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How will Trump's chip restrictions in Southeast Asia affect China?

CHENNAI – 18 Nov, 2026 As U.S. President Donald Trump heads to China, his administration has renewed its efforts to restrict China's access to state-of-the-art semiconductors.

On Monday, Washington announced new interim rules to increase oversight of data center operators in Singapore, Malaysia, Thailand, Indonesia, and Brazil.

This measure not only limits the export of advanced chips, but also limits their access to the computing power that Chinese companies currently rent abroad to train artificial intelligence (AI) models.

In particular, Southeast Asian countries have invested heavily in data centers to achieve their AI goals – and Chinese companies seeking computing power abroad have been a key market.

But now these companies will need a license from the U.S. government to buy advanced chips from Nvidia or other U.S. chipmakers. This allows Washington to monitor whether those chips are being used to serve Chinese companies or are being smuggled into China.

This poses a new challenge for Beijing, as it relies heavily on obtaining computing services from abroad due to U.S. export restrictions. According to research by the Institute for Progress, a U.S.-based think tank, it is predicted that at least 30% of China's advanced AI computing power in 2027 will come from being rented or smuggled abroad.

