Semiconductor Weekly News

Monday 19 – Sunday 25 October 2026

NVIDIA signed capacity deals with six supply-chain partners, and Japan's METI set out a plan for ¥400bn more in Rapidus equity over three years

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Sources: NVIDIA, US Commerce, NTT, Lam Research, Meta, Waymo, Reuters, X-energy, The Information and others

Editor's Picks

NVIDIA locks in capacity

2.5x

[Confirmed] A multibillion-dollar advance to IBIDEN and $1.1B to KYEC; NVIDIA plans 2.5x package substrate capacity in three years
(NVIDIA, Oct 21)

Japan plans Rapidus equity

¥400bn

[Reported] ¥400bn across FY2027-29 (about US$2.5bn, press conversion), taking state equity to ¥650bn. Yomiuri puts the increment at ¥250bn
(Business+IT, Oct 20)

Commerce funds chip R&D

$389M

[Confirmed] Letters of intent with Helion, Commonwealth Fusion, Vertical Semiconductor and Sibelco; Commerce takes non-voting equity as a condition
(Commerce, Oct 22)

AI Chips & GPUs

NVIDIA expands capacity with six partners

[Confirmed] IBIDEN's Ono plant in Gifu, which makes IC package substrates, targets 3x current capacity with more in Q1 2028; Taiwan's KYEC gets a $1.1B advance and targets April 2027 volume in the US; Amkor lifts Korean interposer capacity over 300% by end-2028. Only KYEC's figure is disclosed. (NVIDIA, Oct 21)

AWS opens a PyTorch backend for Trainium

[Confirmed] TorchNeuron went to public beta on Oct 20 under Apache 2.0, announced on the PyTorch blog Oct 19. AWS says one line of code moves existing models to Trainium2 and Trainium3. Sparse tensors and dynamic shapes are unsupported in the first release. (PyTorch blog, Oct 19)

Infineon widens its NVIDIA tie-up to GaN

[Confirmed] Germany's Infineon extends its 800V DC rack work with NVIDIA to gallium-nitride intermediate bus converters, covering 800V to 50V, 12V and 6V. The claim that GaN switches at up to 1 MHz and shrinks magnetics is Infineon's own. No availability date. (Infineon, Oct 21)

Fab & Supply Chain

Four die at TSMC's Kaohsiung site

[Confirmed] A fall at the Fab 22 site on Oct 20 killed four workers. The science-park bureau suspended steel-beam lifting until contractor Shang Hao Machinery files an improvement plan, and TSMC paused structural-steel work at its new Taiwan fab sites. Cause under investigation. (CNA, Oct 21)

Intel starts tool install at Arizona Fab 62

[Confirmed] Intel began moving production tools into the completed Fab 62 shell, targeting operation in late 2028. Node, volume-start date, wafer capacity and capex are all undisclosed. The first major structural truss is up at Ohio One in New Albany. **[Reported]** Accounts differ on when High-NA EUV enters high-volume use. (Tom's Hardware, Oct 21)

Lam Research posts an $8.22B quarter

[Confirmed] Revenue was $8.22B for the quarter ended Sept 27, up 22% sequentially, with a 40.0% GAAP operating margin and $2.19 diluted EPS. CEO Tim Archer called revenue, profit and EPS a record. The ~54% year-on-year rise is our calculation from the release. (Lam Research, Oct 21)

Consumer Chips

Apple sets an Oct 28 product event

[Confirmed] Invitations went out Oct 19 for a Los Angeles event tagged “Pro and tell.” [Reported] Bloomberg's Mark Gurman expects touchscreen MacBook Pros on M5 Pro and M5 Max, an OLED iPad mini and an M6 iMac. Apple has confirmed no product and no chip. (9to5Mac, Oct 19)

Micron details G11 NAND above 400 layers

[Confirmed] At its Oct 21 investor webinar, chief technology and products officer Scott DeBoer said G11 exceeds 400 layers with twice G9's bit density, up to 1.5x its I/O speed and 25% less energy per bit. It uses wafer bonding, ramps in 2H 2027, and the G10 generation was dropped. (Blocks & Files, Oct 22)

Leaked video said to show RTX 5090 teardowns

[Reported] Tom's Hardware reported a leaked video said to show GeForce RTX 5090 cards being dismantled at Chinese factories so the GPUs can go into AI server boards. The source is the video, not a company; the volumes are unverified and we found only this one outlet. (Tom's Hardware, Oct 24)

Hyperscalers, US Data Centers & Energy

Meta's Ohio Prometheus phase one is live

[Confirmed] Meta's engineering blog said on Oct 19 that the first phase of its New Albany supercluster is complete and trained the Muse models, running hundreds of thousands of GB200 and GB300 NVL72 GPUs. **[Outlook]** The ~1M GPU scale and Vera Rubin are targets; no total MW given. (Meta, Oct 19)

Amazon, AEP and X-energy sign an SMR pact

[Outlook] A joint development agreement signed Oct 19 covers feasibility work on twelve 80MWe Xe-100 reactors, 960MW, at AEP's retired plant site in Sullivan County, Indiana. Amazon provides milestone-based funding, amount undisclosed. No dates; this is not a build decision. (X-energy, Oct 19)

CoreWeave slides, dragging neoclouds with it

[Confirmed] CoreWeave closed Oct 22 down 10.1% at $55.60, its 2026 low, with IREN down 8.4% and Nebius 7.2%. **[Reported]** The Information says the stock nearly halved in 12 days, on worries that rising rates make its debt harder to carry. HSBC reiterated Sell on Oct 20 at a $39 target. (Opening Bell Daily, Oct 22)

Autonomous Driving & Automotive Chips

Tesla's Q3 net income falls 43%

[Confirmed] Revenue was about $28B, roughly flat, and net income $787M, down 43% year on year. Optimus production started at Fremont, which the shareholder letter calls the first production-quality robots. [Outlook] Musk claims 20,000 a week by end-2027; customer robotaxis around Q2 2027. (TechCrunch, Oct 21)

Waymo starts airport rides in Las Vegas

[Confirmed] From Oct 21 Waymo serves Harry Reid International, with pickups and drop-offs in autonomous-vehicle zones on the Ground Zero Level at Terminals 1 and 3. Access is limited to existing Las Vegas riders at first. Trips stay inside the current 24-square-mile service area. (Waymo, Oct 21)

Rivian buys UK startup Third Dimension

[Confirmed] Disclosed Oct 22: a 15-person UK startup founded in 2024 that uses AI to turn images and video into realistic 3D environments. Terms were not disclosed. Rivian will build simulations from real driving data to test driver assistance and the robotaxis it plans with Uber. (TechCrunch, Oct 22)

Chip Startups & Venture

Raised **$1.5B**	**[Confirmed]** Tenstorrent (Toronto, Canada; RISC-V AI processors and IP) closed its Series E at a $6.2B post-money valuation, led by Trace Capital and Innovation X (Tenstorrent, Oct 19)
Raised **$150M**	**[Confirmed]** Eka Robotics (US; force-sensing grippers and physical AI) raised a Series A at a $1.45B post-money valuation, led by a16z and F-Prime; performance claims are its own (TechCrunch, Oct 20)
Raising **~$15B**	**[Reported]** DeepSeek (China; AI models) raised about RMB100bn per Bloomberg, with CATL and Tencent named as possible investors. No close is confirmed (TechCrunch, Oct 22)
In talks **$100s M**	**[Reported]** Firmus (Australia; GPU cloud) is in talks for an NVIDIA investment of hundreds of millions after its pulled IPO; neither has confirmed (The Information, Oct 20)
Deal size **Undisc.**	**[Confirmed]** BOS Semiconductors (South Korea; automotive AI chips) signed an MOU with LG Electronics and HANA Micron on automotive chiplets (design-reuse, Oct 20)

Industry Deals & Policy

Commerce funds R&D at four firms

[Confirmed] Helion $175M, Commonwealth Fusion $85M, Vertical Semiconductor $73M, Sibelco $56M, all ceilings, with a non-voting Commerce stake as a condition. These are not final awards (Commerce, Oct 22)

METI plans ¥400bn in Rapidus equity

[Reported] ¥150bn, ¥150bn and ¥100bn across FY2027-29 (about US$2.5bn, press conversion), lifting state equity to ¥650bn. It unlocks about ¥2tn in private loans and depends on the annual fiscal investment and loan budget request (Business+IT, Oct 20)

NEDO funds two photonics projects

[Confirmed] NTT Innovative Devices leads Furukawa Electric, Shinko Electric and Japan Semiconductor toward 10x-plus productivity. PFN and Tenstorrent develop a photonics xPU (NTT, Oct 20)

Samsung, SK hynix raise NAND layers

[Confirmed] Both confirm the move to higher layers and consult Washington. **[Reported]** Xi'an targets 286-layer V9 NAND by 2027; Dalian goes from 192 to 240+ layers. How far US equipment licences were granted is unclear (Reuters, Oct 21)

State & Local Policy

California signs AI training deals

[Confirmed] Governor Newsom said on Oct 21 the state agreed with Google, Adobe, IBM and Microsoft to train students in grades 9-12, community colleges and the state universities for AI jobs, at no cost to the state. No headcount or dollar figures, and nothing on semiconductors. (Governor's office, Oct 21)

Mississippi seeks about $6.1M from MZX Tech

[Confirmed] The state environmental agency (MDEQ) seeks about $6.1M over land disturbed at three Southaven sites without stormwater permits, per an Oct 22 SEC filing. Only one outlet reports the $25,000-a-day basis and names MZX Tech, SpaceXAI's parent. **[Outlook]** Talks continue. (DeSoto Times-Tribune, Oct 23)

Memphis halts data-center building 135 days

[Confirmed] On Oct 20 the council rejected a longer moratorium and passed a substitute ordinance halting data-center construction for 135 days; accounts of the rejected term differ, one year or 18 months. The same evening Amazon dropped its Ashburn, Virginia campus, agreeing to rezone with a data-center ban.
(CBS News, Oct 21)

Sources & Certainty Tags

Certainty tag legend

- [Confirmed] decided or announced fact
- [Outlook] plan, target or forecast
- [Reported] media report, not company-confirmed
- [Proposal] proposal or recommendation
- [Checked] result of our own primary-source check
- [View] our interpretation (Japan slide only)

Outlets cited in this issue

- Primary: NVIDIA, US Commerce/NIST, NTT, Lam Research, Meta, Waymo, Tenstorrent, Infineon, PyTorch, X-energy, Office of the Governor of California, Federal Register
- Press: Reuters (via Yahoo Finance), The Information, CBS News, CNA/Focus Taiwan, TechCrunch, Tom's Hardware, Blocks & Files, Business+IT, 9to5Mac, design-reuse, DeSoto Times-Tribune
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