

Global InfiniBand Switch ASIC Market Growth 2026-2032

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Abstracts

The global InfiniBand Switch ASIC market size is predicted to grow from US\$ 3424 million in 2025 to US\$ 9781 million in 2032; it is expected to grow at a CAGR of 14.3% from 2026 to 2032.

An InfiniBand switch ASIC is an application-specific integrated circuit used to build InfiniBand switching systems for high-performance computing, AI clusters, supercomputers, and data-center back-end fabrics. It performs high-speed packet forwarding across InfiniBand ports and supports fabric-level functions such as adaptive routing, congestion control, partitioning, telemetry, and in-network computing capabilities. These ASICs are embedded in fixed-configuration InfiniBand switches, modular director-class switches, and high-density fabric systems, serving as the core switching silicon that enables low-latency, high-bandwidth, lossless scale-out interconnects.

Based on our research, the InfiniBand switch ASIC market is an extremely narrow and highly concentrated segment of the high-performance networking silicon industry. It should not be mixed with Ethernet switch ASICs, NICs, HCAs, DPUs, optical modules, or complete switch systems. The core function of an InfiniBand switch ASIC is to enable low-latency, high-bandwidth, lossless switching in HPC and AI cluster fabrics, with capabilities such as adaptive routing, congestion control, telemetry, fabric partitioning, and in-network computing. This makes the market structurally different from merchant Ethernet switching silicon.

From a supply perspective, the current market is effectively dominated by NVIDIA. Mellanox was historically the leading InfiniBand silicon and systems supplier, and NVIDIA completed its acquisition of Mellanox in 2020. Since then, InfiniBand switching

has become part of NVIDIA's end-to-end data-center platform, spanning GPUs, HCAs, DPUs, switches, cables, software, and cluster management. Historical competitors such as QLogic, Voltaire, SilverStorm, and Topspin are relevant for longlist completeness, but they do not represent independent active suppliers of 2025 InfiniBand switch ASIC revenue.

From a demand perspective, the market has been structurally re-accelerated by large AI training clusters. Traditional HPC demand remains important but is no longer the only growth driver. AI clusters require extremely high bisection bandwidth, low latency, lossless operation, and predictable collective communication performance. NVIDIA Quantum-2 and Quantum-X800 illustrate this shift from 400G NDR to 800G XDR InfiniBand platforms, with much higher port density and in-network processing capabilities. As cluster sizes increase, the switching fabric becomes a critical determinant of GPU utilization and total system performance.

The main competitive pressure does not come from another active InfiniBand switch ASIC vendor, but from alternative fabrics. Ethernet-based AI networking, RoCE, Ultra Ethernet, Cornelis Omni-Path, and other HPC interconnects are all trying to reduce dependence on proprietary InfiniBand ecosystems. In the near term, NVIDIA's vertical integration across compute and networking provides a strong advantage. Over the longer term, hyperscalers may increasingly evaluate Ethernet and open fabric alternatives to reduce cost, improve sourcing flexibility, and avoid platform lock-in. As a result, InfiniBand switch ASICs should be viewed as strategic AI infrastructure silicon rather than a broad merchant switching market.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for InfiniBand Switch ASIC and breaks down the forecast by Product Generation, 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 InfiniBand Switch ASIC.

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

Segmentation by Product Generation:

QDR / FDR Generation

EDR Generation

HDR Generation

NDR Generation

XDR / 800G Generation

Segmentation by Switching Capability:

Basic Packet Forwarding

Adaptive Routing

Congestion Control

In-network Computing

Telemetry and Fabric Management

Segmentation by Fabric Topology Role:

Leaf Switch ASIC

Spine Switch ASIC

Director-class Fabric ASIC

Edge / Access Fabric ASIC

Segmentation by Application:

AI Training Cluster

HPC / Supercomputing

AI Inference Cluster

Storage / Data Fabric

Cloud Back-end Network

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global InfiniBand Switch ASIC market?

What factors are driving InfiniBand Switch ASIC market growth, globally and by region?

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

How do InfiniBand Switch ASIC market opportunities vary by end market size?

How does InfiniBand Switch ASIC break out by Product Generation, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global InfiniBand Switch ASIC Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for InfiniBand Switch ASIC by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for InfiniBand Switch ASIC by Country/Region, 2021, 2025 & 2032
- 2.2 InfiniBand Switch ASIC Segment by Product Generation
 - 2.2.1 QDR / FDR Generation
 - 2.2.2 EDR Generation
 - 2.2.3 HDR Generation
 - 2.2.4 NDR Generation
 - 2.2.5 XDR / 800G Generation
 - 2.2.6 InfiniBand Switch ASIC Sales by Product Generation
 - 2.2.6.1 Global InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)
 - 2.2.6.2 Global InfiniBand Switch ASIC Revenue and Market Share by Product Generation (2021-2026)
 - 2.2.6.3 Global InfiniBand Switch ASIC Sale Price by Product Generation (2021-2026)
- 2.3 InfiniBand Switch ASIC Segment by Switching Capability
 - 2.3.1 Basic Packet Forwarding
 - 2.3.2 Adaptive Routing
 - 2.3.3 Congestion Control
 - 2.3.4 In-network Computing
 - 2.3.5 Telemetry and Fabric Management

2.3.6 InfiniBand Switch ASIC Sales by Switching Capability

2.3.6.1 Global InfiniBand Switch ASIC Sales Market Share by Switching Capability (2021-2026)

2.3.6.2 Global InfiniBand Switch ASIC Revenue and Market Share by Switching Capability (2021-2026)

2.3.6.3 Global InfiniBand Switch ASIC Sale Price by Switching Capability (2021-2026)

2.4 InfiniBand Switch ASIC Segment by Fabric Topology Role

2.4.1 Leaf Switch ASIC

2.4.2 Spine Switch ASIC

2.4.3 Director-class Fabric ASIC

2.4.4 Edge / Access Fabric ASIC

2.4.5 InfiniBand Switch ASIC Sales by Fabric Topology Role

2.4.5.1 Global InfiniBand Switch ASIC Sales Market Share by Fabric Topology Role (2021-2026)

2.4.5.2 Global InfiniBand Switch ASIC Revenue and Market Share by Fabric Topology Role (2021-2026)

2.4.5.3 Global InfiniBand Switch ASIC Sale Price by Fabric Topology Role (2021-2026)

2.5 InfiniBand Switch ASIC Segment by Application

2.5.1 AI Training Cluster

2.5.2 HPC / Supercomputing

2.5.3 AI Inference Cluster

2.5.4 Storage / Data Fabric

2.5.5 Cloud Back-end Network

2.5.6 InfiniBand Switch ASIC Sales by Application

2.5.6.1 Global InfiniBand Switch ASIC Sale Market Share by Application (2021-2026)

2.5.6.2 Global InfiniBand Switch ASIC Revenue and Market Share by Application (2021-2026)

2.5.6.3 Global InfiniBand Switch ASIC Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global InfiniBand Switch ASIC Breakdown Data by Company

3.1.1 Global InfiniBand Switch ASIC Annual Sales by Company (2021-2026)

3.1.2 Global InfiniBand Switch ASIC Sales Market Share by Company (2021-2026)

3.2 Global InfiniBand Switch ASIC Annual Revenue by Company (2021-2026)

3.2.1 Global InfiniBand Switch ASIC Revenue by Company (2021-2026)

3.2.2 Global InfiniBand Switch ASIC Revenue Market Share by Company (2021-2026)

- 3.3 Global InfiniBand Switch ASIC Sale Price by Company
- 3.4 Key Manufacturers InfiniBand Switch ASIC Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers InfiniBand Switch ASIC Product Location Distribution
 - 3.4.2 Players InfiniBand Switch ASIC Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR INFINIBAND SWITCH ASIC BY GEOGRAPHIC REGION

- 4.1 World Historic InfiniBand Switch ASIC Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global InfiniBand Switch ASIC Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global InfiniBand Switch ASIC Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic InfiniBand Switch ASIC Market Size by Country/Region (2021-2026)
 - 4.2.1 Global InfiniBand Switch ASIC Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global InfiniBand Switch ASIC Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas InfiniBand Switch ASIC Sales Growth
- 4.4 APAC InfiniBand Switch ASIC Sales Growth
- 4.5 Europe InfiniBand Switch ASIC Sales Growth
- 4.6 Middle East & Africa InfiniBand Switch ASIC Sales Growth

5 AMERICAS

- 5.1 Americas InfiniBand Switch ASIC Sales by Country
 - 5.1.1 Americas InfiniBand Switch ASIC Sales by Country (2021-2026)
 - 5.1.2 Americas InfiniBand Switch ASIC Revenue by Country (2021-2026)
- 5.2 Americas InfiniBand Switch ASIC Sales by Product Generation (2021-2026)
- 5.3 Americas InfiniBand Switch ASIC Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

6.1 APAC InfiniBand Switch ASIC Sales by Region

6.1.1 APAC InfiniBand Switch ASIC Sales by Region (2021-2026)

6.1.2 APAC InfiniBand Switch ASIC Revenue by Region (2021-2026)

6.2 APAC InfiniBand Switch ASIC Sales by Product Generation (2021-2026)

6.3 APAC InfiniBand Switch ASIC Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe InfiniBand Switch ASIC by Country

7.1.1 Europe InfiniBand Switch ASIC Sales by Country (2021-2026)

7.1.2 Europe InfiniBand Switch ASIC Revenue by Country (2021-2026)

7.2 Europe InfiniBand Switch ASIC Sales by Product Generation (2021-2026)

7.3 Europe InfiniBand Switch ASIC Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa InfiniBand Switch ASIC by Country

8.1.1 Middle East & Africa InfiniBand Switch ASIC Sales by Country (2021-2026)

8.1.2 Middle East & Africa InfiniBand Switch ASIC Revenue by Country (2021-2026)

8.2 Middle East & Africa InfiniBand Switch ASIC Sales by Product Generation (2021-2026)

8.3 Middle East & Africa InfiniBand Switch ASIC Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of InfiniBand Switch ASIC

10.3 Manufacturing Process Analysis of InfiniBand Switch ASIC

10.4 Industry Chain Structure of InfiniBand Switch ASIC

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 InfiniBand Switch ASIC Distributors

11.3 InfiniBand Switch ASIC Customer

12 WORLD FORECAST REVIEW FOR INFINIBAND SWITCH ASIC BY GEOGRAPHIC REGION

12.1 Global InfiniBand Switch ASIC Market Size Forecast by Region

12.1.1 Global InfiniBand Switch ASIC Forecast by Region (2027-2032)

12.1.2 Global InfiniBand Switch ASIC Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global InfiniBand Switch ASIC Forecast by Product Generation (2027-2032)

12.7 Global InfiniBand Switch ASIC Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 NVIDIA Corporation

13.1.1 NVIDIA Corporation Company Information

13.1.2 NVIDIA Corporation InfiniBand Switch ASIC Product Portfolios and Specifications

13.1.3 NVIDIA Corporation InfiniBand Switch ASIC Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 NVIDIA Corporation Main Business Overview

13.1.5 NVIDIA Corporation Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. InfiniBand Switch ASIC Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. InfiniBand Switch ASIC Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of QDR / FDR Generation

Table 4. Major Players of EDR Generation

Table 5. Major Players of HDR Generation

Table 6. Major Players of NDR Generation

Table 7. Major Players of XDR / 800G Generation

Table 8. Global InfiniBand Switch ASIC Sales by Product Generation (2021-2026) & (K Pcs)

Table 9. Global InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)

Table 10. Global InfiniBand Switch ASIC Revenue by Product Generation (2021-2026) & (\$ million)

Table 11. Global InfiniBand Switch ASIC Revenue Market Share by Product Generation (2021-2026)

Table 12. Global InfiniBand Switch ASIC Sale Price by Product Generation (2021-2026) & (US\$/Pcs)

Table 13. Major Players of Basic Packet Forwarding

Table 14. Major Players of Adaptive Routing

Table 15. Major Players of Congestion Control

Table 16. Major Players of In-network Computing

Table 17. Major Players of Telemetry and Fabric Management

Table 18. Global InfiniBand Switch ASIC Sales by Switching Capability (2021-2026) & (K Pcs)

Table 19. Global InfiniBand Switch ASIC Sales Market Share by Switching Capability (2021-2026)

Table 20. Global InfiniBand Switch ASIC Revenue by Switching Capability (2021-2026) & (\$ million)

Table 21. Global InfiniBand Switch ASIC Revenue Market Share by Switching Capability (2021-2026)

Table 22. Global InfiniBand Switch ASIC Sale Price by Switching Capability (2021-2026) & (US\$/Pcs)

Table 23. Major Players of Leaf Switch ASIC

Table 24. Major Players of Spine Switch ASIC

Table 25. Major Players of Director-class Fabric ASIC

Table 26. Major Players of Edge / Access Fabric ASIC

Table 27. Global InfiniBand Switch ASIC Sales by Fabric Topology Role (2021-2026) & (K Pcs)

Table 28. Global InfiniBand Switch ASIC Sales Market Share by Fabric Topology Role (2021-2026)

Table 29. Global InfiniBand Switch ASIC Revenue by Fabric Topology Role (2021-2026) & (\$ million)

Table 30. Global InfiniBand Switch ASIC Revenue Market Share by Fabric Topology Role (2021-2026)

Table 31. Global InfiniBand Switch ASIC Sale Price by Fabric Topology Role (2021-2026) & (US\$/Pcs)

Table 32. Global InfiniBand Switch ASIC Sale by Application (2021-2026) & (K Pcs)

Table 33. Global InfiniBand Switch ASIC Sale Market Share by Application (2021-2026)

Table 34. Global InfiniBand Switch ASIC Revenue by Application (2021-2026) & (\$ million)

Table 35. Global InfiniBand Switch ASIC Revenue Market Share by Application (2021-2026)

Table 36. Global InfiniBand Switch ASIC Sale Price by Application (2021-2026) & (US\$/Pcs)

Table 37. Global InfiniBand Switch ASIC Sales by Company (2021-2026) & (K Pcs)

Table 38. Global InfiniBand Switch ASIC Sales Market Share by Company (2021-2026)

Table 39. Global InfiniBand Switch ASIC Revenue by Company (2021-2026) & (\$ millions)

Table 40. Global InfiniBand Switch ASIC Revenue Market Share by Company (2021-2026)

Table 41. Global InfiniBand Switch ASIC Sale Price by Company (2021-2026) & (US\$/Pcs)

Table 42. Key Manufacturers InfiniBand Switch ASIC Producing Area Distribution and Sales Area

Table 43. Players InfiniBand Switch ASIC Products Offered

Table 44. InfiniBand Switch ASIC Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 45. New Products and Potential Entrants

Table 46. Market M&A Activity & Strategy

Table 47. Global InfiniBand Switch ASIC Sales by Geographic Region (2021-2026) & (K Pcs)

Table 48. Global InfiniBand Switch ASIC Sales Market Share Geographic Region

(2021-2026)

Table 49. Global InfiniBand Switch ASIC Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 50. Global InfiniBand Switch ASIC Revenue Market Share by Geographic Region (2021-2026)

Table 51. Global InfiniBand Switch ASIC Sales by Country/Region (2021-2026) & (K Pcs)

Table 52. Global InfiniBand Switch ASIC Sales Market Share by Country/Region (2021-2026)

Table 53. Global InfiniBand Switch ASIC Revenue by Country/Region (2021-2026) & (\$ millions)

Table 54. Global InfiniBand Switch ASIC Revenue Market Share by Country/Region (2021-2026)

Table 55. Americas InfiniBand Switch ASIC Sales by Country (2021-2026) & (K Pcs)

Table 56. Americas InfiniBand Switch ASIC Sales Market Share by Country (2021-2026)

Table 57. Americas InfiniBand Switch ASIC Revenue by Country (2021-2026) & (\$ millions)

Table 58. Americas InfiniBand Switch ASIC Sales by Product Generation (2021-2026) & (K Pcs)

Table 59. Americas InfiniBand Switch ASIC Sales by Application (2021-2026) & (K Pcs)

Table 60. APAC InfiniBand Switch ASIC Sales by Region (2021-2026) & (K Pcs)

Table 61. APAC InfiniBand Switch ASIC Sales Market Share by Region (2021-2026)

Table 62. APAC InfiniBand Switch ASIC Revenue by Region (2021-2026) & (\$ millions)

Table 63. APAC InfiniBand Switch ASIC Sales by Product Generation (2021-2026) & (K Pcs)

Table 64. APAC InfiniBand Switch ASIC Sales by Application (2021-2026) & (K Pcs)

Table 65. Europe InfiniBand Switch ASIC Sales by Country (2021-2026) & (K Pcs)

Table 66. Europe InfiniBand Switch ASIC Revenue by Country (2021-2026) & (\$ millions)

Table 67. Europe InfiniBand Switch ASIC Sales by Product Generation (2021-2026) & (K Pcs)

Table 68. Europe InfiniBand Switch ASIC Sales by Application (2021-2026) & (K Pcs)

Table 69. Middle East & Africa InfiniBand Switch ASIC Sales by Country (2021-2026) & (K Pcs)

Table 70. Middle East & Africa InfiniBand Switch ASIC Revenue Market Share by Country (2021-2026)

Table 71. Middle East & Africa InfiniBand Switch ASIC Sales by Product Generation (2021-2026) & (K Pcs)

Table 72. Middle East & Africa InfiniBand Switch ASIC Sales by Application (2021-2026) & (K Pcs)
Table 73. Key Market Drivers & Growth Opportunities of InfiniBand Switch ASIC
Table 74. Key Market Challenges & Risks of InfiniBand Switch ASIC
Table 75. Key Industry Trends of InfiniBand Switch ASIC
Table 76. InfiniBand Switch ASIC Raw Material
Table 77. Key Suppliers of Raw Materials
Table 78. InfiniBand Switch ASIC Distributors List
Table 79. InfiniBand Switch ASIC Customer List
Table 80. Global InfiniBand Switch ASIC Sales Forecast by Region (2027-2032) & (K Pcs)
Table 81. Global InfiniBand Switch ASIC Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 82. Americas InfiniBand Switch ASIC Sales Forecast by Country (2027-2032) & (K Pcs)
Table 83. Americas InfiniBand Switch ASIC Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 84. APAC InfiniBand Switch ASIC Sales Forecast by Region (2027-2032) & (K Pcs)
Table 85. APAC InfiniBand Switch ASIC Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 86. Europe InfiniBand Switch ASIC Sales Forecast by Country (2027-2032) & (K Pcs)
Table 87. Europe InfiniBand Switch ASIC Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 88. Middle East & Africa InfiniBand Switch ASIC Sales Forecast by Country (2027-2032) & (K Pcs)
Table 89. Middle East & Africa InfiniBand Switch ASIC Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 90. Global InfiniBand Switch ASIC Sales Forecast by Product Generation (2027-2032) & (K Pcs)
Table 91. Global InfiniBand Switch ASIC Revenue Forecast by Product Generation (2027-2032) & (\$ millions)
Table 92. Global InfiniBand Switch ASIC Sales Forecast by Application (2027-2032) & (K Pcs)
Table 93. Global InfiniBand Switch ASIC Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 94. NVIDIA Corporation Basic Information, InfiniBand Switch ASIC Manufacturing Base, Sales Area and Its Competitors

Table 95. NVIDIA Corporation InfiniBand Switch ASIC Product Portfolios and Specifications

Table 96. NVIDIA Corporation InfiniBand Switch ASIC Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 97. NVIDIA Corporation Main Business

Table 98. NVIDIA Corporation Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of InfiniBand Switch ASIC
- Figure 2. InfiniBand Switch ASIC Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global InfiniBand Switch ASIC Sales Growth Rate 2021-2032 (K Pcs)
- Figure 7. Global InfiniBand Switch ASIC Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. InfiniBand Switch ASIC Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. InfiniBand Switch ASIC Sales Market Share by Country/Region (2025)
- Figure 10. InfiniBand Switch ASIC Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of QDR / FDR Generation
- Figure 12. Product Picture of EDR Generation
- Figure 13. Product Picture of HDR Generation
- Figure 14. Product Picture of NDR Generation
- Figure 15. Product Picture of XDR / 800G Generation
- Figure 16. Global InfiniBand Switch ASIC Sales Market Share by Product Generation in 2026
- Figure 17. Global InfiniBand Switch ASIC Revenue Market Share by Product Generation (2021-2026)
- Figure 18. Product Picture of Basic Packet Forwarding
- Figure 19. Product Picture of Adaptive Routing
- Figure 20. Product Picture of Congestion Control
- Figure 21. Product Picture of In-network Computing
- Figure 22. Product Picture of Telemetry and Fabric Management
- Figure 23. Global InfiniBand Switch ASIC Sales Market Share by Switching Capability in 2026
- Figure 24. Global InfiniBand Switch ASIC Revenue Market Share by Switching Capability (2021-2026)
- Figure 25. Product Picture of Leaf Switch ASIC
- Figure 26. Product Picture of Spine Switch ASIC
- Figure 27. Product Picture of Director-class Fabric ASIC
- Figure 28. Product Picture of Edge / Access Fabric ASIC
- Figure 29. Global InfiniBand Switch ASIC Sales Market Share by Fabric Topology Role

in 2026

Figure 30. Global InfiniBand Switch ASIC Revenue Market Share by Fabric Topology Role (2021-2026)

Figure 31. InfiniBand Switch ASIC Consumed in AI Training Cluster

Figure 32. Global InfiniBand Switch ASIC Market: AI Training Cluster (2021-2026) & (K Pcs)

Figure 33. InfiniBand Switch ASIC Consumed in HPC / Supercomputing

Figure 34. Global InfiniBand Switch ASIC Market: HPC / Supercomputing (2021-2026) & (K Pcs)

Figure 35. InfiniBand Switch ASIC Consumed in AI Inference Cluster

Figure 36. Global InfiniBand Switch ASIC Market: AI Inference Cluster (2021-2026) & (K Pcs)

Figure 37. InfiniBand Switch ASIC Consumed in Storage / Data Fabric

Figure 38. Global InfiniBand Switch ASIC Market: Storage / Data Fabric (2021-2026) & (K Pcs)

Figure 39. InfiniBand Switch ASIC Consumed in Cloud Back-end Network

Figure 40. Global InfiniBand Switch ASIC Market: Cloud Back-end Network (2021-2026) & (K Pcs)

Figure 41. Global InfiniBand Switch ASIC Sale Market Share by Application (2025)

Figure 42. Global InfiniBand Switch ASIC Revenue Market Share by Application in 2025

Figure 43. InfiniBand Switch ASIC Sales by Company in 2025 (K Pcs)

Figure 44. Global InfiniBand Switch ASIC Sales Market Share by Company in 2025

Figure 45. InfiniBand Switch ASIC Revenue by Company in 2025 (\$ millions)

Figure 46. Global InfiniBand Switch ASIC Revenue Market Share by Company in 2025

Figure 47. Global InfiniBand Switch ASIC Sales Market Share by Geographic Region (2021-2026)

Figure 48. Global InfiniBand Switch ASIC Revenue Market Share by Geographic Region in 2025

Figure 49. Americas InfiniBand Switch ASIC Sales 2021-2026 (K Pcs)

Figure 50. Americas InfiniBand Switch ASIC Revenue 2021-2026 (\$ millions)

Figure 51. APAC InfiniBand Switch ASIC Sales 2021-2026 (K Pcs)

Figure 52. APAC InfiniBand Switch ASIC Revenue 2021-2026 (\$ millions)

Figure 53. Europe InfiniBand Switch ASIC Sales 2021-2026 (K Pcs)

Figure 54. Europe InfiniBand Switch ASIC Revenue 2021-2026 (\$ millions)

Figure 55. Middle East & Africa InfiniBand Switch ASIC Sales 2021-2026 (K Pcs)

Figure 56. Middle East & Africa InfiniBand Switch ASIC Revenue 2021-2026 (\$ millions)

Figure 57. Americas InfiniBand Switch ASIC Sales Market Share by Country in 2025

Figure 58. Americas InfiniBand Switch ASIC Revenue Market Share by Country (2021-2026)

Figure 59. Americas InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)

Figure 60. Americas InfiniBand Switch ASIC Sales Market Share by Application (2021-2026)

Figure 61. United States InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 62. Canada InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 63. Mexico InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 64. Brazil InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 65. APAC InfiniBand Switch ASIC Sales Market Share by Region in 2025

Figure 66. APAC InfiniBand Switch ASIC Revenue Market Share by Region (2021-2026)

Figure 67. APAC InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)

Figure 68. APAC InfiniBand Switch ASIC Sales Market Share by Application (2021-2026)

Figure 69. China InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 70. Japan InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 71. South Korea InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 72. Southeast Asia InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 73. India InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 74. Australia InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 75. China Taiwan InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 76. Europe InfiniBand Switch ASIC Sales Market Share by Country in 2025

Figure 77. Europe InfiniBand Switch ASIC Revenue Market Share by Country (2021-2026)

Figure 78. Europe InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)

Figure 79. Europe InfiniBand Switch ASIC Sales Market Share by Application (2021-2026)

Figure 80. Germany InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 81. France InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 82. UK InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 83. Italy InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 84. Russia InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 85. Middle East & Africa InfiniBand Switch ASIC Sales Market Share by Country (2021-2026)

Figure 86. Middle East & Africa InfiniBand Switch ASIC Sales Market Share by Product Generation (2021-2026)

Figure 87. Middle East & Africa InfiniBand Switch ASIC Sales Market Share by Application (2021-2026)

Figure 88. Egypt InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 89. South Africa InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 90. Israel InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 91. Turkey InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 92. GCC Countries InfiniBand Switch ASIC Revenue Growth 2021-2026 (\$ millions)

Figure 93. Manufacturing Cost Structure Analysis of InfiniBand Switch ASIC in 2026

Figure 94. Manufacturing Process Analysis of InfiniBand Switch ASIC

Figure 95. Industry Chain Structure of InfiniBand Switch ASIC

Figure 96. Channels of Distribution

Figure 97. Global InfiniBand Switch ASIC Sales Market Forecast by Region (2027-2032)

Figure 98. Global InfiniBand Switch ASIC Revenue Market Share Forecast by Region (2027-2032)

Figure 99. Global InfiniBand Switch ASIC Sales Market Share Forecast by Product Generation (2027-2032)

Figure 100. Global InfiniBand Switch ASIC Revenue Market Share Forecast by Product Generation (2027-2032)

Figure 101. Global InfiniBand Switch ASIC Sales Market Share Forecast by Application (2027-2032)

Figure 102. Global InfiniBand Switch ASIC Revenue Market Share Forecast by Application (2027-2032)

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