

Roundup: The latest developments in chips and semiconductors

Article

A snapshot of the semiconductor landscape: Chip delivery times shrank again in August, indicating that the yearslong global chip shortage could be easing.

The gap between when a chip is ordered and when it is delivered averaged 26.8 weeks in August, per the **Susquehanna Financial Group's** data—a day shorter than the previous month. That's still a little more than 14 weeks behind delivery times at the onset of the pandemic.

Intel goes after NVIDIA with GPU pivot: Intel, which has fallen behind in computer CPUs, is now entering the desktop GPU market with **Arc A770** and **A750 GPU**, [per](#) Engadget.

- Intel says its GPUs will outperform **Nvidia's** midrange **RTX 3060** models when they ship in mid-October.
- It has launched a GPU business in time to support the [growth](#) in cloud gaming and streaming.
- **Nvidia has a 10% market share in the overall GPU market** and 82% of all the GPU market share in the discrete graphics card market, [per](#) Entrepreneur.

Our take: Intel has an opportunity to disrupt the GPU space by competing on price and performance. If successful, Intel's GPU could rattle market leaders like Nvidia and **AMD** while creating another profit center for Intel.

Samsung squares off with TSMC on 2 nanometer chips: Samsung is all-in on making the world's most advanced microprocessors in five years, [per](#) CNBC. The company said it will begin making chips in the 2 nm process, smaller than the 4 nm chips made by **TSMC** and used in the **iPhone 14**.

- Samsung, the world's largest chipmaker by revenue, is already [working on](#) 3 nm chip technology.
- The company is [building](#) a \$17 billion chip fab in Texas, which will create 1,800 jobs when it opens in 2024.

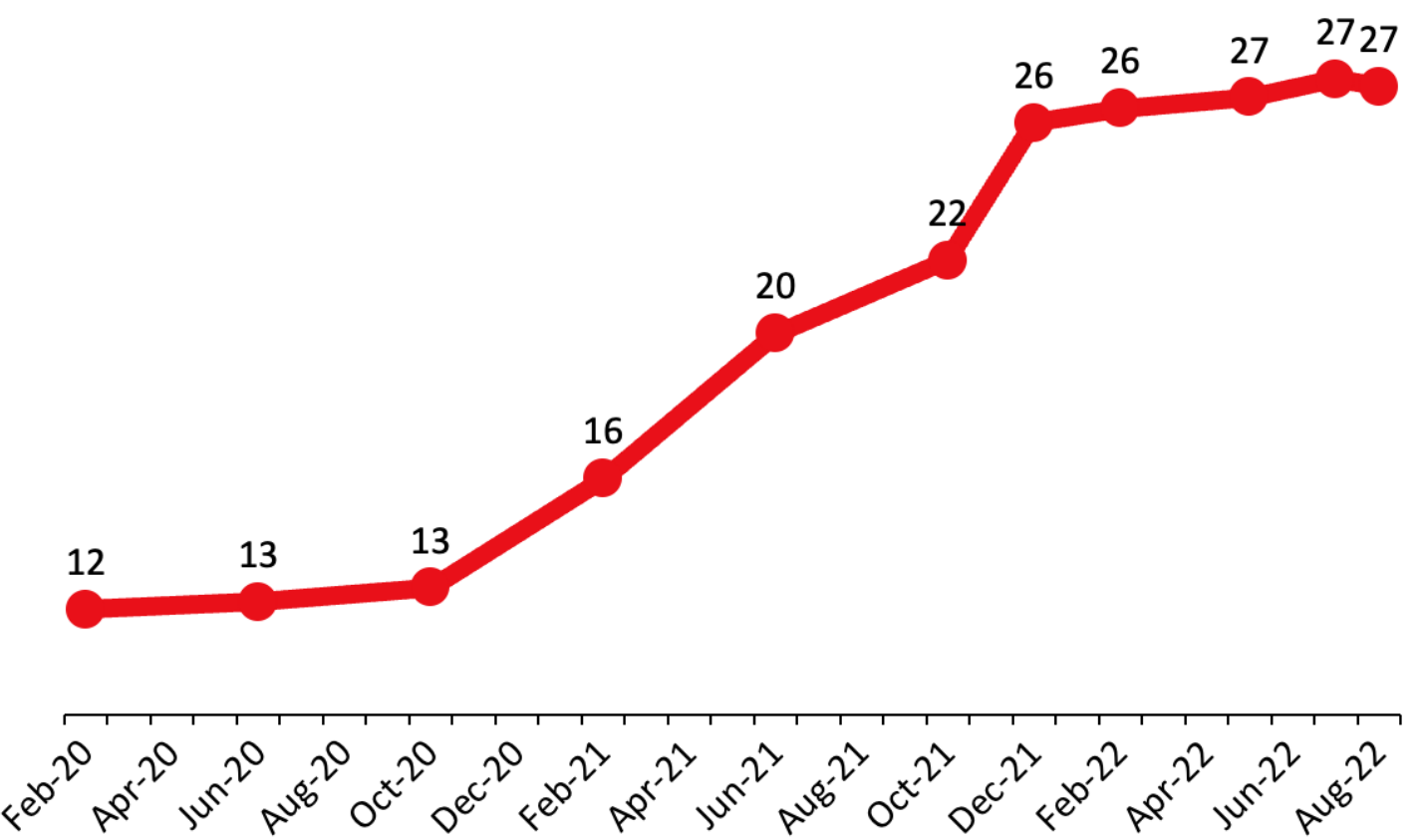
Our take: Samsung has the momentum to challenge TSMC in high-end chips. As a producer of smartphones, tablets, and PCs, Samsung's motivation to create the whole widget could help it succeed.

Micron pledges \$100 billion for New York factory: The chipmaker, which develops memory and storage solutions used in EVs, consumer electronics, PCs, and smartphones, plans to spend \$100 million on its Clay, New York, factory over the next 20 years.

- **Micron said the project will generate nearly 50,000 jobs** — about 9,000 Micron employees and more than 40,000 jobs for suppliers and contractors, [per](#) The New York Times.
- "There is no doubt that without the CHIPS Act, we would not be here today," said **Sanjay Mehrotra**, CEO of Micron.

Our take: It's been two months since President Biden signed the CHIPS Act, and there is considerable momentum from chipmakers announcing plans for US-based factories, despite the added pressure of the [tech cold war](#) with China.

Gap Between Ordering a Chip and Delivery (In weeks)



Source: Susquehanna Financial Group, 2022

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