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Advanced Micro Devices confirms plans to make chips at TSMC Arizona

Greg Barr

Another major global chip sector player is lining up to do business with Taiwan Semiconductor Manufacturing Co. in Arizona.

Santa Clara, California-based Advanced Micro Devices Inc. (Nasdaq: AMD) said Tuesday that some of its CPUs – central processing units – aimed at the data center market would be produced at TSMC's main factory in north Phoenix, known as Fab 21.

The company said in a statement that the chips to be made in Arizona in 2026 would be its most sophisticated to date, using 2 nm (nanometer) process technology, known internally as codename "Venice."

The most significant part of the news, Barron's reported , is that this will be the first time AMD has made these processors in North America, rather than at TSMC's main global factory in Taiwan. According to Barron's, TSMC said it will be able to make the 2 nm chips for all customers in Arizona in the second half of 2025.

"By working together, we are driving significant technology scaling resulting in better performance, power efficiency and yields for high-performance silicon," said TSMC Chairman and CEO Dr. C.C. Wei, in a statement.

The AMD announcement comes as President Donald Trump ratchets up his tariff tiffs with China and the Far East and puts pressure on global chipmakers to push more manufacturing into the U.S. As Reuters reports, the administration is investigating whether chip imports could threaten national security, which could be a precursor to slapping tariffs on those products.

Nvidia, also based in Santa Clara, jumped on the made-in-America bandwagon Monday, saying it would make a major investment in Texas with plans to manufacture AI supercomputers at sites in Dallas and Houston.

At the same time, the company reiterated that it had started production of its AI Blackwell chips at the TSMC Arizona factory, which the company had confirmed to the Phoenix Business Journal in March and was first reported by Reuters last December . Other companies that have confirmed that their chips are being made by TSMC include Apple, Intel and Qualcomm.

TSMC in early March was among the first global chipmakers to announce a huge investment in the U.S., more than doubling its previous $65 billion direct foreign investment plan in Arizona to $165 billion .

On Sunday, the Trump administration indicated that semiconductors and the equipment used to make semiconductors could be exempt from the latest tariffs imposed on China, but Trump then walked back those comments on Monday by saying such

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exemptions were not permanent, making for another topsy-turvy day on Wall Street. On Tuesday, stocks turned lower amid the lack of clarity on the tariff policy.

"Our new fifth-generation EPYC is doing very well, so we're ready to start production," AMD Chief Executive Lisa Su told reporters in Taipei, according to the Reuters report. "We want to have a very resilient supply chain, so Taiwan continues to be a very important part of that supply chain, but the United States is also going to be important and we're expanding our work there, including our work with TSMC and other key supply chain partners."

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