

Global White Box Switch Network Operating System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global White Box Switch Network Operating System market size is expected to reach \$ 2474 million by 2032, rising at a market growth of 17.1% CAGR during the forecast period (2026-2032).

A White Box Switch Network Operating System (NOS) refers to the software that runs on white box switches, providing the necessary functionality to manage and control network traffic within a data center, campus network, or other networking environment. White box switches are hardware devices that are manufactured by third-party Original Design Manufacturers (ODMs) and are often based on merchant silicon, offering an alternative to traditional proprietary networking hardware.

SONiC is becoming the core growth engine of white box switch NOS. The white box switch NOS market is increasingly centered on SONiC because it separates switch hardware from software and supports multi-vendor switching ASICs. SONiC Foundation describes SONiC as a Linux-based open-source NOS that runs on switches from multiple vendors and ASICs, using Switch Abstraction Interface to decouple hardware and software. This makes it attractive for cloud providers, telecom operators, large enterprises, and AI data centers that want lower vendor lock-in and more flexible hardware sourcing.

Demand is shifting from hyperscale cloud to broader enterprise and service-provider adoption. SONiC was created by Microsoft for Azure data centers and later moved under the Linux Foundation, but its use is expanding beyond hyperscalers into enterprise data centers, telecom networks, and edge infrastructure. 650 Group projected the SONiC data-center switching market to exceed US\$8 billion by 2027, and specifically noted that SONiC's role outside hyperscalers would increase significantly.

AI data centers are creating a new demand cycle for open Ethernet NOS platforms. AI training clusters require high-radix, low-latency, high-bandwidth Ethernet fabrics, which increases demand for programmable and automated switch operating systems. NVIDIA describes Spectrum-X Ethernet switches as purpose-built for hyperscale generative AI fabrics and scalable to hundreds of thousands of GPUs, while open Ethernet AI/HPC deployments are also emerging with SONiC-based 800GbE fabrics.

Hardware-software decoupling is becoming a purchasing priority. Traditional switch vendors bundled proprietary NOS software with hardware, but white box networking allows customers to choose switching hardware, ASIC platforms, and NOS independently. This reduces dependence on a single vendor and supports faster adoption of Broadcom, NVIDIA/Mellanox, Marvell, Intel, or other switch silicon. The Linux Foundation notes that SONiC runs across more than 100 switch platforms and multiple ASICs, supporting this open-networking model.

This report studies the global White Box Switch Network Operating System demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for White Box Switch Network Operating System, 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 White Box Switch Network Operating System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global White Box Switch Network Operating System total market, 2021-2032, (USD Million)

Global White Box Switch Network Operating System total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: White Box Switch Network Operating System total market, key domestic companies, and share, (USD Million)

Global White Box Switch Network Operating System revenue by player, revenue and market share 2021-2026, (USD Million)

Global White Box Switch Network Operating System total market by Type, CAGR, 2021-2032, (USD Million)

Global White Box Switch Network Operating System total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global White Box Switch Network Operating System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cumulus Networks, Arista Networks, DriveNets, IP Infusion, Arrcus, Pica8, SnapRoute, Kaloom, 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 White Box Switch Network Operating System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 White Box Switch Network Operating System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global White Box Switch Network Operating System Market, Segmentation by Type:

Cloud Data Center

Other

Global White Box Switch Network Operating System Market, Segmentation by Architecture:

Monolithic NOS

Modular NOS

Global White Box Switch Network Operating System Market, Segmentation by Commercial Model:

Subscription-based NOS

Perpetual License NOS

Global White Box Switch Network Operating System Market, Segmentation by Application:

SMEs

Large Enterprises

Companies Profiled:

Cumulus Networks

Arista Networks

DriveNets

IP Infusion

Arrcus

Pica8

SnapRoute

Kaloom

Key Questions Answered

1. How big is the global White Box Switch Network Operating System market?
2. What is the demand of the global White Box Switch Network Operating System market?
3. What is the year over year growth of the global White Box Switch Network Operating System market?
4. What is the total value of the global White Box Switch Network Operating System market?
5. Who are the Major Players in the global White Box Switch Network Operating System market?
6. What are the growth factors driving the market demand?

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