



Issue on: 2025/05/05

ELAN Monthly Sales Report – April 2025

ELAN Microelectronics Corp. (the Company), a leading touch controller solution provider in global NB market, announced its consolidated net sales of NT\$ 1,073 million for April 2025. With the traditional hot season, despite short-term disruptions from tariff policy, normal orders remained stable, with monthly revenue increasing by 5.1% MoM and 1.4% YoY. To mitigate the uncertainties brought by tariff policy, the company continues to maintain close communication with customers, monitor real-time order and production demand, and proactively adjust production schedules to ensure stable supply, meet customer needs, and maintain operational flexibility.

Sales for April 2025 --YoY Comparison

Unit: NT\$ Thousand

Year	2025	2024	YoY
Net Sales (Consolidated)	1,073,381	1,058,727	1.38%

The sales breakdown in April 2025: Touchpad Module 46%, Touchscreen Controller 28%, Fingerprint Sensor 10%, Pointstick (PST) 11%, Microcontroller 3%, and 2% from the sales of affiliates. Touch applications, including biometric applications, accounted for 84% and non-touch applications accounted for 16%.

2Q25 marks the traditional hot season for consumer electronics. While tariff policy changes have introduced macroeconomic uncertainty, normal orders and shipments remain stable, supported by normalized inventory levels. In the short term, we are providing flexible shipment schedules and coordinating production planning to help customers mitigate tariff policy impacts.

Despite ongoing market noise, we remain confident in the upcoming replacement cycle. With Microsoft's end of support for Windows 10, demand for security-enhanced devices—such as those with fingerprint recognition—is expected to grow, driven by the need to protect organizational data and assets.

<<ELAN is a world leader in human-machine interfaces, notably in Touchscreen Controller with Pen Supports, Touchpad Module, Pointing Stick and Biometrics (fingerprint sensors and facial recognition). For more information, please go to <http://www.emc.com.tw/emc/en>.>>



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In addition, we are actively working with customers to expand AI applications, integrating AI features into new models and together shaping the future AI PCs. We maintain positive on the long-term growth of the NB industry and will continue to deepen customer collaboration to create mutual value.

Looking ahead to the NB market in 2025, we anticipate a NB replacement cycle due to 1) Microsoft's Windows 10 will no longer receive support updates or free software updates, starting in 2025'Q4, and 2) a well-prepared AI PC supply chain. In fact, such replacement cycle already started in the Japanese market in 2024, and the growth trend of the demand is expected to continue. General market research institutions view the market positively, predict moderate market growth. With this, we are confident in driving an increase in operational efficiency.

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