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Jensen’s fall, Asia’s bill: Nvidia supplier Ibiden sinks 8% on Huang turmoil

Ibiden, the Japanese company that makes the substrate base for most advanced AI chips and gets nearly 30% of its sales from Nvidia, fell 8.3% as Nvidia’s board weighs options post-scandal.

By **Manasee Kurlekar** | November 12, 2026



Ibiden, the Japanese company that makes the substrate base for most advanced AI chips and gets nearly 30% of its sales from Nvidia, fell 8.3% as Nvidia’s board weighed removing Jensen Huang.

The suppliers that depend most on Nvidia are the most exposed to a leadership change.

Nvidia made up 29.4% of Ibiden’s sales in FY to March 2026, up from 20.3% the year before.

Ibiden supplies substrates for more than 80% of cutting-edge GPUs, and Nvidia is funding a tripling of its Ono plant.

On Thursday, TSMC, the largest stock in the Taiex and Nvidia’s chipmaker, fell 2.3%, Advantest lost 4.63% and SK Hynix 1.80%, while Samsung rose 0.97%.

A Korean chip official said “Our biggest question is whether a potential successor would maintain the same favourable relationship with us.”

Read online: https://worldbusinesswatch.com/market-signals/28/407/jensens-fall-asias-bill-nvidia-supplier-ibiden-sinks-8-on-huang-turmoil.html
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