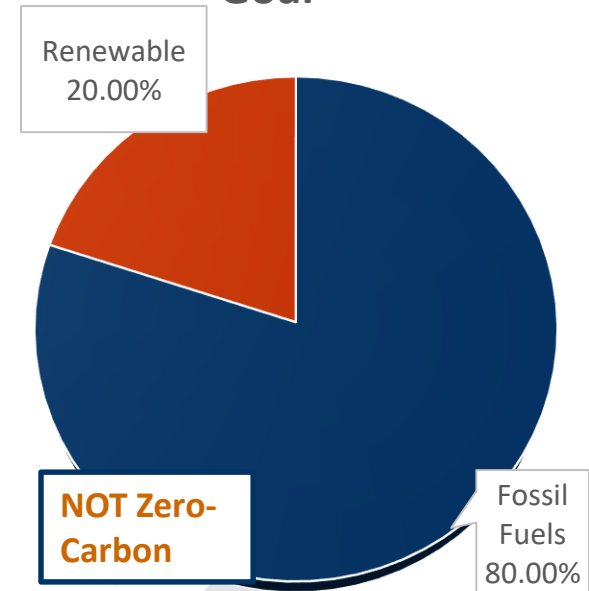
This is the total number of companies impacted by Taiwan's supply chain, without taking into consideration any possible overlap.



# The Best the Taiwan Government Can Do is Achieve 20% Renewable Energy by 2027

- The Best the Taiwan Government can do is **Achieve 20% Renewable Energy by 2027\*** this is far behind the UN goal of reducing emissions at least 43% by 2030
- The government has not presented any verifiable, scalable options to replace 80% of fossil fuels with zero-carbon sources after 2027
  - No decarbonization
  - No reduction of emissions
  - NOT carbon-neutral
  - Fails energy transition
- Why is the DDP phasing out nuclear energy from the mix? Nuclear is the only scalable zero-carbon energy source and 59% of voters approved nuclear energy in the 2018 referendum

Electricity Generation 2027  
Goal

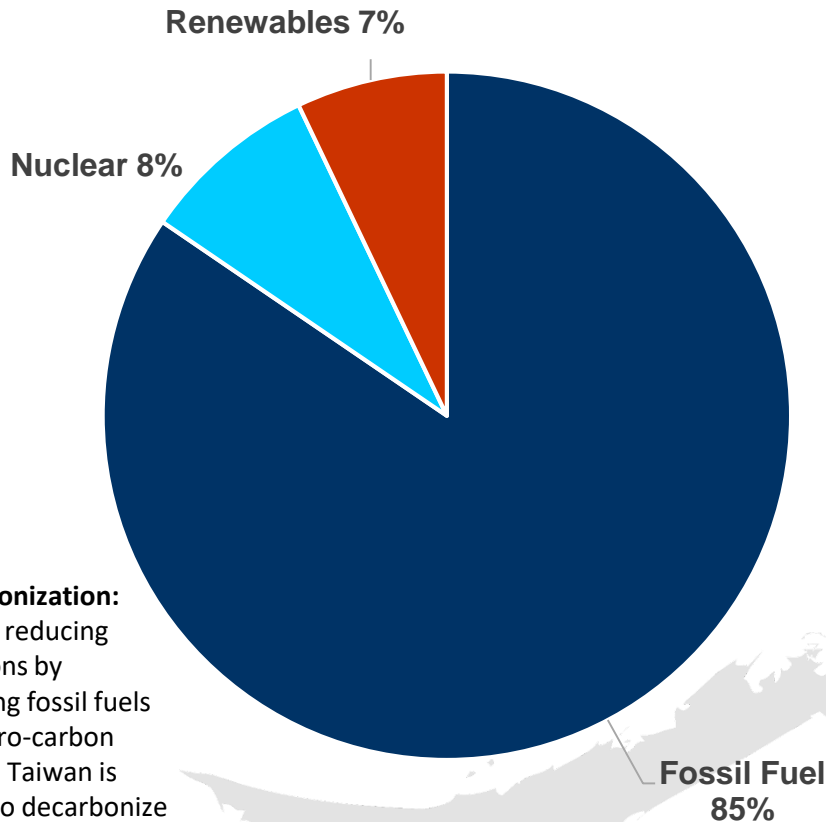


| Fossil 2027           | Zero-Carbon 2027              |
|-----------------------|-------------------------------|
| Coal: 30%<br>LNG: 50% | Nuclear: 0%<br>Renewable: 20% |
| <b>Total: 80%</b>     | <b>Total: 20%</b>             |

• Source MOEA: <https://www.taiwannews.com.tw/en/news/4489552>  
• \* Source: <https://www.un.org/en/climatechange/net-zero-coalition>

# The Best the Taiwan Government Can Do is Achieve 20% Renewable Energy by 2027

## Taiwan's Current Energy Reality (2023)



**Decarbonization:** means: reducing emissions by replacing fossil fuels with zero-carbon energy. Taiwan is failing to decarbonize and complete energy transition

The Taiwan Government's claim that it will be "Carbon Neutral" is a lie

- Removing nuclear from the energy mix makes Taiwan dependent on fossil fuel imports
- Taiwan companies (and their supply chains) will lose their access to market share and global supply chains as governments and MNCs in developed markets demand reduced carbon footprints (see slide 24)
- Lack of zero-carbon energy will lead to a mass exodus of Taiwan's supply chains and a complete hollowing out of the economy
- This will result in mass unemployment, stock market collapse, loss of all international competitiveness and missed global leadership opportunity
- Not only will Taiwan suffer but this will cause a global supply chain disruption leading to a huge rise in the cost of all electronics, defense security concerns and global economic slowdown

# The Taiwan Government Has Created a Regulatory Environment that Obstructs Decarbonization, Energy Transition and Foreign/Local Investment in Energy Resilience and Sustainability

## Independent Power Producers (“IPPs”) Are Obstructed by Government Requirements

- **Offshore wind developers are leaving the Taiwan market**
  - The government requirements for “Made in Taiwan” components for offshore wind turbines (~70%) **undermine normal, open market competition** and are impossible to meet and cause delays, supply chain disruption, additional costs and are driving large scale market withdrawals
  - International developers are forced to forgo proven international market components and to buy components that do not exist in Taiwan
  - Inexperienced local manufacturers are unable to supply adequate quality components in a cost-effective way
  - This policy causes increased IPP costs, delays, departures to other markets and is an example of how the government is a direct cause of the catastrophic failure to deliver zero-carbon energy to Taiwan supply chains, which is a major cause of the growing snowball effect of businesses mass migrating out of Taiwan to secure zero-carbon energy. China is currently 36% zero carbon energy and has planned and budgeted to be 86% green.
  - Over each of the last five years, Taiwan saw a 15% annual rise in outbound investment flows as supply chains continue to leave. (The net overseas investment of Taiwan’s top 2000 enterprises hit a five-year high in 2022)

Source: <https://www.bloomberg.com/opinion/articles/2024-04-16/taiwan-s-wind-power-ambitions-are-in-peril>

Source: <https://focustaiwan.tw/business/202205170010>

Source: <https://www.reuters.com/business/energy/taiwans-cpc-says-has-lost-almost-2-bln-this-year-due-high-energy-prices-2022-07-05/>

Source: [https://www.moeaic.gov.tw/business\\_category.view?lang=en&seq=2](https://www.moeaic.gov.tw/business_category.view?lang=en&seq=2)

# The Taiwan Government Has Created a Regulatory Environment that Obstructs Decarbonization, Energy Transition and Foreign/Local Investment in Energy Resilience and Sustainability

- **The Taiwan Government Obstructs Investment in Nuclear Energy IPPs**
  - International and domestic investment in nuclear is the only scalable option for Taiwan to reach a net-zero energy transition and prevent a mass migration of industry/supply chains. The private sector must be allowed and incentivized to aid in the energy transition **without improper government intervention and barriers. But the Taiwan Government's current policy ensures the catastrophic failure to deliver zero-carbon energy will continue to drive supply chains away from Taiwan**
  - The Government mandates private investors in nuclear IPPs to joint venture with state owned enterprises, which must own more than 50% of the total shares and control the venture
  - No foreign investor would willingly JV with Taipower or CPC which have been mismanaged and incurred combined losses of over USD10 billion. These SOE's have no capital to invest. Private investors are aware of the Taiwan government's hostility to nuclear energy, despite the 59% of the population supporting it (2018 Referendum) and more than 50 other nations opting for this as the only scalable baseload zero carbon energy solution. Foreign investors are discouraged when they see the Taiwan government's pattern of multiple untrustworthy anti-investor failures with NPP4. That project was canceled twice and embroiled in years of litigation/arbitration with many international engineering groups. It is a globally known example of an energy project failure with the government and SOE contributing to its demise twice. Any professional financial investor who allowed a capital deployment to happen under these circumstances would almost certainly be sued.

Source: <https://www.bloomberg.com/opinion/articles/2024-04-16/taiwan-s-wind-power-ambitions-are-in-peril>

Source: <https://focustaiwan.tw/business/202205170010>

Source: <https://www.reuters.com/business/energy/taiwans-cpc-says-has-lost-almost-2-bln-this-year-due-high-energy-prices-2022-07-05/>

# Taiwan Supply Chains Have Two Options: Shut Down or Migrate to a Zero-Carbon Energy Jurisdictions

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- **If the Taiwan Government is unable to decarbonize and complete energy transition Taiwan supply chains will be left with two choices:**
  - Shut down their domestic capacity that cannot secure competitively priced zero-carbon energy to permit continued exports in the face of rising global zero-carbon requirements and carbon taxes
  - Relocate their cutting-edge global manufacturing supply chains away from Taiwan to zero-carbon jurisdictions (China and/or elsewhere) to preserve their ability to sustainably compete and to export to the world's largest (zero-carbon energy requiring) consumer markets



# Manufacturers will be Forced to Migrate to a Green Energy, Zero-Carbon Jurisdiction

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China is transitioning into the most competitive **zero-carbon energy producer** and will once again be the **green, go-to low cost manufacturing jurisdiction**

- Unlike Taiwan, China is actually implementing and funding its results driven plan to become the **green energy zero-carbon factory floor of the world**
  - Taiwanese manufacturers will choose to migrate to one or more green energy, zero-carbon jurisdictions to survive
  - Chinese zero-carbon exports will comply with the European Union's Carbon Border Adjustment Mechanism ("CBAM") and other similar laws proposed in the US and other low-carbon jurisdictions
  - Taiwan is already losing competitive advantage. This is already visible
  - **How will Taiwan create the market conditions to attract the corporate, strategic, financial, technology partners and Institutional investors that meet, compete for and retain investment for energy transition**
  - **How will Taiwan enterprises export without zero-carbon energy?**
  - **How will Taiwan compete for international and domestic energy technology solution providers and international institutional ESG investors and investment dollars?**
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# Relying Solely on Solar and Wind is Insufficient for Decarbonization

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Taiwan's new roadmap calls for a 60%-70% renewable energy goal by 2050

| Year | Renewable Energy Generation % | % Increase from 2022 |
|------|-------------------------------|----------------------|
| 2022 | 5%                            | N/A                  |
| 2050 | 70%                           | 1300%                |

- If Taiwan's government cannot deliver a 200% increase to 15% and 300% increase to 20% renewable energy then:
- How can Taiwan achieve a **1300% increase** in renewable energy from today's levels to meet the 2050 goal of 70%?
- How can the Taiwan government be trusted to achieve large and long-term goals when the **short term goals for renewable energy have failed?**
- **Taiwan Government's "Carbon Neutral" Roadmap Is a Greenwashing Placebo Failure**

## Domestic Industry/Business Associations In Taiwan Are Deeply Concerned About The Government's Inability To Supply Enough Zero-Carbon Energy

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- Matthew Miao- Chairman, Chinese National Federation of Industries (“CNFI”) said *“the CNFI plays an important role in communicating industry concerns with the government”*, Mr. Miao said he would *“promote, energy conservation, decarbonization, call for the extension of existing nuclear power plants and for the development of new nuclear power plants”*



- Lin Por-fong (林伯豐), Chairman of the Chinese National Association of Industry and Commerce (“CNAIC”) advised the government to accept the nation faces a power shortage and **reconsider the use of nuclear power instead of pursuing its "nuclear-free homeland" project at any cost.**

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Source: CNFI calls for gov't action to bolster Taiwan's global competitiveness: <https://focustaiwan.tw/business/202308080031>

Source: Taiwan's power supply system unable to withstand minor errors: expert  
[http://www.besland.com.tw/portal\\_x1\\_page.php?cnt\\_id=157&search\\_type=1](http://www.besland.com.tw/portal_x1_page.php?cnt_id=157&search_type=1)



# International Industry/Business Associations In Taiwan Are Deeply Concerned About The Government's Inability To Supply Enough Zero-carbon Energy

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- *“Arguably, the most important lesson for Taiwan from the war in Ukraine is that **it is folly to rely on imports** to meet energy needs. Taiwan's ultimate goal should therefore be to achieve a high degree of energy security. And to do this, there is no alternative to the **mass deployment of renewable energy and storage.**”- Duncan Levine ECCT*



- *“AmCham's members are increasingly **worried about the** Taiwan government's ability to ensure **energy security** and **grid resilience** while pushing for a transition to renewables, especially in light of the severe power outages seen in May 2021 as well as this March”- Andrea Wu, AmCham Vice Chairperson*

# If Decarbonization is Not Achieved, Taiwan is Doomed Economically

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## Economic Consequences of No Decarbonization:

- Companies **cannot export** products because border carbon taxes make Taiwan's exports too expensive
- The EU's Carbon Border Adjustment Mechanism ("CBAM") comes into effect in 2026
- China and the US have proposed similar carbon tax bills that will be implemented in the near future
- Taiwan **loses ability to export** to developed markets
- **52% of export dependent GDP will suffer**



# If Decarbonization is Not Achieved, Taiwan is Doomed Economically

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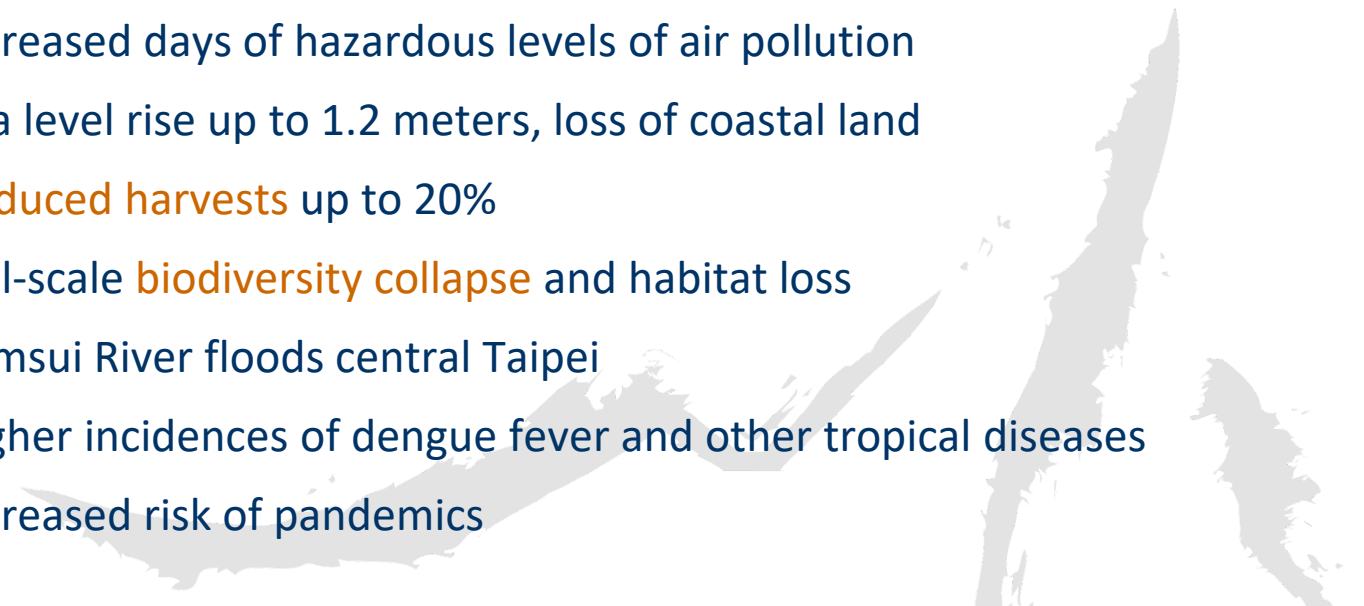
## Economic Consequences of No Decarbonization:

- Industries, supply chains and companies have a choice: close or mass migrate
  - Managers, directors and shareholders will exercise best business judgement rule to preserve ability to export and grow
  - Entire Taiwanese industry supply chains will mass migrate to green energy jurisdictions
  - China is on target to achieve its energy transition goals and reach almost 90% zero-carbon energy (see: China's Strategy and Implementation Plan to Achieve Carbon Neutrality)
  - China does not need to use military force to unify Taiwan as economic convergence becomes the most rational market solution (燒餅粘芝麻)
-

# If Decarbonization is Not Achieved Taiwan is Doomed Environmentally

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## Environmental Consequences of No Decarbonization:

- Longer summers and shorter winters
  - Record breaking heatwaves
  - Longer and more extreme weather events including intense droughts and floods
  - Increased intensity of typhoons and rainfall
  - Increased days of hazardous levels of air pollution
  - Sea level rise up to 1.2 meters, loss of coastal land
  - **Reduced harvests** up to 20%
  - Full-scale **biodiversity collapse** and habitat loss
  - Tamsui River floods central Taipei
  - Higher incidences of dengue fever and other tropical diseases
  - Increased risk of pandemics
- 

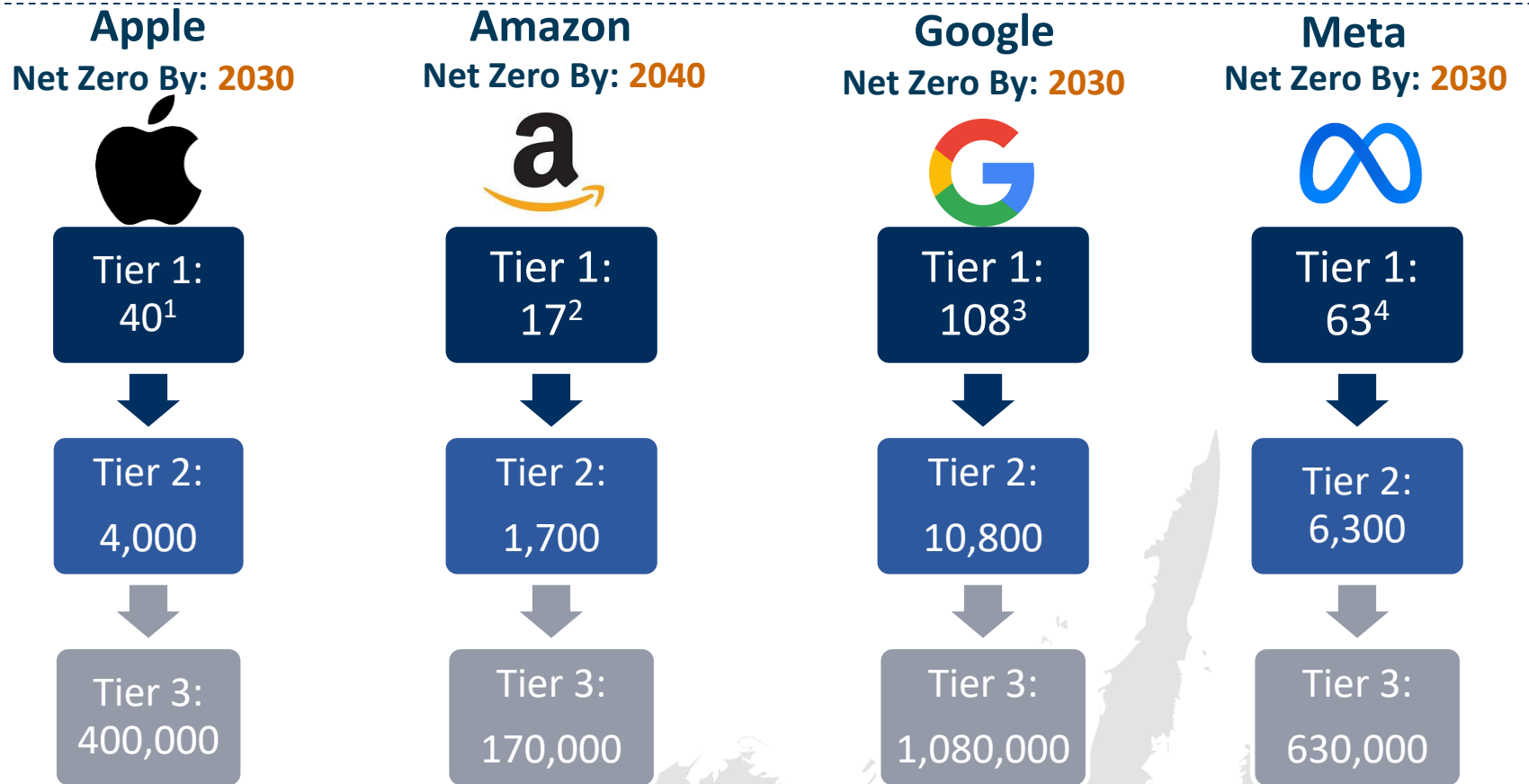
# If Decarbonization is Not Achieved, Taiwan is Doomed Socially

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## As Industry Migrates Away from Taiwan, These are the Social Consequences of No Decarbonization:

- With industry leaving, companies and people will follow, loss of tax base and reduced tax revenue
  - Job losses, **massive unemployment**
  - Wage stagnation
  - Loss of international competitiveness
  - Depopulation: decreasing birth rate
  - Depopulation: increasing aging population
  - Population loss leads to the financial degradation of social welfare, health and labor insurance
  - Loss of students for academic institutions
  - Fewer youth to populate the armed forces
  - Increasing **wealth and income inequality**
  - Young people unable to afford homes
  - Negative net immigration
  - **Food insecurity** and increasing food prices
- 

# Apple, Amazon, Google and Meta Taiwan Supply Chain



We are assuming that each Tier 1 company only has 100 companies in its supply chain and that each Tier 2 company has only 100 companies in its supply chain.

**Total: 2,303,028**

1. <https://www.apple.com/supplier-responsibility/pdf/Apple-Supplier-List.pdf>

2. <https://d39w7f4ix9f5s9.cloudfront.net/cb/19/77dfc5b441c892cd6e2be166ba70/final-amazon-supplier-list-2019-11-14-updated-1005am.pdf>

3. <https://cloud.google.com/find-a-partner/?location=Taiwan>

4. [https://www.facebook.com/business/partner-directory/search?solution\\_type=campaign\\_management&ref=pd\\_home\\_hero\\_cta&countries=TW](https://www.facebook.com/business/partner-directory/search?solution_type=campaign_management&ref=pd_home_hero_cta&countries=TW)

# List of Apple's Taiwan Suppliers

- Advanced Semiconductor Engineering Technology Holding Co., Ltd.
- Amkor Technology Incorporated
- ams-OSRAM AG
- Analog Devices Incorporated
- Broadcom Limited
- Career Technology (Mfg.) Company Limited
- Cheng Uei Precision Industry Company Limited (Foxlink)
- Cirrus Logic Incorporated
- Compeq Manufacturing Company Limited
- Corning Incorporated
- Delta Electronics Incorporated
- Diodes Incorporated
- Flexium Interconnect Incorporated
- Genius Electronic Optical Company Limited
- Kunshan Kersen Science and Technology Company Limited
- Largan Precision Company Limited
- Lattice Semiconductor Corp
- Lumentum Holdings Incorporated
- Micron Technology Incorporated
- Murata Manufacturing Company Limited
- Nanya Technology Corporation
- NOK Corporation
- Novatek Microelectronics Corp.
- NXP Semiconductors N.V
- ON Semiconductor Corporation
- Parade Technologies Limited
- Pioneer Material Precision Tech Company Limited
- Platinum Optics Technology Incorporated
- Renesas Electronics Corporation
- Skyworks Solutions Incorporated
- STMicroelectronics N.V.
- Taiwan Hodaka Technology Company Limited
- Taiwan Semiconductor Manufacturing Company Limited
- Texas Instruments Incorporated
- Toyoda Gosei Co., Limited
- Trinseo S.A.
- TXC Corporation
- Unimicron Technology Corporation
- Unitech Printed Circuit Board Corporation
- Winbond Electronics Corporation
- Yageo Corporation

Total: 40

# List of Amazon's Taiwan Suppliers

- A Mount Inc.
- Ability Opto-Electronics Technology Co., Ltd.
- Compal Electronics
- Everlight Electronics Co., Ltd.
- Hon Hai Precision Industry Co., Ltd
- Innolux Corp.
- InvenSense
- Kinko Optical Co., Ltd
- Largan Precision Co., Ltd.
- Macronix International Co., Ltd
- Mektec Corporation
- Nanya Technology Corporation
- Pegatron Corporation
- Quanta Computer Inc
- Siward Crystal Technology Co. Ltd
- TA-I Technology Co., Ltd. Sec. 3
- TXC Corporation
- Unitech Printed Circuit Board Corporation
- Walsin
- Wistron Corporation
- Yageo Corporation

Total: 17



# List of Google's Taiwan Suppliers

- Hon Hai Precision Industry (Foxconn)
- Pegatron
- Quanta Computer
- Compal Electronics
- TSMC
- Largan Precision
- MediaTek
- ASUS
- Acer
- ADATA
- Chunghwa Telecom
- Delta Elecontrics
- Innolux Corporation
- Silicon INtegrated Systems (SiFive)
- Microchip Technology
- Synaptics
- VIA Technologies
- Cypress Semiconductor
- E Ink
- Lite-On Technology
- Murata Manufacturing
- Nuvoton Technology
- Renesas Electronics
- SiTime
- Winbond Electronics
- Advantech
- AKM Semiconductor
- HiSilicon Technologies
- Macronix International
- Power Integrations
- Richtek Technology
- Silicon Motion
- Unimicron Technology
- United Microelectronics Corporation (UMC)
- ASE Technology Holding Co.
- Nanya Technology
- SPIL
- Powerchip Semiconductor Manufacturing Corporation
- Sunny Optical Technology
- Luxshare Precision Industry
- Corephotonics
- OmniVision Technologies
- Inventec
- MSi
- TPV Technology
- Wistron Corporation
- SK Hynix
- AOS Technologies
- Dialog Semiconductor
- NXP Semiconductors
- ON Semiconductor
- Silergy
- Vishay Intertechnology
- Kinpo Electronics (KYOCERA)
- Multi-Fineline Electronix (MFS)

# List of Google's Taiwan Suppliers

- Multi-Fineline Electronix (MFS)
- Tripod Technology (TTE)
- Yung Soon Lih (YSL)
- Qualcomm
- UNISOC (Spreadtrum)
- Unisoc
- Kingston Technology
- Phison Electronics
- Innodisk
- SanDisk
- Samsung
- Toshiba
- Far EasTone Telecommunications
- Taiwan Mobile
- Asia Pacific Telecom
- Mega Broadband
- AU Optronics
- HannStar
- CPT
- LG Display
- Infineon Technologies
- STMicroelectronics
- Broadcom
- Elan Microelectronics
- Alps Electric
- Goodix
- Nvidia
- Realtek
- MStar
- Yunnan E Ink Technology
- SiPix Imaging Systems
- Waveshare Electronics
- Onyx Boox
- Panasonic
- TEAC
- Yageo
- Walsin Technology
- Taiyo Yuden
- EPCOS
- Silicon Labs
- Espressif Systems
- TXC Corporation
- Abracon
- Micro Crystal Technology
- Vectron International
- ASPEED
- InnTek
- Cirrus Logic
- ESS Technology
- Wolfson Microelectronics
- Marvell Technology Group
- Innogrit
- Powerchip Semiconductor Manufacturing Corporation (PSMC)

Total: 108

# List of Meta's Taiwan Suppliers

- Luna
- Madgicx Media
- Bango Audiences
- Yellowhead
- Pareto Solutions
- Alison.ai
- Omneky
- Taipei Digital
- InsCoder Limiter
- Assembly - APAC
- Appier
- Business Factory
- Cacafly
- 91APP - TWD
- InTarget Group
- Liquid Advertising
- iProspect
- Re:Ad Media Corp.
- Akohub
- i-Spot Media
- Tagtoo
- Smartly.io
- Webcom Group
- Psquared Publishing Inc
- Starcom MediaVest Group (SMG) TW
- Shopline
- Ad-Tracker
- Digital Advertising Consortium Taiwan
- Carat Performance Team
- ComHere
- Hello Creative Media
- SignalSight
- Global Marketing Ads
- AdGeek TW 1
- Jubbit
- STARTLab
- Fimmick
- AnyMind Group
- Punwave
- MicroAd Taiwan
- JS Adways
- Koo Data
- Weblisher Co. Ltd. II
- Bridgewell
- Republic of Media
- Mainment GBhn
- Dentsu WebChutney Pvt. Ltd.
- SAYA
- Beyond Media Global Group
- Backer Founder
- Beyond Media Global APAC
- Atfone, Inc.
- Global Rev Gen
- 36 Presents
- Response Digital Growth Agency
- AdHub
- Meekco.Asia
- Jinz Digital
- LevelUp Agency Vietnam Company Limited
- Star to Asia
- OXG Media
- FINN Partners Singapore
- Tiger Pistol Inc.

Total: 63

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**228+**

**Total Amount of Apple, Amazon, Google and Meta's Tier 1  
Companies in Taiwan**

**22,800+**

**Total Amount of Apple, Amazon, Google and Meta's Tier 2  
Companies in Taiwan**

**2,280,000+**

**Total Amount of Apple, Amazon, Google and Meta's Tier 3  
Companies in Taiwan**

**Total: 2,303,028**

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# Other Sample Taiwan Technology Corporations



# Other Taiwan Manufacturing and Industrial Corporations

- Manufacturing and Industrial Corporations:



**KYMCO**

gogoro



**PHISON**

**nuvoTon**



**FLEXium**

**3M**

 **TOYOTA**



Unilever



# 15 Largest Industry Associations and Chambers of Commerce in Taiwan

Chinese National Federation of Industries

Taiwan Chamber of Commerce

Chinese National Association of Industry and Commerce

Taiwan Federation of Commerce

General Chamber of Commerce of the Republic of China

Industrial Associations of Taipei

Taipei Chamber of Commerce

Taipei Computer Association

Taiwan Association of Machinery Industry

Taiwan IoT Technology and Industry Association

Photonic Industry and Technology Development Association

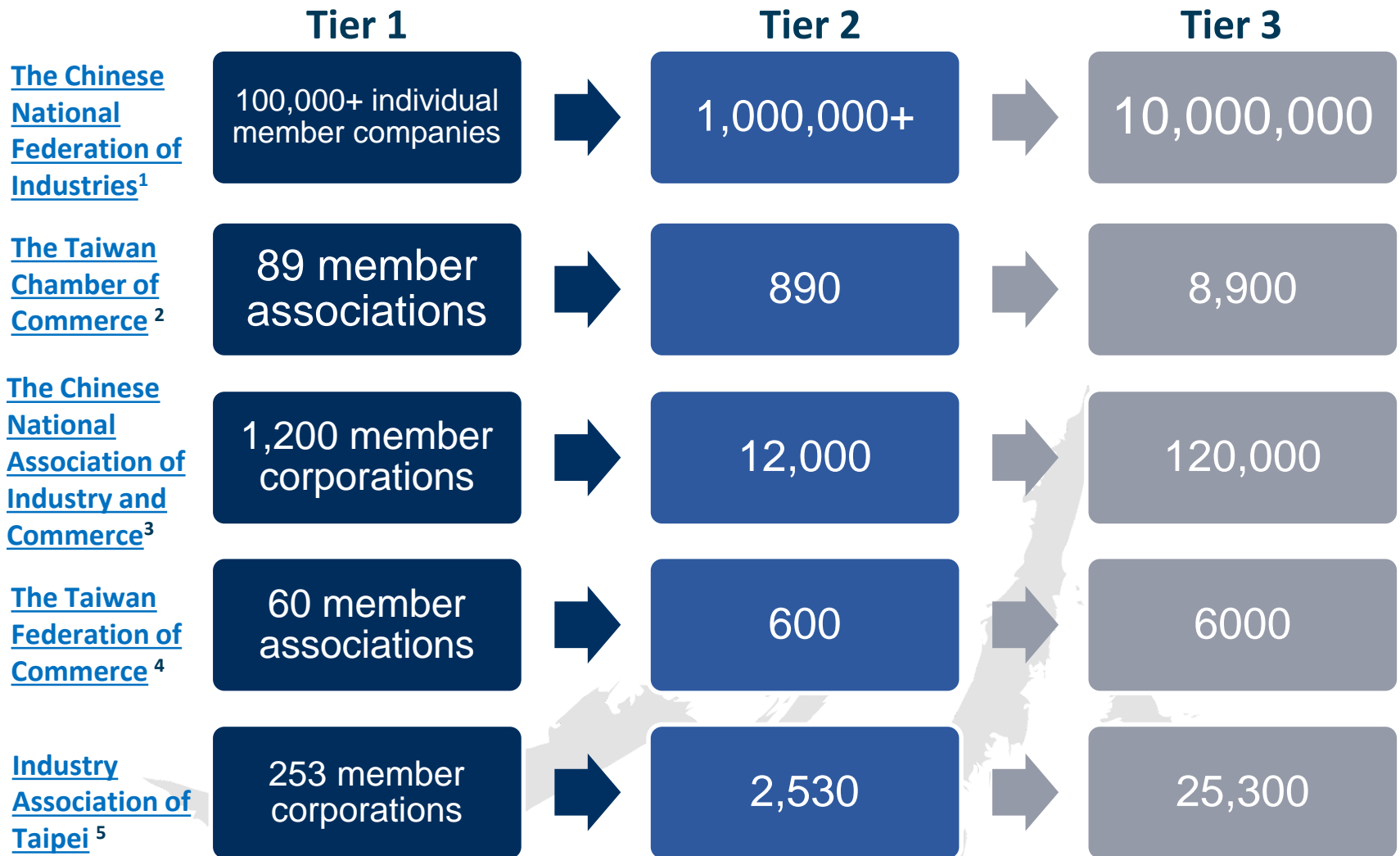
Taiwan Semiconductor Industry Association

Taiwan Electrical and Electronic Manufactures Association

Taiwan Automation Intelligence and Robotics Association

Taiwan Petrochemical Industry Association

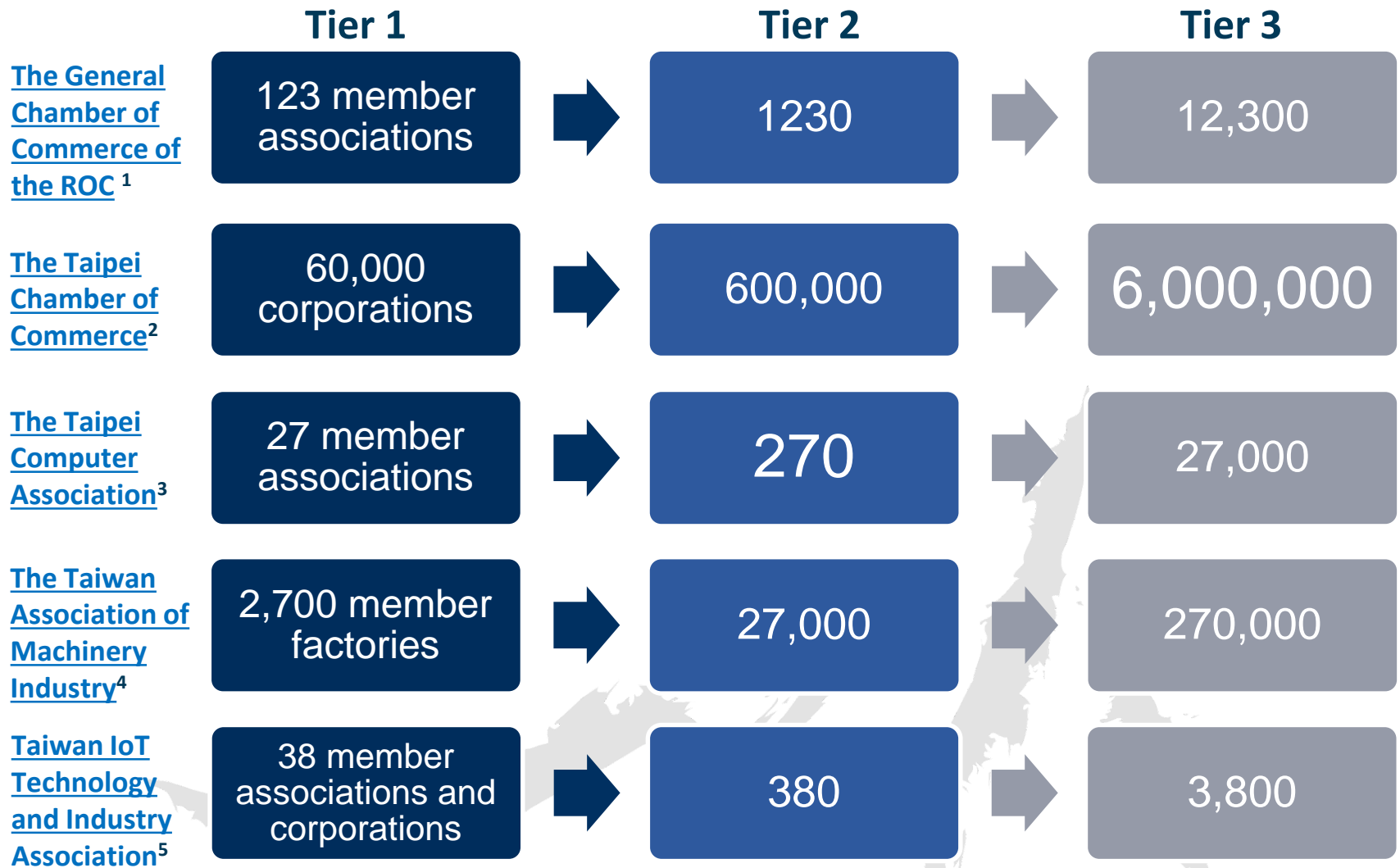
# 15 Largest Taiwan Industry Associations



1. <http://www.cnfi.org.tw/front/bin/home.phtml> 2. <https://www.chamber-commerce.net/dir/4073/Taiwan-Chamber-of-Commerce-in-Taipei>  
 3. [https://www.cnaic.org/eng\\_pages/45d461](https://www.cnaic.org/eng_pages/45d461) 4. <http://www.tfoc.org> 5. <http://www.iatc.org>

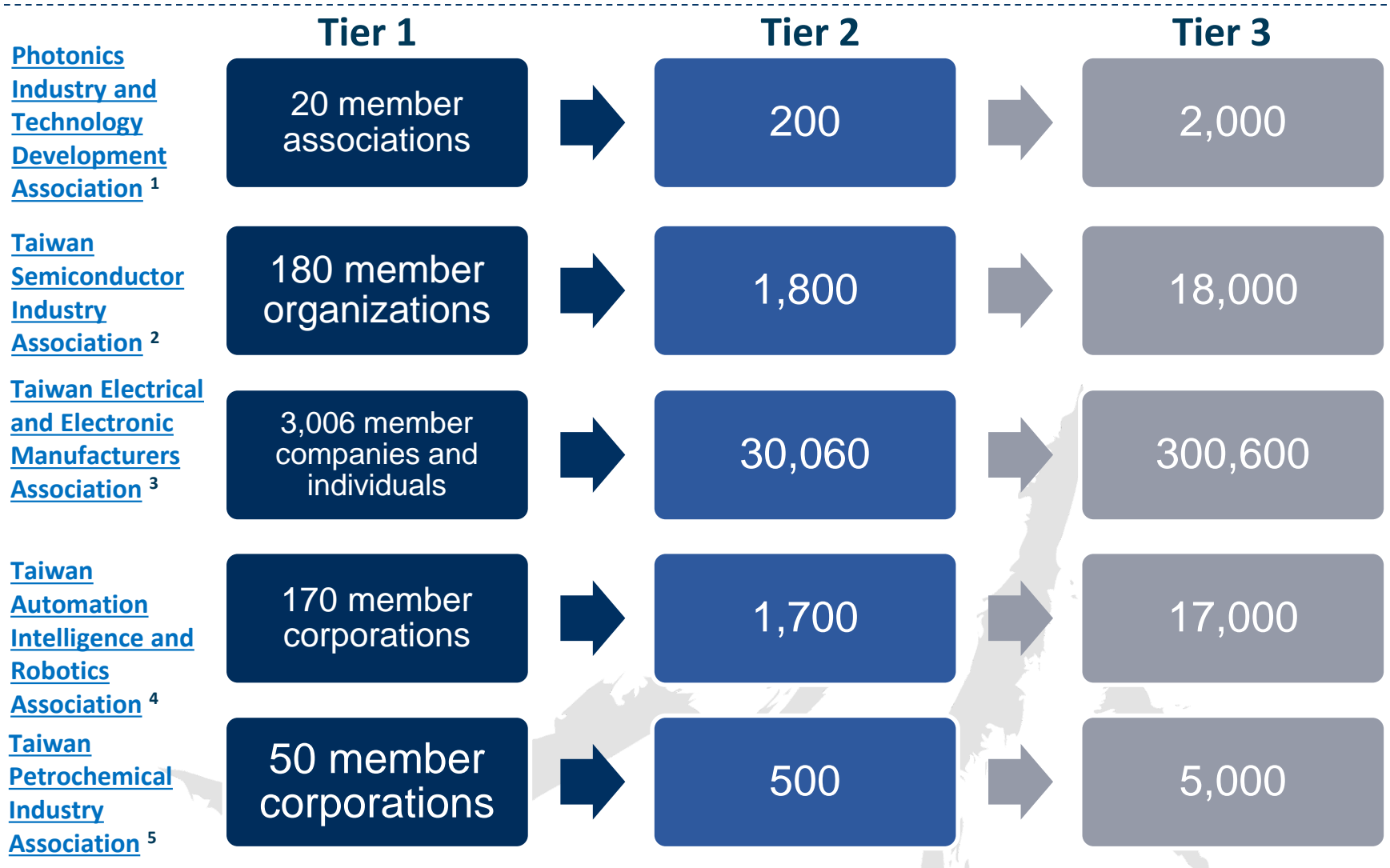


# 15 Largest Taiwan Industry Associations



1. <http://www.roccoc.org.tw/web/index/index.jsp> 2. <http://www.tpecoc.com.tw/> 3. <https://www.tca.org.tw/en/> 4. <http://www.tami.org/>  
5. <http://www.twiota.org/en/>

# 15 Largest Taiwan Industry Associations



1. <https://en.pida.org.tw/> 2. <https://www.tsia.org.tw/EN/index> 3. <http://www.teema.org.tw/englishnew/index.html> 4. <https://www.tairoa.org.tw/>  
5. <http://www.piat.org.tw/publication.html>

# Taiwan's Potential Migrating Supply Chain is Huge

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**165,216**

The Total Amount of Companies in Tier 1 of  
Taiwan's 15 Largest Industry Associations

**1,652,160**

The Total Amount of Companies in Tier 2 of  
Taiwan's 15 Largest Industry Associations

**16,521,600**

The Total Amount of Companies in Tier 3 of  
Taiwan's 15 Largest Industry Associations

**Total: 18,338,976**

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# Taiwan's 30 Major Science/Industrial Parks

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Hsinchu Science  
Park

Central Taiwan  
Science Park

Southern Taiwan  
Science Park

Meilun Industrial  
Park

Fongle Industrial  
Park

Longde Industrial  
Park

Nangang Software  
Industrial Park

Tainan Technology  
and Science Park

Tucheng Industrial  
Park

Shulin Industrial  
Park

Guanyin Industrial  
Park

Linkou Industrial Park

Gueishan Industrial  
Park

Pingjhen Industrial  
Park

Taoyuan Youth  
Industrial Park

# Taiwan's 30 Major Science/Industrial Parks

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Dyuan Industrial  
Park

Jhongli Industrial  
Park

Hsinchu Industrial  
Park

Northern Region  
Industrial Park

Toufen Industrial  
Park

Taichung Youth  
Industrial Park

Taichung Harbor Kwan-  
Lien Industrial Park

Taichung Industrial  
Park

Dali Industrial Park

Chuansing  
Industrial Park

Changhua Costal  
Industrial Park

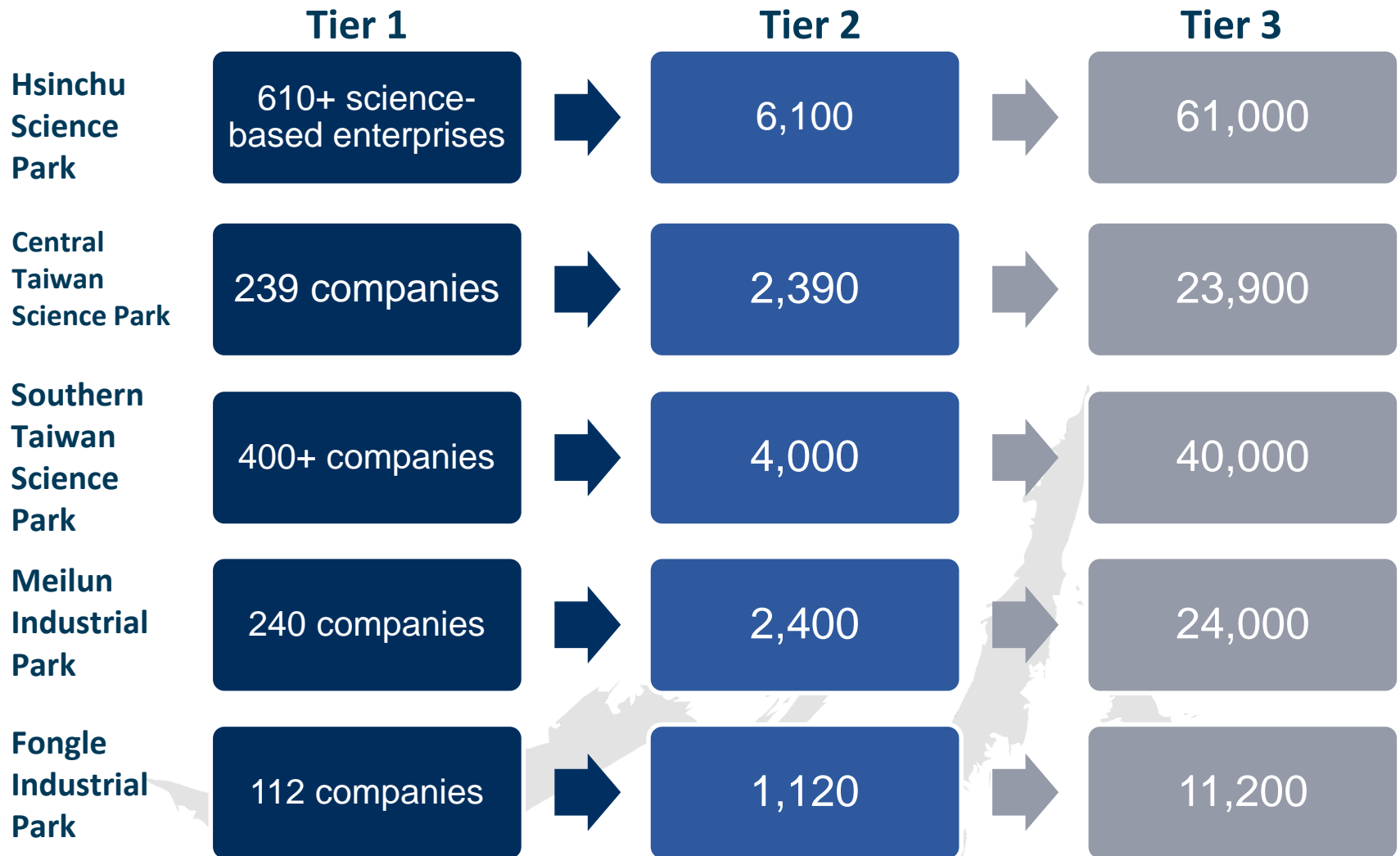
Fusing Industrial  
Park

Fangyuan Industrial  
Park

Nangang Industrial  
Park

Douliou Industrial  
Park

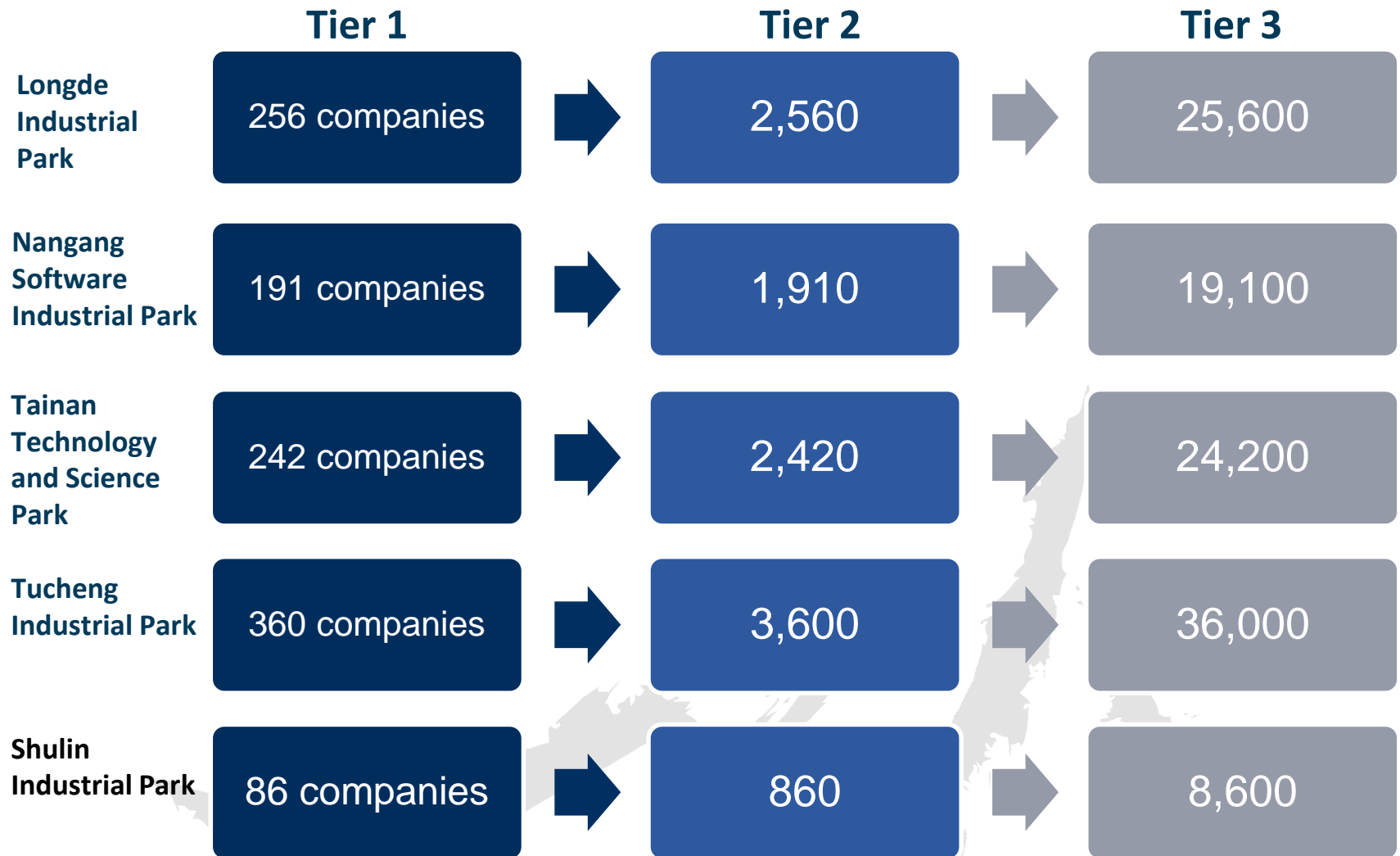
# Taiwan's 30 Major Science/Industrial Parks



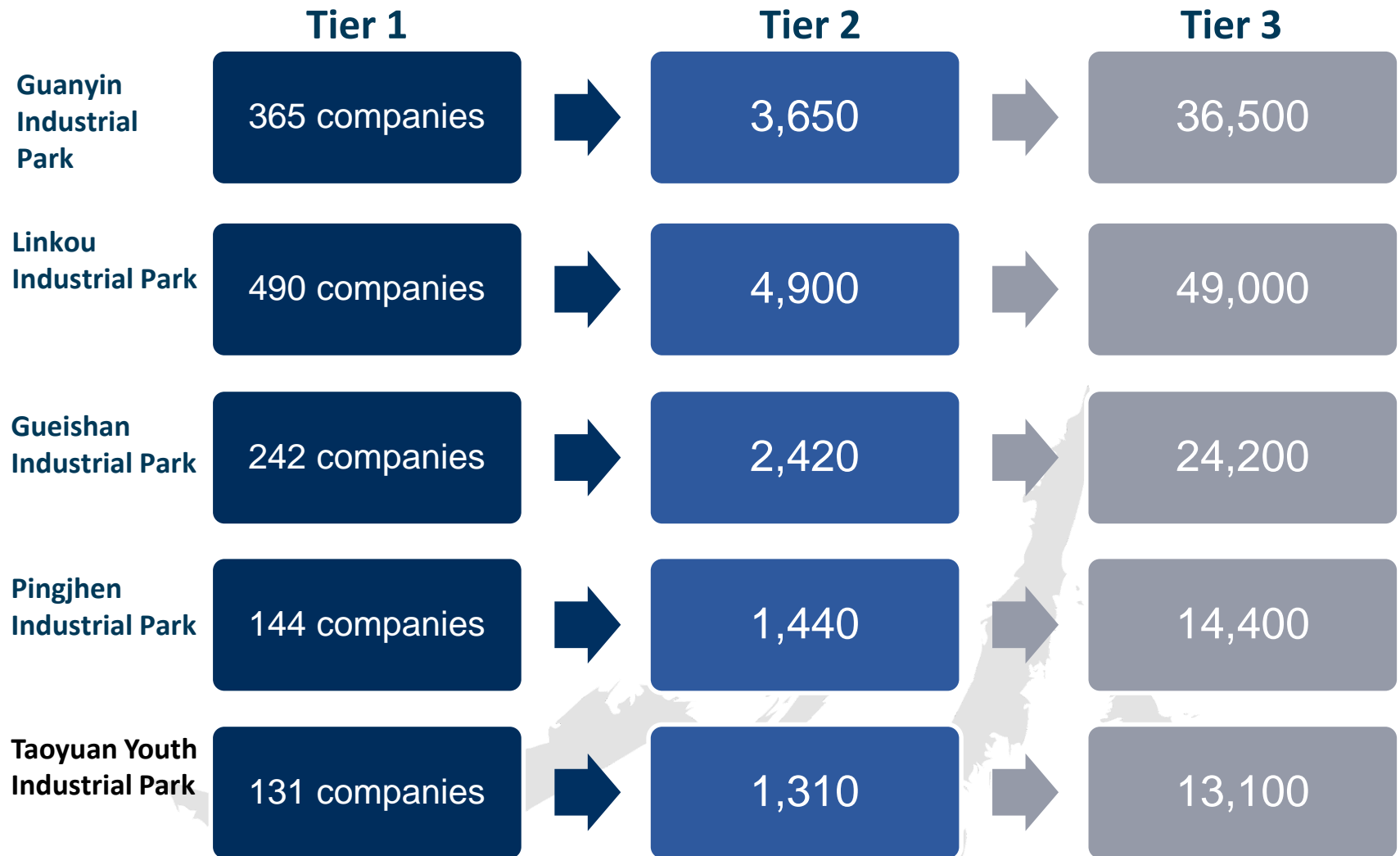
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We are assuming that each Tier 1 company only has 10 companies in its supply chain and that each Tier 2 company has only 10 companies in its supply chain.

# Taiwan's 30 Major Science/Industrial Parks

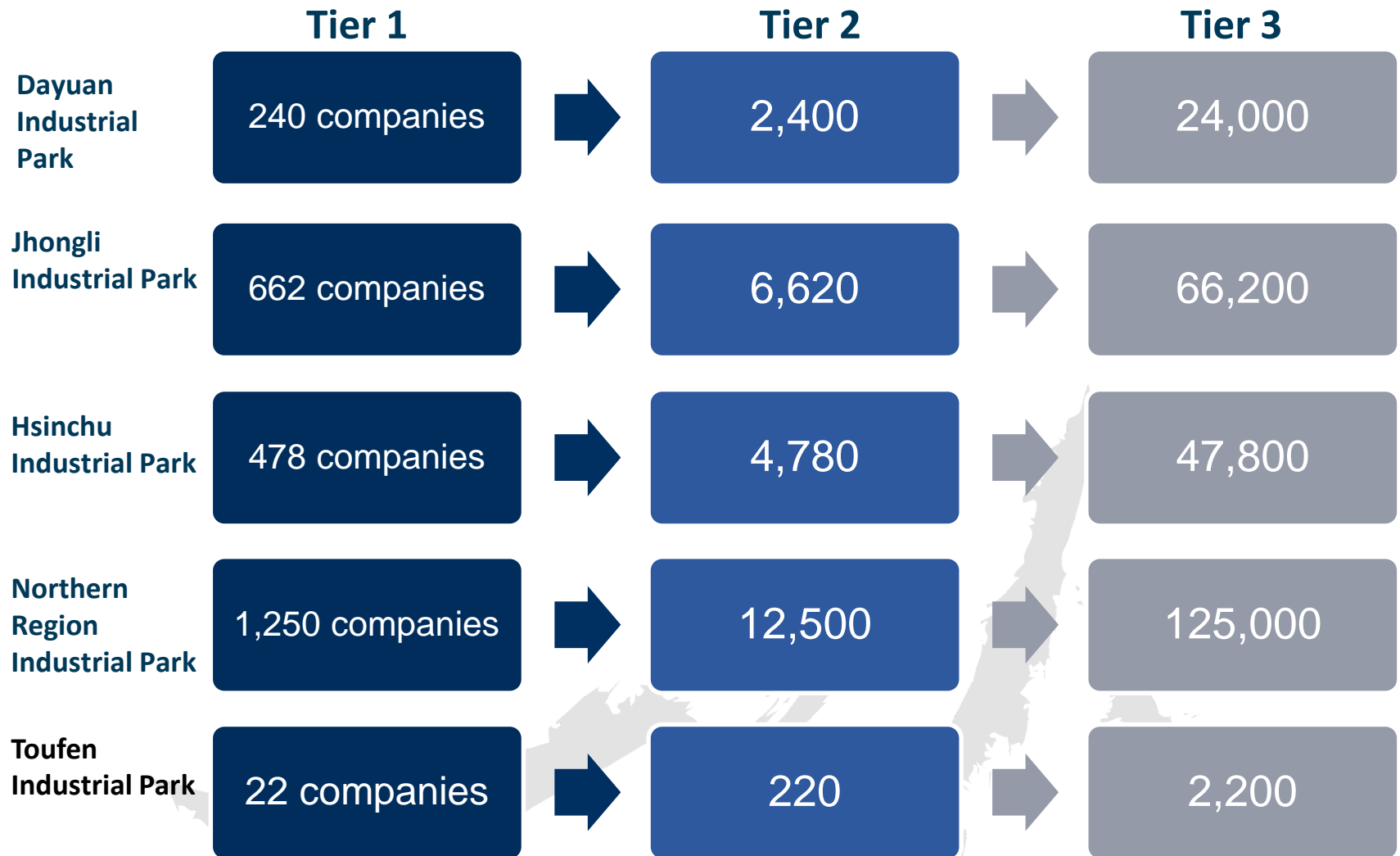


# Taiwan's 30 Major Science/Industrial Parks

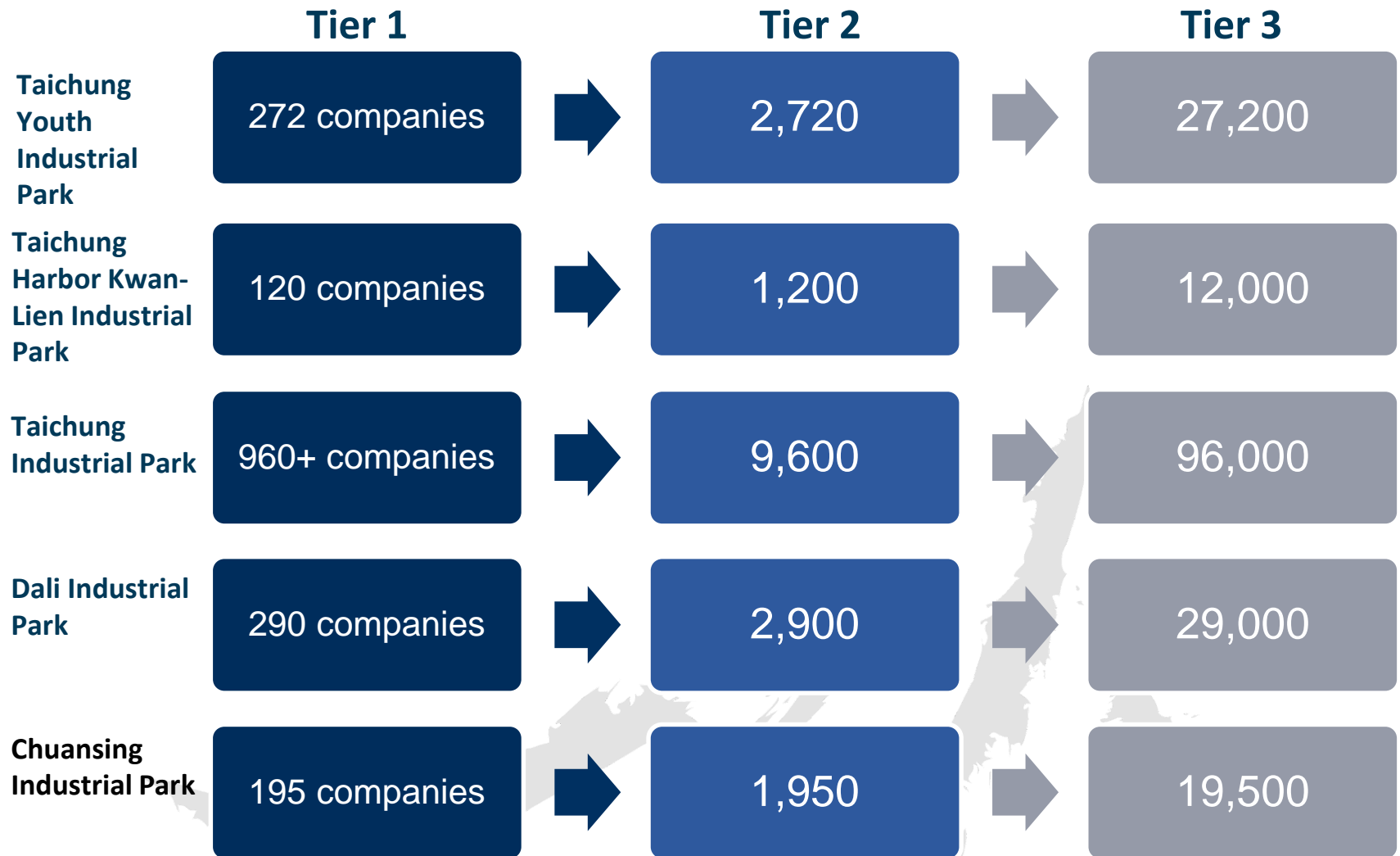




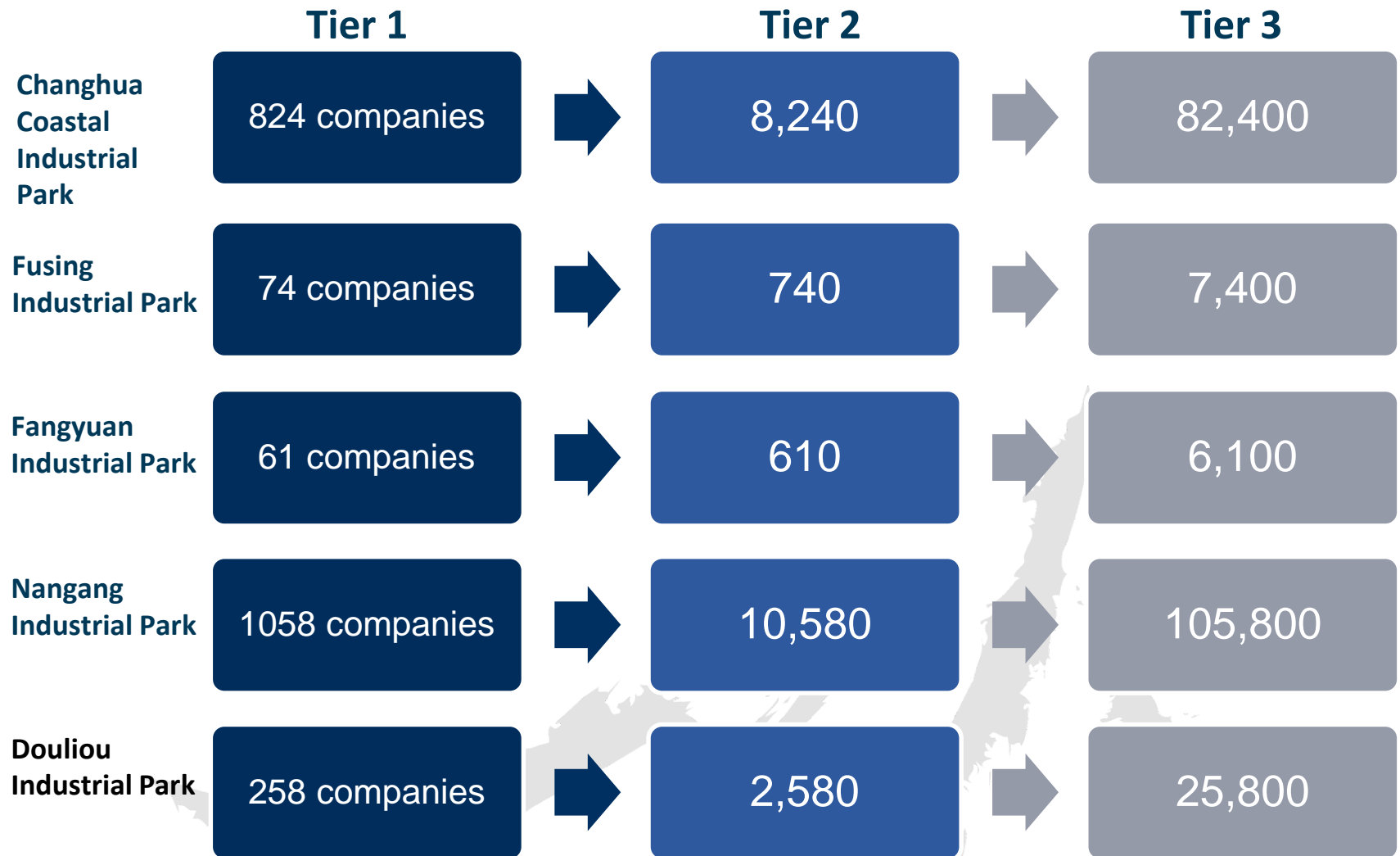
# Taiwan's 30 Major Science/Industrial Parks



# Taiwan's 30 Major Science/Industrial Parks



# Taiwan's 30 Major Science/Industrial Parks



# Foreign Chambers of Commerce in Taiwan

## Members

American  
Chamber of  
Commerce  
("AmCham")

~580 companies

European  
Chamber of  
Commerce  
("ECCT")

~420 companies

British  
Chamber of  
Commerce

~150 companies

Australia and  
New Zealand  
Chamber of  
Commerce

~110 companies

Canadian  
Chamber of  
Commerce

~90

# Taiwan's Potential Migrating Supply Chain is Huge

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**10,872**

**Total Amount of Tier 1 Companies in Taiwan's 30 Major Science/Industrial Parks**

**108,720**

**Total Amount of Tier 2 Companies in Taiwan's 30 Major Science/Industrial Parks**

**1,087,200**

**Total Amount of Tier 3 Companies in Taiwan's 30 Major Science/Industrial Parks**

**Total: 1,206,792 Companies**

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# The Total Amount of Companies in Taiwan in Global Supply Chains

|        | The Top 4 Companies | 15 Industry Associations | 30 Science and Industrial Parks | Total      |
|--------|---------------------|--------------------------|---------------------------------|------------|
| Tier 1 | 228                 | 165,216                  | 10,872                          | 176,316    |
| Tier 2 | 22,800              | 1,652,160                | 108,720                         | 21,672,480 |
| Tier 3 | 2,280,000           | 16,521,600               | 1,087,200                       | 19,888,800 |
| Total  | 2,303,028           | 18,338,976               | 1,206,792                       | 23,837,676 |

This is the total number of companies impacted by Taiwan's supply chain, without taking into consideration any possible overlap.