

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

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Abstracts

The global Co-Packaged Optics Optical Engine market size is expected to reach \$ 1047 million by 2032, rising at a market growth of 9.1% CAGR during the forecast period (2026-2032).

Co-packaged optics optical engines are high-density optical-electrical conversion components designed for AI computing clusters, high-speed switch chips, accelerator chips, and data center networking equipment. Their core function is to complete high-speed conversion between electrical and optical signals near the chip package. By using silicon photonics, external continuous-wave lasers, optical I/O chiplets, driver amplification, photodetection, fiber-array coupling, and advanced packaging technologies, these products move part of the interconnect functions traditionally handled by front-panel pluggable optical modules closer to the chip. This helps reduce high-speed electrical channel loss, shorten board-level trace distances, increase bandwidth density, and improve system energy efficiency. These products are typically delivered as CPO optical engines, NPO optical engines, optical I/O chiplets, external light source modules, fiber-coupling components, or subassemblies of complete switching systems. Typical applications include 51.2T and higher-speed switches, AI server clusters, GPU and XPU interconnects, high-performance computing networks, cloud data center scale-up interconnects, and scale-out interconnects. Their main customers include switch chip vendors, AI chip vendors, cloud service operators, optical communication equipment vendors, and advanced packaging system integrators. Commercialization priorities focus on power consumption, thermal management, reliability, serviceability, packaging yield, and ecosystem standardization.

The industrial value of co-packaged optics optical engines is evolving from a single optical communication component into a system-level solution for bottlenecks in AI

computing infrastructure. As AI training and inference clusters expand, switches, GPUs, XPU, and accelerators require higher-density, lower-power, and lower-latency data transmission. Traditional board-level high-speed electrical connections are approaching practical limits in distance, loss, thermal performance, and power consumption. Optical engines move electrical-to-optical conversion from front-panel pluggable modules to the vicinity of chip packages, allowing high-speed signals to be converted over shorter electrical paths and then transmitted over optical fibers for longer-distance, high-bandwidth connectivity. This can materially improve system-level energy efficiency and interconnect density. The commercialization of this technology is not merely a replacement for optical modules, but a restructuring of the relationship among switch chips, photonic chips, external light sources, packaging structures, and system thermal design. It is therefore well positioned as a key direction for AI data center networking upgrades and chip-to-chip interconnect upgrades.

From the perspective of the value chain, co-packaged optics optical engines feature parallel technology routes and multi-party collaboration. Silicon photonics platforms integrate modulators, waveguides, photodetectors, and coupling structures into compact chips. External continuous-wave laser sources provide stable optical power. Driver ICs and transimpedance amplifiers handle high-speed electrical signal processing, while advanced packaging addresses thermal management, precision assembly, fiber coupling, and reliability validation. Companies enter the market from different positions, with some focusing on switch chips and systems, some on optical I/O chiplets, some on external light sources, and others on fiber arrays and packaging components. Because CPO products must simultaneously meet requirements for bandwidth, power consumption, thermal performance, yield, serviceability, and standards compatibility, no single segment can easily form a complete commercial closed loop on its own. Competition will increasingly be defined by platform ecosystems, customer qualification capabilities, and cross-domain engineering integration.

In the coming years, the growth of co-packaged optics optical engines will be driven primarily by AI infrastructure investment, switch chip bandwidth upgrades, and data center energy-efficiency requirements. Near-term adoption is most likely in high-end switches, AI training clusters, and hyperscale cloud data centers, while medium-term expansion may extend to AI accelerator packages, chip-to-chip interconnects, GPU pooling, and high-performance computing networks. The market still faces challenges in cost, reliability, packaging yield, field serviceability, and standards convergence, but these challenges will also accelerate the evolution of external light sources, socketed optical engines, 3D optical I/O, and high-precision passive coupling components. Production capacity will concentrate in countries and regions with strengths in silicon

photonics design, lasers, optical components, advanced packaging, and system integration, while demand will concentrate in markets with active cloud computing, AI server, and high-performance networking deployment. Overall, this segment is in an early phase of transition from technology validation to scaled deployment, and its long-term growth potential will depend on the pace of AI network architecture upgrades and the maturity of the CPO ecosystem.

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

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

Highlights and key features of the study

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

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

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

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

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

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

Global Co-Packaged Optics Optical Engine production by Transmission Capacity, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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

This report profiles key players in the global Co-Packaged Optics Optical 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 Broadcom Inc., NVIDIA Corporation, Marvell Technology, Inc., Ayar Labs, Inc., Ranovus Inc., Ciena Corporation, Coherent

Corp., Lumentum Holdings Inc., Lightmatter, Inc., Credo Technology Group Inc., 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 Optical Engine market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Co-Packaged Optics Optical Engine Market, Segmentation by Transmission Capacity:

100G

400G

800G

1.6T

3.2T

6.4T and Above

32T and Above

Global Co-Packaged Optics Optical Engine Market, Segmentation by Light Source Configuration:

Integrated Laser

External Laser Source

Without Light Source

Global Co-Packaged Optics Optical Engine Market, Segmentation by Integration Position:

In-Package Integration

Package-Edge Mounting

Front-Panel External

Others

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

Switch Chip Interconnect

Compute Chip Interconnect

Optical Module Interconnect

External Light Source Supply

Others

Companies Profiled:

Broadcom Inc.

NVIDIA Corporation

Marvell Technology, Inc.

Ayar Labs, Inc.

Ranovus Inc.

Ciena Corporation

Coherent Corp.

Lumentum Holdings Inc.

Lightmatter, Inc.

Credo Technology Group Inc.

POET Technologies Inc.

Furukawa Electric Co., Ltd.

LIPAC Co., Ltd.

Suzhou TFC Optical Communication Co., Ltd.

Accelink Technologies Co., Ltd.

Key Questions Answered:

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

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