

Global Coherent Optical Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Coherent Optical Module market size is expected to reach \$ 12340 million by 2032, rising at a market growth of 10.1% CAGR during the forecast period (2026-2032).

Coherent optical module is a high-speed optoelectronic device that uses coherent detection technology to achieve high-sensitivity long-distance optical signal transmission. Its working principle is to coherently mix the optical signal at the transmitting end with the local oscillator light at the receiving end, thereby obtaining much higher receiving sensitivity and spectral efficiency than traditional direct detection technology. The core components include coherent optical digital signal processor chip, tunable laser, modulator, and coherent receiver. In 2025, the global sales of coherent optical modules will be approximately 9.3 million units, mainly driven by the rapid penetration of 400ZR, 800ZR, and 800ZR+pluggable coherent modules in the field of data center interconnection. The shipment volume of 800ZR and ZR+optical modules is expected to exceed 200000 ports by 2026. The average unit price of coherent optical modules in 2025 is about \$670, of which the bulk purchase unit price of 400ZR QSFP-DD packaging modules is about \$400 to \$500, the unit price of 800ZR and higher performance long-distance coherent modules is between \$1000 and \$1800, and the unit price of next-generation coherent products above 1.2T can reach \$2500 to \$3500. The average capacity utilization rate of the global high-speed coherent optical module industry in 2025 is about 75% to 85%, with leading enterprises such as Zhongji Xuchuang achieving a capacity utilization rate of about 80%, with an annual production capacity of about 15 million units and a shipment volume of about 12 million units. The capacity utilization rate of Xin Yisheng is also maintained at a high level of about 80%. The upstream and downstream enterprises of coherent optical modules cover the complete chain from semiconductor materials to final applications. The upstream mainly includes indium phosphide substrate suppliers, epitaxial wafer manufacturers, optical

chip design companies such as Coherent, Lumentum, Broadcom, as well as electronic chip design companies such as Marvel, Broadcom, Credo, and Huawei HiSilicon; The midstream is an optical module packaging manufacturing enterprise, mainly including Zhongji Xuchuang, Xinyisheng, Guangxun Technology, Huagong Zhengyuan, Hisense Broadband, Sols Optoelectronics, Coherent, Lumentum, etc; The downstream includes optical communication equipment manufacturers and end-users, including Cisco, Ciena, Nokia, Huawei, ZTE, FiberHome, as well as Amazon AWS, Microsoft Azure, Google Cloud, etc Meta? Cloud computing and Internet enterprises such as Tencent Cloud, Alibaba and ByteDance, as well as global telecom operators such as China Mobile, China Telecom and China Unicom. The overall gross profit margin of the coherent optical module industry is at a relatively high level, with top companies having a gross profit margin of about 39% to 44%. In the second quarter of 2025, the gross profit margin of Zhongji Xuchuang reached 41.5%, and further rose to 44.48% in the fourth quarter, setting a new historical high. The gross profit margin of the New Yisheng 800G LPO product is about 48.7%, while the gross profit margin of domestic second tier manufacturers is usually between 25% and 35%.

The coherent optical module market is at a critical turning point, rising from billions of dollars to tens of billions of dollars. In terms of policy driving, China's 'East Data West Computing' project clearly requires accelerating the opening of direct data connection channels between the east and west, which has formed a strong policy pull for the application of 400G and 800G coherent optical modules in data center interconnection scenarios; The 'Action Plan for Stable Growth of Electronic Information Manufacturing Industry 2025-2026' and other policies issued by the Ministry of Industry and Information Technology and other ministries in 2025 clearly include CPO and high-speed optical modules as key research and development areas, and support the mass production and landing of products such as 800G and 1.6T; Guangdong Province has proposed to focus on developing the optical communication industry, while Shanghai plans to achieve an output value of 350 billion yuan in the information and communication industry by 2025. Shaanxi Province is accelerating breakthroughs in silicon optical integrated chip technology and improving the self-sufficiency rate of domestically produced high-end laser chips; The second phase of the 'CHIPS for America' program launched by the United States in 2025 continues to support the expansion of local optical chip manufacturing capacity, and the European Union has also included silicon optical technology in the special support category for key digital infrastructure. Major economies around the world have formed a policy resonance for the construction of high-speed optical communication infrastructure.

This report studies the global Coherent Optical Module production, demand, key

manufacturers, and key regions.

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

Highlights and key features of the study

Global Coherent Optical Module total production and demand, 2021-2032, (K Units)

Global Coherent Optical Module total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Coherent Optical Module domestic production, consumption, key domestic manufacturers and share

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

Global Coherent Optical Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global Coherent 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 InnoLight Technology (CN), Coherent Corp. (US), Cisco Systems (US), Lumentum (US), Broadcom (US), HiSilicon (CN), Eoptolink Technology (CN), Hisense Broadband (CN), Accelink Technologies (CN), HG Genuine (CN), 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 Coherent 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 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 Coherent Optical Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Coherent Optical Module Market, Segmentation by Type:

100 Gbps

200 Gbps

400 Gbps

800 Gbps

Others

Global Coherent Optical Module Market, Segmentation by Packaging:

QSFP-DD Package

CFP2 Package

CFP4 Package

Other

Global Coherent Optical Module Market, Segmentation by Transmission Distance:

80-500 KM

500-2000 KM

2000 KM

Global Coherent Optical Module Market, Segmentation by Application:

Data Center Interconnect (DCI)

Metropolitan Area Network (MAN)

Wide Area Network (WAN)

Other

Companies Profiled:

InnoLight Technology (CN)

Coherent Corp. (US)

Cisco Systems (US)

Lumentum (US)

Broadcom (US)

HiSilicon (CN)

Eoptolink Technology (CN)

Hisense Broadband (CN)

Accelink Technologies (CN)

HG Genuine (CN)

Source Photonics (US)

Intel (US)

Fujitsu Optical Components (JP)

Sumitomo Electric Industries (JP)

ZTE Corporation (CN)

FiberHome Telecommunication Technologies (CN)

Nokia (FI)

Ciena (US)

Key Questions Answered:

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

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