

Global InfiniBand Switch ASIC Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G693F5955E2FEN.html>

Date: July 2026

Pages: 83

Price: US\$ 4,480.00 (Single User License)

ID: G693F5955E2FEN

Abstracts

The global InfiniBand Switch ASIC market size is expected to reach \$ 9842 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

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,

DPU, 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 studies the global InfiniBand Switch ASIC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for InfiniBand Switch ASIC 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 InfiniBand Switch ASIC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global InfiniBand Switch ASIC total production and demand, 2021-2032, (K Pcs)

Global InfiniBand Switch ASIC total production value, 2021-2032, (USD Million)

Global InfiniBand Switch ASIC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global InfiniBand Switch ASIC consumption by region & country, CAGR, 2021-2032 &

(K Pcs)

U.S. VS China: InfiniBand Switch ASIC domestic production, consumption, key domestic manufacturers and share

Global InfiniBand Switch ASIC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global InfiniBand Switch ASIC production by Product Generation, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global InfiniBand Switch ASIC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global InfiniBand Switch ASIC 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, 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 InfiniBand Switch ASIC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Product Generation, 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 InfiniBand Switch ASIC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global InfiniBand Switch ASIC Market, Segmentation by Product Generation:

QDR / FDR Generation

EDR Generation

HDR Generation

NDR Generation

XDR / 800G Generation

Global InfiniBand Switch ASIC Market, Segmentation by Switching Capability:

Basic Packet Forwarding

Adaptive Routing

Congestion Control

In-network Computing

Telemetry and Fabric Management

Global InfiniBand Switch ASIC Market, Segmentation by Fabric Topology Role:

Leaf Switch ASIC

Spine Switch ASIC

Director-class Fabric ASIC

Edge / Access Fabric ASIC

Global InfiniBand Switch ASIC Market, Segmentation by Application:

AI Training Cluster

HPC / Supercomputing

AI Inference Cluster

Storage / Data Fabric

Cloud Back-end Network

Companies Profiled:

NVIDIA Corporation

Key Questions Answered:

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

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