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Apple Expands U.S. Manufacturing With \$600 Billion Commitment.

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Apple Inc. (NASDAQ: AAPL) has announced a significant expansion of its U.S. investment, adding \$100 billion to its previous pledge and bringing the total to \$600 billion over the next four years. The decision, revealed on Wednesday, Aug. 6, comes as the White House imposes new tariffs on dozens of countries, underscoring the importance of securing domestic manufacturing capabilities.

The announcement was made alongside President Donald Trump, who has long advocated for more American-made products, particularly Apple's flagship iPhones. While the plan stops short of full-scale smartphone assembly in the U.S., it lays out concrete steps for building essential components domestically.

Key suppliers in this initiative include Corning, Coherent, GlobalWafers America, Applied Materials, Texas Instruments, Samsung, GlobalFoundries, Amkor Technology, and Broadcom. Apple has also reaffirmed its commitment to sourcing rare earth materials from MP Materials.

According to the company, Corning will continue to provide the glass used in iPhones and Apple Watches, while Coherent will supply VCSEL lasers used in facial recognition systems. GlobalWafers will produce semiconductor wafers for iPhones and iPads, with fabrication handled by Texas Instruments and Taiwan Semiconductor Manufacturing's new facility in Arizona.

"Apple engineers work closely with suppliers across the United States to create silicon chips that are on the leading edge of innovation," said Apple Chief Operating Officer Sabih Khan in a company statement. "We're committed to supporting U.S. suppliers involved in every key stage of the chip-making process. We want America to lead in this critical industry, and we're expanding our efforts to grow a silicon manufacturing ecosystem that will benefit innovators across America."

This move mirrors strategies from other technology leaders, such as TSMC, which is investing \$165 billion in Arizona to build multiple advanced fabrication plants and research centers. These projects aim to reduce dependence on foreign supply chains and avoid potential disruptions from trade disputes or tariffs.

Apple's renewed U.S. focus follows a period of stagnant stock performance. Revenue growth has also flattened in recent years, despite Apple holding its position as one of the largest publicly traded companies in the world.

Investors hope the domestic manufacturing push, combined with a solid fiscal third-quarter earnings report, will help drive future growth. Apple's Services division remains a strong performer with higher profit margins, but hardware sales still generate the bulk of its revenue.

The broader impact on product pricing remains uncertain. Manufacturing in the U.S. generally carries higher costs, but the benefits of a secure, tariff-resistant supply chain could outweigh the risks for Apple in the long term.

While Apple's price-to-earnings ratio of 32 is reasonable for the tech sector, analysts remain divided on its short-term potential. The company's latest move could bolster its reputation with policymakers and consumers alike, positioning it to better compete in an increasingly competitive and politically charged global marketplace.