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Global Data Center TOR Switch Market Growth 2026-2032

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Abstracts

The global Data Center TOR Switch market size is predicted to grow from US$ 4275 million in 2025 to US$ 12696 million in 2032; it is expected to grow at a CAGR of 16.9% from 2026 to 2032.

In 2025, global Data Center TOR Switch production reached approximately 87k units, with an average global market price of around US$50k per unit.

A Data Center Top-of-Rack (TOR) Switch is an access-layer network switching device deployed at the top of a server rack or inside a data-center cabinet. It connects servers, storage systems, GPU servers, AI computing nodes, and upstream network equipment, enabling high-speed data forwarding and network resource management. TOR switches are key components of modern leaf-spine data center architectures, providing high-density ports, low-latency switching, and large bandwidth through Ethernet and optical communication technologies. A typical TOR switch consists of switching ASICs, control processors, memory, optical interfaces, power systems, thermal management components, PCB assemblies, mechanical structures, and network operating software. Driven by cloud computing, AI model training, GPU clusters, and high-performance computing, TOR switches are evolving toward higher port speeds, greater switching capacity, lower latency, intelligent network management, and optimized connectivity for AI clusters. They are widely used in internet data centers, cloud service platforms, enterprise data centers, financial institutions, HPC facilities, and large-scale AI computing infrastructures.

The upstream supply chain of data center TOR switches includes switching ASICs, processors, memory chips, optical modules, PCBs, power-management ICs, connectors, thermal materials, and mechanical components. Switching ASICs

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determine switching capacity, port speed, and network performance, while optical modules define transmission distance and bandwidth capability. High-performance PCBs, power systems, and thermal solutions ensure stable operation under intensive workloads. Representative upstream suppliers include Broadcom, NVIDIA (Mellanox), Marvell, Intel, AMD, Micron, Samsung, SK hynix, Coherent, Lumentum, Amphenol, Molex, TTM Technologies, and TSMC. Major midstream manufacturers include Cisco, Arista Networks, Juniper Networks, Huawei, H3C, Ruijie Networks, Accton Technology, and Celestica. Downstream applications include cloud computing, internet services, artificial intelligence, high-performance computing, financial services, telecom operators, and enterprise data centers, with representative users such as Amazon Web Services, Microsoft Azure, Google Cloud, Meta, Alibaba Cloud, Tencent Cloud, ByteDance, and Oracle. These companies illustrate typical value-chain participants rather than confirmed direct supplier relationships.

The data center TOR switch market is currently undergoing rapid technology upgrades, driven by increasing demand for high-speed, low-latency, and highly reliable network connectivity from cloud computing, artificial intelligence, large-scale model training, high-performance computing, and expanding data-center infrastructure. Traditional TOR switches are upgrading from 10G/25G connectivity toward 100G, 400G, and 800G interfaces, while AI server clusters are accelerating the adoption of high-bandwidth networks, lossless Ethernet, and intelligent traffic management. Key future trends include wider adoption of high-speed optical interconnects, growth of AI-oriented network switches, expansion of open networking operating systems such as SONiC, higher-performance switching ASICs, and improved thermal and power-efficiency designs. Major growth drivers include generative AI infrastructure investment, cloud service expansion, enterprise digital transformation, data-center construction, and increasing bandwidth requirements. Challenges include concentration of switching ASIC suppliers, high optical-module costs, fluctuations in data-center investment cycles, intense competition among network equipment vendors, and pricing pressure caused by increasing adoption of white-box switches. Overall, conventional server-access switching demand remains stable, while high-speed TOR switches designed for AI clusters, HPC, and next-generation data-center architectures are expected to become the major growth area.

LP Information, Inc. (LPI) ' newest research report, the “Data Center TOR Switch Industry Forecast” looks at past sales and reviews total world Data Center TOR Switch sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center TOR Switch sales for 2026 through 2032. With Data Center TOR Switch sales broken down by region, market sector and sub-sector, this report provides

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a detailed analysis in US$ millions of the world Data Center TOR Switch industry.

This Insight Report provides a comprehensive analysis of the global Data Center TOR Switch 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 Data Center TOR Switch portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center TOR Switch market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center TOR Switch and breaks down the forecast by Type, 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 Data Center TOR Switch.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center TOR Switch market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

1–5 Tbps Switching Capacity

5–25 Tbps Switching Capacity

Over 25 Tbps Switching Capacity

Segmentation by Port Rate:

1G

10G

25G

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40G

100G

200G

400G

800G

Others

Segmentation by Application:

Internet Data Center

Enterprise Data Center

Financial Data Center

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

Cisco

Arista Networks

Juniper

NVIDIA

Supermicro

Marvell

Celestica

Huawei

ZTE

H3C

HAN Networks

Htopto

Maipu Communication

Yunke China

Gigalight

Putian Xinke Communication

Ruijie Networks

Inspur

Shiyun Technology

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HOHUNET

Boying Communication

Edgecore

Accton Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center TOR Switch market?

What factors are driving Data Center TOR Switch market growth, globally and by region?

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

How do Data Center TOR Switch market opportunities vary by end market size?

How does Data Center TOR Switch break out by Type, by Application?

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