

Global AI Cluster Network Switches Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Cluster Network Switches market size is expected to reach \$ 70428 million by 2032, rising at a market growth of 21.3% CAGR during the forecast period (2026-2032).

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, 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 studies the global AI Cluster Network Switches production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Cluster Network Switches and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Cluster Network Switches that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Cluster Network Switches total production and demand, 2021-2032, (Units)

Global AI Cluster Network Switches total production value, 2021-2032, (USD Million)

Global AI Cluster Network Switches production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global AI Cluster Network Switches consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: AI Cluster Network Switches domestic production, consumption, key domestic manufacturers and share

Global AI Cluster Network Switches production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global AI Cluster Network Switches production by Interconnect Protocol, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global AI Cluster Network Switches production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global AI Cluster Network Switches market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Cluster Network Switches market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Interconnect Protocol, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Cluster Network Switches Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Cluster Network Switches Market, Segmentation by Interconnect Protocol:

Ethernet AI Switches

InfiniBand Switches

Proprietary / HPC Interconnect Switches

Other

Global AI Cluster Network Switches Market, Segmentation by Port Speed Class:

100G / 200G Class

400G Class

800G Class

1.6T and Above

Global AI Cluster Network Switches Market, Segmentation by Product Form Factor:

Fixed Box Switch

Modular Chassis Switch

Distributed Disaggregated Chassis

Integrated Fabric Appliance

Other

Global AI Cluster Network Switches Market, Segmentation by Fabric Role:

Top-of-Rack / Leaf Switch

Spine Switch

Super-Spine / Core Switch

DCI / Scale-Across Switch

Global AI Cluster Network Switches Market, Segmentation by Application:

Large-scale AI Training Clusters

AI Inference Clusters

HPC / AI Converged Clusters

Sovereign / Enterprise AI Data Centers

Other

Companies Profiled:

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

Key Questions Answered:

1. How big is the global AI Cluster Network Switches market?
2. What is the demand of the global AI Cluster Network Switches market?
3. What is the year over year growth of the global AI Cluster Network Switches market?
4. What is the production and production value of the global AI Cluster Network Switches market?
5. Who are the key producers in the global AI Cluster Network Switches market?
6. What are the growth factors driving the market demand?

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