



Empowering Connections with Precision.

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凱基證券投資論壇 KGI Taiwan Corporate Day 2026 Q1

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本簡報包含關於 Taiwan Semiconductor Inc. (TSC) 業務前景、策略規劃、產品開發及市場狀況的前瞻性陳述。這些陳述反映了管理層當前的預期和假設，本質上存在重大風險和不確定性。由於包括但不限於全球經濟形勢變動、客戶需求演變、監管發展、供應鏈限制及競爭動態等因素，實際結果可能與預測存在重大差異。

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簡報內容

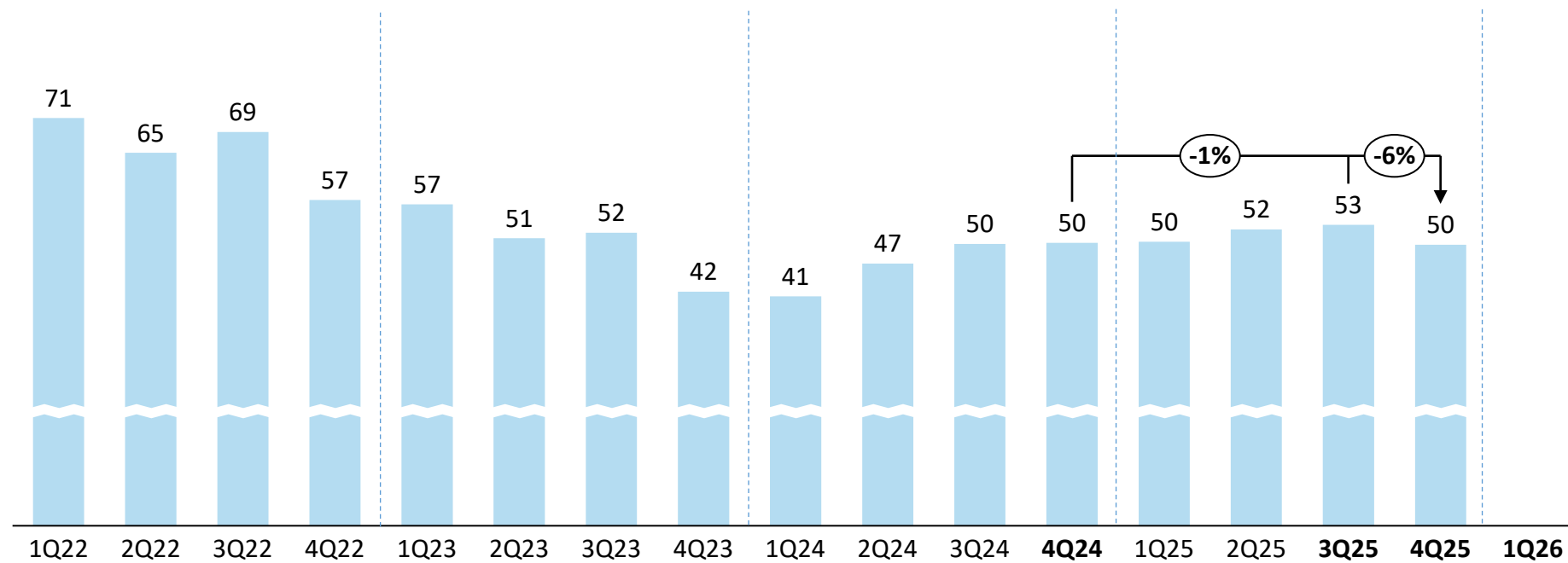
- 財務報告
- 營收分佈
- 產品應用
- 法人提問

營收報告
4Q25

Taiwan Semiconductor Co., Ltd

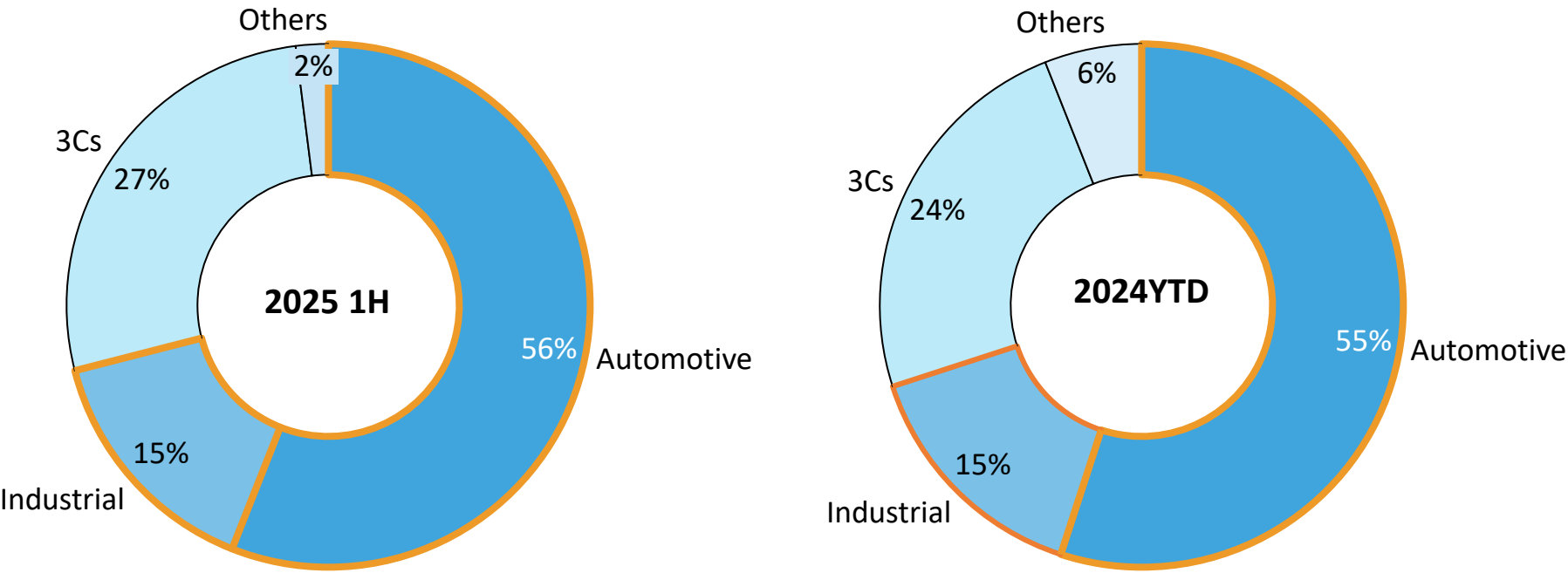
季度營收 (半導體)

Unit: \$USD M

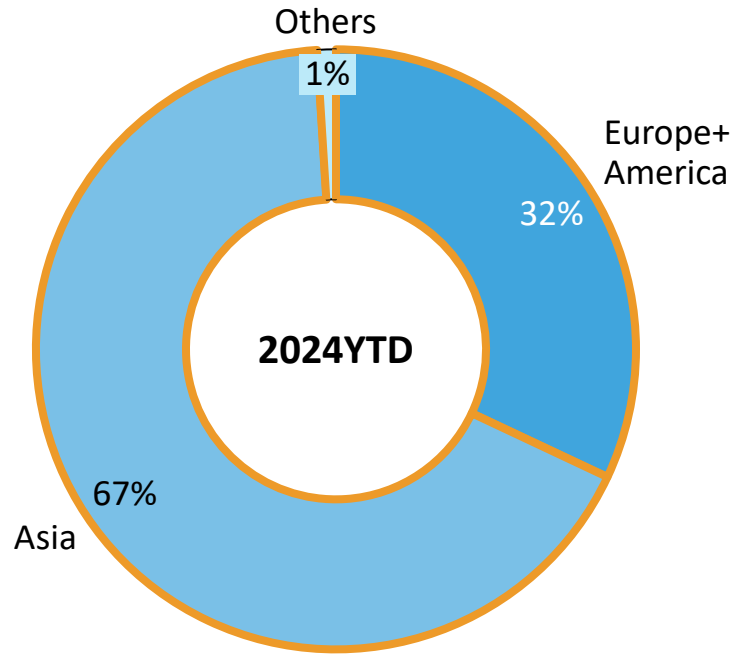
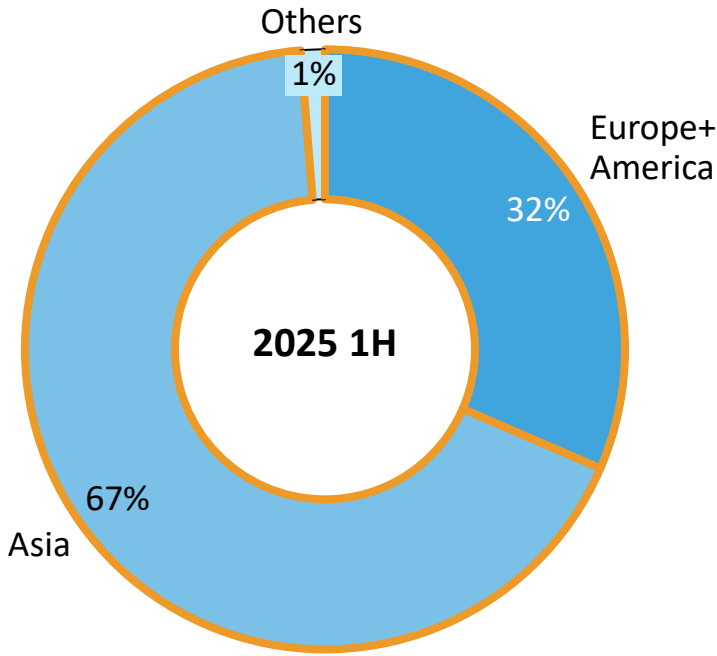


營收分佈 – 應用

Auto + Industrial **70%** of Revenue



營收分佈 – 區域

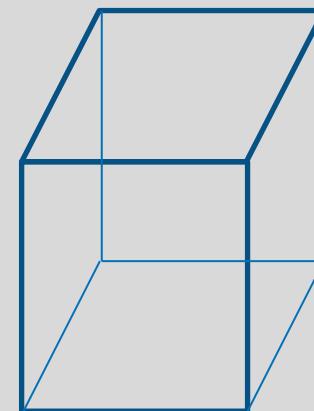


台灣半導體(股)

Taiwan Semi

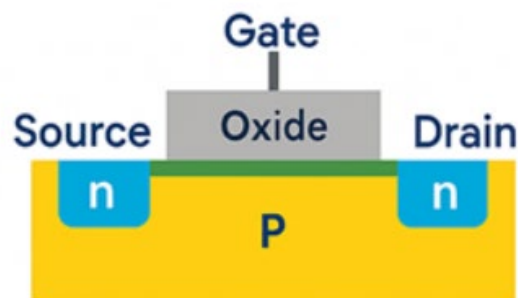
(系列專輯)

MOSFET Applications



MOSFET

(Metal-Oxide-Semiconductor Field-Effect Transistor)



消費性電子

- 筆記電腦與桌機
- 電源供應器
- 行動裝置
- 家電與照明

工業控制

- 伺服器電源
- 電信基地台
- 工業自動化
- 電動工具

再生能源

- 太陽能逆變器
- 儲能系統
- 不斷電系統
- 電網系統

車用電子

- 動力總成
- 安全控制
- 車身電子
- 自動駕駛

Automotive Grade (AEC-Q101)

定義

- 依據AEC國際汽車電子協會 (Automotive Electronics Council) 為車規驗證標準
- 符合零失效(Zero Defect) 品質管理標準IATF 16949規範

特性

- 高溫高壓 環境
- 生命週期長
 - 產品可靠度
 - 長期供貨
- 穩定供應鏈及產線

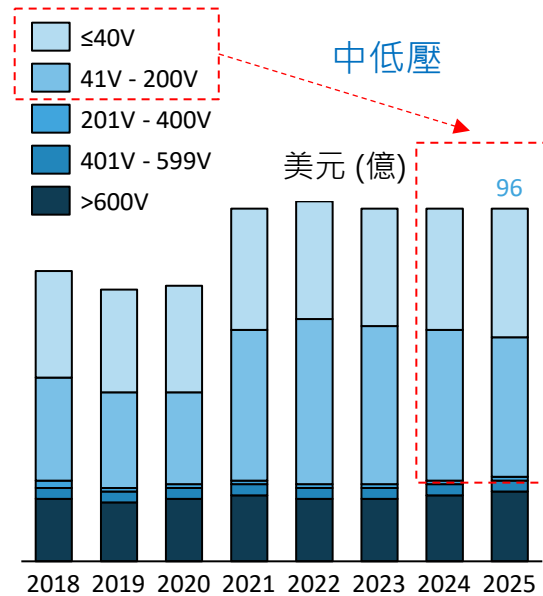
規範

- AEC-Q100 (IC)
- **AEC-Q101 (Discrete)**
- AEC-Q200 (Passive Component)
- ...etc

應用

- 空調 / 雨刮器
- 電動車窗 / 門
- 動力轉向
- 煞車輔助
- DC/DC轉換
- 電池管理

AEC-Q101 MOSFETs



40V MOSFETs (12V 客用)

- Infineon
- ON Semi
- Nexperia
- **Taiwan Semi**

80V / 100V MOSFETs (48V 油電)

- ROHM
- Toshiba
- **Taiwan Semi**

60V / 80V MOSFETs (24V 商用)

- ON Semi
- **Taiwan Semi**

150V MOSFETs (elec. bike)

- Infineon
- Toshiba
- ROHM
- **Taiwan Semi**

AEC-Q101

MOSFETs

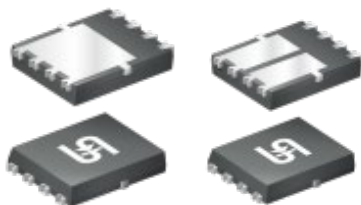
Application Estimation

AEC-Q101 MOSFET	BEV (純電車)	HEV/PHEV (輕油電)	ICE (燃油車)
40V - 100V	320	200	150
BMS	200	80	-
e-Fuse	50	30	15
BSG/ISG	20	30	-
Engine Control	-	-	40
Body Electronics	30	30	60
Seat / Window ...etc	10	20	25
ADAS / Infotain	10	10	10
600V ~	80	50	-
Traction inverter	35	30	-
OBC	15	10	-
DC/DC	15	10	-
HV System	15	-	-
TTL	400	250	150

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MOSFETs

Product Development



產品數量 (進位約當量)	Standard (標規)	AEC-Q101 (車規)	TTL (總約當量)
N-Channel	190	60	250
20V	10	-	10
30V	30	-	30
40V	40	20	60
60V	40	20	60
80V	10	10	20
100V	20	10	30
600V	40	-	40
P-Channel	40	10	50
-20V	10	-	10
-30V	10	-	10
-40V	10	-	10
-60V	10	10	20
TTL	230	70	300

產品優勢

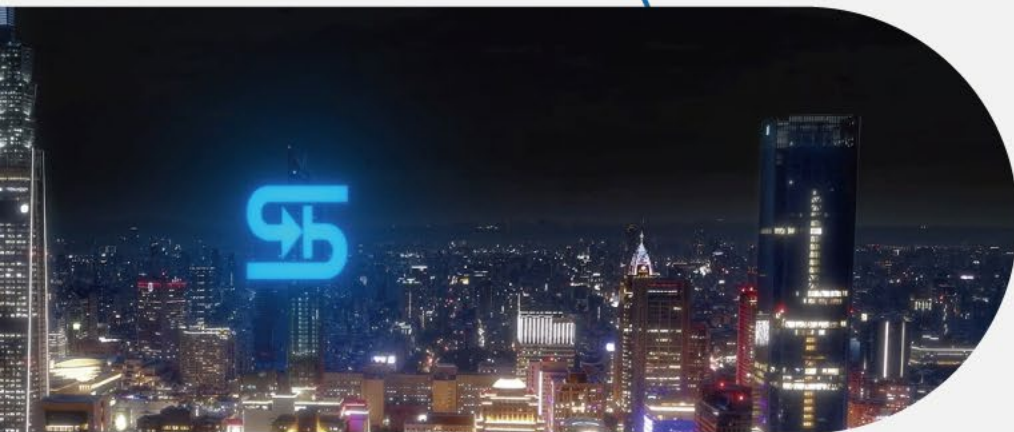
- 自主設計
- 台灣晶圓廠 代工協作
- 產品規格提升
- 品質 + 價值 + 競爭力



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Q & A

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