

# Global Co-Packaged Optics Module (CPO) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Co-Packaged Optics Module (CPO) market size is expected to reach \$ 1400 million by 2032, rising at a market growth of 37.7% CAGR during the forecast period (2026-2032).

Co-Packaged Optics (CPO) is an advanced heterogeneous integration of optics and silicon on a single packaged substrate aimed at addressing next generation bandwidth and power challenges. CPO brings together a wide range of expertise in fiber optics, digital signal processing (DSP), switch ASICs, and state-of-the-art packaging & test to provide disruptive system value for the data center and cloud infrastructure. Generally, CPOs offer power saving in several different ways:

**No lossy copper traces:** Unlike pluggable optics, CPO design eliminates the need for signals to traverse from the application-specific integrated circuit (ASIC) chip over energy-sapping copper links across the board up to the front panel. Instead, CPO design brings the fiber directly to the switch enabling short, low-loss communication between the chip and the optical engine.

**Fewer digital signal processors (DSPs):** In current architectures for speeds higher than 25G/lane, DSP-based retimers have become necessary components in pluggable optics to actively analyze and compensate for signal degradation, distortions, and timing issues. The DSP contributes to driving up the overall system power by as much as 25-30%. However, given that CPOs eliminate the off-chip lossy copper traces between the ASIC and the optics, designers can safely eliminate one DSP level to save power and reduce costs.

**Integrated lasers:** There are two schools of thought regarding laser source placement.

The prevalent approach involves an external laser, necessitating the transmission of light through a fiber and coupling it into the CPO and typically incurring an optical power loss of 30-50%. The alternative approach integrates the laser directly onto the chip, offering a notably higher optical coupling compared to the latter approach, provided that thermal management and laser reliability are viable.

High bandwidth and low latency: CPOs can enable higher bandwidth and lower latency, mainly because of fewer DSPs and the removal of long copper traces. Additional blocks like DSPs as well as the parasitics in copper traces all introduce delays that signals won't see in a CPO solution.

The AI revolution is a recurring theme across industries, with projections of the AI sector reaching \$280 billion by 2030. CPO technology, which integrates optical engines with compute chips (e.g., AI/ML accelerators), could benefit from AI-driven demand for high-speed, low-latency data transmission in data centers and HPC clusters.

Tech giants like Google, Amazon, Microsoft, and Meta are exploring CPO to enhance power efficiency and data transmission speeds. CPO is expected to replace traditional pluggable optics in data center switches by 2026–2028.

Traditional pluggable optics consume 50-60% more power than CPO. CPO enables energy-efficient data transmission, reducing cooling costs in data centers. Growing focus on green data centers and carbon footprint reduction is accelerating CPO deployment.

Industry alliances like OIF (Optical Internetworking Forum) and Open Compute Project (OCP) are working on CPO specifications. Companies like Cisco, Intel, Broadcom, etc. are collaborating to develop standardized CPO modules for commercial deployment.

This report studies the global Co-Packaged Optics Module (CPO) demand, key companies, and key regions.

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

## **Highlights and key features of the study**

Global Co-Packaged Optics Module (CPO) total market, 2021-2032, (USD Million)

Global Co-Packaged Optics Module (CPO) total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Co-Packaged Optics Module (CPO) total market, key domestic companies, and share, (USD Million)

Global Co-Packaged Optics Module (CPO) revenue by player, revenue and market share 2021-2026, (USD Million)

Global Co-Packaged Optics Module (CPO) total market by Type, CAGR, 2021-2032, (USD Million)

Global Co-Packaged Optics Module (CPO) total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Co-Packaged Optics Module (CPO) market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Broadcom, NVIDIA, Cisco, Ranovus, Intel, Marvell Technology, 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 Module (CPO) market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Module (CPO) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Co-Packaged Optics Module (CPO) Market, Segmentation by Type:

Less than 1.6 T

1.6 to 3.2 T

More than 3.2 T

#### Global Co-Packaged Optics Module (CPO) Market, Segmentation by Service:

2.5D CPO Integration

3D CPO Integration

#### Global Co-Packaged Optics Module (CPO) Market, Segmentation by Product:

Chiplet-based CPO

Edge-Coupled Fiber CPO

## Global Co-Packaged Optics Module (CPO) Market, Segmentation by Application:

Data Center and HPC

Telecommunication and Networking

## Companies Profiled:

Broadcom

NVIDIA

Cisco

Ranovus

Intel

Marvell Technology

## Key Questions Answered

1. How big is the global Co-Packaged Optics Module (CPO) market?
2. What is the demand of the global Co-Packaged Optics Module (CPO) market?
3. What is the year over year growth of the global Co-Packaged Optics Module (CPO) market?
4. What is the total value of the global Co-Packaged Optics Module (CPO) market?
5. Who are the Major Players in the global Co-Packaged Optics Module (CPO) market?
6. What are the growth factors driving the market demand?

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