



Tuesday, September 3rd 2019



Yangtze Memory Begins Mass-production of 64-layer 3D NAND Flash Memory

by btarunr | Sep 3rd, 2019 03:25 | [Discuss \(9 Comments\)](#)

Yangtze Memory Technologies (YMTC), a Chinese state-backed semiconductor company founded in 2016 as part of the Chinese Government's tech-independence push, has commenced mass-production of 64-layer 3D NAND flash memory chips, at a rate of 100,000 to 150,000 wafers per month leading into 2020. The 64-layer 3D NAND chips are based on YMTC's "in-house" Xtracking architecture. The company is already developing a 128-layer 3D NAND flash chip, and is skipping 96-layer along the way.

YMTC's capacity will be augmented by a new fab being built by its parent company, Tsinghua Unigroup. Tsinghua is a state-owned company which holds a controlling 51 percent stake in YMTC, and is a beneficiary of China's National Semiconductor Industry Investment Fund. When it goes online in 2021-22, the new Tsinghua fab, located in Chengdu, will augment YMTC's capacity by an additional 100,000 12-inch wafers per month. Its existing fab in Nanjing will also receive a capacity expansion.



Source: DigiTimes



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9 Comments

fynxer

#1

Okej, interesting!

I am not so knowledgeable in the NAND market, rather than just copy paste the news can you also give some insight to how this may affect the market.

1. How large of a slice is 150K wafers/month compared to the now existing global NAND market.
2. Is this a significant amount to affect NAND prices in 2020.
3. With Xtacking DRAM-like high I/O speed is this a competitor to Samsungs Z-NAND.
4. With 128 Layers NAND in development, taking in to account reduced product development time by at least three months, significantly accelerating 3D NAND time-to-market, when can we expect 128 Layer to be ready for release.

Posted on Sep 3rd 2019, 4:35

dj-electric

#2

Im just happy someone is lighting some fire up SK's greedy nand industry's ass

Posted on Sep 3rd 2019, 4:40

bonehead123

#3

Well, please call me whenever this results in a 2000PB nvmeOF drive with 50K read/write speeds for <\$100 that fits in a slot that is 1/100th the size of the ones we have now.....hahaha :)

And FYI, SK's days time of reckoning is coming, and sooner than they think..

Posted on Sep 3rd 2019, 7:03

TheLostSwede

#4

News Editor

This will have little to no effect on anything sold outside of China, as I have a feeling they won't be exporting these products.

Posted on Sep 3rd 2019, 7:11

Deathy

#5

TheLostSwede

This will have little to no effect on anything sold outside of China, as I have a feeling they won't be exporting these products.

Make that "little", since even if they don't export (which seems likely), Chinese customers of Yangtze NAND still will stop buying "normal" NAND. So the demand for global NAND will decrease. Which will result in some effect.

Posted on Sep 3rd 2019, 8:06

Fourstaff

#6

Here comes a new challenger!

TheLostSwede

This will have little to no effect on anything sold outside of China, as I have a feeling they won't be exporting these products.

They will displace existing suppliers, leaving more Samsung/Hynix/Micron/etc. for us.

Posted on Sep 3rd 2019, 8:19

Mistral

#7

So, whose tech is that based on? Micron?

Posted on Sep 3rd 2019, 9:47

m3gaj3ans

#8

Mistral

So, whose tech is that based on? Micron?

it's china so who ever they decided to copy it from.

Posted on Sep 3rd 2019, 10:40

Mephis

#9

Fourstaff

Here comes a new challenger!

They will displace existing suppliers, leaving more Samsung/Hynix/Micron/etc. for us.

Serious question, because I have no idea:

How does 100,000 to 150,000 wafer starts compare to someone like Samsung's memory business?

I would imagine it is a small percentage of the global memory output and wouldn't expect much effect on the memory market. Besides if it is, it will be a good time for the next virus to hit the fabs. ;)

Posted on Sep 3rd 2019, 14:34

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