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Apple joins the ranks of SoIC, UNIMICRON take advantage of it, and simultaneously wins big orders

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Huizhong, Zhang Chengwen/Taipei report



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ration M series chips.
有限公司 carrier board partner, will
in large orders as the
power of TSMC's related packaging
platform increases. In particular, Unicom
is already the main supplier of Apple's
current M-series carrier boards. With the
advancement of TSMC's advanced
packaging, it is estimated that the
demand for Unicom's carrier boards will
increase significantly by two to three
times this year, making it the biggest
beneficiary.

As early as the 2022 Open Innovation
Platform (OIP) Ecosystem Forum, TSMC
announced the establishment of the new
TSMC 3DFabric Alliance to accelerate
system innovation. Its partners span
semiconductor benchmark factories in
Taiwan, Japan, the United States, and
South Korea, and some of the carrier
boards are in Taiwan. On behalf of
UNIMICRON, the ecosystem will continue

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ustry has reported that

...hips are expected to be introduced into SoIC advanced packaging.

This part belongs to the 3D front-end process. The industry is optimistic about it. It mainly corresponds to the supporting back-end process services, which is expected to drive more demand for carrier boards.

According to industry analysis, the 3D advanced packaging currently promoted by various manufacturers actually still requires a carrier board for the 2.5D packaging process in the backend and has a low yield rate. If there is an outlet to the sea and major manufacturers actively introduce diversified applications, future demand growth is expected.

The industry said that judging from the current largest demand for ABF carrier

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rocesses are carried by
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Morgan Stanley Semiconductor Industry Analyst Zhan Jiahong bluntly stated that UNIMICRON is likely to be Apple's main supplier of M2 Ultra chip substrates, and demand this year will surge two to three times compared with 2023. Judging from the research firm IDC's estimate of M2 Ultra sales last year at about 75,000 units, Morgan Stanley estimates that the number of Apple AI servers used this year will be about 200,000.

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