

300493

2022-003

	☒ ☒
	☒

		JP MORGAN	
		Don Vally	
		APS	

PZT

TWS

MEMS(Micro-Electro-Mechanical Systems)

MEMS

2021 MEMS 300

450 RMB 13%

2021 12

Mems 90 Mems

IC

MEMS

B

					pixel
				3d	
	MEMS		MEMS	CMOS	chiplet
	mems	ASIC			
			Chiplet	2.5d	3d
		2.5d	3d		pcb sip
			pcb	sip	
			Chiplet	Intel	
				MEMS	
					pzt
	pzt				
		mems		+	fab
		pzt			
					b
	VR AR				
				pzt	
		pzt		mems	l
Wafer	8		cmos		cmos

MEMS

XMEMS

uSound(ST)

4d

Q1 Mems

TWS

SMT

	AR	MEMS	
	Q3	Mems	
		pixel	
	mems	wire bonding	1024
	Q4	Mems	
		mems	
			mems
	Q5	mems	
	tw		
			mems
			50
	mems speaker		
	Q6	mems	
			ASIC
	2		1
	Q7	Mems	

cis mems speaker

Q8

Amr tnr gmr

Asp

Q9

mems

12

1

pixel

pixel

120-140

pixel

1024

9

10

Q10

Audiopixel

1024

1024

1024

Q11

Mems

mems

mems

xMems

uSound

stm

Bosch

twS

MEMS

Q12 Mems

Mems

mems

ASIC pa

mems

AR VR

AR VR

mems speaker

mems

ar vr

mems

Q17

mems

oppo

2

mems

oppo

4 mems

Q18

1

wafer

Wafer

8000

8

8000

98%

Q19

6-9

Q20

mems

ic

MEMS

2

1 wafer

Q21

2

MEMS Speaker

	Q22 mems Q23 ASIC IC twos 1024 mems ASIC mems Q24 mems ASIC IC ASIC 23 mems 4 5 RMB
	2022 11 29