Technology

Amazon Says New Nvidia-Based Systems Won't Be Online Until 2025

AWS Won't Have Nvidia-Based Systems Online This Year

By Edward Ludlow and Ian King
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Amazon.com Inc.'s Amazon Web Services, the world's biggest cloud-computing provider, said that new systems running Nvidia Corp.'s Blackwell chips probably won't be online until early next year, a later timeline than originally anticipated.

When Nvidia introduced the new generation of processors in March, it said that partners like Amazon would have Blackwell-based products ready by the end of 2024. But after a production change – dubbed a respin – Amazon is still waiting to get major quantities of the chip to put into its data centers.

Nvidia's timelines have "shifted," AWS Chief Executive Officer Matt Garman said Thursday on Bloomberg Television. "Right now, we're working with them and we have early samples, but as they get their yields up from the respin of the Blackwell chip, it'll probably be early next year before we get production samples in real volume."

Investors are keenly focused on when Nvidia's latest product will get into the hands of customers and put to use. The chipmaker has become one of the world's most valuable companies on the strength of runaway demand for its artificial intelligence chips. Nvidia has said that – even after production delays – it expects to get billions of dollars of revenue from the processor in the fourth quarter.

AWS will be the first to deploy computers based on the new chip in significant quantities, Garman said, giving it a unique view into Blackwell's progress. Dell Technologies Inc. also has said that Blackwell-based servers will be generally available at the beginning of 2025.

Nvidia products have become a prized commodity among data center operators, which use the chips to develop AI software and services. The Santa Clara, California-based company acknowledged in August that Blackwell proved more difficult to produce than anticipated. The company said that it was making changes to improve its manufacturing yield — the number of functioning chips that come out of factories.

Supplies will be plentiful after manufacturing gains momentum, CEO Jensen Huang said in a Bloomberg Television interview at the time. "We're going to have lots and lots of supply, and we will be able to ramp," he said.
— With assistance from Matt Day