

Global Chip-on-Board Optical Assembly Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Chip-on-Board Optical Assembly market size is expected to reach \$ 3456 million by 2032, rising at a market growth of 18.1% CAGR during the forecast period (2026-2032).

Chip-on-Board Optical Assembly is a board-level optoelectronic integration component designed for high-speed optical interconnects and precision optical sensing. Its core approach is to directly mount lasers, photodetectors, silicon photonics chips, driver ICs, TIAs, passive optical components, and necessary control devices on printed circuit boards, ceramic substrates, optical engine boards, or dedicated carriers, and to complete high-density integration of the optoelectronic conversion unit through wire bonding, flip-chip bonding, SMT hybrid assembly, active optical coupling, encapsulation, and automated testing. This product addresses the trade-offs of traditional discrete optical devices in data rate, miniaturization, thermal management, cost, and assembly efficiency, enabling optical modules, active optical cables, on-board optical modules, near-package optical interconnects, and optical sensing modules to operate with shorter electrical paths, higher channel density, and lower cost per bit. Typical customers include optical module manufacturers, data center equipment suppliers, switch and server vendors, AI cluster system integrators, optical sensing and imaging equipment manufacturers, and advanced packaging foundries. Common delivery forms include COB optical engines, COB optical transceiver modules, AOC-embedded optical engines, on-board optoelectronic modules, CPO/NPO optical engines, and customized optical sensing board-level assemblies, with business models centered on standard product sales, custom development, ODM/OEM, and packaging manufacturing services.

Chip-on-Board Optical Assembly is evolving from a process choice inside conventional

optical modules into an important integration platform for high-speed optical interconnect systems. As switch chips, GPUs, server NICs, and optical module interfaces continue to move to higher data rates, signal loss, crosstalk, thermal density, and power consumption on PCBs are becoming increasingly severe, forcing shorter distances between optical chips and electrical chips. COB solutions directly integrate lasers, photodetectors, drivers, TIAs, and passive optical components on board-level carriers, enabling smaller size, shorter interconnects, higher automated assembly efficiency, and lower cost per bit. Compared with traditional TO-CAN or BOX packaging, COB has cost and density advantages in short-reach data center links, parallel multimode transmission, AOCs, SR-class optical modules, and selected PSM products. Its limitations mainly lie in hermeticity, contamination protection, reworkability, and extreme reliability, so BOX, ceramic packaging, and higher-order heterogeneous integration will continue to coexist in long-haul telecom and high-reliability industrial scenarios. Overall, COB is not a single package form, but a collection of high-density optoelectronic assembly capabilities. Competition will increasingly center on die placement, micron-level coupling, thermal paths, automated testing, and high-volume yield.

AI clusters and cloud data centers are significantly reshaping the demand structure for Chip-on-Board Optical Assembly. In the past, such components were mainly used in 10G, 25G, 40G, and 100G short-reach optical modules, with the core logic focused on cost optimization and module miniaturization. Now, demand for 800G, 1.6T, and future higher-speed interconnects is raising the strategic role of optical engines in system architecture. High-speed switches and GPU clusters require higher bandwidth density and lower power consumption. Front-panel pluggable optical modules will remain large in scale, but on-board optics, near-package optics, co-packaged optics, and optical I/O are becoming important complements to next-generation architectures. COB plays both a transitional and an extending role in this process. It provides a mature and cost-efficient optoelectronic assembly solution for pluggable optical modules and AOCs, while also building capabilities in multichannel placement, silicon photonics coupling, thermal management, and automated testing for OBO, NPO, and CPO. Future growth will be concentrated in high-speed Ethernet, AI back-end networks, GPU pooling interconnects, in-board optical interconnects, and high-density fiber array interfaces. Market competition will move from simple module price competition toward a combined contest of optical chip platforms, packaging yield, customer qualification cycles, system power consumption, and supply chain delivery capability.

From a regional perspective, the Chip-on-Board Optical Assembly supply chain has already formed a multi-location collaborative structure. Mainland China and Taiwan

have complete supply chains in optical module manufacturing, optical engine assembly, PCB production, and packaging services, covering high-volume demand from low-speed access modules to high-speed data center modules. Japanese companies have deep capabilities in on-board optical modules, precision connectors, ceramic substrates, and optical I/O technologies, making them well positioned to extend into system-level high-reliability optical interconnects. Korean companies are entering higher-integration optical engine markets through platforms such as O-SiP, creating technological substitution pressure on traditional COB. U.S. and Israeli companies participate in global competition mainly through high-speed connectors, silicon photonics platforms, optical engine design, and innovative interconnect architectures. On the demand side, key customers include North American cloud service providers, global switch vendors, Chinese communications equipment manufacturers, AI server supply chains, and high-performance computing users. As the optical transceiver and optical interconnect markets continue to expand, the packaging and assembly value associated with COB will continue to rise, although the industry will also face constraints from high-speed chip supply, customer qualification, automation equipment investment, and price erosion. Companies with platform-based products, scale manufacturing, and multi-region delivery capabilities are more likely to capture long-term share.

This report studies the global Chip-on-Board Optical Assembly production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Chip-on-Board Optical Assembly 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 Chip-on-Board Optical Assembly that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Chip-on-Board Optical Assembly total production and demand, 2021-2032, (Million Units)

Global Chip-on-Board Optical Assembly total production value, 2021-2032, (USD Million)

Global Chip-on-Board Optical Assembly production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Chip-on-Board Optical Assembly consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Chip-on-Board Optical Assembly domestic production, consumption, key domestic manufacturers and share

Global Chip-on-Board Optical Assembly production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Chip-on-Board Optical Assembly production by Transmission Distance, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Chip-on-Board Optical Assembly production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Chip-on-Board Optical Assembly 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 TRUELIGHT CORPORATION, Chengdu Tsuhan Technology Co., Ltd., Xinsulian HangZhou Technology Co. Ltd, Broadex Technologies, ShunYun Technology, ETU-Link Technology Co., Ltd., Optcore, FIC Global, Inc., Pixon Technologies Corp., KYOCERA Corporation, 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 Chip-on-Board Optical Assembly 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 Transmission Distance, 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 Chip-on-Board Optical Assembly Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Chip-on-Board Optical Assembly Market, Segmentation by Transmission Distance:

On-Board Interconnect COB Optical Assembly

Intra-System Interconnect COB Optical Assembly

In-Rack Short-Reach COB Optical Assembly

Data Center Short-Reach COB Optical Assembly

Medium-Reach Transmission COB Optical Assembly

Long-Reach Transmission COB Optical Assembly

Global Chip-on-Board Optical Assembly Market, Segmentation by Fiber Medium:

Multimode Fiber COB Optical Assembly

Single-Mode Fiber COB Optical Assembly

Parallel Multi-Fiber COB Optical Assembly

Board-Level Optical Waveguide COB Optical Assembly

Free-Space Coupled COB Optical Assembly

Global Chip-on-Board Optical Assembly Market, Segmentation by Primary Chip

Platform:

VCSEL Array COB Optical Assembly

DFB Laser COB Optical Assembly

EML Laser COB Optical Assembly

Silicon Photonics PIC COB Optical Assembly

Photodetector Array COB Optical Assembly

CMOS Image Sensor COB Optical Assembly

Other

Global Chip-on-Board Optical Assembly Market, Segmentation by Application:

Data Center Short-Reach Interconnect

AI Cluster High-Speed Interconnect

Switch On-Board Interconnect

Server Intra-System Interconnect

Active Optical Cable Link

5G Transport Network

Other

Companies Profiled:

TRUELIGHT CORPORATION

Chengdu Tsuhan Technology Co., Ltd.

Xinsulian HangZhou Technology Co. Ltd

Broadex Technologies

ShunYun Technology

ETU-Link Technology Co., Ltd.

Optcore

FIC Global, Inc.

Pixon Technologies Corp.

KYOCERA Corporation

I-PEX Inc.

Samtec, Inc.

Advanced Semiconductor Engineering, Inc.

LIPAC Co., Ltd.

ColorChip Ltd.

Chengdu FTE Technology Co., Ltd.

Chengdu Eugenlight Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Chip-on-Board Optical Assembly market?
2. What is the demand of the global Chip-on-Board Optical Assembly market?
3. What is the year over year growth of the global Chip-on-Board Optical Assembly market?
4. What is the production and production value of the global Chip-on-Board Optical Assembly market?

5. Who are the key producers in the global Chip-on-Board Optical Assembly market?
6. What are the growth factors driving the market demand?

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