

Global Modular Core Switches Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Modular Core Switches market size is expected to reach \$ 1527 million by 2032, rising at a market growth of 13.8% CAGR during the forecast period (2026-2032).

Modular core switches are high-end network switching devices featuring a modular chassis architecture; they allow for the flexible expansion of port density, switching capacity, and functionality through hot-swappable main control boards and line card modules, enabling users to scale up by adding switching modules as network demands grow without replacing the entire unit. Designed for high reliability, these switches incorporate features such as 1+1 redundancy for main control boards, N+1 redundancy for power modules, and fan redundancy, making them widely applicable in the core layers of large-scale data centers, carrier backbone network nodes, and the core switching infrastructure of hyperscale enterprise campus networks. In 2025, global sales volume for modular core switches reached approximately 45,000 units with an average unit price of around \$13,500, while the industry's aggregate capacity utilization rate stood at approximately 72%. Upstream sectors include suppliers of core components such as high-performance switching chips, optical modules, power modules, and high-speed backplane connectors; downstream sectors comprise end-users with stringent requirements for network reliability and scalability, including cloud computing data center operators, telecommunications carriers, large financial institutions, and government agencies. The industry's average gross profit margin is approximately 52%. The product cost structure is broken down as follows: high-performance switching chips and network processors account for approximately 35%; optical modules and high-speed backplane connectors for 20%; chassis structural components and power modules for 12%; operating system and software R&D amortization for 10%; cooling systems and fan modules for 5%; manufacturing, assembly, and testing labor for 8%; quality inspection and reliability certification for 5%; and logistics, warehousing, and

after-sales support for 5%. Regarding downstream demand, the evolution of AI large-model training clusters from the 'thousand-GPU' to 'ten-thousand-GPU' scale, necessitating lower latency and non-blocking switching capabilities, has driven rapid growth in procurement demand for modular switches in data center cores. Additionally, the expansion of hyperscale data centers and upgrades to next-generation 400G/800G networks are fueling the replacement of legacy equipment, while the evolution of telecom carrier backbone and metropolitan area networks toward IPv6+ and SRv6 technologies is stimulating demand for the deployment of high-end modular switches. Downstream clients primarily include leading global cloud service providers such as Amazon AWS, Microsoft Azure, Google Cloud, and Alibaba Cloud; telecommunications operators like China Telecom, China Mobile, China Unicom, AT&T, and Verizon; as well as major financial institutions and stock exchanges, including JPMorgan Chase and Goldman Sachs. Regarding market opportunities, policy drivers see major global economies incorporating computing infrastructure and future network development into national strategies with prioritized support. Technological innovation is driving the commercialization of 51.2T switching chips, the maturation of CPO (Co-Packaged Optics) technology, and the increasingly robust ecosystem of the SONiC open-source network operating system. Shifts in consumer demands, specifically the rising requirements from data center operators for automated network management and energy efficiency, are propelling the evolution of modular switches toward software-defined architectures and green, low-carbon operations. Overall, the modular core-layer switch industry is experiencing rapid growth driven by the expansion of AI computing infrastructure and generational network upgrades, resulting in a continuously expanding market.

The market for modular core-layer switches is experiencing a golden age of growth, driven by the large-scale deployment of AI computing clusters and generational upgrades in Ethernet technology; industry momentum remains strong. On the demand side, the rise of generative AI and large-model training is rapidly scaling GPU clusters from the thousand-GPU level to the hundred-thousand-GPU level. AI training imposes rigorous demands for low latency and non-blocking switching; a single modular core switch must deliver switching capacities in the tens of terabits per second (Tbps) alongside nanosecond-level latency, directly fueling an annual growth rate of over 20% in the procurement of high-end modular switches. Simultaneously, global hyperscale data center operators are accelerating network architecture upgrades from 100G to 400G and 800G. The ability of modular switches to upgrade port speeds simply by swapping line cards makes them the optimal choice for the smooth evolution of data center networks, generating steady, ongoing demand for equipment upgrades. On the supply side, the industry is rapidly evolving toward higher switching capacity, lower

power consumption, and enhanced programmability. Advancements in switching chip manufacturing?moving from 7nm to 5nm and 3nm processes?are further reducing power consumption and boosting performance; Co-Packaged Optics (CPO) technology, which integrates optical modules and switching chips onto a single substrate, significantly cuts power usage and latency; and the adoption of open network operating systems and programmable data planes is making network operations and maintenance increasingly automated and intelligent. Regarding the competitive landscape, Cisco and Arista dominate the global market, leveraging their proprietary switching chips and deeply entrenched customer relationships. Juniper and Huawei maintain strong competitiveness in the mid-to-high-end segments, while white-box switch vendors are making rapid inroads into the hyperscale data center market by capitalizing on open-source ecosystems and the trend toward hardware-software decoupling. However, the industry also faces challenges. The manufacturing of advanced-node switching chips relies heavily on a limited number of foundries, such as TSMC, creating potential supply chain risks due to geopolitical tensions. Additionally, the high cost of modular switches may lead some customers to switch to fixed-configuration models to reduce procurement expenses during economic downturns, exerting structural pressure on the high-end modular switch market. Overall, the modular core switch sector has entered an upward cycle driven by the dual forces of expanding AI computing power and technological upgrades. Companies possessing in-house switching chip capabilities, deep ties with leading cloud providers, and a track record of continuous innovation are poised to reap sustained benefits from this growth phase. Global market sales volume is projected to grow at an average annual rate of 12% to 20% over the next five years; notably, the high-end modular switch segment?designed for AI clusters?is expected to expand at a rate exceeding 30%, serving as the core engine driving industry growth.

This report studies the global Modular Core Switches production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Modular Core 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 Modular Core Switches that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Modular Core Switches total production and demand, 2021-2032, (K Units)

Global Modular Core Switches total production value, 2021-2032, (USD Million)

Global Modular Core Switches production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Modular Core Switches consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Modular Core Switches domestic production, consumption, key domestic manufacturers and share

Global Modular Core Switches production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Modular Core Switches production by Switching Capacity, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Modular Core Switches production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Modular Core 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 CommScope (US), Cisco Systems, Inc. (US), Arista Networks, Inc. (US), Juniper Networks, Inc. (US), Huawei Technologies Co., Ltd. (CN), Hewlett Packard Enterprise (HPE) (US), Dell Technologies Inc. (US), Extreme Networks, Inc. (US), H3C Technologies Co., Ltd. (CN), ZTE Corporation (CN), 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 Modular Core Switches market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Switching Capacity, 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 Modular Core Switches Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Modular Core Switches Market, Segmentation by Switching Capacity:

52.2 - 86.4 Tbps

> 86.4 Tbps

Global Modular Core Switches Market, Segmentation by Number of Gigabit Port:

?24

24-36

36-48

48-72

?72

Global Modular Core Switches Market, Segmentation by Redundancy Design:

Dual-active Redundant

Single-active (Non-redundant)

Global Modular Core Switches Market, Segmentation by Application:

Metropolitan Area Network

Campus Network

Data Center

Other

Companies Profiled:

CommScope (US)

Cisco Systems, Inc. (US)

Arista Networks, Inc. (US)

Juniper Networks, Inc. (US)

Huawei Technologies Co., Ltd. (CN)

Hewlett Packard Enterprise (HPE) (US)

Dell Technologies Inc. (US)

Extreme Networks, Inc. (US)

H3C Technologies Co., Ltd. (CN)

ZTE Corporation (CN)

Ruijie Networks Co., Ltd. (CN)

Inspur Electronic Information Industry Co., Ltd. (CN)

Maipu Communication Technology Co., Ltd. (CN)

Raisecom Technology Co., Ltd. (CN)

Tsinghua Unigroup Co., Ltd. (CN)

Shenzhen IP-COM Networks Co., Ltd. (CN)

Shenzhen Sundray Technology Co., Ltd. (CN)

Alcatel-Lucent Enterprise (FR)

Nokia Corporation (FI)

NEC Corporation (JP)

Fujitsu Limited (JP)

Lenovo Group Ltd. (CN)

Edgecore Networks Corporation (TW)

Key Questions Answered:

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

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