

Global COBO On-Board Optical Module Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G600F5FD152EEN.html>

Date: July 2026

Pages: 97

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

ID: G600F5FD152EEN

Abstracts

The global COBO On-Board Optical Module market size is expected to reach \$ 1030 million by 2032, rising at a market growth of 35.1% CAGR during the forecast period (2026-2032).

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 studies the global COBO On-Board Optical Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for COBO On-Board Optical Module 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 COBO On-Board Optical Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global COBO On-Board Optical Module total production and demand, 2021-2032, (K Units)

Global COBO On-Board Optical Module total production value, 2021-2032, (USD Million)

Global COBO On-Board Optical Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global COBO On-Board Optical Module consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: COBO On-Board Optical Module domestic production, consumption, key domestic manufacturers and share

Global COBO On-Board Optical Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global COBO On-Board Optical Module production by Optical Medium, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global COBO On-Board Optical Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global COBO On-Board Optical Module 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World COBO On-Board Optical Module 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 Optical Medium, 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 COBO On-Board Optical Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global COBO On-Board Optical Module Market, Segmentation by Optical Medium:

Multimode Fiber Optical Module

Single-Mode Fiber Optical Module

In-Board Optical Cable Module

Embedded Waveguide Optical Module

Global COBO On-Board Optical Module Market, Segmentation 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

Global COBO On-Board Optical Module Market, Segmentation 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

Global COBO On-Board Optical Module Market, Segmentation by Application:

Data Center Switch Interconnect

Server Adapter Interconnect

High-Performance Computing Interconnect

Aerospace Embedded Interconnect

Industrial Embedded Interconnect

Other

Companies Profiled:

Kyocera Corporation

Samtec, Inc.

Applied Optoelectronics, Inc.

Amphenol Corporation

Broadcom Inc.

Smiths Group plc

Furukawa FITEL Optical Components Co., Ltd.

Molex, LLC

Coherent Corp.

Key Questions Answered:

1. How big is the global COBO On-Board Optical Module market?
2. What is the demand of the global COBO On-Board Optical Module market?

3. What is the year over year growth of the global COBO On-Board Optical Module market?
4. What is the production and production value of the global COBO On-Board Optical Module market?
5. Who are the key producers in the global COBO On-Board Optical Module market?
6. What are the growth factors driving the market demand?

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