

Global CPO Switch Optical Engines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CPO Switch Optical Engines market size is expected to reach \$ 350 million by 2032, rising at a market growth of 14.6% CAGR during the forecast period (2026-2032).

Optical engines for co-packaged optics switches are core optoelectronic conversion components used in AI data centers, high performance computing clusters, and cloud data center switching networks. The product scope focuses on optical engines, optical I/O chiplets, and silicon photonics based optoelectronic subassemblies placed close to, or integrated with, high speed switch ASIC packages. A typical product integrates a silicon photonic integrated circuit, optical modulators, photodetectors, driver ICs, transimpedance amplifiers, control circuits, fiber array coupling structures, and thermal management packaging. Its main function is to convert high speed electrical signals from a switch chip into optical signals over very short electrical channels, reducing SerDes channel loss, increasing port density, lowering system level power consumption, and improving interconnect efficiency in large AI clusters. Key specifications include optical engine bandwidth, lane speed, number of optical lanes, modulation format, power density, insertion loss, coupling efficiency, operating temperature, package size, reliability lifetime, and electrical interface compatibility with switch ASICs. Major applications include 51.2T and above Ethernet switches, InfiniBand switches, AI training clusters, GPU interconnect networks, and next generation data center optical interconnect systems. In 2025, the global average price of optical engines for co-packaged optics switches was about USD 50,000 to USD 250,000 per unit, with an average gross margin of about 35% to 55%.

Optical engines for co-packaged optics switches are emerging as a critical hardware layer in AI data center networking. The core industry logic is to move part of the

optoelectronic conversion function from front panel pluggable modules to a position much closer to the switch ASIC, so that high speed electrical channels become shorter, signal loss is reduced, bandwidth density improves, and system level power consumption can be better controlled. The upstream supply chain includes silicon photonics wafers, modulators, photodetectors, driver ICs, transimpedance amplifiers, fiber arrays, package substrates, thermal materials, and precision coupling components. The midstream layer covers optical engine design, silicon photonics integration, optoelectronic packaging, testing, calibration, and switch system adaptation. The downstream market is mainly driven by AI data centers, cloud switching fabrics, high performance computing, and large scale GPU clusters. At this stage, product value is less about a single optical device and more about deep integration across photonics, electronics, packaging, thermal design, and network system architecture.

The competitive landscape is still concentrated and platform driven. Companies with switch ASIC capabilities, silicon photonics platforms, AI networking systems, and early customer validation resources have a clear advantage in product landing. Specialized players are entering through optical I/O chiplets, silicon photonics engines, and near chip interconnect architectures, while traditional optical module, optical component, and advanced packaging suppliers are trying to extend into optical engine manufacturing and optoelectronic co-packaging. However, the number of companies that can be confidently classified as actual producers of CPO switch optical engines remains limited. Recent acquisition activity and ecosystem partnerships show that the competitive focus is shifting from standalone optical modules toward chip level optical interconnect, package level integration, and system level qualification.

The policy and industry environment remains supportive. AI infrastructure investment, data center capital expenditure, high speed Ethernet upgrades, advanced packaging capacity expansion, and regional supply chain localization are all helping the technology move from engineering validation to early volume adoption. At the same time, the industry still faces practical barriers, including reliability, serviceability, optical fiber coupling yield, external laser source matching, thermal drift control, and cost reduction. Over the next few years, growth will mainly come from high end AI cluster switching networks that need higher bandwidth and lower power consumption. CPO optical engines are unlikely to replace all pluggable optical modules in the near term, but they are well positioned to form a fast growing incremental market in top tier switch ASIC platforms and hyperscale data center deployments.

This report studies the global CPO Switch Optical Engines production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global CPO Switch Optical Engines total production and demand, 2021-2032, (Units)

Global CPO Switch Optical Engines total production value, 2021-2032, (USD Million)

Global CPO Switch Optical Engines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global CPO Switch Optical Engines consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: CPO Switch Optical Engines domestic production, consumption, key domestic manufacturers and share

Global CPO Switch Optical Engines production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global CPO Switch Optical Engines production by Optical Engine Bandwidth Class, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global CPO Switch Optical Engines production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global CPO Switch Optical Engines 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, Ciena Corporation, Ayar Labs, Inc., Ranovus Inc., Marvell Technology, Inc., Lightmatter, Inc., Accelink Technologies Co., Ltd., POET Technologies Inc., Intel Corporation, 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 CPO Switch Optical Engines market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Optical Engine Bandwidth Class, 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 CPO Switch Optical Engines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CPO Switch Optical Engines Market, Segmentation by Optical Engine Bandwidth Class:

Up to 1.6 Tbps Class

Above 1.6 to 3.2 Tbps Class

Above 3.2 to 6.4 Tbps Class

Above 6.4 Tbps Class

Others

Global CPO Switch Optical Engines Market, Segmentation by Electrical Lane Speed:

100G per Lane and Below

200G per Lane Class

400G per Lane and Above

Others

Global CPO Switch Optical Engines Market, Segmentation by Application:

Ethernet AI Data Center Switches

InfiniBand AI Cluster Switches

High Performance Computing Switch Fabrics

Cloud Data Center Optical Interconnects

Others

Companies Profiled:

Broadcom Inc.

NVIDIA Corporation

Ciena Corporation

Ayar Labs, Inc.

Ranovus Inc.

Marvell Technology, Inc.

Lightmatter, Inc.

Accelink Technologies Co., Ltd.

POET Technologies Inc.

Intel Corporation

OpenLight Photonics, Inc.

Centera Photonics Inc.

Credo Technology Group Holding Ltd.

Key Questions Answered:

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

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