

# Global RDMA Networking Chip Market Growth 2026-2032

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## Abstracts

The global RDMA Networking Chip market size is predicted to grow from US\$ 4109 million in 2025 to US\$ 15287 million in 2032; it is expected to grow at a CAGR of 19.2% from 2026 to 2032.

RDMA network chips are network controller or network acceleration processors deployed at the host-side network interface of servers, storage systems, AI compute nodes, HPC clusters, and cloud data centers to enable remote direct memory access, protocol offload, queue management, DMA data movement, congestion control, low-latency transport, and host I/O acceleration. This research scope mainly covers RDMA-capable NIC ASICs, InfiniBand host channel adapters, SmartNIC SoCs, DPUs/IPUs, and selected FPGA-based SmartNIC platforms that support InfiniBand, RoCE/RoCEv2, or iWARP. These chips are typically implemented in PCIe adapters, OCP NICs, DPU cards, or on-board controllers, allowing CPUs, GPUs, memory, remote storage, and distributed compute nodes to exchange high-bandwidth, low-latency, and low-jitter data with reduced CPU involvement. They are core host-side networking components for AI training clusters, high-performance computing, cloud infrastructure, NVMe-over-Fabrics storage, distributed databases, and ultra-low-latency financial networking.

Based on our research, the essence of the RDMA network chip industry is the evolution of high-performance computing networks from ?host CPU-involved data transfer? toward ?hardware offload at the network interface.? It is not a single-protocol chip category, but a host-side network acceleration chip family covering RDMA NIC ASICs, InfiniBand HCAs, SmartNIC SoCs, DPUs/IPUs, and selected FPGA SmartNIC platforms. Its core value lies in using hardware to perform queue management, DMA data movement, transport protocol processing, congestion control, and I/O offload, enabling low-latency, high-bandwidth, and low-CPU-overhead data exchange among

GPUs, CPUs, remote memory, and storage nodes. In AI training clusters, HPC, cloud data centers, and NVMe-oF storage, RDMA capability has gradually shifted from a 'high-performance optional feature' to an important capability in core network architecture. From the supply-side structure, RDMA network chips represent a highly concentrated and technologically demanding market. NVIDIA, through Mellanox ConnectX, InfiniBand HCAs, RoCE NICs, and BlueField DPUs, has built a strong ecosystem in AI training and high-end HPC interconnects. Broadcom, with its Ethernet controllers, RoCE NICs, and AI Ethernet roadmap, has become an important competitor in the Ethernet RDMA route. Intel, Marvell, and AMD participate through Ethernet controllers, IPU, OCTEON DPUs, Pensando DPUs, and FPGA SmartNIC platforms. By comparison, Chinese suppliers and European mid-sized or smaller players are still more concentrated in system solutions, SmartNIC/DPU exploration, cloud vendor self-developed projects, and regional market supplementation. The number of RDMA NIC ASIC suppliers with meaningful influence in the global open market remains limited. From the demand-side structure, AI training clusters are currently the strongest incremental growth driver. Large model training requires large-scale parameter synchronization, gradient exchange, and distributed communication among GPUs, and high-speed RDMA networks directly affect cluster training efficiency, scalability, and tail-latency performance. InfiniBand still retains advantages in low latency and mature ecosystem support in high-end training clusters, while RoCEv2, backed by Ethernet's cost advantages, open ecosystem, and large-scale switching infrastructure, is becoming an important route for AI Ethernet clusters. Beyond AI, HPC, distributed storage, NVMe-oF, memory pooling, low-latency databases, and financial trading networks continue to support demand for RDMA NICs, SmartNICs, and DPUs, although their growth elasticity is generally lower than that of AI data centers. From the product roadmap perspective, RDMA network chips are evolving from traditional NIC ASICs toward higher integration, stronger programmability, and more complete infrastructure offload. Traditional RDMA NICs mainly solve high-speed transmission and low CPU utilization problems. SmartNICs add virtual switching, tunneling, security policy enforcement, telemetry, and storage offload on top of that. DPUs/IPUs further integrate CPU cores, network engines, storage engines, security engines, and management functions, becoming infrastructure processors in cloud data centers that operate independently from the host CPU. Future competition will not only involve port-speed upgrades from 200G and 400G to 800G and beyond, but also comprehensive competition in congestion control, GPU Direct, NVMe-oF, programmable data planes, virtualization isolation, security offload, and energy efficiency. From the perspective of competitive trends, the RDMA network chip market is likely to show a pattern of 'high-end concentration, Ethernet expansion, DPU penetration, and coexistence with cloud vendor self-developed solutions.' NVIDIA's advantages in InfiniBand and the GPU ecosystem are likely to remain significant in the

near term, but the rapid development of Ethernet RDMA will create larger opportunities for Broadcom, Intel, Marvell, AMD, and selected cloud-vendor customized solutions. Cloud vendors' requirements for cost control, controllability, security isolation, and infrastructure offload will continue to drive the development of DPUs/IPUs and self-developed SmartNICs. At the same time, ordinary NIC vendors, switch chip vendors, server OEMs, and system integrators should not be treated as equivalent to RDMA network chip suppliers. The report scope should strictly distinguish chip suppliers, adapter card brands, switch vendors, and cloud-platform internal-use chips to avoid overstating the open-market size.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for RDMA Networking Chip and breaks down the forecast by RDMA 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 RDMA Networking Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of RDMA Networking Chip market by product type, application, key manufacturers and key regions and countries.

Segmentation by RDMA Protocol:

InfiniBand RDMA

RoCE / RoCEv2

iWARP

Proprietary / Enhanced RDMA

#### Segmentation by Port Speed:

25G / 50G

100G

200G

400G

800G

#### Segmentation by Chip Type:

RDMA NIC ASIC

InfiniBand HCA

SmartNIC SoC

DPU / IPU

FPGA SmartNIC Platform

Custom / Captive Cloud ASIC

#### Segmentation by Application:

AI Training Clusters

HPC

Cloud Infrastructure

Storage and NVMe-oF

Financial Low-latency Networking

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

Broadcom Inc.

Intel Corporation

Advanced Micro Devices, Inc.

Marvell Technology, Inc.

Chelsio Communications, Inc.

Napatech A/S

Kalray S.A.

Achronix Semiconductor Corporation

ATTO Technology, Inc.

Huawei Technologies Co., Ltd.

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global RDMA Networking Chip market?

What factors are driving RDMA Networking Chip market growth, globally and by region?

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

How do RDMA Networking Chip market opportunities vary by end market size?

How does RDMA Networking Chip break out by RDMA Protocol, by Application?

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