NVIDIA Expands Commitments With Supply Chain Partners to Support AI Infrastructure Buildout

Long-Term Supply Agreements Across Multiple Critical Inputs Position NVIDIA for Sustainable Growth

News Summary:

- New agreements with Kinsus and Samsung Electro-Mechanics support additional substrate capacity and expanded production capabilities at existing factories.
- NVIDIA's work with Amkor and SPIL expands advanced packaging capacity for current and next-generation accelerated computing platforms.
- NVIDIA Vera Rubin NVL72 and Vera CPUs began volume shipments in the third quarter, leveraging TSMC's 5nm, 3nm and CoWoS advanced packaging technologies.
- Foxconn is deepening its collaboration with NVIDIA, drawing on its global production network to support next-generation GPU and networking platforms.

NVIDIA today announced expanded commitments with supply chain partners to support sustainable long-term growth, aligning supply and manufacturing capacity with demand for its accelerated computing and AI infrastructure platforms.

Working with Amkor Technology, Foxconn, Kinsus Interconnect Technology, Samsung Electro-Mechanics, Siliconware Precision Industries (SPIL) and TSMC, NVIDIA is expanding manufacturing capacity across substrates, advanced packaging, wafer and contract manufacturing to scale production of its current and next-generation accelerated computing platforms.

“Our supply chain is a strategic advantage," said Debora Shoquist, executive vice president of operations at NVIDIA. “Our work with these partners builds on our manufacturing foundation for long-term growth, expanding capacity across components, advanced packaging and system production to deliver the accelerated computing platforms our customers need."

Increasing Substrate Capacity and Production Capabilities
NVIDIA is expanding its substrate supply commitments with Kinsus and Samsung Electro-Mechanics, adding manufacturing capacity and improving production capabilities at existing factories.

Under a new agreement with NVIDIA, Kinsus plans to expand its advanced ABF package substrate manufacturing capacity dedicated to NVIDIA by more than 3.5x over current levels from its Youth campus in Taoyuan, Taiwan.

Production is expected to begin in the second half of 2027, with the additional capacity targeted for the third quarter of 2028. This multiyear agreement builds on the companies' existing supplier relationship and supports NVIDIA's long-term supply planning for its accelerated computing platforms.

“We believe AI will be one of the most important technology transitions of our lifetime," said Scott Chen, CEO and president of Kinsus. “After more than a decade of partnership with NVIDIA, we are excited to continue building the future together."

NVIDIA and Samsung Electro-Mechanics have amended their existing substrate supply agreement to improve operational capabilities at existing factories in support of increased production of NVIDIA's accelerated computing platforms.

The amendment builds on the companies' previously announced multiyear collaboration supporting substrate manufacturing in Sejong and Busan, South Korea, for NVIDIA's compute and high-speed networking technologies.

“By combining our world-class substrate fine-processing technology and high-reliability MLCC technology, we will perfectly fulfill our role as a total solution provider so that NVIDIA's AI platform can be supplied to the global market on time, with the highest performance and quality," said Duck-Hyun Chang, CEO of Samsung Electro-Mechanics.

Scaling Advanced Packaging Through Multiyear Agreements
NVIDIA's advanced packaging plans include a new capacity expansion with SPIL and previously announced agreements supporting Amkor's manufacturing expansion in the U.S. and South Korea.

NVIDIA is supporting Amkor's expansion of advanced packaging capacity in Arizona and South Korea through multiyear agreements announced in July and October 2026, totaling nearly $3 billion. The agreements include prepayments to help Amkor scale manufacturing capacity for NVIDIA's long-term production needs.

“Our agreements with NVIDIA support investments in Arizona and South Korea that will serve multiple generations of AI

platforms," said Kevin Engel, president and CEO of Amkor. “That long-term planning allows us to advance our packaging technologies and add manufacturing capacity as NVIDIA's production needs grow."

NVIDIA and SPIL are expanding advanced packaging operations in Taiwan under a multiyear agreement supported by multibillion-dollar funding from NVIDIA. The expansion will increase contracted advanced packaging capacity dedicated to NVIDIA by mid-2029.

The project includes new production lines with turnkey support spanning bumping, interposer wafer fabrication, assembly and testing. These capabilities support semiconductor products with demanding requirements for computing performance, bandwidth, power efficiency and system integration.

“SPIL is proud to strengthen our collaboration with NVIDIA," said C.W. Tsai, CEO and chairman of the board of SPIL. “This agreement enhances our ability to support next-generation packaging technologies and deliver the performance and reliability required for future AI systems."

Next-Generation Technologies for Agentic AI
The third quarter marked the first volume shipment of NVIDIA Vera Rubin NVL72 and Vera CPUs for agentic AI. These products take advantage of TSMC's 5nm, 3nm and CoWoS advanced packaging technologies.

“TSMC and NVIDIA share a longstanding partnership built on semiconductor innovation," said Dr. Kevin Zhang, senior vice president and deputy co-COO at TSMC. “This deep collaboration allows us to plan for future technology requirements and prepare our manufacturing capabilities as NVIDIA brings new platforms to market."

Leveraging Global Manufacturing Footprint for GPU and Networking Platforms
“Foxconn continues to deepen its collaboration with NVIDIA across next-generation GPU and networking platforms," said Young Liu, chairman of Foxconn. “By leveraging its integrated global production network spanning Asia, North America, and Europe, Foxconn is well-positioned to support the volume ramp-up of next-generation AI infrastructure."

Building on Global Supply Chain Expansion
These commitments build on NVIDIA's decades-long partnerships and recent commitments announced in October for manufacturing expansions with Amkor, IBIDEN, King Yuan Electronics (KYEC), Samsung Electro-Mechanics, SPIL and Unimicron. Those plans included an aggregate 2.5x increase in substrate capacity over three years, expanded advanced packaging, a doubling of semiconductor testing capacity from 2026 to 2027 and a 15x increase in SPIL's optical-engine capacity by mid-2027, with aims for another doubling by the end of 2028.

“Our strong and long-standing collaboration with NVIDIA has continued to develop in the area of high-performance IC package substrates," said Koji Kawashima, president and chief executive officer at IBIDEN. “Through the expansion of our Ono Plant, we will continue to strengthen our production capabilities and meet growing demand."

“Our work with NVIDIA demonstrates the value of close collaboration between chip design and semiconductor testing," said Gauss Chang, president at KYEC. “Expanding our testing operations into the United States builds on that relationship and brings our capabilities closer to NVIDIA's growing U.S. manufacturing supply chain."

“As AI reshapes industries and societies around the world, trusted partnerships and supply chain collaboration have never been more important," said SC Chien, chairman of Unimicron. “The advanced substrate capacity investment underscores the strength of our partnership with NVIDIA and our shared commitment to support the rapid growth of AI infrastructure. By investing in advanced substrate technologies and manufacturing capabilities, Unimicron is well-positioned to help customers unlock new opportunities and share in the tremendous growth of the AI era."

About NVIDIA
NVIDIA (NASDAQ: NVDA) is the world leader in AI and accelerated computing.

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