

Global Co-Packaged Optics Engine Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G3E5D0CD0F95EN.html>

Date: August 2026

Pages: 120

Price: US\$ 4,480.00 (Single User License)

ID: G3E5D0CD0F95EN

Abstracts

The global Co-Packaged Optics Engine market size is expected to reach \$ 1266 million by 2032, rising at a market growth of 43.3% CAGR during the forecast period (2026-2032).

In 2025, global Co-Packaged Optics Engine production reached approximately 105 K Units, with an average global market price of around 754 USD per Unit.

A Co-Packaged Optics Engine, or CPO Optical Engine, is an optoelectronic conversion component integrated within the same package or near-package area as high-bandwidth electronic chips such as switch ASICs, AI accelerators, or network processors. It typically consists of silicon photonic chips, modulators, photodetectors, drivers, TIAs, optical coupling structures, control circuits, fiber arrays, and advanced packaging elements, enabling high-speed conversion and transmission between electrical and optical signals close to the chip. Compared with conventional pluggable optical modules, a CPO optical engine is positioned much closer to the compute or switching silicon, helping shorten high-speed electrical links, reduce signal loss and power consumption, and improve system-level port density and interconnect efficiency.

The core value of a Co-Packaged Optics Engine lies in moving optical interconnect capability from external modules to the chip-adjacent domain, directly addressing the growing challenges of power consumption, signal integrity, thermal management, and front-panel density in AI data centers and high-performance computing networks. As AI training clusters scale, switch ASIC bandwidth increases, and 800G, 1.6T, 3.2T, and higher-speed architectures accelerate, traditional pluggable optics are increasingly constrained by system efficiency and physical space limitations. With advantages in lower power, higher density, shorter interconnect paths, and closer optoelectronic co-

integration, CPO optical engines are emerging as a critical technology direction for next-generation AI networking and high-end switching systems. Looking ahead, as silicon photonics processes, external laser sources, advanced packaging, automated optical coupling, and system-level validation continue to mature, CPO optical engines are expected to move from early high-end deployments into broader data center and HPC adoption, becoming a key value unit in the transition from module-level optical upgrades to system-level interconnect redesign.

The upstream raw materials for Co-Packaged Optics Engine mainly include silicon photonic chips, laser light sources, driver chips, DSPs, etc. Typical raw material suppliers include Intel, Marvell, Cisco, Lumentum, Coherent, Broadcom, etc. The downstream applications are mainly silicon photonic modules used in data centers, high-performance computing, and other fields. Typical downstream users include Amazon AWS, Microsoft Azure, Google Cloud, Huawei, ZTE, Alibaba, Tencent, etc.

The single-line capacity of Co-Packaged Optics Engine is mainly affected by the silicon photonics PIC wafer manufacturing yield, optoelectronic chip mounting accuracy, fiber array coupling efficiency, active/passive alignment process, packaging and testing cycle time, and high-speed optoelectronic performance screening time. Among these factors, packaging coupling and testing are usually the key bottlenecks for capacity ramp-up.

This report studies the global Co-Packaged Optics Engine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Co-Packaged Optics Engine 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 Co-Packaged Optics Engine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Co-Packaged Optics Engine total production and demand, 2021-2032, (K Units)

Global Co-Packaged Optics Engine total production value, 2021-2032, (USD Million)

Global Co-Packaged Optics Engine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Co-Packaged Optics Engine consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Co-Packaged Optics Engine domestic production, consumption, key

domestic manufacturers and share

Global Co-Packaged Optics Engine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Co-Packaged Optics Engine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Co-Packaged Optics Engine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Co-Packaged Optics Engine 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 Marvell Technology, Inc., Acacia (Cisco Systems), Broadcom Inc., Intel Corporation, Ayar Labs, Lightmatter, Ranovus, DustPhotonics (Credo Technology), SCINTIL Photonics, Sicoya, 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 Co-Packaged Optics Engine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, 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 Co-Packaged Optics Engine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Co-Packaged Optics Engine Market, Segmentation by Type:

400G and Below

800G

1.6T

3.2T

6.4T and Above

Global Co-Packaged Optics Engine Market, Segmentation by Function:

Transmitter Optical Engine

Receiver Optical Engine

Others

Global Co-Packaged Optics Engine Market, Segmentation by Application:

Data Center

High-performance Computing (HPC)

Other

Companies Profiled:

Marvell Technology, Inc.

Acacia (Cisco Systems)

Broadcom Inc.

Intel Corporation

Ayar Labs

Lightmatter

Ranovus

DustPhotonics (Credo Technology)

SCINTIL Photonics

Sicoya

Accelink

SiFotonics

Elite Photonics

Key Questions Answered:

1. How big is the global Co-Packaged Optics Engine market?
2. What is the demand of the global Co-Packaged Optics Engine market?
3. What is the year over year growth of the global Co-Packaged Optics Engine market?
4. What is the production and production value of the global Co-Packaged Optics Engine market?
5. Who are the key producers in the global Co-Packaged Optics Engine market?
6. What are the growth factors driving the market demand?

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