

Global AI Cluster Network Switches Market Growth 2026-2032

<https://marketpublishers.com/r/GC8A242AB93EEN.html>

Date: July 2026

Pages: 128

Price: US\$ 3,660.00 (Single User License)

ID: GC8A242AB93EEN

Abstracts

The global AI Cluster Network Switches market size is predicted to grow from US\$ 13500 million in 2025 to US\$ 71473 million in 2032; it is expected to grow at a CAGR of 22.6% from 2026 to 2032.

AI Cluster Network Switches are high-bandwidth, low-latency and highly reliable data-center switching systems deployed inside artificial intelligence training, inference and high-performance computing clusters to interconnect GPUs, XPU, CPU servers, storage nodes and upstream fabrics. This research scope focuses on switch hardware systems purpose-built or explicitly positioned for AI workloads, including 400G, 800G and emerging 1.6T Ethernet switches, modular core switches, InfiniBand switching systems, Slingshot and Omni-Path high-performance interconnect switches, and open networking platforms based on switch silicon such as Broadcom Tomahawk/Jericho, NVIDIA Spectrum/Quantum and Marvell Teralynx. Core functions include RDMA/RoCE transport, congestion control, adaptive load balancing, PFC/ECN, telemetry, low-jitter forwarding, lossless fabric operation and scalable GPU-cluster connectivity.

Indicative market pricing is typically in the tens of thousands of US dollars for high-end 400G switches, from tens of thousands to well above one hundred thousand US dollars for dense 800G fixed switches, and materially higher for modular core or cluster-scale switching systems, depending on port speed, port density, silicon platform, optics, software licensing and procurement scale.

Based on our research, AI cluster network switches should not be treated as a mere high-speed extension of traditional data center switches. The industry is emerging as a specialised hardware segment built around the communication requirements of GPU and XPU clusters, where east-west traffic, collective communication, RDMA transport,

congestion control and low-jitter forwarding directly affect model training efficiency and inference throughput. The narrow scope of this report therefore focuses on switch hardware systems deployed inside AI training, inference and HPC/AI clusters, including high-speed Ethernet, InfiniBand and other high-performance interconnect switches. Adjacent products such as optical modules, cables, NICs, DPUs, servers, cloud services and pure network software are treated as related infrastructure, but not counted as the core market revenue.

From the supply side, the global market is increasingly structured around four layers: North American platform leaders and silicon ecosystems, Chinese AI data center switch suppliers, Taiwanese ODM and open networking manufacturers, and selected European data center networking vendors. NVIDIA remains structurally important because of its InfiniBand and Spectrum-X platforms; Arista, Cisco, HPE/Juniper and Dell represent the core branded Ethernet AI fabric suppliers; Huawei, H3C, Ruijie and ZTE are strategically relevant in China's intelligent computing infrastructure; and Accton/Edgecore, UfiSpace, Alpha Networks, QCT and Celestica form a critical open-switch and ODM layer. Broadcom and Marvell are not counted as switch OEMs in the narrow equipment revenue model, but their switching silicon defines much of the current 400G, 800G and emerging 1.6T product cycle.

Demand is being driven first by large-scale AI training clusters and increasingly by inference clusters, AI cloud platforms, sovereign AI infrastructure, telecom intelligent computing centers, research supercomputing facilities and enterprise private AI deployments. Training workloads require large, flat, high-radix fabrics with low job-completion time, while inference workloads are likely to broaden demand for cost-efficient Ethernet and RoCE-based deployments. This is changing the competitive logic of the market: switch vendors are competing not only on port speed and density, but also on effective bandwidth, congestion management, power efficiency, open software support, operational automation and the ability to scale AI fabrics without excessive complexity.

LP Information, Inc. (LPI) ' newest research report, the "AI Cluster Network Switches Industry Forecast" looks at past sales and reviews total world AI Cluster Network Switches sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Cluster Network Switches sales for 2026 through 2032. With AI Cluster Network Switches sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Cluster Network Switches industry.

This Insight Report provides a comprehensive analysis of the global AI Cluster Network Switches landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Cluster Network Switches portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Cluster Network Switches market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Cluster Network Switches and breaks down the forecast by Interconnect Protocol, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Cluster Network Switches.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Cluster Network Switches market by product type, application, key manufacturers and key regions and countries.

Segmentation by Interconnect Protocol:

Ethernet AI Switches

InfiniBand Switches

Proprietary / HPC Interconnect Switches

Other

Segmentation by Port Speed Class:

100G / 200G Class

400G Class

800G Class

1.6T and Above

Segmentation by Product Form Factor:

Fixed Box Switch

Modular Chassis Switch

Distributed Disaggregated Chassis

Integrated Fabric Appliance

Other

Segmentation by Fabric Role:

Top-of-Rack / Leaf Switch

Spine Switch

Super-Spine / Core Switch

DCI / Scale-Across Switch

Segmentation by Application:

Large-scale AI Training Clusters

AI Inference Clusters

HPC / AI Converged Clusters

Sovereign / Enterprise AI Data Centers

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

NVIDIA Corporation

Arista Networks, Inc.

Cisco Systems, Inc.

HPE Juniper Networking

Dell Technologies Inc.

Huawei Technologies Co., Ltd.

H3C Technologies Co., Ltd.

Ruijie Networks Co., Ltd.

Nokia Corporation

Celestica Inc.

Accton Technology Corporation

Edgecore Networks Corporation

UfiSpace Co., Ltd.

Alpha Networks Inc.

Quanta Cloud Technology

FS.com Inc.

NADDOD

Micas Networks

AurCore Technology

Cornelis Networks

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Cluster Network Switches market?

What factors are driving AI Cluster Network Switches market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Cluster Network Switches market opportunities vary by end market size?

How does AI Cluster Network Switches break out by Interconnect Protocol, by Application?

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