

Global RDMA Networking Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global RDMA Networking Chip market size is expected to reach \$ 15189 million by 2032, rising at a market growth of 18.1% CAGR during the forecast period (2026-2032).

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 studies the global RDMA Networking Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for RDMA Networking Chip 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 RDMA Networking Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global RDMA Networking Chip total production and demand, 2021-2032, (K Units)

Global RDMA Networking Chip total production value, 2021-2032, (USD Million)

Global RDMA Networking Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global RDMA Networking Chip consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: RDMA Networking Chip domestic production, consumption, key domestic manufacturers and share

Global RDMA Networking Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global RDMA Networking Chip production by RDMA Protocol, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global RDMA Networking Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global RDMA Networking Chip 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World RDMA Networking Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/K Units) by manufacturer, by RDMA Protocol, 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 RDMA Networking Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global RDMA Networking Chip Market, Segmentation by RDMA Protocol:

InfiniBand RDMA

RoCE / RoCEv2

iWARP

Proprietary / Enhanced RDMA

Global RDMA Networking Chip Market, Segmentation by Port Speed:

25G / 50G

100G

200G

400G

800G

Global RDMA Networking Chip Market, Segmentation by Chip Type:

RDMA NIC ASIC

InfiniBand HCA

SmartNIC SoC

DPU / IPU

FPGA SmartNIC Platform

Custom / Captive Cloud ASIC

Global RDMA Networking Chip Market, Segmentation by Application:

AI Training Clusters

HPC

Cloud Infrastructure

Storage and NVMe-oF

Financial Low-latency Networking

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global RDMA Networking Chip market?
2. What is the demand of the global RDMA Networking Chip market?
3. What is the year over year growth of the global RDMA Networking Chip market?

4. What is the production and production value of the global RDMA Networking Chip market?
5. Who are the key producers in the global RDMA Networking Chip market?
6. What are the growth factors driving the market demand?

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