

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch Market Growth 2026-2032

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Abstracts

The global Liquid-cooled RDMA-capable High-speed Ethernet Switch market size is predicted to grow from US\$ 686 million in 2025 to US\$ 2227 million in 2032; it is expected to grow at a CAGR of 11.0% from 2026 to 2032.

A liquid-cooled RDMA-capable high-speed Ethernet switch is a high-bandwidth lossless Ethernet switching device designed for artificial intelligence compute clusters, cloud data centers, and high-performance computing environments. Its core function is to provide low-latency, high-throughput, low-loss, and predictable data transport among GPU servers, AI accelerator nodes, distributed storage systems, and cross-rack networks. These products typically use 400GE, 800GE, or 1.6TbE ports as their primary interface formats and combine RoCE, PFC, ECN, AI ECN, load balancing, telemetry, congestion visualization, and automated operations capabilities to build a lossless or near-lossless network environment suitable for RDMA traffic. Compared with conventional high-speed Ethernet switches, their key distinction lies in the use of cold-plate liquid cooling, immersion liquid cooling, hybrid cooling, or rack-level coolant delivery designs to reduce the thermal density pressure generated by switch ASICs, optical modules, and high-density ports, while improving system energy efficiency and rack deployment density. These products are commonly delivered as fixed-form-factor switches, open-rack switches, liquid-cooled switch trays, network operating system licenses, and cluster networking solutions. Major customers include hyperscale cloud service providers, AI data center operators, internet platforms, high-performance computing institutions, and large enterprise data centers.

Liquid-cooled RDMA-capable high-speed Ethernet switches are evolving from data center networking devices into critical components of artificial intelligence compute infrastructure. Large model training and distributed inference impose much higher

requirements on GPU-to-GPU communication. Conventional Ethernet switches are often insufficient in congestion control, tail latency, packet-loss recovery, and bandwidth consistency for large-scale parallel computing. As a result, lossless Ethernet switches with RoCE, PFC, ECN, AI ECN, intelligent load balancing, and telemetry capabilities have become important choices for AI cluster deployment. As port speeds move from 400GE to 800GE and 1.6TbE, and switching capacity advances into the 51.2Tbps and 102.4Tbps tiers, the network traffic and thermal load carried by a single device increase significantly. Liquid cooling is therefore moving from an optional configuration to an important design requirement for high-density AI networking. The core competitiveness of these products no longer comes only from port count and switching capacity, but also from the coordination of switch silicon, network operating systems, congestion algorithms, optical and electrical interconnects, thermal architecture, and cluster tuning. Future data center networks will place greater emphasis on end-to-end performance determinism, and devices that can solve bandwidth, latency, power consumption, and operational complexity at the same time will be more likely to win large-scale cluster deployments.

The product technology roadmap is developing through multiple parallel paths. Cold-plate liquid cooling is suitable for integration with existing racks and standardized data center facilities. Immersion liquid cooling is better suited for deployments seeking higher thermal density and stronger facility-level energy efficiency. Hybrid cooling and open-rack coolant delivery are more suitable for full-rack delivery in hyperscale AI clusters. On the networking side, RoCE remains the mainstream Ethernet transport for RDMA. PFC and ECN provide the foundation for lossless control, while AI ECN, global load balancing, congestion telemetry, slow-node detection, and automated configuration are becoming key differentiators for high-end products. On the interconnect side, conventional pluggable optical modules still benefit from deployment maturity, while LPO, NPO, CPO, and short-reach copper interconnects continue to advance around lower power consumption, reduced latency, and improved reliability. On the software side, SONiC, Junos, and vendor-developed operating systems coexist, and customers select technology paths based on openness, stability, operational tools, ecosystem compatibility, and cluster scale. Overall, the industry is unlikely to be dominated by a single technical architecture. Instead, multiple product combinations will emerge around different deployment scales, power budgets, rack standards, and network architectures.

Market demand will continue to be driven by AI compute clusters and will gradually expand into cloud data centers, high-performance computing, converged storage, and data center interconnect. Large cloud service providers and internet platforms are typically the earliest adopters of high-end liquid-cooled RDMA switches because their

training clusters are large, network utilization is high, power costs are sensitive, and requirements for cluster expansion efficiency and fault localization are stringent. AI data center operators and compute leasing platforms place greater emphasis on delivery cycles, rack-level energy efficiency, operational visibility, and compatibility with mainstream AI servers. High-performance computing institutions place more weight on low latency, deterministic forwarding, and long-term stable operation. As liquid-cooled servers, liquid-cooled racks, and high-power AI accelerators become more widely adopted, liquid cooling for switches will advance in parallel with full-rack infrastructure. Future competition will shift from standalone product sales toward complete networking solutions, software subscriptions, operations platforms, and ecosystem lock-in. Vendors with strong product validation capabilities, scaled delivery capabilities, and cross-hardware-and-software coordination will be more likely to establish long-term customer relationships.

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

This Insight Report provides a comprehensive analysis of the global Liquid-cooled RDMA-capable High-speed Ethernet 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 Liquid-cooled RDMA-capable High-speed Ethernet Switch portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Liquid-cooled RDMA-capable High-speed Ethernet Switch market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Liquid-cooled RDMA-capable High-speed Ethernet Switch and breaks down the forecast by Port Speed, 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 Liquid-cooled RDMA-capable High-speed Ethernet Switch.

This report presents a comprehensive overview, market shares, and growth opportunities of Liquid-cooled RDMA-capable High-speed Ethernet Switch market by product type, application, key manufacturers and key regions and countries.

Segmentation by Port Speed:

100G Primary Port Switch

400G Primary Port Switch

1.6T Primary Port Switch

Others

Segmentation by Switching Capacity:

10T-Class and Below Switch

51.2T-Class Switch

102.4T-Class Switch

Others

Segmentation by Port Density:

56-Port-Class Switch

64-Port-Class Switch

128-Port-Class Switch

Others

Segmentation by Application:

AI Computing

Cloud Data Center

Converged Storage

Others

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

Huawei Technologies Co., Ltd.

H3C Technologies Co., Limited

Ruijie Networks Co., Ltd.

Super Micro Computer, Inc.

Celestica Inc.

Hewlett Packard Enterprise Company

Key Questions Addressed in this Report

What is the 10-year outlook for the global Liquid-cooled RDMA-capable High-speed Ethernet Switch market?

What factors are driving Liquid-cooled RDMA-capable High-speed Ethernet Switch market growth, globally and by region?

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

How do Liquid-cooled RDMA-capable High-speed Ethernet Switch market opportunities vary by end market size?

How does Liquid-cooled RDMA-capable High-speed Ethernet Switch break out by Port Speed, by Application?

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