

Global COBO On-Board Optical Module 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 COBO On-Board Optical Module market size was valued at US\$ 125 million in 2025 and is forecast to a readjusted size of US\$ 1030 million by 2032 with a CAGR of 35.1% during review period.

COBO on-board optical modules are board-level optoelectronic conversion components designed for high-speed switching, server interconnects, and high-performance computing systems. They are typically mounted on the motherboard or in PCB areas close to switch chips and processors, converting SerDes outputs into multi-channel optical signals through very short electrical traces and then routing those signals out of the system through multi-fiber cables, in-board optical cables, or optical interfaces. Their core value is to mitigate the electrical loss, power consumption, thermal burden, and faceplate density constraints of front-panel pluggable modules at 400G and higher data rates, while improving bandwidth density and signal integrity within limited board space. Typical product forms include COBO-standardized eight-lane and sixteen-lane modules, on-board optical transceivers, embedded optical engines, compliance test boards, in-board optical cables, and matching connectors. Technology paths include VCSEL-based multimode parallel optics, silicon photonics, thin-film lithium niobate modulators, PAM4 high-speed electrical interfaces, LGA or surface-mount interconnects, and multi-fiber array coupling. Major customers include cloud data centers, switch vendors, server and accelerator card manufacturers, supercomputing systems, and aerospace and defense electronics integrators, with procurement models commonly involving customized design-in, sample validation, limited-volume supply, and system-level co-development.

The industrial value of COBO on-board optical modules comes from the continued expansion of electrical interconnect bottlenecks in high-speed switching systems. As the interface bandwidth of switch chips, processors, and accelerators continues to rise, traditional front-panel pluggable modules require high-speed electrical signals to travel through longer PCB traces and more interconnect structures, which increases loss, crosstalk, equalization power, and thermal pressure at the same time. On-board optical modules move the optoelectronic conversion point into the motherboard and even close to the switch chip or processor, allowing electrical signals to be converted over an extremely short path and then routed over longer distances through fiber or flyover cables. The core significance of this architecture is not simply changing the physical location of the module, but reallocating system constraints among board-level signal integrity, power consumption, thermal management, and faceplate density. Compared with front-panel modules, the on-board approach is better suited to high-end switching, AI clusters, high-performance computing, and closed dedicated systems. Compared with co-packaged optics, it retains relatively replaceable, testable, and separable engineering boundaries, giving it an important transitional role in the evolution of next-generation optical interconnects.

The COBO on-board optical module market is unlikely to converge rapidly around a single route in the near term. Instead, standardized modules, broader mid-board optical transceivers, embedded optical engines, board-mounted optical assemblies, in-board optical cables, and compliance test ecosystems will develop in parallel. Different downstream systems vary widely in their requirements for data rate, reach, power consumption, serviceability, and environmental reliability, creating layered technology paths across VCSEL-based multimode parallel optics, silicon photonics, thin-film lithium niobate, LGA interconnects, surface mounting, multi-fiber array coupling, and flyover architectures. Data centers emphasize bandwidth density, energy per bit, and system cooling. High-performance computing focuses on low latency between nodes and system routability. Aerospace and defense systems prioritize wide temperature ranges, vibration resistance, low profile, and long-term reliability. Therefore, COBO on-board optical modules should not be viewed as an isolated standard component market, but as a supply-chain portfolio market built around system architecture redesign. Competitive advantage comes from the combined fit of optical chips, packaging, connectors, thermal design, test validation, and system-level co-development capabilities.

From an industry outlook perspective, COBO on-board optical modules benefit from the long-term growth of AI data centers, 800G-to-1.6T network upgrades, supercomputing interconnects, and dedicated embedded computing. However, the pace of

commercialization will depend on how system vendors balance serviceability, standards-based interchangeability, thermal design responsibility, and total cost of ownership. Front-panel pluggable modules still have a mature ecosystem and maintenance advantages, while co-packaged optics represents a deeper direction of chip-level integration. On-board optical modules provide an engineering compromise between the two. They reduce the pressure on high-speed electrical paths without immediately forcing the supply chain boundary changes required by co-packaging. In the future, on-board optical modules are more likely to expand first in high-end switches, dedicated accelerator interconnects, aerospace, and defense embedded platforms, before entering a broader range of data center equipment as standards, testing, and supply-chain collaboration mature. The overall outlook should be optimistic but not aggressive, with growth driven mainly by structural demand in high-bandwidth systems rather than simple replacement of existing optical modules.

This report is a detailed and comprehensive analysis for global COBO On-Board Optical Module market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Optical Medium 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 COBO On-Board Optical Module market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global COBO On-Board Optical Module market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global COBO On-Board Optical Module market size and forecasts, by Optical Medium and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global COBO On-Board Optical Module market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 COBO On-Board Optical Module

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 COBO On-Board Optical Module 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 Kyocera Corporation, Samtec, Inc., Applied Optoelectronics, Inc., Amphenol Corporation, Broadcom Inc., Smiths Group plc, Furukawa FITELE Optical Components Co., Ltd., Molex, LLC, Coherent Corp., etc.

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

Market Segmentation

COBO On-Board Optical Module market is split by Optical Medium and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Optical Medium, 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 Optical Medium

Multimode Fiber Optical Module

Single-Mode Fiber Optical Module

In-Board Optical Cable Module

Embedded Waveguide Optical Module

Market segment by Optoelectronic Platform

VCSEL Array Optical Module

Silicon Photonics Optical Module

Thin-Film Lithium Niobate Optical Module

Gallium Arsenide Short-Reach Optical Module

Indium Phosphide Medium- and Long-Reach Optical Module

Hybrid Integrated Optical Module

Market segment by Mounting Method

Surface-Mount Optical Module

LGA Socket-Mounted Optical Module

BGA-Mounted Optical Module

Screw-Fixed Optical Module

Board-Connector Pluggable Optical Module

Market segment by Application

Data Center Switch Interconnect

Server Adapter Interconnect

High-Performance Computing Interconnect

Aerospace Embedded Interconnect

Industrial Embedded Interconnect

Other

Major players covered

Kyocera Corporation

Samtec, Inc.

Applied Optoelectronics, Inc.

Amphenol Corporation

Broadcom Inc.

Smiths Group plc

Furukawa FITEC Optical Components Co., Ltd.

Molex, LLC

Coherent Corp.

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 COBO On-Board Optical Module product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of COBO On-Board Optical Module, with price, sales quantity, revenue, and global market share of COBO On-Board Optical Module from 2021 to 2026.

Chapter 3, the COBO On-Board Optical Module competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the COBO On-Board Optical Module 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 Optical Medium and by Application, with sales market share and growth rate by Optical Medium, 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 COBO On-Board Optical Module market forecast, by regions, by Optical Medium, 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 COBO On-Board Optical Module.

Chapter 14 and 15, to describe COBO On-Board Optical Module sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Optical Medium

1.3.1 Overview: Global COBO On-Board Optical Module Consumption Value by Optical Medium: 2021 Versus 2025 Versus 2032

1.3.2 Multimode Fiber Optical Module

1.3.3 Single-Mode Fiber Optical Module

1.3.4 In-Board Optical Cable Module

1.3.5 Embedded Waveguide Optical Module

1.4 Market Analysis by Optoelectronic Platform

1.4.1 Overview: Global COBO On-Board Optical Module Consumption Value by Optoelectronic Platform: 2021 Versus 2025 Versus 2032

1.4.2 VCSEL Array Optical Module

1.4.3 Silicon Photonics Optical Module

1.4.4 Thin-Film Lithium Niobate Optical Module

1.4.5 Gallium Arsenide Short-Reach Optical Module

1.4.6 Indium Phosphide Medium- and Long-Reach Optical Module

1.4.7 Hybrid Integrated Optical Module

1.5 Market Analysis by Mounting Method

1.5.1 Overview: Global COBO On-Board Optical Module Consumption Value by Mounting Method: 2021 Versus 2025 Versus 2032

1.5.2 Surface-Mount Optical Module

1.5.3 LGA Socket-Mounted Optical Module

1.5.4 BGA-Mounted Optical Module

1.5.5 Screw-Fixed Optical Module

1.5.6 Board-Connector Pluggable Optical Module

1.6 Market Analysis by Application

1.6.1 Overview: Global COBO On-Board Optical Module Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Data Center Switch Interconnect

1.6.3 Server Adapter Interconnect

1.6.4 High-Performance Computing Interconnect

1.6.5 Aerospace Embedded Interconnect

1.6.6 Industrial Embedded Interconnect

1.6.7 Other

1.7 Global COBO On-Board Optical Module Market Size & Forecast

1.7.1 Global COBO On-Board Optical Module Consumption Value (2021 & 2025 & 2032)

1.7.2 Global COBO On-Board Optical Module Sales Quantity (2021-2032)

1.7.3 Global COBO On-Board Optical Module Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Kyocera Corporation

2.1.1 Kyocera Corporation Details

2.1.2 Kyocera Corporation Major Business

2.1.3 Kyocera Corporation COBO On-Board Optical Module Product and Services

2.1.4 Kyocera Corporation COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Kyocera Corporation Recent Developments/Updates

2.2 Samtec, Inc.

2.2.1 Samtec, Inc. Details

2.2.2 Samtec, Inc. Major Business

2.2.3 Samtec, Inc. COBO On-Board Optical Module Product and Services

2.2.4 Samtec, Inc. COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Samtec, Inc. Recent Developments/Updates

2.3 Applied Optoelectronics, Inc.

2.3.1 Applied Optoelectronics, Inc. Details

2.3.2 Applied Optoelectronics, Inc. Major Business

2.3.3 Applied Optoelectronics, Inc. COBO On-Board Optical Module Product and Services

2.3.4 Applied Optoelectronics, Inc. COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Applied Optoelectronics, Inc. Recent Developments/Updates

2.4 Amphenol Corporation

2.4.1 Amphenol Corporation Details

2.4.2 Amphenol Corporation Major Business

2.4.3 Amphenol Corporation COBO On-Board Optical Module Product and Services

2.4.4 Amphenol Corporation COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Amphenol Corporation Recent Developments/Updates

2.5 Broadcom Inc.

2.5.1 Broadcom Inc. Details

- 2.5.2 Broadcom Inc. Major Business
- 2.5.3 Broadcom Inc. COBO On-Board Optical Module Product and Services
- 2.5.4 Broadcom Inc. COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.5.5 Broadcom Inc. Recent Developments/Updates
- 2.6 Smiths Group plc
 - 2.6.1 Smiths Group plc Details
 - 2.6.2 Smiths Group plc Major Business
 - 2.6.3 Smiths Group plc COBO On-Board Optical Module Product and Services
 - 2.6.4 Smiths Group plc COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.6.5 Smiths Group plc Recent Developments/Updates
- 2.7 Furukawa FITEL Optical Components Co., Ltd.
 - 2.7.1 Furukawa FITEL Optical Components Co., Ltd. Details
 - 2.7.2 Furukawa FITEL Optical Components Co., Ltd. Major Business
 - 2.7.3 Furukawa FITEL Optical Components Co., Ltd. COBO On-Board Optical Module Product and Services
 - 2.7.4 Furukawa FITEL Optical Components Co., Ltd. COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Furukawa FITEL Optical Components Co., Ltd. Recent Developments/Updates
- 2.8 Molex, LLC
 - 2.8.1 Molex, LLC Details
 - 2.8.2 Molex, LLC Major Business
 - 2.8.3 Molex, LLC COBO On-Board Optical Module Product and Services
 - 2.8.4 Molex, LLC COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Molex, LLC Recent Developments/Updates
- 2.9 Coherent Corp.
 - 2.9.1 Coherent Corp. Details
 - 2.9.2 Coherent Corp. Major Business
 - 2.9.3 Coherent Corp. COBO On-Board Optical Module Product and Services
 - 2.9.4 Coherent Corp. COBO On-Board Optical Module Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Coherent Corp. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: COBO ON-BOARD OPTICAL MODULE BY MANUFACTURER

3.1 Global COBO On-Board Optical Module Sales Quantity by Manufacturer

(2021-2026)

3.2 Global COBO On-Board Optical Module Revenue by Manufacturer (2021-2026)

3.3 Global COBO On-Board Optical Module Average Price by Manufacturer
(2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of COBO On-Board Optical Module by Manufacturer
Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 COBO On-Board Optical Module Manufacturer Market Share in 2025

3.4.3 Top 6 COBO On-Board Optical Module Manufacturer Market Share in 2025

3.5 COBO On-Board Optical Module Market: Overall Company Footprint Analysis

3.5.1 COBO On-Board Optical Module Market: Region Footprint

3.5.2 COBO On-Board Optical Module Market: Company Product Type Footprint

3.5.3 COBO On-Board Optical Module Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global COBO On-Board Optical Module Market Size by Region

4.1.1 Global COBO On-Board Optical Module Sales Quantity by Region (2021-2032)

4.1.2 Global COBO On-Board Optical Module Consumption Value by Region
(2021-2032)

4.1.3 Global COBO On-Board Optical Module Average Price by Region (2021-2032)

4.2 North America COBO On-Board Optical Module Consumption Value (2021-2032)

4.3 Europe COBO On-Board Optical Module Consumption Value (2021-2032)

4.4 Asia-Pacific COBO On-Board Optical Module Consumption Value (2021-2032)

4.5 South America COBO On-Board Optical Module Consumption Value (2021-2032)

4.6 Middle East & Africa COBO On-Board Optical Module Consumption Value
(2021-2032)

5 MARKET SEGMENT BY OPTICAL MEDIUM

5.1 Global COBO On-Board Optical Module Sales Quantity by Optical Medium
(2021-2032)

5.2 Global COBO On-Board Optical Module Consumption Value by Optical Medium
(2021-2032)

5.3 Global COBO On-Board Optical Module Average Price by Optical Medium
(2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

6.2 Global COBO On-Board Optical Module Consumption Value by Application (2021-2032)

6.3 Global COBO On-Board Optical Module Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2032)

7.2 North America COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

7.3 North America COBO On-Board Optical Module Market Size by Country

7.3.1 North America COBO On-Board Optical Module Sales Quantity by Country (2021-2032)

7.3.2 North America COBO On-Board Optical Module Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2032)

8.2 Europe COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

8.3 Europe COBO On-Board Optical Module Market Size by Country

8.3.1 Europe COBO On-Board Optical Module Sales Quantity by Country (2021-2032)

8.3.2 Europe COBO On-Board Optical Module Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2032)

9.2 Asia-Pacific COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific COBO On-Board Optical Module Market Size by Region

9.3.1 Asia-Pacific COBO On-Board Optical Module Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific COBO On-Board Optical Module Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2032)

10.2 South America COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

10.3 South America COBO On-Board Optical Module Market Size by Country

10.3.1 South America COBO On-Board Optical Module Sales Quantity by Country (2021-2032)

10.3.2 South America COBO On-Board Optical Module Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2032)

11.2 Middle East & Africa COBO On-Board Optical Module Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa COBO On-Board Optical Module Market Size by Country

11.3.1 Middle East & Africa COBO On-Board Optical Module Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa COBO On-Board Optical Module Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 COBO On-Board Optical Module Market Drivers

12.2 COBO On-Board Optical Module Market Restraints

12.3 COBO On-Board Optical Module Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of COBO On-Board Optical Module and Key Manufacturers

13.2 Manufacturing Costs Percentage of COBO On-Board Optical Module

13.3 COBO On-Board Optical Module Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 COBO On-Board Optical Module Typical Distributors

14.3 COBO On-Board Optical Module Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global COBO On-Board Optical Module Consumption Value by Optical Medium, (USD Million), 2021 & 2025 & 2032

Table 2. Global COBO On-Board Optical Module Consumption Value by Optoelectronic Platform, (USD Million), 2021 & 2025 & 2032

Table 3. Global COBO On-Board Optical Module Consumption Value by Mounting Method, (USD Million), 2021 & 2025 & 2032

Table 4. Global COBO On-Board Optical Module Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Kyocera Corporation Basic Information, Manufacturing Base and Competitors

Table 6. Kyocera Corporation Major Business

Table 7. Kyocera Corporation COBO On-Board Optical Module Product and Services

Table 8. Kyocera Corporation COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Kyocera Corporation Recent Developments/Updates

Table 10. Samtec, Inc. Basic Information, Manufacturing Base and Competitors

Table 11. Samtec, Inc. Major Business

Table 12. Samtec, Inc. COBO On-Board Optical Module Product and Services

Table 13. Samtec, Inc. COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Samtec, Inc. Recent Developments/Updates

Table 15. Applied Optoelectronics, Inc. Basic Information, Manufacturing Base and Competitors

Table 16. Applied Optoelectronics, Inc. Major Business

Table 17. Applied Optoelectronics, Inc. COBO On-Board Optical Module Product and Services

Table 18. Applied Optoelectronics, Inc. COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Applied Optoelectronics, Inc. Recent Developments/Updates

Table 20. Amphenol Corporation Basic Information, Manufacturing Base and Competitors

Table 21. Amphenol Corporation Major Business

Table 22. Amphenol Corporation COBO On-Board Optical Module Product and

Services

Table 23. Amphenol Corporation COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Amphenol Corporation Recent Developments/Updates

Table 25. Broadcom Inc. Basic Information, Manufacturing Base and Competitors

Table 26. Broadcom Inc. Major Business

Table 27. Broadcom Inc. COBO On-Board Optical Module Product and Services

Table 28. Broadcom Inc. COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Broadcom Inc. Recent Developments/Updates

Table 30. Smiths Group plc Basic Information, Manufacturing Base and Competitors

Table 31. Smiths Group plc Major Business

Table 32. Smiths Group plc COBO On-Board Optical Module Product and Services

Table 33. Smiths Group plc COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Smiths Group plc Recent Developments/Updates

Table 35. Furukawa FITEL Optical Components Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 36. Furukawa FITEL Optical Components Co., Ltd. Major Business

Table 37. Furukawa FITEL Optical Components Co., Ltd. COBO On-Board Optical Module Product and Services

Table 38. Furukawa FITEL Optical Components Co., Ltd. COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Furukawa FITEL Optical Components Co., Ltd. Recent Developments/Updates

Table 40. Molex, LLC Basic Information, Manufacturing Base and Competitors

Table 41. Molex, LLC Major Business

Table 42. Molex, LLC COBO On-Board Optical Module Product and Services

Table 43. Molex, LLC COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Molex, LLC Recent Developments/Updates

Table 45. Coherent Corp. Basic Information, Manufacturing Base and Competitors

Table 46. Coherent Corp. Major Business

Table 47. Coherent Corp. COBO On-Board Optical Module Product and Services

Table 48. Coherent Corp. COBO On-Board Optical Module Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Coherent Corp. Recent Developments/Updates

Table 50. Global COBO On-Board Optical Module Sales Quantity by Manufacturer (2021-2026) & (K Units)

Table 51. Global COBO On-Board Optical Module Revenue by Manufacturer (2021-2026) & (USD Million)

Table 52. Global COBO On-Board Optical Module Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 53. Market Position of Manufacturers in COBO On-Board Optical Module, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 54. Head Office and COBO On-Board Optical Module Production Site of Key Manufacturer

Table 55. COBO On-Board Optical Module Market: Company Product Type Footprint

Table 56. COBO On-Board Optical Module Market: Company Product Application Footprint

Table 57. COBO On-Board Optical Module New Market Entrants and Barriers to Market Entry

Table 58. COBO On-Board Optical Module Mergers, Acquisition, Agreements, and Collaborations

Table 59. Global COBO On-Board Optical Module Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 60. Global COBO On-Board Optical Module Sales Quantity by Region (2021-2026) & (K Units)

Table 61. Global COBO On-Board Optical Module Sales Quantity by Region (2027-2032) & (K Units)

Table 62. Global COBO On-Board Optical Module Consumption Value by Region (2021-2026) & (USD Million)

Table 63. Global COBO On-Board Optical Module Consumption Value by Region (2027-2032) & (USD Million)

Table 64. Global COBO On-Board Optical Module Average Price by Region (2021-2026) & (US\$/Unit)

Table 65. Global COBO On-Board Optical Module Average Price by Region (2027-2032) & (US\$/Unit)

Table 66. Global COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 67. Global COBO On-Board Optical Module Sales Quantity by Optical Medium (2027-2032) & (K Units)

Table 68. Global COBO On-Board Optical Module Consumption Value by Optical Medium (2021-2026) & (USD Million)

Table 69. Global COBO On-Board Optical Module Consumption Value by Optical Medium (2027-2032) & (USD Million)

Table 70. Global COBO On-Board Optical Module Average Price by Optical Medium (2021-2026) & (US\$/Unit)

Table 71. Global COBO On-Board Optical Module Average Price by Optical Medium (2027-2032) & (US\$/Unit)

Table 72. Global COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 73. Global COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 74. Global COBO On-Board Optical Module Consumption Value by Application (2021-2026) & (USD Million)

Table 75. Global COBO On-Board Optical Module Consumption Value by Application (2027-2032) & (USD Million)

Table 76. Global COBO On-Board Optical Module Average Price by Application (2021-2026) & (US\$/Unit)

Table 77. Global COBO On-Board Optical Module Average Price by Application (2027-2032) & (US\$/Unit)

Table 78. North America COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 79. North America COBO On-Board Optical Module Sales Quantity by Optical Medium (2027-2032) & (K Units)

Table 80. North America COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 81. North America COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 82. North America COBO On-Board Optical Module Sales Quantity by Country (2021-2026) & (K Units)

Table 83. North America COBO On-Board Optical Module Sales Quantity by Country (2027-2032) & (K Units)

Table 84. North America COBO On-Board Optical Module Consumption Value by Country (2021-2026) & (USD Million)

Table 85. North America COBO On-Board Optical Module Consumption Value by Country (2027-2032) & (USD Million)

Table 86. Europe COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 87. Europe COBO On-Board Optical Module Sales Quantity by Optical Medium

(2027-2032) & (K Units)

Table 88. Europe COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 89. Europe COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 90. Europe COBO On-Board Optical Module Sales Quantity by Country (2021-2026) & (K Units)

Table 91. Europe COBO On-Board Optical Module Sales Quantity by Country (2027-2032) & (K Units)

Table 92. Europe COBO On-Board Optical Module Consumption Value by Country (2021-2026) & (USD Million)

Table 93. Europe COBO On-Board Optical Module Consumption Value by Country (2027-2032) & (USD Million)

Table 94. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 95. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Optical Medium (2027-2032) & (K Units)

Table 96. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 97. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 98. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Region (2021-2026) & (K Units)

Table 99. Asia-Pacific COBO On-Board Optical Module Sales Quantity by Region (2027-2032) & (K Units)

Table 100. Asia-Pacific COBO On-Board Optical Module Consumption Value by Region (2021-2026) & (USD Million)

Table 101. Asia-Pacific COBO On-Board Optical Module Consumption Value by Region (2027-2032) & (USD Million)

Table 102. South America COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 103. South America COBO On-Board Optical Module Sales Quantity by Optical Medium (2027-2032) & (K Units)

Table 104. South America COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 105. South America COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 106. South America COBO On-Board Optical Module Sales Quantity by Country (2021-2026) & (K Units)

Table 107. South America COBO On-Board Optical Module Sales Quantity by Country (2027-2032) & (K Units)

Table 108. South America COBO On-Board Optical Module Consumption Value by Country (2021-2026) & (USD Million)

Table 109. South America COBO On-Board Optical Module Consumption Value by Country (2027-2032) & (USD Million)

Table 110. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Optical Medium (2021-2026) & (K Units)

Table 111. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Optical Medium (2027-2032) & (K Units)

Table 112. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Application (2021-2026) & (K Units)

Table 113. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Application (2027-2032) & (K Units)

Table 114. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Country (2021-2026) & (K Units)

Table 115. Middle East & Africa COBO On-Board Optical Module Sales Quantity by Country (2027-2032) & (K Units)

Table 116. Middle East & Africa COBO On-Board Optical Module Consumption Value by Country (2021-2026) & (USD Million)

Table 117. Middle East & Africa COBO On-Board Optical Module Consumption Value by Country (2027-2032) & (USD Million)

Table 118. COBO On-Board Optical Module Raw Material

Table 119. Key Manufacturers of COBO On-Board Optical Module Raw Materials

Table 120. COBO On-Board Optical Module Typical Distributors

Table 121. COBO On-Board Optical Module Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. COBO On-Board Optical Module Picture
- Figure 2. Global COBO On-Board Optical Module Revenue by Optical Medium, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global COBO On-Board Optical Module Revenue Market Share by Optical Medium in 2025
- Figure 4. Multimode Fiber Optical Module Examples
- Figure 5. Single-Mode Fiber Optical Module Examples
- Figure 6. In-Board Optical Cable Module Examples
- Figure 7. Embedded Waveguide Optical Module Examples
- Figure 8. Global COBO On-Board Optical Module Revenue by Optoelectronic Platform, (USD Million), 2021 & 2025 & 2032
- Figure 9. Global COBO On-Board Optical Module Revenue Market Share by Optoelectronic Platform in 2025
- Figure 10. VCSEL Array Optical Module Examples
- Figure 11. Silicon Photonics Optical Module Examples
- Figure 12. Thin-Film Lithium Niobate Optical Module Examples
- Figure 13. Gallium Arsenide Short-Reach Optical Module Examples
- Figure 14. Indium Phosphide Medium- and Long-Reach Optical Module Examples
- Figure 15. Hybrid Integrated Optical Module Examples
- Figure 16. Global COBO On-Board Optical Module Revenue by Mounting Method, (USD Million), 2021 & 2025 & 2032
- Figure 17. Global COBO On-Board Optical Module Revenue Market Share by Mounting Method in 2025
- Figure 18. Surface-Mount Optical Module Examples
- Figure 19. LGA Socket-Mounted Optical Module Examples
- Figure 20. BGA-Mounted Optical Module Examples
- Figure 21. Screw-Fixed Optical Module Examples
- Figure 22. Board-Connector Pluggable Optical Module Examples
- Figure 23. Global COBO On-Board Optical Module Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 24. Global COBO On-Board Optical Module Revenue Market Share by Application in 2025
- Figure 25. Data Center Switch Interconnect Examples
- Figure 26. Server Adapter Interconnect Examples
- Figure 27. High-Performance Computing Interconnect Examples

Figure 28. Aerospace Embedded Interconnect Examples

Figure 29. Industrial Embedded Interconnect Examples

Figure 30. Other Examples

Figure 31. Global COBO On-Board Optical Module Consumption Value, (USD Million):
2021 & 2025 & 2032

Figure 32. Global COBO On-Board Optical Module Consumption Value and Forecast
(2021-2032) & (USD Million)

Figure 33. Global COBO On-Board Optical Module Sales Quantity (2021-2032) & (K
Units)

Figure 34. Global COBO On-Board Optical Module Price (2021-2032) & (US\$/Unit)

Figure 35. Global COBO On-Board Optical Module Sales Quantity Market Share by
Manufacturer in 2025

Figure 36. Global COBO On-Board Optical Module Revenue Market Share by
Manufacturer in 2025

Figure 37. Producer Shipments of COBO On-Board Optical Module by Manufacturer
Sales (\$MM) and Market Share (%): 2025

Figure 38. Top 3 COBO On-Board Optical Module Manufacturer (Revenue) Market
Share in 2025

Figure 39. Top 6 COBO On-Board Optical Module Manufacturer (Revenue) Market
Share in 2025

Figure 40. Global COBO On-Board Optical Module Sales Quantity Market Share by
Region (2021-2032)

Figure 41. Global COBO On-Board Optical Module Consumption Value Market Share
by Region (2021-2032)

Figure 42. North America COBO On-Board Optical Module Consumption Value
(2021-2032) & (USD Million)

Figure 43. Europe COBO On-Board Optical Module Consumption Value (2021-2032) &
(USD Million)

Figure 44. Asia-Pacific COBO On-Board Optical Module Consumption Value
(2021-2032) & (USD Million)

Figure 45. South America COBO On-Board Optical Module Consumption Value
(2021-2032) & (USD Million)

Figure 46. Middle East & Africa COBO On-Board Optical Module Consumption Value
(2021-2032) & (USD Million)

Figure 47. Global COBO On-Board Optical Module Sales Quantity Market Share by
Optical Medium (2021-2032)

Figure 48. Global COBO On-Board Optical Module Consumption Value Market Share
by Optical Medium (2021-2032)

Figure 49. Global COBO On-Board Optical Module Average Price by Optical Medium

(2021-2032) & (US\$/Unit)

Figure 50. Global COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 51. Global COBO On-Board Optical Module Revenue Market Share by Application (2021-2032)

Figure 52. Global COBO On-Board Optical Module Average Price by Application (2021-2032) & (US\$/Unit)

Figure 53. North America COBO On-Board Optical Module Sales Quantity Market Share by Optical Medium (2021-2032)

Figure 54. North America COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 55. North America COBO On-Board Optical Module Sales Quantity Market Share by Country (2021-2032)

Figure 56. North America COBO On-Board Optical Module Consumption Value Market Share by Country (2021-2032)

Figure 57. United States COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 58. Canada COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 59. Mexico COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 60. Europe COBO On-Board Optical Module Sales Quantity Market Share by Optical Medium (2021-2032)

Figure 61. Europe COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 62. Europe COBO On-Board Optical Module Sales Quantity Market Share by Country (2021-2032)

Figure 63. Europe COBO On-Board Optical Module Consumption Value Market Share by Country (2021-2032)

Figure 64. Germany COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 65. France COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 66. United Kingdom COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 67. Russia COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 68. Italy COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 69. Asia-Pacific COBO On-Board Optical Module Sales Quantity Market Share by Optical Medium (2021-2032)

Figure 70. Asia-Pacific COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 71. Asia-Pacific COBO On-Board Optical Module Sales Quantity Market Share by Region (2021-2032)

Figure 72. Asia-Pacific COBO On-Board Optical Module Consumption Value Market Share by Region (2021-2032)

Figure 73. China COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 74. Japan COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 75. South Korea COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 76. India COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 77. Southeast Asia COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 78. Australia COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 79. South America COBO On-Board Optical Module Sales Quantity Market Share by Optical Medium (2021-2032)

Figure 80. South America COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 81. South America COBO On-Board Optical Module Sales Quantity Market Share by Country (2021-2032)

Figure 82. South America COBO On-Board Optical Module Consumption Value Market Share by Country (2021-2032)

Figure 83. Brazil COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 84. Argentina COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 85. Middle East & Africa COBO On-Board Optical Module Sales Quantity Market Share by Optical Medium (2021-2032)

Figure 86. Middle East & Africa COBO On-Board Optical Module Sales Quantity Market Share by Application (2021-2032)

Figure 87. Middle East & Africa COBO On-Board Optical Module Sales Quantity Market Share by Country (2021-2032)

Figure 88. Middle East & Africa COBO On-Board Optical Module Consumption Value

Market Share by Country (2021-2032)

Figure 89. Turkey COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 90. Egypt COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 91. Saudi Arabia COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 92. South Africa COBO On-Board Optical Module Consumption Value (2021-2032) & (USD Million)

Figure 93. COBO On-Board Optical Module Market Drivers

Figure 94. COBO On-Board Optical Module Market Restraints

Figure 95. COBO On-Board Optical Module Market Trends

Figure 96. Porters Five Forces Analysis

Figure 97. Manufacturing Cost Structure Analysis of COBO On-Board Optical Module in 2025

Figure 98. Manufacturing Process Analysis of COBO On-Board Optical Module

Figure 99. COBO On-Board Optical Module Industrial Chain

Figure 100. Sales Channel: Direct to End-User vs Distributors

Figure 101. Direct Channel Pros & Cons

Figure 102. Indirect Channel Pros & Cons

Figure 103. Methodology

Figure 104. Research Process and Data Source

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