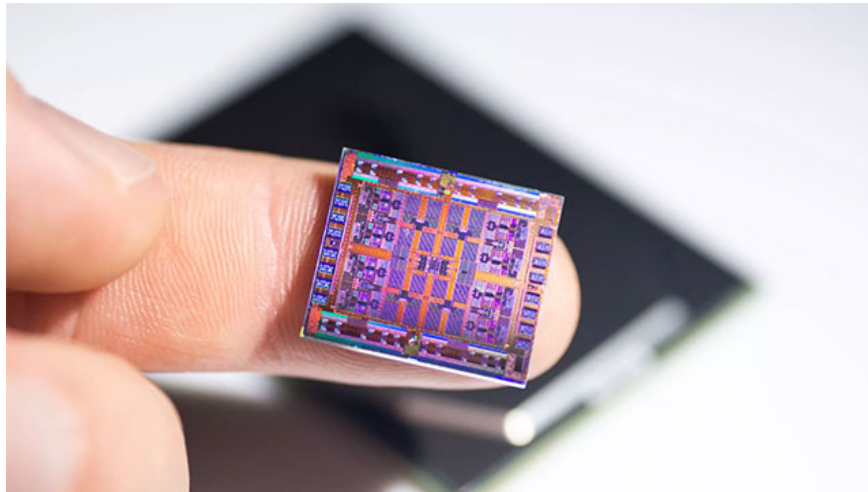


2nm chip prices expected to increase sharply

TSMC reportedly began taking orders for 2nm wafers earlier this month, with prices estimated at up to \$30,000/wafer.

TSMC reportedly began taking orders for 2nm wafers earlier this month, with prices estimated to be as high as \$30,000 per wafer. It's unclear whether the semiconductor giant will be able to lower prices once it reaches a certain production scale, but the price tag puts companies like Apple, Qualcomm, MediaTek, and others in a difficult position. On the one hand, no company wants to fall behind in technology, but on the other hand, increasing the price of chips using the 2nm process could force phone makers to incur additional costs. In other words, future mobile devices equipped with the next-generation chips will have no choice but to increase their prices.



Impact on the mobile chip market

TSMC will need time to ramp up 2nm wafer production. But until then, rising manufacturing costs will force the likes of Apple, Qualcomm, and MediaTek to charge higher prices for their processors. Previously, TF International Securities analyst Ming-Chi Kuo said that not all iPhone 18 models will use 2nm A-series chips due to high wafer costs, and predicted that only the high-end iPhone 18 Pro and iPhone 18 Pro Max models will be equipped with the chip.

Qualcomm is reportedly working on not one but two 2nm chips, one of which is the Snapdragon 8 Elite Gen 3. The semiconductor company is well aware of the consequences of relying solely on TSMC, which is why it is still exploring a dual-sourcing option to take advantage of Samsung's advanced technology nodes. As for MediaTek, the Taiwanese manufacturer could gain a larger market share by selling its upcoming Dimensity 9600 chip at a lower price to phone makers.

While the prediction of a price increase for 2nm chips is well-founded, given the fact that the demand for 2nm wafers is much higher than the current 3nm, the possibility of TSMC reducing prices due to production scale is still possible. Let's wait and see!

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