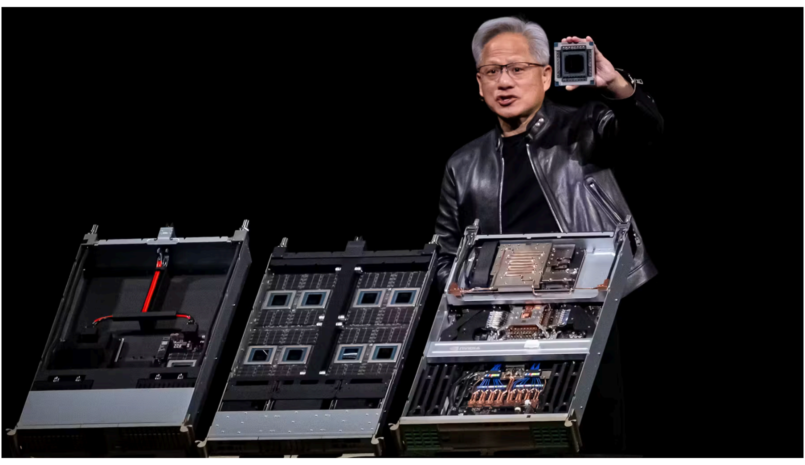
Exclusive 独家报道

China Weighs Allowing Purchases of New Nvidia Chips by ByteDance, Alibaba

中国考虑允许字节跳动、阿里巴巴购买新款 Nvidia 芯片



Jensen Huang, CEO of Nvidia. Photo by David Paul Morris / Getty Images.

Nvidia 首席执行官黄仁勋。图片来源：David Paul Morris / Getty Images。

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Sep 27, 2026, 8:00am PDT

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China's government has signaled it could allow some domestic companies to buy a new Nvidia chip built for high-end professional computers, according to two people familiar with the matter, as the country's AI firms strain for enough computing power to run their chatbots and agents.

据两名知情人士透露，中国政府已发出信号，可能允许部分国内公司购买一款专为高端专业计算机设计的新型 Nvidia 芯片，目前该国的人工智能企业正面临运行其聊天机器人和智能体所需的算力不足的困境。

The Ministry of Industry and Information Technology, which oversees China's tech sector, recently asked companies including Alibaba Group and ByteDance to report on their plans to buy Nvidia's RTX Pro 5500 chips, released this month—specifically how many they want to buy and what they'll use them for, the people said. The ministry has told some Chinese companies the government intends to approve the purchases, they said. Even if that happens, though, it's unclear when the approvals would come, how many chips officials would allow and what standards they would use to decide.

据知情人士透露，负责监管中国科技行业的工业和信息化部最近要求包括阿里巴巴集团和字节跳动在内的公司，就其购买英伟达本月发布的 RTX Pro 5500 芯片的计划提交报告，具体包括购买数量及用途。知情人士表示，工信部已告知部分中国公司，政府有意批准这些采购。然而，即便如此，目前尚不清楚何时会获得批准、官员将允许购买多少芯片，以及他们将采用何种标准进行决策。

The Takeaway 核心要点

- Chinese government weighs allowing purchases of new Nvidia AI chips for professional computers

  中国政府正考虑允许采购用于专业电脑的新型英伟达 AI 芯片
- Approval could give Nvidia new momentum in China's critical AI chip market

  此举获批可能会为英伟达在中国关键的 AI 芯片市场带来新动力
- ByteDance plans to order 1 million RTX Pro 5500 chips for AI models

字节跳动计划为 AI 模型订购 100 万颗 RTX Pro 5500 芯片

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Nvidia’s China business has faced hurdles from both the U.S. and Chinese governments. Washington has blocked sales of its more advanced AI chips to Chinese buyers to constrain development of the country’s AI industry. Beijing has largely barred Chinese companies from buying Nvidia’s advanced chips, both to help domestic suppliers and because of national security concerns regarding issues such as potential backdoors that could funnel data to the U.S.—a possibility Nvidia has strongly denied.

Nvidia 的中国业务面临着来自美国和中国政府的双重障碍。华盛顿已阻止向中国买家销售其更先进的 AI 芯片，以限制该国 AI 产业的发展。北京方面则在很大程度上禁止中国公司购买 Nvidia 的先进芯片，这既是为了扶持国内供应商，也是出于国家安全方面的考量，例如担心可能存在将数据传输至美国的后门——Nvidia 对此可能性已予以强烈否认。

Approval from China for companies to purchase the RTX Pro 5500 would remove a major barrier. The U.S. government hasn’t publicly addressed whether the chip will avoid U.S. export restrictions, although at least some industry executives are expecting it will.

如果中国批准企业购买 RTX Pro 5500，将消除一个主要障碍。美国政府尚未公开说明该芯片是否能规避美国的出口限制，尽管至少有一些行业高管预计它会做到这一点。

Nvidia has long complained about U.S. export controls. An Nvidia spokesperson said China’s domestic makers of chips and cards for workstations “have experienced unprecedented growth since 2022,” while U.S. firms “continue to be restricted by a combination of outdated U.S. export controls, which cover gaming products released nearly a half a decade ago, and China’s own limits on U.S. imports.”

Nvidia 长期以来一直对美国的出口管制表示不满。Nvidia 发言人表示，自 2022 年以来，中国国内的工作站芯片和显卡制造商“经历了前所未有的增长”，而美国公司“继续受到过时的美国出口管制（涵盖了近五年前发布的显卡产品）以及中国自身对美国进口限制的双重制约”。

Nvidia’s China Market Woes

Nvidia 的中国市场困境

Approval for purchases of the new chips would give Nvidia perhaps its best chance in more than a year to regain some momentum in China’s AI market. CEO Jensen Huang has said U.S. export controls have cut his company’s share of China’s advanced AI chip market from about 95% to zero, with domestic companies led by Huawei Technologies filling the void. Nvidia’s forecast for this quarter doesn’t include any data center revenue from China.

批准购买这些新芯片，或许将为 Nvidia 提供一年多来在回升中国 AI 市场势头方面的最佳机会。首席执行官黄仁勋曾表示，美国的出口管制已使其公司在中国先进 AI 芯片市场的份额从约 95% 降至零，以华为技术有限公司为首的本土企业填补了这一空白。Nvidia 对本季度的预测未包含任何来自中国的中心数据收入。

For Beijing, the challenge is that Chinese companies are rolling out AI products and services faster than they can find the chips to run them, compelling authorities to rethink their limits on Nvidia. Even Huawei, China’s biggest AI chip developer, can’t keep up, its rotating chairman, Eric Xu, told reporters last week.

对于北京方面而言，挑战在于中国公司推出 AI 产品和服务的速度

超过了其获取运行芯片的速度，这迫使当局重新考虑对 Nvidia 的限制。华为作为中国最大的 AI 芯片开发商，其轮值董事长徐直军上周告诉记者，即便是华为也无法完全满足需求。

Beijing made the inquiries with its companies ahead of Chinese President Xi Jinping’s visit to the White House on Thursday for talks with President Donald Trump. Huang was among the executives who attended a state dinner Thursday evening for that visit, which included discussion of AI but wasn’t expected to yield any breakthroughs on AI chip trade.

The RTX Pro 5500 isn’t one of Nvidia’s top AI chips. It lacks the high-speed links and fast, expensive memory the company puts in most chips it sells for AI data centers. It is intended for the powerful computers engineers and designers use, built on the same core as Nvidia’s best gaming card.

RTX Pro 5500 并非 Nvidia 的顶级 AI 芯片。它缺乏该公司为其销售的大多数 AI 数据中心芯片所配备的高速链路以及快速且昂贵的内存。它专为工程师和设计师使用的高性能计算机而设计，采用了与 Nvidia 顶级游戏显卡相同的核心架构。

Chinese companies want the RTX Pro 5500 anyway, with ByteDance weighing ordering about 1 million of them, the two people said. The final number could change, depending on how many chips Beijing approves and how many Nvidia can supply.

据两位知情人士透露，中国公司仍然希望获得 RTX Pro 5500，其中字节跳动正考虑订购约 100 万片。最终数量可能会发生变化，具体取决于北京批准的数量以及 Nvidia 的供应能力。

At least some potential buyers plan to put the chips into servers to help run their AI models for customers. One buyer plans to put eight RTX Pro 5500s in each server, a standard setup that lets the chips work together on larger AI models.

至少有一些潜在买家计划将这些芯片安装到服务器中，以帮助为客户运行其 AI 模型。其中一位买家计划在每台服务器中安装八块 RTX Pro 5500，这是一种标准配置，可让芯片协同处理更大的 AI 模型。

Any significant orders could help Nvidia keep some Chinese developers building on its platform instead of switching everything to competing Huawei products. Nvidia aims to start shipping the chips in late December and is targeting about 500,000 chips a quarter for China, according to two other people with knowledge of those plans. At that pace, ByteDance’s order alone would take two quarters to fill. Nvidia sales staff have told customers to order by Sept. 30 to secure supply, according to two chip buyers, who said the RTX Pro 5500 is popular because it’s good at running AI models once they’re built.

任何重大订单都可能有助于 Nvidia 留住部分中国开发者在其平台上进行开发，而不是将所有业务转向竞争对手华为的产品。据另外两名知情人士透露，Nvidia 目标是在 12 月底开始出货这些芯片，并计划每季度向中国供应约 50 万块芯片。按照这个速度，仅 ByteDance 的订单就需要两个季度才能完成。据两名芯片买家透露，Nvidia 的销售人员已告知客户在 9 月 30 日前下单以确保供应，他们表示 RTX Pro 5500 非常受欢迎，因为它在运行已构建好的 AI 模型方面表现出色。

The chip sells for 85,000 yuan to 90,000 yuan (about $13,000) in China, the two chip buyers said, which is roughly what Huawei charges for its Ascend 950PR AI chip, released earlier this year. Demand is spilling over to other Nvidia chips, too. The RTX Pro 6000D—a China-specific model that Beijing barred big Chinese tech firms from buying but smaller companies have been able to purchase—now sells for about 65,000 yuan (close to $10,000), the two buyers said, up from about 50,000 yuan (about $7,500) last year.

据两名芯片买家透露，该芯片在中国市场的售价为 85,000 元至 90,000 元人民币（约合 13,000 美元），这与华为今年早些时候发布的昇腾 950PR AI 芯片的价格大致相当。需求也正外溢到英伟达的其他芯片上。这两位买家表示，RTX Pro 6000D——一款北京禁止中国大型科技公司购买、但小型公司仍可采购的中国特供型号——目前的售价约为 65,000 元（接近 10,000 美元），高于去年的约 50,000 元（约 7,500 美元）。

Caught Between Rival Governments

夹在竞争对手政府之间

The U.S. government has allowed Nvidia to sell older AI chips to China, or chips modified to meet U.S. restrictions on computing capabilities, but Beijing often targets those chips with its own restrictions.

美国政府已允许 Nvidia 向中国销售旧款 AI 芯片，或为满足美国计算能力限制而修改的芯片，但北京方面经常针对这些芯片实施自己的限制。

For example, after Trump in December approved China sales of the H200—an AI chip Nvidia first started selling in other markets in 2024—Beijing told companies they could buy the chip only in special circumstances, The Information reported. In July, Chinese officials told some companies, including Alibaba, ByteDance and DeepSeek, that they could buy limited amounts soon if they said how many chips they needed and why.

例如，据 The Information 报道，在特朗普于 12 月批准向中国销售 H200（Nvidia 于 2024 年首次在其他市场销售的 AI 芯片）后，北京方面告诉企业，只有在特殊情况下才能购买该芯片。今年 7 月，中国官员告诉包括阿里巴巴、字节跳动和 DeepSeek 在内的一些公司，如果他们说明需要多少芯片以及原因，很快就可以购买有限数量的芯片。

Few chips arrived. H200 sales to Chinese buyers made up less than 1% of Nvidia’s data center revenue in the quarter ended July 26, according to the company, which said objections from Beijing kept it from selling the full amount its U.S. license allowed.

到货的芯片寥寥无几。据 Nvidia 称，在截至 7 月 26 日的财季中，向中国买家销售 H200 芯片的收入占其数据中心营收的比例不足 1%；该公司表示，来自北京方面的反对意见使其无法按照美国许可证允许的全额进行销售。

Beijing has been even tougher on the chips Nvidia made just for China. Last year, China’s internet regulator summoned Nvidia representatives over what it called security risks posed by the H20, a processor designed to fit within U.S. export rules. They then told ByteDance, Alibaba and Tencent Holdings to stop buying Nvidia chips until the regulator finished conducting a security review, The Information reported. They also blocked the RTX Pro 6000D due to security concerns, according to the two people familiar with the government’s discussions with companies.

北京对英伟达专门为中国制造的芯片态度更为强硬。据《The Information》报道，去年，中国互联网监管机构就 H20（一款为符合美国出口规则而设计的处理器）所带来的所谓安全风险召见了英伟达代表。随后，他们告知字节跳动、阿里巴巴和腾讯控股，在监管机构完成安全审查之前停止购买英伟达芯片。据两位知情人士透露，出于安全考虑，他们还封锁了 RTX Pro 6000D。

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