

Global Data Center Fabric Software Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Data Center Fabric Software market size was valued at US\$ 8057 million in 2025 and is forecast to a readjusted size of US\$ 14505 million by 2032 with a CAGR of 8.7% during review period.

Data Center Fabric Software is a software layer used to build, control, virtualize, automate, and operate the interconnected switching fabric within a data center. It coordinates physical leaf-spine infrastructure and logical network services through routing and switching protocols, centralized policies, programmable interfaces, telemetry, and lifecycle-management functions. The research scope covers On-premises Deployment and Cloud Deployment, with product functions classified as Network Operating System (NOS), Virtual Overlay Network Software, and Others. Core capabilities typically include device and topology discovery, underlay and overlay provisioning, BGP EVPN and VXLAN control, network segmentation, policy management, zero-touch provisioning, configuration validation, streaming telemetry, fault analysis, upgrades, rollback, and API-based integration with orchestration and infrastructure-as-code tools. Data Center Fabric Software serves Large Enterprises and SMEs operating Internet Data Centers, Enterprise Data Centers, and other high-density computing environments. Product value is determined by scalability, protocol reliability, hardware compatibility, automation depth, observability, security, operational continuity, and the ability to manage distributed or multi-vendor fabrics consistently.

Key Findings

Network operating systems form the foundation of programmable data center fabric control

On-premises deployment remains central while cloud-managed operations continue gaining relevance

Internet data centers represent the most demanding scale and automation use case

AI infrastructure is increasing demand for telemetry automation and deterministic network operations

Market Trends

Data Center Fabric Software is evolving from device-level configuration toward policy-driven, fabric-wide automation. BGP EVPN and VXLAN are increasingly used to separate the physical underlay from virtual network services, while centralized controllers automate provisioning, segmentation, upgrades, compliance, and multi-site connectivity. Product development is also moving toward intent-based workflows, infrastructure-as-code integration, continuous validation, AI-assisted fault analysis, and cloud-managed operations. Long-term differentiation will depend on combining open programmability with predictable performance, operational resilience, and broad hardware interoperability.

Market Dynamics

The market is shaped by rising fabric scale, greater east-west traffic, and the operational difficulty of managing large numbers of switches through device-by-device processes. Customers increasingly expect a unified software layer covering provisioning, policy, telemetry, troubleshooting, and lifecycle management. However, purchasing decisions remain closely connected to switching hardware, protocol architecture, existing automation tools, and engineering capabilities. Vendors must therefore balance software openness, operational simplicity, platform integration, and support accountability.

Drivers

Expansion of cloud services, AI and high-performance computing clusters, distributed applications, virtualization, and containerized workloads is increasing data-center network density and traffic complexity. These environments require scalable leaf-spine architectures, rapid provisioning, consistent segmentation, and timely identification of congestion or failures. Shorter application deployment cycles are also pushing network teams toward automated configuration and infrastructure-as-code practices. Data Center Fabric Software helps operators reduce repetitive tasks, improve configuration consistency, and manage expanding infrastructure without proportionally increasing engineering headcount.

Restraints

Adoption can be limited by migration complexity, dependence on installed switching hardware, integration requirements, and shortages of engineers familiar with EVPN, VXLAN, automation, and programmable networking. Replacing an established NOS or overlay architecture can affect routing policies, operational procedures, security controls, and monitoring systems. Multi-vendor environments may expose differences in feature implementation and telemetry models, while software subscriptions, controller infrastructure, support contracts, and staff training increase total implementation costs. Risk-sensitive operators may therefore adopt new architectures gradually.

Opportunities

Significant opportunities exist in AI data-center fabrics, disaggregated networking, multi-vendor automation, cloud-managed operations, and unified management of distributed data centers. Open NOS platforms and standardized APIs create room for software providers to decouple network functions from specific switching systems. Additional opportunities arise from automated fabric validation, digital-twin testing, predictive fault detection, closed-loop remediation, and integrated security policy. Providers that simplify the deployment and operation of high-bandwidth fabrics can address both hyperscale requirements and enterprises with limited network engineering resources.

Challenges

The principal challenges are maintaining control-plane stability, configuration consistency, protocol interoperability, and service continuity as fabrics expand. Software must process large volumes of telemetry without creating excessive storage, network,

or computing overhead. Vendors also need to manage hardware abstraction, ASIC compatibility, operating-system upgrades, feature parity, and backward compatibility. Security risks include unauthorized policy changes, compromised management interfaces, and errors propagated through automated workflows. Commercial success further depends on proving that operational savings and improved availability outweigh migration and subscription costs.

Value Chain Analysis

The upstream layer comprises switching ASICs, white-box and branded switches, servers, network interface controllers, optical interconnects, routing protocols, open-source networking projects, and standards-based management interfaces. These elements determine forwarding capacity, port speed, buffer characteristics, protocol support, and the level of hardware abstraction available to software developers. The midstream layer creates value through Network Operating Systems, virtual overlay software, fabric controllers, topology databases, policy engines, telemetry systems, automation tools, analytics, security functions, APIs, and lifecycle-management capabilities. Downstream participants include system integrators, cloud and managed-service providers, network consultants, Internet Data Center operators, Enterprise Data Center teams, and other computing-infrastructure users.

Commercial models combine perpetual or subscription licenses, cloud-managed services, hardware-software bundles, support contracts, upgrades, and professional services. Major costs include software engineering, protocol development, hardware adaptation, interoperability testing, security maintenance, technical support, and ecosystem integration. Value and customer retention increase when software becomes embedded in provisioning, policy, monitoring, and change-management workflows. Platforms with broad hardware compatibility and open automation interfaces can address multi-vendor environments, while vertically integrated suppliers can differentiate through coordinated hardware performance, software functionality, and support accountability.

Segment Insights

On-premises Deployment remains important because production fabric control frequently requires direct infrastructure access, predictable availability, local security enforcement, and integration with existing switches and operational systems. Cloud Deployment is gaining relevance for centralized management, distributed-site visibility,

subscription delivery, software updates, and reduced controller maintenance. The preferred model depends on data residency, failure-domain design, connectivity reliability, operational policy, and whether management functions must remain available independently of external cloud connections.

By function, Network Operating System software provides the device-level control plane, routing, switching, programmability, telemetry, and hardware abstraction required to operate fabric switches. Virtual Overlay Network Software creates logical networks, tenant separation, workload mobility, and policy-based connectivity across the physical underlay. Other software functions include fabric orchestration, assurance, observability, configuration validation, analytics, and lifecycle management. Large Enterprises typically require greater scale, redundancy, policy control, and integration, while SMEs place stronger emphasis on simplified deployment, centralized administration, predictable costs, and limited operational complexity.

Downstream Market Opportunities

Internet Data Centers require high port density, tenant isolation, rapid service provisioning, multi-site connectivity, and continuous fabric visibility, creating strong demand for scalable automation and overlay functions. Enterprise Data Centers prioritize application availability, segmentation, hybrid-cloud connectivity, security policy, and simplified operations across mixed generations of infrastructure. Other opportunities arise in AI computing clusters, high-performance computing, edge facilities, regional data centers, and specialized cloud environments. Across these applications, the most valuable software reduces configuration risk, accelerates network changes, and provides actionable telemetry without disrupting production workloads.

Regional Insights

North America has a mature ecosystem of cloud operators, networking vendors, software specialists, and large-scale data centers, supporting advanced adoption of programmable fabrics and disaggregated networking. Europe presents opportunities around automation, energy-efficient operations, open standards, security, and data-sovereignty requirements. Asia-Pacific is supported by expanding cloud capacity, digital services, telecommunications investment, and enterprise data-center modernization. China has a distinct domestic ecosystem of networking equipment and software providers serving local standards, procurement, support, and deployment requirements.

Regional competition is influenced by installed hardware bases, local technical support, partner networks, regulatory requirements, and access to large data-center projects.

Competitive Landscape Analysis

Competition combines integrated networking vendors, software-led fabric specialists, open-networking providers, and virtualization platforms. Cisco Systems, Arista Networks, Hewlett Packard Enterprise, Nokia, NVIDIA, Dell Technologies, Extreme Networks, Huawei, H3C, ZTE, and Ruijie Networks compete through combinations of switching hardware, NOS capabilities, controllers, automation, telemetry, and support. Microsoft is associated with open and cloud-oriented networking software ecosystems, while Broadcom (VMware) is positioned around virtual overlay networking and workload-level policy. Arrcus, DriveNets, Aviz Networks, IP Infusion, Hedgehog, Pica8, and Asterfusion emphasize varying combinations of disaggregated networking, hardware choice, open NOS architectures, cloud-native operations, and multi-vendor management. Competitive differentiation increasingly depends on protocol scale, hardware compatibility, automation depth, telemetry quality, AI-fabric support, deployment flexibility, ecosystem integration, and total operating cost. The market therefore presents both vertically integrated and software-disaggregated models, with customer preferences determined by infrastructure strategy and operational capabilities.

Report Scope

This report is a detailed and comprehensive analysis for global Data Center Fabric Software market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type 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 Data Center Fabric Software market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Data Center Fabric Software market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Data Center Fabric Software market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Data Center Fabric Software market shares of main players, in revenue (\$ Million), 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 Data Center Fabric Software

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 Data Center Fabric Software market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Microsoft, Cisco Systems, Arista Networks, Hewlett Packard Enterprise, Nokia, NVIDIA, Dell Technologies, Broadcom(VMware), Extreme Networks, Arrcus, etc.

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

Data Center Fabric Software market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

On-premises Deployment

Cloud Deployment

Market segment by Function

Network Operating System (NOS)

Virtual Overlay Network Software

Others

Market segment by End-user Size

Large Enterprises

SMEs

Market segment by Application

Internet Data Center (IDC)

Enterprise Data Center (EDC)

Others

Market segment by players, this report covers

Microsoft

Cisco Systems

Arista Networks

Hewlett Packard Enterprise

Nokia

NVIDIA

Dell Technologies

Broadcom(VMware)

Extreme Networks

Arrcus

DriveNets

Aviz Networks

IP Infusion

Hedgehog

Pica8

Huawei

H3C

ZTE

Ruijie Networks

Asterfusion

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Data Center Fabric Software product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Data Center Fabric Software, with revenue, gross margin, and global market share of Data Center Fabric Software from 2021 to 2026.

Chapter 3, the Data Center Fabric Software competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Data Center Fabric Software market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Data Center Fabric Software.

Chapter 13, to describe Data Center Fabric Software research findings and conclusion.

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