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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.

rier 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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