

Global Open RAN DU Accelerator Cards Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Open RAN DU Accelerator Cards market size is expected to reach \$ 626 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

Open RAN DU accelerator cards are physical hardware acceleration products used on the distributed unit side of open radio access network architectures. They are mainly installed in general purpose servers, edge computing servers, or virtualized base station platforms to offload high workload functions in 5G baseband physical layer processing, fronthaul processing, and low latency data paths. The product scope mainly covers PCIe accelerator cards, FPGA accelerator cards, ASIC accelerator cards, FEC accelerator cards, fronthaul accelerator cards, inline L1 accelerator cards, and integrated DU hardware acceleration modules. Core technologies include LDPC decoding and encoding, Turbo coding, HARQ processing, rate matching, O-RAN fronthaul protocol processing, eCPRI data forwarding, PTP timing synchronization, hardware offload, low latency DMA transfer, and adaptation to virtualized RAN software stacks. Key specifications include interface type, supported bandwidth, cell capacity, fronthaul data rate, L1 processing latency, power consumption, server compatibility, synchronization accuracy, and compatibility with DU software frameworks. These products are mainly used in Open RAN base stations, virtualized RAN systems, private 5G networks, edge cloud base stations, and operator open network deployments. In 2025, the global average price of Open RAN DU accelerator cards was approximately USD 5,000 per unit, and the industry average gross margin was about 38%.

Open RAN DU accelerator cards are a hardware category created at the intersection of telecom semiconductors, server acceleration cards, and virtualized radio access networks. The upstream supply chain includes ASICs, FPGAs, DPUs, memory devices,

power management chips, high speed connectors, printed circuit boards, and thermal materials. The midstream segment covers accelerator card design, board manufacturing, firmware development, and software stack integration. Downstream demand comes from operator Open RAN networks, virtualized RAN platforms, private 5G systems, edge cloud base stations, and multi vendor interoperable radio networks. The core value of this product is not general server acceleration, but the offloading of time sensitive DU side physical layer and fronthaul workloads from general purpose CPUs, helping open base station architectures achieve lower latency, lower power consumption, and higher real time processing stability. The competitive landscape is concentrated, but technology routes remain divided. Leading suppliers are mainly competing around inline L1 acceleration, look aside FEC acceleration, programmable FPGA acceleration, and integrated SoC based acceleration platforms, while smaller companies tend to focus on fronthaul acceleration, private 5G deployments, compact DU systems, or regional commercial projects. Recent product development is moving toward higher integration, lower power consumption, and stronger compatibility with mainstream Open RAN software stacks. At the same time, some architectures are shifting from independent accelerator cards toward embedded server modules or chip level integration. Industry partnerships and acquisition driven portfolio changes are also important, because commercial adoption depends heavily on validation among chip platforms, server vendors, Open RAN software providers, and mobile operators. The policy environment is generally supportive, as many markets are encouraging open, interoperable, and diversified telecom infrastructure supply chains. This creates room for DU accelerator cards to move from field trials into commercial deployment. However, the industry still faces constraints from telecom capital expenditure cycles, the strong installed base of traditional RAN systems, interoperability certification costs, and competition from CPU integrated acceleration, GPU based RAN platforms, and general purpose DPU solutions. The market is therefore unlikely to expand like a broad commodity server card segment. Its growth will be concentrated in high performance macro base stations, private 5G, edge cloud deployments, and selected regional Open RAN networks, with long term opportunities remaining meaningful but supplier qualification becoming increasingly selective.

This report studies the global Open RAN DU Accelerator Cards production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Open RAN DU Accelerator Cards 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 Open RAN DU Accelerator

Cards that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Open RAN DU Accelerator Cards total production and demand, 2021-2032, (Units)

Global Open RAN DU Accelerator Cards total production value, 2021-2032, (USD Million)

Global Open RAN DU Accelerator Cards production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Open RAN DU Accelerator Cards consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Open RAN DU Accelerator Cards domestic production, consumption, key domestic manufacturers and share

Global Open RAN DU Accelerator Cards production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Open RAN DU Accelerator Cards production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Open RAN DU Accelerator Cards production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Open RAN DU Accelerator Cards 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 Qualcomm Technologies, Inc., Intel Corporation, Advanced Micro Devices, Inc., Dell Technologies Inc., Marvell Technology, Inc., EdgeQ Inc., ADLINK Technology Inc., Silicom Ltd., GVTel Co., Ltd., Nanjing DIGE Communication Technology Co., Ltd., 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 Open RAN DU Accelerator Cards market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, 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 Open RAN DU Accelerator Cards Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Open RAN DU Accelerator Cards Market, Segmentation by Type:

Inline Accelerator

Lookaside Accelerator

Others

Global Open RAN DU Accelerator Cards Market, Segmentation by Processing Platform:

ASIC or SoC-based Cards

FPGA-based Cards

DPU or SmartNIC-based Cards

Hybrid Acceleration Cards

Others

Global Open RAN DU Accelerator Cards Market, Segmentation by Application:

Telecommunications

Industrial and Enterprise Networks

Government and Public Sector

Research and Testing

Others

Companies Profiled:

Qualcomm Technologies, Inc.

Intel Corporation

Advanced Micro Devices, Inc.

Dell Technologies Inc.

Marvell Technology, Inc.

EdgeQ Inc.

ADLINK Technology Inc.

Silicom Ltd.

GVTel Co., Ltd.

Nanjing DIGE Communication Technology Co., Ltd.

Kalray S.A.

Compal Electronics, Inc.

Key Questions Answered:

1. How big is the global Open RAN DU Accelerator Cards market?
2. What is the demand of the global Open RAN DU Accelerator Cards market?
3. What is the year over year growth of the global Open RAN DU Accelerator Cards market?
4. What is the production and production value of the global Open RAN DU Accelerator Cards market?
5. Who are the key producers in the global Open RAN DU Accelerator Cards market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Open RAN DU Accelerator Cards Introduction
- 1.2 World Open RAN DU Accelerator Cards Supply & Forecast
 - 1.2.1 World Open RAN DU Accelerator Cards Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Open RAN DU Accelerator Cards Production (2021-2032)
 - 1.2.3 World Open RAN DU Accelerator Cards Pricing Trends (2021-2032)
- 1.3 World Open RAN DU Accelerator Cards Production by Region (Based on Production Site)
 - 1.3.1 World Open RAN DU Accelerator Cards Production Value by Region (2021-2032)
 - 1.3.2 World Open RAN DU Accelerator Cards Production by Region (2021-2032)
 - 1.3.3 World Open RAN DU Accelerator Cards Average Price by Region (2021-2032)
 - 1.3.4 North America Open RAN DU Accelerator Cards Production (2021-2032)
 - 1.3.5 Europe Open RAN DU Accelerator Cards Production (2021-2032)
 - 1.3.6 China Open RAN DU Accelerator Cards Production (2021-2032)
 - 1.3.7 Japan Open RAN DU Accelerator Cards Production (2021-2032)
 - 1.3.8 China Taiwan Open RAN DU Accelerator Cards Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Open RAN DU Accelerator Cards Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Open RAN DU Accelerator Cards Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Open RAN DU Accelerator Cards Demand (2021-2032)
- 2.2 World Open RAN DU Accelerator Cards Consumption by Region
 - 2.2.1 World Open RAN DU Accelerator Cards Consumption by Region (2021-2026)
 - 2.2.2 World Open RAN DU Accelerator Cards Consumption Forecast by Region (2027-2032)
- 2.3 United States Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.4 China Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.5 Europe Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.6 Japan Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.7 South Korea Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.8 ASEAN Open RAN DU Accelerator Cards Consumption (2021-2032)
- 2.9 India Open RAN DU Accelerator Cards Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Open RAN DU Accelerator Cards Production Value by Manufacturer (2021-2026)

3.2 World Open RAN DU Accelerator Cards Production by Manufacturer (2021-2026)

3.3 World Open RAN DU Accelerator Cards Average Price by Manufacturer (2021-2026)

3.4 Open RAN DU Accelerator Cards Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Open RAN DU Accelerator Cards Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Open RAN DU Accelerator Cards in 2025

3.5.3 Global Concentration Ratios (CR8) for Open RAN DU Accelerator Cards in 2025

3.6 Open RAN DU Accelerator Cards Market: Overall Company Footprint Analysis

3.6.1 Open RAN DU Accelerator Cards Market: Region Footprint

3.6.2 Open RAN DU Accelerator Cards Market: Company Product Type Footprint

3.6.3 Open RAN DU Accelerator Cards Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Open RAN DU Accelerator Cards Production Value Comparison

4.1.1 United States VS China: Open RAN DU Accelerator Cards Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Open RAN DU Accelerator Cards Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Open RAN DU Accelerator Cards Production Comparison

4.2.1 United States VS China: Open RAN DU Accelerator Cards Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Open RAN DU Accelerator Cards Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Open RAN DU Accelerator Cards Consumption

Comparison

4.3.1 United States VS China: Open RAN DU Accelerator Cards Consumption

Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Open RAN DU Accelerator Cards Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Open RAN DU Accelerator Cards Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Open RAN DU Accelerator Cards Production Value (2021-2026)

4.4.3 United States Based Manufacturers Open RAN DU Accelerator Cards Production (2021-2026)

4.5 China Based Open RAN DU Accelerator Cards Manufacturers and Market Share

4.5.1 China Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Open RAN DU Accelerator Cards Production Value (2021-2026)

4.5.3 China Based Manufacturers Open RAN DU Accelerator Cards Production (2021-2026)

4.6 Rest of World Based Open RAN DU Accelerator Cards Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Open RAN DU Accelerator Cards Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Inline Accelerator

5.2.2 Lookaside Accelerator

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World Open RAN DU Accelerator Cards Production by Type (2021-2032)

5.3.2 World Open RAN DU Accelerator Cards Production Value by Type (2021-2032)

5.3.3 World Open RAN DU Accelerator Cards Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PROCESSING PLATFORM

6.1 World Open RAN DU Accelerator Cards Market Size Overview by Processing Platform: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Processing Platform

6.2.1 ASIC or SoC-based Cards

6.2.2 FPGA-based Cards

6.2.3 DPU or SmartNIC-based Cards

6.2.4 Hybrid Acceleration Cards

6.2.5 Others

6.3 Market Segment by Processing Platform

6.3.1 World Open RAN DU Accelerator Cards Production by Processing Platform (2021-2032)

6.3.2 World Open RAN DU Accelerator Cards Production Value by Processing Platform (2021-2032)

6.3.3 World Open RAN DU Accelerator Cards Average Price by Processing Platform (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Open RAN DU Accelerator Cards Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Telecommunications

7.2.2 Industrial and Enterprise Networks

7.2.3 Government and Public Sector

7.2.4 Research and Testing

7.2.5 Others

7.3 Market Segment by Application

7.3.1 World Open RAN DU Accelerator Cards Production by Application (2021-2032)

7.3.2 World Open RAN DU Accelerator Cards Production Value by Application (2021-2032)

7.3.3 World Open RAN DU Accelerator Cards Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 Qualcomm Technologies, Inc.

8.1.1 Qualcomm Technologies, Inc. Details

8.1.2 Qualcomm Technologies, Inc. Major Business

8.1.3 Qualcomm Technologies, Inc. Open RAN DU Accelerator Cards Product and Services

8.1.4 Qualcomm Technologies, Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 Qualcomm Technologies, Inc. Recent Developments/Updates

8.1.6 Qualcomm Technologies, Inc. Competitive Strengths & Weaknesses

8.2 Intel Corporation

8.2.1 Intel Corporation Details

8.2.2 Intel Corporation Major Business

8.2.3 Intel Corporation Open RAN DU Accelerator Cards Product and Services

8.2.4 Intel Corporation Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Intel Corporation Recent Developments/Updates

8.2.6 Intel Corporation Competitive Strengths & Weaknesses

8.3 Advanced Micro Devices, Inc.

8.3.1 Advanced Micro Devices, Inc. Details

8.3.2 Advanced Micro Devices, Inc. Major Business

8.3.3 Advanced Micro Devices, Inc. Open RAN DU Accelerator Cards Product and Services

8.3.4 Advanced Micro Devices, Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Advanced Micro Devices, Inc. Recent Developments/Updates

8.3.6 Advanced Micro Devices, Inc. Competitive Strengths & Weaknesses

8.4 Dell Technologies Inc.

8.4.1 Dell Technologies Inc. Details

8.4.2 Dell Technologies Inc. Major Business

8.4.3 Dell Technologies Inc. Open RAN DU Accelerator Cards Product and Services

8.4.4 Dell Technologies Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 Dell Technologies Inc. Recent Developments/Updates

8.4.6 Dell Technologies Inc. Competitive Strengths & Weaknesses

8.5 Marvell Technology, Inc.

8.5.1 Marvell Technology, Inc. Details

8.5.2 Marvell Technology, Inc. Major Business

8.5.3 Marvell Technology, Inc. Open RAN DU Accelerator Cards Product and Services

8.5.4 Marvell Technology, Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 Marvell Technology, Inc. Recent Developments/Updates

8.5.6 Marvell Technology, Inc. Competitive Strengths & Weaknesses

8.6 EdgeQ Inc.

8.6.1 EdgeQ Inc. Details

8.6.2 EdgeQ Inc. Major Business

8.6.3 EdgeQ Inc. Open RAN DU Accelerator Cards Product and Services

8.6.4 EdgeQ Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 EdgeQ Inc. Recent Developments/Updates

8.6.6 EdgeQ Inc. Competitive Strengths & Weaknesses

8.7 ADLINK Technology Inc.

8.7.1 ADLINK Technology Inc. Details

8.7.2 ADLINK Technology Inc. Major Business

8.7.3 ADLINK Technology Inc. Open RAN DU Accelerator Cards Product and Services

8.7.4 ADLINK Technology Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 ADLINK Technology Inc. Recent Developments/Updates

8.7.6 ADLINK Technology Inc. Competitive Strengths & Weaknesses

8.8 Silicom Ltd.

8.8.1 Silicom Ltd. Details

8.8.2 Silicom Ltd. Major Business

8.8.3 Silicom Ltd. Open RAN DU Accelerator Cards Product and Services

8.8.4 Silicom Ltd. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.8.5 Silicom Ltd. Recent Developments/Updates

8.8.6 Silicom Ltd. Competitive Strengths & Weaknesses

8.9 GVTel Co., Ltd.

8.9.1 GVTel Co., Ltd. Details

8.9.2 GVTel Co., Ltd. Major Business

8.9.3 GVTel Co., Ltd. Open RAN DU Accelerator Cards Product and Services

8.9.4 GVTel Co., Ltd. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.9.5 GVTel Co., Ltd. Recent Developments/Updates

8.9.6 GVTel Co., Ltd. Competitive Strengths & Weaknesses

8.10 Nanjing DIGE Communication Technology Co., Ltd.

8.10.1 Nanjing DIGE Communication Technology Co., Ltd. Details

8.10.2 Nanjing DIGE Communication Technology Co., Ltd. Major Business

8.10.3 Nanjing DIGE Communication Technology Co., Ltd. Open RAN DU Accelerator Cards Product and Services

8.10.4 Nanjing DIGE Communication Technology Co., Ltd. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.10.5 Nanjing DIGE Communication Technology Co., Ltd. Recent Developments/Updates

8.10.6 Nanjing DIGE Communication Technology Co., Ltd. Competitive Strengths & Weaknesses

8.11 Kalray S.A.

8.11.1 Kalray S.A. Details

8.11.2 Kalray S.A. Major Business

8.11.3 Kalray S.A. Open RAN DU Accelerator Cards Product and Services

8.11.4 Kalray S.A. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.11.5 Kalray S.A. Recent Developments/Updates

8.11.6 Kalray S.A. Competitive Strengths & Weaknesses

8.12 Compal Electronics, Inc.

8.12.1 Compal Electronics, Inc. Details

8.12.2 Compal Electronics, Inc. Major Business

8.12.3 Compal Electronics, Inc. Open RAN DU Accelerator Cards Product and Services

8.12.4 Compal Electronics, Inc. Open RAN DU Accelerator Cards Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.12.5 Compal Electronics, Inc. Recent Developments/Updates

8.12.6 Compal Electronics, Inc. Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Open RAN DU Accelerator Cards Industry Chain

9.2 Open RAN DU Accelerator Cards Upstream Analysis

9.2.1 Open RAN DU Accelerator Cards Core Raw Materials

9.2.2 Main Manufacturers of Open RAN DU Accelerator Cards Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Open RAN DU Accelerator Cards Production Mode

9.6 Open RAN DU Accelerator Cards Procurement Model

9.7 Open RAN DU Accelerator Cards Industry Sales Model and Sales Channels

9.7.1 Open RAN DU Accelerator Cards Sales Model

9.7.2 Open RAN DU Accelerator Cards Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Open RAN DU Accelerator Cards Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Open RAN DU Accelerator Cards Production Value by Region (2021-2026) & (USD Million)

Table 3. World Open RAN DU Accelerator Cards Production Value by Region (2027-2032) & (USD Million)

Table 4. World Open RAN DU Accelerator Cards Production Value Market Share by Region (2021-2026)

Table 5. World Open RAN DU Accelerator Cards Production Value Market Share by Region (2027-2032)

Table 6. World Open RAN DU Accelerator Cards Production by Region (2021-2026) & (Units)

Table 7. World Open RAN DU Accelerator Cards Production by Region (2027-2032) & (Units)

Table 8. World Open RAN DU Accelerator Cards Production Market Share by Region (2021-2026)

Table 9. World Open RAN DU Accelerator Cards Production Market Share by Region (2027-2032)

Table 10. World Open RAN DU Accelerator Cards Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Open RAN DU Accelerator Cards Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Open RAN DU Accelerator Cards Major Market Trends

Table 13. World Open RAN DU Accelerator Cards Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Open RAN DU Accelerator Cards Consumption by Region (2021-2026) & (Units)

Table 15. World Open RAN DU Accelerator Cards Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Open RAN DU Accelerator Cards Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Open RAN DU Accelerator Cards Producers in 2025

Table 18. World Open RAN DU Accelerator Cards Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Open RAN DU Accelerator Cards Producers in 2025

Table 20. World Open RAN DU Accelerator Cards Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Open RAN DU Accelerator Cards Company Evaluation Quadrant

Table 22. World Open RAN DU Accelerator Cards Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Open RAN DU Accelerator Cards Production Site of Key Manufacturer

Table 24. Open RAN DU Accelerator Cards Market: Company Product Type Footprint

Table 25. Open RAN DU Accelerator Cards Market: Company Product Application Footprint

Table 26. Open RAN DU Accelerator Cards Competitive Factors

Table 27. Open RAN DU Accelerator Cards New Entrant and Capacity Expansion Plans

Table 28. Open RAN DU Accelerator Cards Mergers & Acquisitions Activity

Table 29. United States VS China Open RAN DU Accelerator Cards Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Open RAN DU Accelerator Cards Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Open RAN DU Accelerator Cards Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Open RAN DU Accelerator Cards Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Open RAN DU Accelerator Cards Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Open RAN DU Accelerator Cards Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Open RAN DU Accelerator Cards Production Market Share (2021-2026)

Table 37. China Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Open RAN DU Accelerator Cards Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Open RAN DU Accelerator Cards Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Open RAN DU Accelerator Cards Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Open RAN DU Accelerator Cards Production Market Share (2021-2026)

Table 42. Rest of World Based Open RAN DU Accelerator Cards Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production Market Share (2021-2026)

Table 47. World Open RAN DU Accelerator Cards Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Open RAN DU Accelerator Cards Production by Type (2021-2026) & (Units)

Table 49. World Open RAN DU Accelerator Cards Production by Type (2027-2032) & (Units)

Table 50. World Open RAN DU Accelerator Cards Production Value by Type (2021-2026) & (USD Million)

Table 51. World Open RAN DU Accelerator Cards Production Value by Type (2027-2032) & (USD Million)

Table 52. World Open RAN DU Accelerator Cards Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Open RAN DU Accelerator Cards Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Open RAN DU Accelerator Cards Production Value by Processing Platform, (USD Million), 2021 & 2025 & 2032

Table 55. World Open RAN DU Accelerator Cards Production by Processing Platform (2021-2026) & (Units)

Table 56. World Open RAN DU Accelerator Cards Production by Processing Platform (2027-2032) & (Units)

Table 57. World Open RAN DU Accelerator Cards Production Value by Processing Platform (2021-2026) & (USD Million)

Table 58. World Open RAN DU Accelerator Cards Production Value by Processing Platform (2027-2032) & (USD Million)

Table 59. World Open RAN DU Accelerator Cards Average Price by Processing Platform (2021-2026) & (K US\$/Unit)

Table 60. World Open RAN DU Accelerator Cards Average Price by Processing

Platform (2027-2032) & (K US\$/Unit)

Table 61. World Open RAN DU Accelerator Cards Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Open RAN DU Accelerator Cards Production by Application (2021-2026) & (Units)

Table 63. World Open RAN DU Accelerator Cards Production by Application (2027-2032) & (Units)

Table 64. World Open RAN DU Accelerator Cards Production Value by Application (2021-2026) & (USD Million)

Table 65. World Open RAN DU Accelerator Cards Production Value by Application (2027-2032) & (USD Million)

Table 66. World Open RAN DU Accelerator Cards Average Price by Application (2021-2026) & (K US\$/Unit)

Table 67. World Open RAN DU Accelerator Cards Average Price by Application (2027-2032) & (K US\$/Unit)

Table 68. Qualcomm Technologies, Inc. Basic Information, Manufacturing Base and Competitors

Table 69. Qualcomm Technologies, Inc. Major Business

Table 70. Qualcomm Technologies, Inc. Open RAN DU Accelerator Cards Product and Services

Table 71. Qualcomm Technologies, Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Qualcomm Technologies, Inc. Recent Developments/Updates

Table 73. Qualcomm Technologies, Inc. Competitive Strengths & Weaknesses

Table 74. Intel Corporation Basic Information, Manufacturing Base and Competitors

Table 75. Intel Corporation Major Business

Table 76. Intel Corporation Open RAN DU Accelerator Cards Product and Services

Table 77. Intel Corporation Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Intel Corporation Recent Developments/Updates

Table 79. Intel Corporation Competitive Strengths & Weaknesses

Table 80. Advanced Micro Devices, Inc. Basic Information, Manufacturing Base and Competitors

Table 81. Advanced Micro Devices, Inc. Major Business

Table 82. Advanced Micro Devices, Inc. Open RAN DU Accelerator Cards Product and Services

Table 83. Advanced Micro Devices, Inc. Open RAN DU Accelerator Cards Production

(Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Advanced Micro Devices, Inc. Recent Developments/Updates

Table 85. Advanced Micro Devices, Inc. Competitive Strengths & Weaknesses

Table 86. Dell Technologies Inc. Basic Information, Manufacturing Base and Competitors

Table 87. Dell Technologies Inc. Major Business

Table 88. Dell Technologies Inc. Open RAN DU Accelerator Cards Product and Services

Table 89. Dell Technologies Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Dell Technologies Inc. Recent Developments/Updates

Table 91. Dell Technologies Inc. Competitive Strengths & Weaknesses

Table 92. Marvell Technology, Inc. Basic Information, Manufacturing Base and Competitors

Table 93. Marvell Technology, Inc. Major Business

Table 94. Marvell Technology, Inc. Open RAN DU Accelerator Cards Product and Services

Table 95. Marvell Technology, Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Marvell Technology, Inc. Recent Developments/Updates

Table 97. Marvell Technology, Inc. Competitive Strengths & Weaknesses

Table 98. EdgeQ Inc. Basic Information, Manufacturing Base and Competitors

Table 99. EdgeQ Inc. Major Business

Table 100. EdgeQ Inc. Open RAN DU Accelerator Cards Product and Services

Table 101. EdgeQ Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. EdgeQ Inc. Recent Developments/Updates

Table 103. EdgeQ Inc. Competitive Strengths & Weaknesses

Table 104. ADLINK Technology Inc. Basic Information, Manufacturing Base and Competitors

Table 105. ADLINK Technology Inc. Major Business

Table 106. ADLINK Technology Inc. Open RAN DU Accelerator Cards Product and Services

Table 107. ADLINK Technology Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 108. ADLINK Technology Inc. Recent Developments/Updates

Table 109. ADLINK Technology Inc. Competitive Strengths & Weaknesses

Table 110. Silicom Ltd. Basic Information, Manufacturing Base and Competitors

Table 111. Silicom Ltd. Major Business

Table 112. Silicom Ltd. Open RAN DU Accelerator Cards Product and Services

Table 113. Silicom Ltd. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Silicom Ltd. Recent Developments/Updates

Table 115. Silicom Ltd. Competitive Strengths & Weaknesses

Table 116. GVTel Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 117. GVTel Co., Ltd. Major Business

Table 118. GVTel Co., Ltd. Open RAN DU Accelerator Cards Product and Services

Table 119. GVTel Co., Ltd. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. GVTel Co., Ltd. Recent Developments/Updates

Table 121. GVTel Co., Ltd. Competitive Strengths & Weaknesses

Table 122. Nanjing DIGE Communication Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 123. Nanjing DIGE Communication Technology Co., Ltd. Major Business

Table 124. Nanjing DIGE Communication Technology Co., Ltd. Open RAN DU Accelerator Cards Product and Services

Table 125. Nanjing DIGE Communication Technology Co., Ltd. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Nanjing DIGE Communication Technology Co., Ltd. Recent Developments/Updates

Table 127. Nanjing DIGE Communication Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 128. Kalray S.A. Basic Information, Manufacturing Base and Competitors

Table 129. Kalray S.A. Major Business

Table 130. Kalray S.A. Open RAN DU Accelerator Cards Product and Services

Table 131. Kalray S.A. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Kalray S.A. Recent Developments/Updates

Table 133. Kalray S.A. Competitive Strengths & Weaknesses

Table 134. Compal Electronics, Inc. Basic Information, Manufacturing Base and Competitors

Table 135. Compal Electronics, Inc. Major Business

Table 136. Compal Electronics, Inc. Open RAN DU Accelerator Cards Product and Services

Table 137. Compal Electronics, Inc. Open RAN DU Accelerator Cards Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 138. Compal Electronics, Inc. Recent Developments/Updates

Table 139. Compal Electronics, Inc. Competitive Strengths & Weaknesses

Table 140. Global Key Players of Open RAN DU Accelerator Cards Upstream (Raw Materials)

Table 141. Global Open RAN DU Accelerator Cards Typical Customers

Table 142. Open RAN DU Accelerator Cards Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Open RAN DU Accelerator Cards Picture

Figure 2. World Open RAN DU Accelerator Cards Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Open RAN DU Accelerator Cards Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 5. World Open RAN DU Accelerator Cards Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Open RAN DU Accelerator Cards Production Value Market Share by Region (2021-2032)

Figure 7. World Open RAN DU Accelerator Cards Production Market Share by Region (2021-2032)

Figure 8. North America Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 9. Europe Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 10. China Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 11. Japan Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 12. China Taiwan Open RAN DU Accelerator Cards Production (2021-2032) & (Units)

Figure 13. Open RAN DU Accelerator Cards Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 16. World Open RAN DU Accelerator Cards Consumption Market Share by Region (2021-2032)

Figure 17. United States Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 18. China Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 19. Europe Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 20. Japan Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 21. South Korea Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 22. ASEAN Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 23. India Open RAN DU Accelerator Cards Consumption (2021-2032) & (Units)

Figure 24. Producer Shipments of Open RAN DU Accelerator Cards by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Open RAN DU Accelerator Cards Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Open RAN DU Accelerator Cards Markets in 2025

Figure 27. United States VS China: Open RAN DU Accelerator Cards Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Open RAN DU Accelerator Cards Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Open RAN DU Accelerator Cards Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Open RAN DU Accelerator Cards Production Market Share 2025

Figure 31. China Based Manufacturers Open RAN DU Accelerator Cards Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Open RAN DU Accelerator Cards Production Market Share 2025

Figure 33. World Open RAN DU Accelerator Cards Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Open RAN DU Accelerator Cards Production Value Market Share by Type in 2025

Figure 35. Inline Accelerator

Figure 36. Lookaside Accelerator

Figure 37. Others

Figure 38. World Open RAN DU Accelerator Cards Production Market Share by Type (2021-2032)

Figure 39. World Open RAN DU Accelerator Cards Production Value Market Share by Type (2021-2032)

Figure 40. World Open RAN DU Accelerator Cards Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 41. World Open RAN DU Accelerator Cards Production Value by Processing Platform, (USD Million), 2021 & 2025 & 2032

Figure 42. World Open RAN DU Accelerator Cards Production Value Market Share by Processing Platform in 2025

Figure 43. ASIC or SoC-based Cards

Figure 44. FPGA-based Cards

Figure 45. DPU or SmartNIC-based Cards

Figure 46. Hybrid Acceleration Cards

Figure 47. Others

Figure 48. World Open RAN DU Accelerator Cards Production Market Share by Processing Platform (2021-2032)

Figure 49. World Open RAN DU Accelerator Cards Production Value Market Share by Processing Platform (2021-2032)

Figure 50. World Open RAN DU Accelerator Cards Average Price by Processing Platform (2021-2032) & (K US\$/Unit)

Figure 51. World Open RAN DU Accelerator Cards Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 52. World Open RAN DU Accelerator Cards Production Value Market Share by Application in 2025

Figure 53. Telecommunications

Figure 54. Industrial and Enterprise Networks

Figure 55. Government and Public Sector

Figure 56. Research and Testing

Figure 57. Others

Figure 58. World Open RAN DU Accelerator Cards Production Market Share by Application (2021-2032)

Figure 59. World Open RAN DU Accelerator Cards Production Value Market Share by Application (2021-2032)

Figure 60. World Open RAN DU Accelerator Cards Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 61. Open RAN DU Accelerator Cards Industry Chain

Figure 62. Open RAN DU Accelerator Cards Procurement Model

Figure 63. Open RAN DU Accelerator Cards Sales Model

Figure 64. Open RAN DU Accelerator Cards Sales Channels, Direct Sales, and Distribution

Figure 65. Methodology

Figure 66. Research Process and Data Source

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