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Macronix Aiming to Cut NAND Prices

CUPERTINO, Calif. — Miin Wu believes that he can cut 3D NAND prices by a third. The founder of Macronix is raising funds for a three-year effort that is both ambitious and pragmatic. The NOR and ROM maker seeks funds to expand by a little more than 10% of its current capacity of about 400,000 12-inch equivalent wafers/month.

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IoT Boosting MCU Market

SAN FRANCISCO — The market for microcontrollers is forecast to rise steadily over the next five years, due mostly to the the increasing prevalence of sensors and the rise of the Internet of Things (IoT)

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MicroLED Apple's and Samsung's Next Holy Grail

The Apple Watch Series 4 surprised observers at Apple's annual iPhone event last week by stealing the show from the latest iPhone generation. With rounded corners, a larger display, and built-in EKG scanner, the new Apple watch was billed in some media reports as "the most sought-after gadget in the aftermath of Apple's fall hardware refresh."

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TALK TO US



Facebook Working on Chips

SAN JOSE, Calif. — A Facebook executive confirmed reports that the social networking giant is hiring chip engineers and designing at least one ASIC. The news came at the @Scale event here, where Facebook announced that five chip companies will support Glow, an open-source, deep-learning compiler that it backs.

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Samsung Reportedly Plans to Cut Memory Production

SAN FRANCISCO — South Korea's Samsung Electronics is cutting back plans for memory production increases in an effort to keep supplies tight in the face of slowing demand, according to a report by the Bloomberg news service.

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Future Horizons Ltd, • 44 Bethel Road • Sevenoaks • Kent TN13 3UE • England

Tel: +44 1732 740440 • Fax: +44 1732 740442

e-mail: mail@futurehorizons.com • <http://www.futurehorizons.com/>

Affiliates in Europe, India, Israel, Japan, Russian, San Jose California, USA

Macronix Aiming To Cut NAND Prices

CUPERTINO, Calif. — Miin Wu believes that he can cut 3D NAND prices by a third. The founder of Macronix is raising funds for a three-year effort that is both ambitious and pragmatic.

The NOR and ROM maker seeks funds to expand by a little more than 10% of its current capacity of about 400,000 12-inch equivalent wafers/month. An extra 50,000 wafers/month will initially be in traditional 3D NAND. Once it establishes a customer base, it will ramp a novel architecture that it claims sports 30% lower cost per bit.

If all goes well, the company aims to release its first chips in in a little more than two years. Miin Wu was in Silicon Valley recently to discuss with equipment makers details of key etch tools needed to make competitive 3D NAND parts.

IoT Boosting MCU Market

SAN FRANCISCO — The market for microcontrollers is forecast to rise steadily over the next five years, due mostly to the the increasing prevalence of sensors and the rise of the Internet of Things (IoT).

MCU shipments are projected to rise by 18% this this year, reaching 30.6 billion units. It is forecasted that MCU sales will increase 11% to reach a new all-time high of \$18.6 billion this year, with further growth of 9% to \$20.4 billion expected in 2019.

Over the next five years, it has been predicted that MCU sales will increase by a compound annual growth rate (CAGR) of 7.2%, reaching nearly \$23.9 billion in 2022. Unit shipments are forecast to increase by an 11.1% CAGR over the same period, reaching roughly 43.8 billion units in 2022.

MicroLED Apple's And Samsung's Next Holy Grail

TOKYO — The Apple Watch Series 4 surprised observers at Apple's annual iPhone event last week by stealing the show from the latest iPhone generation. With rounded corners, a larger display, and built-in EKG scanner, the new Apple watch was billed in some media reports as "the most sought-after gadget in the aftermath of Apple's fall hardware refresh."

Patrick Moorhead, founder and president of Moor Insights & Strategy, said, "With Watch Series 4, Apple continued its differentiated approach of creating a 'computer on the wrist' that runs real apps, not just applets." He called the Series 4's 30% bigger viewable image area as key to new uses. He added that users might prefer to "rely more on their Watch than their iPhones.

Facebook Working On Chips

SAN JOSE, Calif. — A Facebook executive confirmed reports that the social networking giant is hiring chip engineers and designing at least one ASIC. The news came at the @Scale event here, where Facebook announced that five chip companies will support Glow, an open-source, deep-learning compiler that it backs.

Facebook "is absolutely bringing up a silicon team focused on working with silicon providers, and we have a chip we're building, but it's not our primary focus," said Jason Taylor, vice president of infrastructure at Facebook. The chip is "not the equivalent of [Google's] TPU" deep-learning accelerator, he added, declining to provide further details on its focus or time frame.

Working with the estimated 50 companies designing AI accelerators is one focus for the new Facebook chip group. "There will be a lot of [accelerator] chips in the market," said Taylor at a press roundtable. "The big question is whether the workloads they are designed for are the important ones at the time.

Samsung Reportedly Plans To Cut Memory Production

SAN FRANCISCO — South Korea's Samsung Electronics is cutting back plans for memory production increases in an effort to keep supplies tight in the face of slowing demand, according to a report by the Bloomberg news service.

The report, which cites unnamed sources said to be briefed on the matter, said that Samsung now expects DRAM bit growth of less than 20% this year and NAND flash bit growth of about 30%. Samsung had said earlier this year that it expected DRAM bit growth of about 20% and NAND bit growth of about 40% this year.

Samsung declined to comment in the Bloomberg report and also declined an EE Times request for comment through a spokesperson.