

Global RDMA Networking Chip 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 RDMA Networking Chip market size was valued at US\$ 4322 million in 2025 and is forecast to a readjusted size of US\$ 15189 million by 2032 with a CAGR of 18.1% during review period.

RDMA network chips are network controller or network acceleration processors deployed at the host-side network interface of servers, storage systems, AI compute nodes, HPC clusters, and cloud data centers to enable remote direct memory access, protocol offload, queue management, DMA data movement, congestion control, low-latency transport, and host I/O acceleration. This research scope mainly covers RDMA-capable NIC ASICs, InfiniBand host channel adapters, SmartNIC SoCs, DPUs/IPUs, and selected FPGA-based SmartNIC platforms that support InfiniBand, RoCE/RoCEv2, or iWARP. These chips are typically implemented in PCIe adapters, OCP NICs, DPU cards, or on-board controllers, allowing CPUs, GPUs, memory, remote storage, and distributed compute nodes to exchange high-bandwidth, low-latency, and low-jitter data with reduced CPU involvement. They are core host-side networking components for AI training clusters, high-performance computing, cloud infrastructure, NVMe-over-Fabrics storage, distributed databases, and ultra-low-latency financial networking.

Based on our research, the essence of the RDMA network chip industry is the evolution of high-performance computing networks from ?host CPU-involved data transfer? toward ?hardware offload at the network interface.? It is not a single-protocol chip category, but a host-side network acceleration chip family covering RDMA NIC ASICs, InfiniBand HCAs, SmartNIC SoCs, DPUs/IPUs, and selected FPGA SmartNIC platforms. Its core value lies in using hardware to perform queue management, DMA data movement, transport protocol processing, congestion control, and I/O offload,

enabling low-latency, high-bandwidth, and low-CPU-overhead data exchange among GPUs, CPUs, remote memory, and storage nodes. In AI training clusters, HPC, cloud data centers, and NVMe-oF storage, RDMA capability has gradually shifted from a 'high-performance optional feature' to an important capability in core network architecture. From the supply-side structure, RDMA network chips represent a highly concentrated and technologically demanding market. NVIDIA, through Mellanox ConnectX, InfiniBand HCAs, RoCE NICs, and BlueField DPUs, has built a strong ecosystem in AI training and high-end HPC interconnects. Broadcom, with its Ethernet controllers, RoCE NICs, and AI Ethernet roadmap, has become an important competitor in the Ethernet RDMA route. Intel, Marvell, and AMD participate through Ethernet controllers, IPUs, OCTEON DPUs, Pensando DPUs, and FPGA SmartNIC platforms. By comparison, Chinese suppliers and European mid-sized or smaller players are still more concentrated in system solutions, SmartNIC/DPU exploration, cloud vendor self-developed projects, and regional market supplementation. The number of RDMA NIC ASIC suppliers with meaningful influence in the global open market remains limited. From the demand-side structure, AI training clusters are currently the strongest incremental growth driver. Large model training requires large-scale parameter synchronization, gradient exchange, and distributed communication among GPUs, and high-speed RDMA networks directly affect cluster training efficiency, scalability, and tail-latency performance. InfiniBand still retains advantages in low latency and mature ecosystem support in high-end training clusters, while RoCEv2, backed by Ethernet's cost advantages, open ecosystem, and large-scale switching infrastructure, is becoming an important route for AI Ethernet clusters. Beyond AI, HPC, distributed storage, NVMe-oF, memory pooling, low-latency databases, and financial trading networks continue to support demand for RDMA NICs, SmartNICs, and DPUs, although their growth elasticity is generally lower than that of AI data centers. From the product roadmap perspective, RDMA network chips are evolving from traditional NIC ASICs toward higher integration, stronger programmability, and more complete infrastructure offload. Traditional RDMA NICs mainly solve high-speed transmission and low CPU utilization problems. SmartNICs add virtual switching, tunneling, security policy enforcement, telemetry, and storage offload on top of that. DPUs/IPUs further integrate CPU cores, network engines, storage engines, security engines, and management functions, becoming infrastructure processors in cloud data centers that operate independently from the host CPU. Future competition will not only involve port-speed upgrades from 200G and 400G to 800G and beyond, but also comprehensive competition in congestion control, GPU Direct, NVMe-oF, programmable data planes, virtualization isolation, security offload, and energy efficiency. From the perspective of competitive trends, the RDMA network chip market is likely to show a pattern of 'high-end concentration, Ethernet expansion, DPU penetration, and coexistence with cloud vendor self-developed solutions.' NVIDIA's

advantages in InfiniBand and the GPU ecosystem are likely to remain significant in the near term, but the rapid development of Ethernet RDMA will create larger opportunities for Broadcom, Intel, Marvell, AMD, and selected cloud-vendor customized solutions. Cloud vendors' requirements for cost control, controllability, security isolation, and infrastructure offload will continue to drive the development of DPUs/IPUs and self-developed SmartNICs. At the same time, ordinary NIC vendors, switch chip vendors, server OEMs, and system integrators should not be treated as equivalent to RDMA network chip suppliers. The report scope should strictly distinguish chip suppliers, adapter card brands, switch vendors, and cloud-platform internal-use chips to avoid overstating the open-market size.

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

Global RDMA Networking Chip market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/K Units), 2021-2032

Global RDMA Networking Chip market size and forecasts, by RDMA Protocol and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/K Units), 2021-2032

Global RDMA Networking Chip market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/K Units), 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 RDMA Networking Chip

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 RDMA Networking Chip 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, Broadcom Inc., Intel Corporation, Advanced Micro Devices, Inc., Marvell Technology, Inc., Chelsio Communications, Inc., Napatech A/S, Kalray S.A., Achronix Semiconductor Corporation, ATTO Technology, Inc., etc.

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

Market Segmentation

RDMA Networking Chip market is split by RDMA Protocol and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by RDMA Protocol, 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 RDMA Protocol

InfiniBand RDMA

RoCE / RoCEv2

iWARP

Proprietary / Enhanced RDMA

Market segment by Port Speed

25G / 50G

100G

200G

400G

800G

Market segment by Chip Type

RDMA NIC ASIC

InfiniBand HCA

SmartNIC SoC

DPU / IPU

FPGA SmartNIC Platform

Custom / Captive Cloud ASIC

Market segment by Application

AI Training Clusters

HPC

Cloud Infrastructure

Storage and NVMe-oF

Financial Low-latency Networking

Major players covered

NVIDIA Corporation

Broadcom Inc.

Intel Corporation

Advanced Micro Devices, Inc.

Marvell Technology, Inc.

Chelsio Communications, Inc.

Napatech A/S

Kalray S.A.

Achronix Semiconductor Corporation

ATTO Technology, Inc.

Huawei Technologies Co., Ltd.

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 RDMA Networking Chip product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of RDMA Networking Chip, with price, sales quantity, revenue, and global market share of RDMA Networking Chip from 2021 to 2026.

Chapter 3, the RDMA Networking Chip competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the RDMA Networking Chip 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 RDMA Protocol and by Application, with sales market share and growth rate by RDMA Protocol, 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 RDMA Networking Chip market forecast, by regions, by RDMA Protocol, 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 RDMA Networking Chip.

Chapter 14 and 15, to describe RDMA Networking Chip sales channel, distributors, customers, research findings and conclusion.

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