

Global Carrier-Depletion Phase Shifter Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carrier-Depletion Phase Shifter market size is expected to reach \$ 1125 million by 2032, rising at a market growth of 18.7% CAGR during the forecast period (2026-2032).

A carrier-depletion phase shifter is a core active device for high-speed electro-optic phase modulation in silicon photonic integrated circuits. It typically introduces a PN junction or PIN junction into a silicon waveguide and applies a reverse bias to expand the depletion region, changing the free-carrier concentration in the waveguide and thereby modifying the effective refractive index and absorption loss to enable fast control of optical phase, optical intensity, or resonant wavelength. The device addresses the need for high-bandwidth, low-power, and scalable conversion from electrical signals to optical signals in high-speed optical communications and on-chip optical interconnects. It is commonly integrated into Mach-Zehnder modulators, microring modulators, coherent IQ modulators, optical switches, and programmable photonic circuits. Its technology foundation relies on SOI silicon photonics platforms, CMOS-compatible ion implantation, deep ultraviolet lithography, metal interconnects, traveling-wave electrodes, and PDK compact models. Key metrics include V_πL, 3-dB electro-optic bandwidth, insertion loss, modulation efficiency, drive voltage, extinction ratio, and energy per bit. Product delivery forms include standard device cells in a PDK, MPW prototype dies, custom PICs, silicon photonic optical engines, coherent optical subassemblies, or integrated modulation units inside pluggable optical modules, serving data center interconnects, AI-cluster optical I/O, metro coherent transmission, co-packaged optics, microwave photonics, LiDAR, quantum photonics, and on-chip sensing.

Carrier-depletion phase shifters occupy one of the most critical active modulation

positions in the silicon photonics value chain. Their strategic value does not come only from the electro-optic conversion function of an individual phase-shifting cell, but also from the manufacturability that allows the device to be replicated across large-scale PICs, optical engines, coherent subassemblies, and co-packaged optical systems. Conventional electrical interconnects are approaching limits in speed, distance, power consumption, and thermal management. By integrating a reverse-biased PN junction into a silicon waveguide, silicon photonics platforms enable electrical signals to modulate optical phase or intensity with relatively low drive power, providing a manufacturable device foundation for high-density optical interconnects. Public product forms in the market indicate that these devices are more commonly delivered as part of silicon photonic MZMs, microring modulators, coherent IQ modulators, or optical I/O chips, rather than as standalone discrete phase shifters. Therefore, industry research should include silicon photonics foundry platforms, PDK device libraries, photonic integrated circuits, and modular optical engines within the same scope, with emphasis on process nodes, device-library maturity, tape-out services, packaging coupling, driver co-design, and production yield.

The core demand drivers come from AI data centers, cloud computing networks, coherent transmission, and next-generation co-packaged optics. As switch-chip throughput, GPU cluster size, and east-west traffic continue to grow, pluggable optical modules remain the dominant shipment format, but high-bandwidth systems are gradually moving optical-electrical conversion from the front panel toward the board, package, and near-chip levels. Carrier-depletion phase shifters offer high speed, CMOS compatibility, and integration suitability, supporting the evolution of 400G, 800G, 1.6T, and higher-speed optical links. Compared with thermo-optic tuners, they provide response speeds better suited for data modulation. Compared with carrier-injection devices, their reverse-biased operation helps reduce limitations associated with minority-carrier lifetime. Compared with non-silicon electro-optic solutions, their advantage lies in easier entry into wafer-scale silicon photonics manufacturing and PDK ecosystems. Future competition will focus on energy per bit, bandwidth per channel, V/L , loss, linearity, thermal drift, packaging density, and system-level co-optimization.

The industry landscape is being shaped jointly by platform providers, device companies, system vendors, and emerging optical I/O companies. Foundry and open-access platforms reduce the entry barrier for silicon photonic design through PDKs, MPW runs, and custom tape-out services, enabling startups, optical module manufacturers, and system-level customers to integrate carrier-depletion modulators into dedicated PICs. Optical communication device companies combine silicon photonic modulators, detectors, lasers, DSPs, and packaging capabilities to form module-level products that

can be deployed directly in data centers and metro networks. Emerging optical I/O companies further combine microring modulation, wavelength-division multiplexing, UCIe interconnects, and advanced packaging to replace part of the copper interconnect with optical links, targeting bandwidth scaling and energy-efficiency improvements in AI computing. Overall, the industry remains in a rapid expansion phase, benefiting in the near term from 800G and 1.6T module upgrades, in the medium term from CPO and optical I/O chiplet deployment, and in the long term from additional applications in programmable photonics, optical switching, quantum photonic circuits, microwave photonics, and sensing systems.

This report studies the global Carrier-Depletion Phase Shifter production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carrier-Depletion Phase Shifter and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Carrier-Depletion Phase Shifter that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carrier-Depletion Phase Shifter total production and demand, 2021-2032, (Million Units)

Global Carrier-Depletion Phase Shifter total production value, 2021-2032, (USD Million)

Global Carrier-Depletion Phase Shifter production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Carrier-Depletion Phase Shifter consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Carrier-Depletion Phase Shifter domestic production, consumption, key domestic manufacturers and share

Global Carrier-Depletion Phase Shifter production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Carrier-Depletion Phase Shifter production by Signal Modulation, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Carrier-Depletion Phase Shifter production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Carrier-Depletion Phase Shifter market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key

companies covered as a part of this study include GlobalFoundries Inc., Tower Semiconductor Ltd., Intel Corporation, AIM Photonics, imec, CEA-Leti, CompoundTek Pte Ltd, University of Southampton CORNERSTONE, NTT Innovative Devices Corporation, SiFotonics Technologies Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Carrier-Depletion Phase Shifter market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Signal Modulation, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Carrier-Depletion Phase Shifter Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carrier-Depletion Phase Shifter Market, Segmentation by Signal Modulation:

DC-Biased Carrier-Depletion Phase Shifter

NRZ High-Speed Carrier-Depletion Phase Shifter

PAM4 High-Speed Carrier-Depletion Phase Shifter

Coherent I/Q Carrier-Depletion Phase Shifter

Analog RF Carrier-Depletion Phase Shifter

Pulse-Controlled Carrier-Depletion Phase Shifter

Global Carrier-Depletion Phase Shifter Market, Segmentation by Operating Band:

O-Band Carrier-Depletion Phase Shifter

C-Band Carrier-Depletion Phase Shifter

L-Band Carrier-Depletion Phase Shifter

C and L-Band Carrier-Depletion Phase Shifter

Other Near-Infrared Band Carrier-Depletion Phase Shifter

Mid-Infrared Exploratory Carrier-Depletion Phase Shifter

Other

Global Carrier-Depletion Phase Shifter Market, Segmentation by Performance Target:

High-Speed-Priority Carrier-Depletion Phase Shifter

Low-Drive-Voltage-Priority Carrier-Depletion Phase Shifter

Low-Insertion-Loss-Priority Carrier-Depletion Phase Shifter

Small-Footprint-Priority Carrier-Depletion Phase Shifter

High-Linearity-Priority Carrier-Depletion Phase Shifter

Other

Global Carrier-Depletion Phase Shifter Market, Segmentation by Delivery Form:

PDK Device-Library Carrier-Depletion Phase Shifter

MPW Die Carrier-Depletion Phase Shifter

Custom PIC Carrier-Depletion Phase Shifter

Optical-Engine-Integrated Carrier-Depletion Phase Shifter

Coherent Optical Subassembly-Integrated Carrier-Depletion Phase Shifter

Pluggable Optical Module-Integrated Carrier-Depletion Phase Shifter

Other

Global Carrier-Depletion Phase Shifter Market, Segmentation by Application:

Data Center Optical Interconnect

AI Cluster Optical I/O

Coherent Optical Communication

Co-Packaged Optics

Optical Switch Matrix

LiDAR Beam Control

Quantum Photonic Circuit

On-Chip Sensing Readout

Other

Companies Profiled:

GlobalFoundries Inc.

Tower Semiconductor Ltd.

Intel Corporation

AIM Photonics

imec

CEA-Leti

CompoundTek Pte Ltd

University of Southampton CORNERSTONE

NTT Innovative Devices Corporation

SiFotonics Technologies Co., Ltd.

Sicoya GmbH

OpenLight Photonics, Inc.

Cisco Systems, Inc.

Broadcom Inc.

Marvell Technology, Inc.

Coherent Corp.

Ayar Labs, Inc.

Lightmatter, Inc.

STMicroelectronics N.V.

Key Questions Answered:

1. How big is the global Carrier-Depletion Phase Shifter market?
2. What is the demand of the global Carrier-Depletion Phase Shifter market?
3. What is the year over year growth of the global Carrier-Depletion Phase Shifter market?
4. What is the production and production value of the global Carrier-Depletion Phase Shifter market?
5. Who are the key producers in the global Carrier-Depletion Phase Shifter market?
6. What are the growth factors driving the market demand?

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