

Global Chip-on-Carrier Package Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Chip-on-Carrier Package market size was valued at US\$ 1343 million in 2025 and is forecast to a readjusted size of US\$ 2397 million by 2032 with a CAGR of 8.6% during review period.

Chip-on-Carrier package is a first-level packaging format for active optoelectronic chips. Its core approach is to mount a laser diode, electro-absorption modulated laser, semiconductor optical amplifier, gain chip, or photodetector chip onto a metallized ceramic, aluminum nitride, C-Mount, or other high-thermal-conductivity carrier, and to establish electrical interconnection and thermal paths through soldering, wire bonding, flip-chip assembly, or termination structures. It addresses the handling difficulty of bare dies, burn-in and screening needs, thermal path limitations, customer integration complexity, and high-frequency signal-integrity requirements. Therefore, it is widely used as an intermediate device in optical transceiver sub-assemblies, external light sources for silicon photonics, LiDAR light sources, pump sources, gas absorption spectroscopy sources, medical lasers, and scientific optical systems. The product normally does not prioritize a complete housing or fiber pigtail. Instead, it emphasizes open mounting, low thermal resistance, testability, customization, ease of optical coupling, and compatibility with non-hermetic or customer-owned package platforms. Common delivery forms include standard-wavelength off-the-shelf products, CoC devices screened by wavelength and power, high-speed communication CoCs with RF termination, OEM carriers with NTC or TEC compatibility, and customized package supply for high-volume optical module and laser system manufacturers.

Chip-on-Carrier packaging is becoming a critical intermediate format in the active optoelectronic device industry, connecting bare dies with system-level packages. As

optical communications, LiDAR, quantum optics, and industrial laser systems increasingly require open integration, efficient thermal dissipation, and rapid validation, direct bare-die delivery can no longer fully satisfy customer requirements for handling, screening, burn-in, testing, and secondary assembly. Complete TO, butterfly, or fiber-coupled modules, by contrast, may reduce design flexibility and increase cost. CoC mounts the chip on a metallized carrier, ceramic carrier, aluminum nitride carrier, or C-Mount carrier, allowing the chip to obtain basic electrical interconnection, thermal paths, and testability before it enters the customer's module. For high-speed EMLs, DFB lasers, SOAs, APDs, and high-power laser diodes, this format balances thermal resistance, signal integrity, non-hermetic package compatibility, and OEM assembly efficiency. In the future, the value of this product will not lie only in the device itself, but also in the engineering capability built around carrier design, solder materials, termination structures, burn-in screening, and customer optical-path adaptation.

From the demand perspective, the growth of CoC chip packaging will be jointly driven by higher-speed communications and the diversification of laser applications. Data centers and access networks continue to move toward higher speed, lower power consumption, and higher integration density, creating clear demand for EML, DFB, and APD CoC devices in optical sub-assemblies. Automotive and industrial LiDAR are driving the development of CoC devices with high peak power, eye-safe wavelengths, and multi-junction structures, with the 1550 nm direction emphasizing long range, stronger return signals, and a higher safety margin. Gas detection, environmental monitoring, aerospace, and life-science applications require narrow-linewidth, tunable, and custom-wavelength light sources, supporting the delivery of DFB, FP, SLD, and gain chips in open carrier formats. Medical aesthetics, pumping, illumination, and materials processing focus more on high power, high efficiency, long lifetime, and controllable cost. Therefore, CoC is not a single package specification, but a family of application-oriented packaging platforms built around different chips, wavelength bands, power levels, and system integration methods.

The competitive landscape will reflect regional specialization and capability stratification. European, American, and Japanese suppliers have stronger accumulated capabilities in high-speed communications, narrow-linewidth devices, custom scientific light sources, APD receivers, and high-reliability customer projects, with products emphasizing data rate, wavelength accuracy, reliability standards, and complex system adaptation. Chinese suppliers are expanding rapidly in high-power laser diodes, CoS and CoC pump devices, and industrial and medical applications, with advantages in wavelength coverage, cost, delivery speed, and customization response. Future competition will not depend only on the ability to provide a specific chip, but on the ability to build an end-to-

end capability covering epitaxial chips, facet processing, die attach, carrier materials, wire bonding, burn-in, testing, and batch consistency. As non-hermetic optical modules, external light sources for silicon photonics, and high-power laser systems expand shipments, companies with platform-based packaging, long-term reliability data, and customer co-development capabilities will be better positioned to increase pricing power and move from single-device suppliers to key optoelectronic sub-assembly partners.

This report is a detailed and comprehensive analysis for global Chip-on-Carrier Package market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Active Device Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Chip-on-Carrier Package market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-on-Carrier Package market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-on-Carrier Package market size and forecasts, by Active Device Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-on-Carrier Package market shares of main players, shipments in revenue (\$ Million), sales quantity (Million Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Chip-on-Carrier Package

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Chip-on-Carrier Package market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Coherent Corp., Broadcom Inc., NTT Innovative Devices Corporation, Anritsu Corporation, Modulight Corporation, SemiNex Corporation, Innolume GmbH, Sacher Lasertechnik GmbH, nanoplus Nanosystems and Technologies GmbH, Shenzhen Box Optronics Technology Co., Ltd., etc.

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

Market Segmentation

Chip-on-Carrier Package market is split by Active Device Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Active Device Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Active Device Type

Laser Diode CoC Chip Package

Electro-Absorption Modulated Laser CoC Chip Package

Semiconductor Optical Amplifier CoC Chip Package

Gain Chip CoC Chip Package

Avalanche Photodiode CoC Chip Package

Other

Market segment by Operating Mode

Continuous-Wave CoC Chip Package

Quasi-Continuous-Wave CoC Chip Package

Pulsed CoC Chip Package

High-Speed Modulated CoC Chip Package

Market segment by Thermal Management Process

AuSn Hard-Solder CoC Chip Package

Indium Soft-Solder CoC Chip Package

P-Side-Down CoC Chip Package

Flip-Chip CoC Chip Package

Passive-Cooling CoC Chip Package

Market segment by Integration Interface

Wire-Bond Pad CoC Chip Package

RF-Terminated CoC Chip Package

Face-Down APD CoC Chip Package

Free-Space Optical CoC Chip Package

Silicon Photonics Coupled CoC Chip Package

Other

Market segment by Application

Data Center Optical Interconnect

LiDAR

Fiber Laser Pumping

Defense Ranging and Targeting

Quantum Optics Experiment

Other

Major players covered

Coherent Corp.

Broadcom Inc.

NTT Innovative Devices Corporation

Anritsu Corporation

Modulight Corporation

SemiNex Corporation

Innolume GmbH

Sacher Lasertechnik GmbH

nanoplus Nanosystems and Technologies GmbH

Shenzhen Box Optonics Technology Co., Ltd.

Hangzhou Brandnew Technology Co., Ltd.

Dogain Skyera Laser Technology (Danyang) Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Chip-on-Carrier Package product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Chip-on-Carrier Package, with price, sales quantity, revenue, and global market share of Chip-on-Carrier Package from 2021 to 2026.

Chapter 3, the Chip-on-Carrier Package competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Chip-on-Carrier Package breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Active Device Type and by Application, with sales market share and growth rate by Active Device Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Chip-on-Carrier Package market forecast, by regions, by Active Device Type, and by Application, with sales and revenue,

from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Chip-on-Carrier Package.

Chapter 14 and 15, to describe Chip-on-Carrier Package sales channel, distributors, customers, research findings and conclusion.

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