

Global DAC and AEC 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 DAC and AEC market size was valued at US\$ 2065 million in 2025 and is forecast to a readjusted size of US\$ 5299 million by 2032 with a CAGR of 14.1% during review period.

In 2025, global DAC and AEC sales volume reached approximately 16,310.7 K Units, with a average price of 102.4 USD/Unit.

Data Center DAC (Direct Attach Copper) and AEC (Active Electrical Cable) are short-reach high-speed interconnect solutions widely used inside data centers to connect servers, switches, and networking equipment. DAC is a passive copper cable with no active electronic components, offering very low cost, zero power consumption, and reliable performance over short distances (typically up to 1?3 meters at high data rates). AEC, by contrast, integrates active signal-conditioning components such as redrivers or retimers within the cable connectors, enabling improved signal integrity and longer reach (generally 2?7 meters) while still using copper rather than optical fiber. Together, DAC and AEC form cost- and power-efficient alternatives to optical interconnects, with DAC favored for ultra-short links and AEC used where higher data rates or longer copper reach are required in modern high-density data centers.

DAC and AEC are two categories of high-speed short-reach copper interconnect solutions used inside modern data centers to connect servers, GPU clusters, network interface cards, switches, routers, storage systems, and equipment within or between adjacent racks. DAC, or Direct Attach Copper, is typically built with high-speed twinax copper cable, pluggable form factors such as QSFP, QSFP-DD, OSFP or SFP-DD, and identification EEPROMs, but without active signal-processing devices. It relies mainly on the host SerDes for transmission and reception, offering low cost, low latency, low

power consumption, and high reliability for very short links, typically around 1-3 meters. AEC, or Active Electrical Cable, integrates active components such as redrivers, retimers, DSPs or SerDes devices inside the cable-end modules to compensate for high-frequency loss, crosstalk, and bit-error issues. It is increasingly used in 400G, 800G and emerging 1.6T data center architectures where copper reach, signal integrity, and cabling density are critical. For a narrow industry-research scope, the market should be limited to high-speed data center copper cable assemblies, excluding AOC, optical transceivers, fiber cables, generic Ethernet cables, power cords, and low-speed consumer electronics cables.

The production model for DAC and AEC combines high-speed cable materials, precision connectors, automated cable assembly, signal-integrity validation, and customer qualification. DAC manufacturing is closer to precision cable and connector assembly, with key barriers in low-loss copper conductors, shielding design, impedance control, termination process, EMI management, and high-speed testing. AEC adds active signal-conditioning chips, retimers or redrivers, firmware, thermal design, and system-level interoperability, making it more of a 'chip solution + cable assembly + platform validation' business. Estimated gross margin can be segmented as follows: mature or standard DAC products are generally around 15%-25%; high-end 400G/800G DAC and customized rack-level cabling solutions are typically around 20%-30%; AEC cable assembly suppliers may reach around 25%-40%, while platform suppliers with proprietary SerDes/DSP technology and reference designs can achieve higher margins. Upstream inputs include copper conductors, foamed insulation, shielding materials, connectors, cages, EEPROMs, retimer/redriver/DSP chips, and testing equipment. Midstream suppliers include connector, cable assembly, and active cable solution providers such as Amphenol, TE Connectivity, Molex, Luxshare, BizLink, Volex, and Credo. Downstream customers include cloud service providers, AI server vendors, switch vendors, OEM/ODM manufacturers, telecom equipment companies, and large enterprise data centers. Overall, DAC economics are more sensitive to cost control and manufacturing scale, while AEC is more exposed to chip supply, customer qualification cycles, and rapid high-speed standard transitions.

AI training, inference clusters, and cloud data centers are shifting competition from standalone compute performance to full-link bandwidth across GPUs, NICs, switches, and storage. This structurally increases the value of high-speed short-reach interconnects. As networks migrate from 400G to 800G and 1.6T, rack-level port density, cabling complexity, and power constraints are rising simultaneously. DAC will remain the fundamental choice for ultra-short in-rack links due to low cost, low latency, and minimal power consumption, while AEC is gaining a larger role in higher-speed,

longer-reach copper links, high-density CLOS architectures, and liquid-cooled AI racks. Energy constraints further enhance the appeal of efficient copper interconnects, as data center operators increasingly optimize cost per bit, power per bit, and maintainability across the network layer.

The core challenge for DAC and AEC is that high-speed signal integrity is approaching the physical limits of copper channels. As channel speeds move toward 112G and 224G SerDes, insertion loss, return loss, crosstalk, bend radius, thermal management, and bit-error control become much harder to manage. DAC is naturally limited by reach and data rate, while AEC improves copper reach but introduces additional power consumption, heat, chip cost, firmware compatibility, and customer qualification risks. At the same time, optical transceivers, AOC, silicon photonics, and future co-packaged optics will remain strong alternatives in longer-reach and higher-bandwidth scenarios. Copper price volatility, precious-metal costs, trade policy, customer concentration, and hyperscaler pricing power may also pressure profitability in mid- and low-end product segments.

Downstream demand is expected to follow a pattern of stable DAC volume growth, accelerating AEC penetration, and continued coexistence between copper and optical solutions. Traditional server-to-ToR links, in-rack switch interconnects, and short storage links will continue to rely heavily on DAC. AI servers, GPU clusters, liquid-cooled racks, 800G switches, and open Ethernet-based AI networks are pushing AEC from a complementary solution toward a critical interconnect layer. Customer purchasing criteria are moving beyond unit cable price toward system-level TCO, including network power consumption, port density, cable volume, serviceability, supply stability, and compatibility with mainstream switch and NIC platforms. Going forward, leading cloud and AI infrastructure customers are likely to deepen cooperation with suppliers that combine high-speed connector design, copper cable manufacturing, SerDes technology, signal-integrity simulation, and global delivery capabilities, supporting further industry concentration.

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

Global DAC and AEC 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 DAC and AEC market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global DAC and AEC 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 DAC and AEC

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 DAC and AEC 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 Credo, Amphenol, TE Connectivity, Molex, Voelx, Juniper Networks (HPE), Luxshare Precision, NVIDIA, JPC Connectivity, Panduit, etc.

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

Market Segmentation

DAC and AEC market is split by Type and by Application. For the period 2021-2032, the

growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

DAC (Direct Attach Copper)

AEC (Active Electrical Cable)

Market segment by Data Rates

?100G

200G

400G

800G

?1.6T

Market segment by Application

Data Centers

Enterprises

AI Servers

High-Performance Computing (HPC)

Others

Major players covered

Credo

Amphenol

TE Connectivity

Molex

Volex

Juniper Networks (HPE)

Luxshare Precision

NVIDIA

JPC Connectivity

Panduit

Approved Networks (Legrand)

Proterial, Ltd

Broadex Technologies

Kingsignal Technology

Zhaolong Interconnect

LevelOne (DDC)

10Gtek

Infraeo

Shenzhen HTD Information-Tech

Shenzhen Sopto Technology

C-FLINK Technology

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 DAC and AEC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of DAC and AEC, with price, sales quantity, revenue, and global market share of DAC and AEC from 2021 to 2026.

Chapter 3, the DAC and AEC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the DAC and AEC 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 Type and by Application, with sales market share and growth rate by Type, 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 DAC and AEC market forecast, by regions, by Type, 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 DAC and AEC.

Chapter 14 and 15, to describe DAC and AEC sales channel, distributors, customers, research findings and conclusion.

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