

## **TrendForce : Restrictions on Export of AI Chips from NVIDIA and AMD to China Will Weaken Sales Momentum and Prompt Supply Chain to Assess Extent of Impact**

### **AI Chips Including the H20 and MI308 Will Have to Obtain Licenses Under New Review Procedure Before They Can Be Exported to China; NVIDIA and AMD Are Forced to Recognize Related Losses**

According to the latest investigation by global market intelligence firm TrendForce, the U.S. government notified NVIDIA on April 9, 2025, that export licenses are required for exporting NVIDIA's H20 chip (or other chips with equivalent performance in memory bandwidth and interconnect bandwidth) to China, including Hong Kong and Macau, or to companies headquartered in these regions. This restriction is effective indefinitely and is expected to have significant repercussions, impacting not only NVIDIA's sales of the H20 but also AMD's sales of the MI308 and other similar AI chips.

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### **New Review Mechanism Aims to Prevent the Use of NVIDIA's H20 or HPC Chips in Chinese Supercomputers as This Presents National Security Concerns for US Government; Some CSPs May Still Be Able to Obtain These Chips for General AI Applications**

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## New Review Mechanism on China by the US May Affect Subsequent AI Business Development in China for NVIDIA and AMD

Implication of Executive Order	Impact
New review mechanism by the US government	The US government will have a new set of rules for reviewing performance to allow for a more timely review of AI chips including those being sold to China. This includes a new review process.
AI chips required to be approved by the US government	A requirement to review AI chips, including NVIDIA's A100 and A100's A100, are prohibited from being sold to or transferred to Chinese organizations. A Chinese organization will not be able to apply for a license, but could use a license to buy AI chips from other countries.
AI chips required to be approved by the US government	A100 is a general purpose AI chip. A100 is a general purpose AI chip. A100 is a general purpose AI chip. A100 is a general purpose AI chip.
AI chips required to be approved by the US government	A license to export AI chips is a prerequisite for general purpose AI applications. The process to license AI chips is a prerequisite for general purpose AI applications. The process to license AI chips is a prerequisite for general purpose AI applications.

Source: TrendForce, Apr. 2025

## Chinese Market Expected to Weaken in Growth on External Purchases of High-End GPUs from NVIDIA and AMD; Future Path to March towards Autonomous AI Chip Solutions



New US Review Mechanism May Undermine H20 Shipment and Lower NVIDIA's High-End GPUs to Roughly XXXX% in 2025



Source: TrendForce, Apr. 2025

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**H20 and MI308 Chips Together Are Projected to Account for Around XXXX% of Total HBM Demand in 2025, Though There Is Now a Risk of Downward Revision**

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### HBM Specifications Adopted by Mainstream GPU Offerings

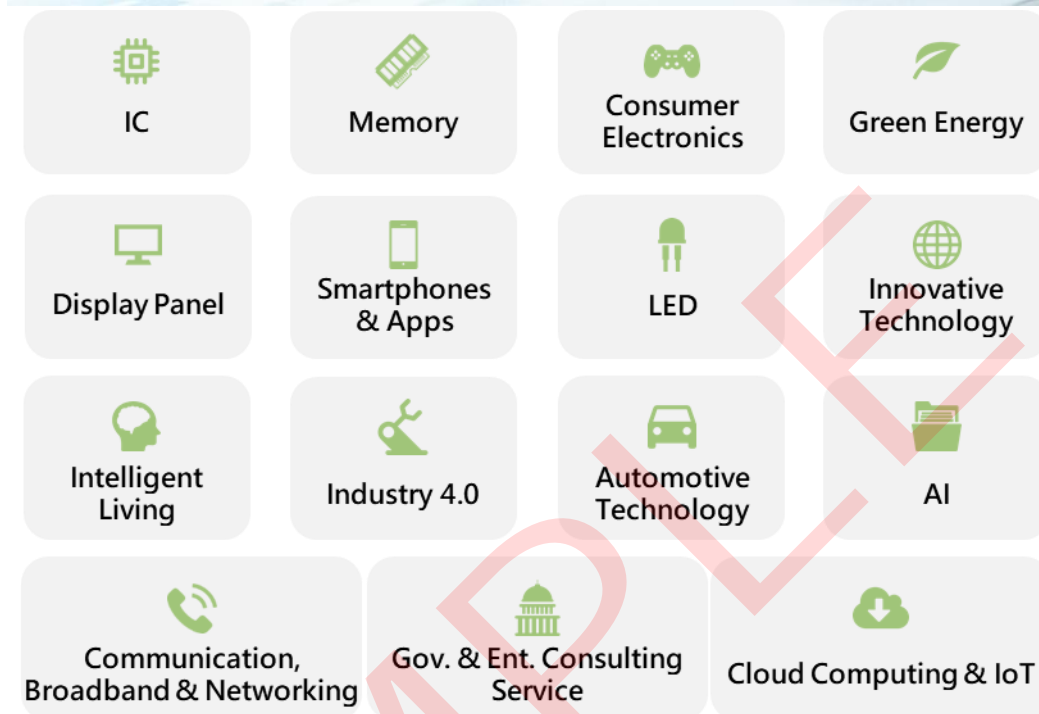
Company	GPU Name	2024	2024	2024	2024	2025	2025	2025	2025	2025	2025
NVIDIA	RTX 5090	[Blurred]									
	RTX 5080	[Blurred]									
	RTX 5070	[Blurred]									
AMD	RDNA 3	[Blurred]									
	RDNA 4	[Blurred]									

Source: TrendForce, Apr. 2025



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