

Global AI Cluster Network Switches Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global AI Cluster Network Switches market size was valued at US\$ 14200 million in 2025 and is forecast to a readjusted size of US\$ 70428 million by 2032 with a CAGR of 21.3% during review period.

AI Cluster Network Switches are high-bandwidth, low-latency and highly reliable data-center switching systems deployed inside artificial intelligence training, inference and high-performance computing clusters to interconnect GPUs, XPU's, CPU servers, storage nodes and upstream fabrics. This research scope focuses on switch hardware systems purpose-built or explicitly positioned for AI workloads, including 400G, 800G and emerging 1.6T Ethernet switches, modular core switches, InfiniBand switching systems, Slingshot and Omni-Path high-performance interconnect switches, and open networking platforms based on switch silicon such as Broadcom Tomahawk/Jericho, NVIDIA Spectrum/Quantum and Marvell Teralynx. Core functions include RDMA/RoCE transport, congestion control, adaptive load balancing, PFC/ECN, telemetry, low-jitter forwarding, lossless fabric operation and scalable GPU-cluster connectivity.

Indicative market pricing is typically in the tens of thousands of US dollars for high-end 400G switches, from tens of thousands to well above one hundred thousand US dollars for dense 800G fixed switches, and materially higher for modular core or cluster-scale switching systems, depending on port speed, port density, silicon platform, optics, software licensing and procurement scale.

Based on our research, AI cluster network switches should not be treated as a mere high-speed extension of traditional data center switches. The industry is emerging as a

specialised hardware segment built around the communication requirements of GPU and XPU clusters, where east-west traffic, collective communication, RDMA transport, congestion control and low-jitter forwarding directly affect model training efficiency and inference throughput. The narrow scope of this report therefore focuses on switch hardware systems deployed inside AI training, inference and HPC/AI clusters, including high-speed Ethernet, InfiniBand and other high-performance interconnect switches. Adjacent products such as optical modules, cables, NICs, DPUs, servers, cloud services and pure network software are treated as related infrastructure, but not counted as the core market revenue.

From the supply side, the global market is increasingly structured around four layers: North American platform leaders and silicon ecosystems, Chinese AI data center switch suppliers, Taiwanese ODM and open networking manufacturers, and selected European data center networking vendors. NVIDIA remains structurally important because of its InfiniBand and Spectrum-X platforms; Arista, Cisco, HPE/Juniper and Dell represent the core branded Ethernet AI fabric suppliers; Huawei, H3C, Ruijie and ZTE are strategically relevant in China's intelligent computing infrastructure; and Accton/Edgecore, UfiSpace, Alpha Networks, QCT and Celestica form a critical open-switch and ODM layer. Broadcom and Marvell are not counted as switch OEMs in the narrow equipment revenue model, but their switching silicon defines much of the current 400G, 800G and emerging 1.6T product cycle.

Demand is being driven first by large-scale AI training clusters and increasingly by inference clusters, AI cloud platforms, sovereign AI infrastructure, telecom intelligent computing centers, research supercomputing facilities and enterprise private AI deployments. Training workloads require large, flat, high-radix fabrics with low job-completion time, while inference workloads are likely to broaden demand for cost-efficient Ethernet and RoCE-based deployments. This is changing the competitive logic of the market: switch vendors are competing not only on port speed and density, but also on effective bandwidth, congestion management, power efficiency, open software support, operational automation and the ability to scale AI fabrics without excessive complexity.

This report is a detailed and comprehensive analysis for global AI Cluster Network Switches market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Interconnect Protocol and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with

market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global AI Cluster Network Switches market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Cluster Network Switches market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Cluster Network Switches market size and forecasts, by Interconnect Protocol and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Cluster Network Switches market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for AI Cluster Network Switches

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global AI Cluster Network Switches market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NVIDIA Corporation, Arista Networks, Inc., Cisco Systems, Inc., HPE Juniper Networking, Dell Technologies Inc., Huawei Technologies Co., Ltd., H3C Technologies Co., Ltd., Ruijie Networks Co., Ltd., Nokia Corporation, Celestica Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

AI Cluster Network Switches market is split by Interconnect Protocol and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Interconnect Protocol, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Interconnect Protocol

Ethernet AI Switches

InfiniBand Switches

Proprietary / HPC Interconnect Switches

Other

Market segment by Port Speed Class

100G / 200G Class

400G Class

800G Class

1.6T and Above

Market segment by Product Form Factor

Fixed Box Switch

Modular Chassis Switch

Distributed Disaggregated Chassis

Integrated Fabric Appliance

Other

Market segment by Fabric Role

Top-of-Rack / Leaf Switch

Spine Switch

Super-Spine / Core Switch

DCI / Scale-Across Switch

Market segment by Application

Large-scale AI Training Clusters

AI Inference Clusters

HPC / AI Converged Clusters

Sovereign / Enterprise AI Data Centers

Other

Major players covered

NVIDIA Corporation

Arista Networks, Inc.

Cisco Systems, Inc.

HPE Juniper Networking

Dell Technologies Inc.

Huawei Technologies Co., Ltd.

H3C Technologies Co., Ltd.

Ruijie Networks Co., Ltd.

Nokia Corporation

Celestica Inc.

Accton Technology Corporation

Edgecore Networks Corporation

UfiSpace Co., Ltd.

Alpha Networks Inc.

Quanta Cloud Technology

FS.com Inc.

NADDOD

Micas Networks

AurCore Technology

Cornelis Networks

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe AI Cluster Network Switches product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Cluster Network Switches, with price, sales quantity, revenue, and global market share of AI Cluster Network Switches from 2021 to 2026.

Chapter 3, the AI Cluster Network Switches competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Cluster Network Switches breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Interconnect Protocol and by Application, with sales market share and growth rate by Interconnect Protocol, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and AI Cluster Network Switches market forecast, by regions, by Interconnect Protocol, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of AI

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Chapter 14 and 15, to describe AI Cluster Network Switches sales channel, distributors, customers, research findings and conclusion.

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