

Global InfiniBand Switch ASIC 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 InfiniBand Switch ASIC market size was valued at US\$ 3601 million in 2025 and is forecast to a readjusted size of US\$ 9842 million by 2032 with a CAGR of 13.5% during review period.

An InfiniBand switch ASIC is an application-specific integrated circuit used to build InfiniBand switching systems for high-performance computing, AI clusters, supercomputers, and data-center back-end fabrics. It performs high-speed packet forwarding across InfiniBand ports and supports fabric-level functions such as adaptive routing, congestion control, partitioning, telemetry, and in-network computing capabilities. These ASICs are embedded in fixed-configuration InfiniBand switches, modular director-class switches, and high-density fabric systems, serving as the core switching silicon that enables low-latency, high-bandwidth, lossless scale-out interconnects.

Based on our research, the InfiniBand switch ASIC market is an extremely narrow and highly concentrated segment of the high-performance networking silicon industry. It should not be mixed with Ethernet switch ASICs, NICs, HCAs, DPUs, optical modules, or complete switch systems. The core function of an InfiniBand switch ASIC is to enable low-latency, high-bandwidth, lossless switching in HPC and AI cluster fabrics, with capabilities such as adaptive routing, congestion control, telemetry, fabric partitioning, and in-network computing. This makes the market structurally different from merchant Ethernet switching silicon.

From a supply perspective, the current market is effectively dominated by NVIDIA. Mellanox was historically the leading InfiniBand silicon and systems supplier, and

NVIDIA completed its acquisition of Mellanox in 2020. Since then, InfiniBand switching has become part of NVIDIA's end-to-end data-center platform, spanning GPUs, HCAs, DPUs, switches, cables, software, and cluster management. Historical competitors such as QLogic, Voltaire, SilverStorm, and Topspin are relevant for longlist completeness, but they do not represent independent active suppliers of 2025 InfiniBand switch ASIC revenue.

From a demand perspective, the market has been structurally re-accelerated by large AI training clusters. Traditional HPC demand remains important but is no longer the only growth driver. AI clusters require extremely high bisection bandwidth, low latency, lossless operation, and predictable collective communication performance. NVIDIA Quantum-2 and Quantum-X800 illustrate this shift from 400G NDR to 800G XDR InfiniBand platforms, with much higher port density and in-network processing capabilities. As cluster sizes increase, the switching fabric becomes a critical determinant of GPU utilization and total system performance.

The main competitive pressure does not come from another active InfiniBand switch ASIC vendor, but from alternative fabrics. Ethernet-based AI networking, RoCE, Ultra Ethernet, Cornelis Omni-Path, and other HPC interconnects are all trying to reduce dependence on proprietary InfiniBand ecosystems. In the near term, NVIDIA's vertical integration across compute and networking provides a strong advantage. Over the longer term, hyperscalers may increasingly evaluate Ethernet and open fabric alternatives to reduce cost, improve sourcing flexibility, and avoid platform lock-in. As a result, InfiniBand switch ASICs should be viewed as strategic AI infrastructure silicon rather than a broad merchant switching market.

This report is a detailed and comprehensive analysis for global InfiniBand Switch ASIC market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Generation 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 InfiniBand Switch ASIC market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global InfiniBand Switch ASIC market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global InfiniBand Switch ASIC market size and forecasts, by Product Generation and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global InfiniBand Switch ASIC market shares of main players, shipments in revenue (\$ Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 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 InfiniBand Switch ASIC

- 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 InfiniBand Switch ASIC 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, etc.

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

Market Segmentation

InfiniBand Switch ASIC market is split by Product Generation and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Generation, 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 Product Generation

QDR / FDR Generation

EDR Generation

HDR Generation

NDR Generation

XDR / 800G Generation

Market segment by Switching Capability

Basic Packet Forwarding

Adaptive Routing

Congestion Control

In-network Computing

Telemetry and Fabric Management

Market segment by Fabric Topology Role

Leaf Switch ASIC

Spine Switch ASIC

Director-class Fabric ASIC

Edge / Access Fabric ASIC

Market segment by Application

AI Training Cluster

HPC / Supercomputing

AI Inference Cluster

Storage / Data Fabric

Cloud Back-end Network

Major players covered

NVIDIA Corporation

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 InfiniBand Switch ASIC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of InfiniBand Switch ASIC, with price, sales quantity, revenue, and global market share of InfiniBand Switch ASIC from 2021 to 2026.

Chapter 3, the InfiniBand Switch ASIC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed

emphatically by landscape contrast.

Chapter 4, the InfiniBand Switch ASIC 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 Product Generation and by Application, with sales market share and growth rate by Product Generation, 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 InfiniBand Switch ASIC market forecast, by regions, by Product Generation, 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 InfiniBand Switch ASIC.

Chapter 14 and 15, to describe InfiniBand Switch ASIC sales channel, distributors, customers, research findings and conclusion.

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