

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
Executive Summary	
Significant Changes	1
Overview	1
Definitions	8
Vendor Product Maps	9
Methodology	11
Worldwide Tables (Mfg. Revenue, Units and/or Ports, Mfg. ASP)	
Table 1: Worldwide Ethernet – Controller & Adapter Market – by Speed	1
Table 2: Worldwide Ethernet – Controller & Adapter Market – by Platform Type	3
Table 3: Worldwide 1 Gbps Ethernet – Controller & Adapter Market – Server Attach	4
Table 4: Worldwide 10 Gbps Ethernet – Controller & Adapter Market – Total	5
Table 5: Worldwide 10 Gbps Ethernet – Controller & Adapter Market – Controllers	6
Table 6: Worldwide 10 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	7
Table 7: Worldwide 25 Gbps Ethernet – Controller & Adapter Market – Total	8
Table 8: Worldwide 25 Gbps Ethernet – Controller & Adapter Market – Controllers	9
Table 9: Worldwide 25 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	10
Table 10: Worldwide 40 Gbps Ethernet – Controller & Adapter Market – Total	11
Table 11: Worldwide 40 Gbps Ethernet – Controller & Adapter Market – Controllers	12
Table 12: Worldwide 40 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	13
Table 13: Worldwide 50 Gbps Ethernet – Controller & Adapter Market – Total	14
Table 14: Worldwide 50 Gbps Ethernet – Controller & Adapter Market – Controllers	15
Table 15: Worldwide 50 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	16
Table 16: Worldwide 100 Gbps Ethernet – Controller & Adapter Market – Total	17
Table 17: Worldwide 100 Gbps Ethernet – Controller & Adapter Market – Controllers	18
Table 18: Worldwide 100 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	19
Table 19: Worldwide 200 Gbps Ethernet – Controller & Adapter Market – Total	20
Table 20: Worldwide 200 Gbps Ethernet – Controller & Adapter Market – Controllers	21
Table 21: Worldwide 200 Gbps Ethernet – Controller & Adapter Market – Fiber/Copper Split	22
Table 22: Worldwide Total Ethernet – Controller & Adapter Market – Smart NIC – by Speed	23
Table 23: Worldwide Total Ethernet – Controller & Adapter Market – Smart NIC – by Platform Type	25
Table 24: Worldwide Total Ethernet – Controller & Adapter Market – Standard NIC vs. Smart NIC	26
Appendix 1: Worldwide Total Ethernet – Controller & Adapter Market – Vendor Type	27
Appendix 2: Worldwide Total Ethernet – Controller & Adapter Market – FCoE Enabled	29
Appendix 3: Worldwide InfiniBand – Controller & Adapter Market – Total by Port Speed	30
Vendor Tables	
Total Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	31
1 Gbps Ethernet – Controller & Adapter – Server Attach	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	35
1 Gbps Ethernet – Controller – Server Attach	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	39
1 Gbps Ethernet – Stand-alone Adapter – Server Attach	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	43
10 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	47

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
10 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	51
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	55
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	59
10 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	63
10 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	67
10 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	71
10 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	75
Worldwide – Copper Ports – Total.....	76
Worldwide – Copper Ports – Direct Attach Copper.....	77
Worldwide – Copper Ports – Base-T	78
Worldwide – Copper Ports – Others	79
25 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	80
25 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	84
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	88
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	92
25 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	96
25 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	100
25 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	104
25 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	108
Worldwide – Copper Ports – Total.....	109
Worldwide – Copper Ports – Direct Attach Copper.....	110
Worldwide – Copper Ports – Base-T	111
Worldwide – Copper Ports – Others	112
40 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	113
40 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	117
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	121
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	125

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
40 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	129
40 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	133
40 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	137
40 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	141
Worldwide – Copper Ports – Total.....	142
Worldwide – Copper Ports – Direct Attach Copper.....	143
Worldwide – Copper Ports – Base-T	144
Worldwide – Copper Ports – Others	145
50 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	146
50 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	150
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	154
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	158
50 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	162
50 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	166
50 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	170
50 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	174
Worldwide – Copper Ports – Total.....	175
Worldwide – Copper Ports – Direct Attach Copper.....	176
Worldwide – Copper Ports – Base-T	177
Worldwide – Copper Ports – Others	178
100 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	179
100 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	183
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	187
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	191
100 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	195
100 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	199

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
100 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	203
100 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	207
Worldwide – Copper Ports – Total.....	208
Worldwide – Copper Ports – Direct Attach Copper.....	209
Worldwide – Copper Ports – Base-T	210
Worldwide – Copper Ports – Others	211
200 Gbps Ethernet – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	212
200 Gbps Ethernet – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	216
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	220
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	224
200 Gbps Ethernet – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	228
200 Gbps Ethernet – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	232
200 Gbps Ethernet – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	236
200 Gbps Ethernet – Fiber/Copper Split	
Worldwide – Fiber Ports	240
Worldwide – Copper Ports – Total.....	241
Worldwide – Copper Ports – Direct Attach Copper.....	242
Worldwide – Copper Ports – Base-T	243
Worldwide – Copper Ports – Others	244
Total Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	245
10 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	249
10 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	253
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	257
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP.....	261
10 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	265
10 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	269
10 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	273

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
25 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	277
25 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	281
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	285
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	289
25 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	293
25 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	297
25 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	301
40 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	305
40 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	309
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	313
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	317
40 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	321
40 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	325
40 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	329
50 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	333
50 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	337
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	341
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	345
50 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	349
50 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	353
50 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	357

Table of Contents – Ethernet Adapter & Smart NIC

	Page No.
100 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	361
100 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	365
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	369
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	373
100 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	377
100 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	381
100 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	385
200 Gbps Smart NIC – Controller & Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	389
200 Gbps Smart NIC – Controller	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	393
Worldwide – Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	397
Worldwide – Non-Server Attach – Mfg. Revenue, Units, Ports, Mfg. Port ASP	401
200 Gbps Smart NIC – Daughter Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	405
200 Gbps Smart NIC – Mezzanine Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	409
200 Gbps Smart NIC – Stand-alone Adapter	
Worldwide – Total – Mfg. Revenue, Units, Ports, Mfg. Port ASP	413
Total Ethernet – FCoE Enabled	
Worldwide – FCoE Enabled – Total – Mfg. Revenue, Ports, Mfg. Port ASP	417