

Global Fiber Array Units Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G04440F4462BEN.html>

Date: April 2026

Pages: 187

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

ID: G04440F4462BEN

Abstracts

The global Fiber Array Units market size is expected to reach \$ 579 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

In 2025, global Fiber Array Units production reached approximately 4,119.2 K Units, with an average global market price of around 55 USD per Unit.

Fiber Array Units (FAUs) are passive optical core devices that are precisely positioned and encapsulated with multiple single-mode/multimode optical fibers at fixed intervals, angles, and dimensions using a high-precision V-groove substrate or silicon-based structure. They are primarily used for multi-channel parallel transmission, efficient coupling, and spatial alignment of optical signals. In optical modules, silicon photonics chips, optical engines, and CPO (co-packaged optics) systems, they play a crucial role as the physical carrier of optical channels, the optical path coupling interface, and the spatial positioning of optical paths, making them a core foundational component for achieving high-speed, high-density optical interconnects.

The raw materials for Fiber Array Units mainly include optical fibers, V-groove substrates, adhesives, and other auxiliary materials. Typical raw material suppliers include Heraeus, Tosoh, Momentive, Shin-Etsu, SCHOTT, Kavalier, and others. Downstream applications are mainly in planar optical wave circuit (PLC) devices, optical transceiver modules, silicon photonics, CPO, and optical engine fields. Typical users include NVIDIA, Broadcom, Huawei, ZTE, and others.

The single-line capacity of Fiber Array Units varies greatly depending on the technology route, degree of customization, and level of automation of the production line. The overall gross profit margin of the industry is in the range of 30%-45%.

Fiber Array Units (FLUs), with their unique characteristics of multi-channel parallelism, micron-level high-precision alignment, high-density integration, and stable optical coupling, precisely address the core pain points in the current silicon photonics and CPO co-packaging field. Through a structured optical path design, they solve the problem of efficient connection between silicon photonic chips and external optical fibers, significantly improving coupling efficiency and batch consistency, and effectively reducing the packaging difficulty and production cost of silicon photonic modules. Simultaneously, their compact and modular optical path carrier meets the stringent requirements of ultra-high density, low loss, and low power consumption under the CPO architecture, alleviating the heat dissipation pressure and space bottlenecks of internal interconnects in high-speed computing systems. This allows co-packaging optics to move from a technological concept to engineering implementation, becoming a key bridge connecting chip-level optical interconnects and system-level optical transmission, providing indispensable underlying support for the large-scale commercialization of silicon photonics and the industrialization of CPO.

Globally, North America, with its top-tier computing architecture and silicon photonics technology reserves, leads the definition of high-end products and the implementation of CPO solutions, becoming the core source of technology and demand. Europe focuses on reliable industrial and telecom-grade applications, emphasizing stability, compliance, and long-cycle quality, maintaining its advantage in high-end customization and harsh environment applications. The Asia-Pacific region, relying on its complete optical communication industry chain and efficient manufacturing capabilities, undertakes the supply of mainstream global production capacity, possessing a leading advantage in high-speed, high-volume, and cost-effective products, and is the core engine of industry growth. According to our data, the Asia-Pacific region's market share of Fiber Array Units is approximately 48% in 2025. It is projected to reach 52% by 2032, with a CAGR of approximately 15%. The industry is characterized by concentrated competition among leading companies, significant technological barriers, and strong customer loyalty. Current global core players include Corning, Sumitomo Electric Industries, Tianfu Communication, Kohoku Kogyo, Zhishang Technology, Orbray, Shijia Photonics Technology, PHIX, Yiyuantong Technology, SENKO Advanced Components, Bocheng Technology, Molex, and Boruwei Technology. The top five global players are projected to account for approximately 43% of the market share by 2025. The market structure is clear, and barriers to entry continue to strengthen, making it difficult for newcomers to quickly break through.

Driven by the explosive growth of AI computing power, the iteration of high-speed

optical modules, the accelerated penetration of silicon photonics, and the large-scale deployment of CPO (Content Processing) solutions, Fiber Array Units are experiencing rapid growth. The continuous pursuit of bandwidth density and energy efficiency by hyperscale data centers and intelligent computing clusters is pushing optical modules towards higher speeds, directly boosting demand for multi-channel, high-precision Fiber Array Units. The transition of silicon photonics technology from the laboratory to mass production has significantly increased the reliance on standardized, highly consistent optical path interfaces, opening up new growth opportunities. As the mainstream direction for next-generation data center interconnects, CPO places higher demands on the usage, precision, and integration of Fiber Array Units, creating demand for specialized, high-performance products. Coupled with the long-term trends of global digitalization and the replacement of copper with fiber optics, the industry has solid underlying demand, a clear growth logic, and long-term, certain growth momentum.

The Fiber Array Units sector is at a critical inflection point of rapid growth and value upgrading, with its market potential continuing to be released. With the ramp-up of 1.6T and 3.2T optical modules and the gradual commercialization of CPO, product structures are upgrading towards higher channel counts, higher precision, two-dimensional arrays, and specialization, leading to a simultaneous increase in value and industry prosperity. Technologically, the industry continues to evolve towards miniaturization, integration, and low loss, deeply integrating with silicon photonics and optical engines to become a core foundational component of next-generation optical interconnect systems. In terms of applications, the industry is expanding from traditional data communication and telecommunications fields to emerging high-growth scenarios such as AI computing power, intelligent computing centers, and high-performance computing, continuously broadening its growth boundaries.

This report studies the global Fiber Array Units production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Fiber Array Units 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 Fiber Array Units that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Fiber Array Units total production and demand, 2021-2032, (K Units)

Global Fiber Array Units total production value, 2021-2032, (USD Million)

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

Global Fiber Array Units consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Fiber Array Units domestic production, consumption, key domestic manufacturers and share

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

Global Fiber Array Units production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Fiber Array Units production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Fiber Array Units 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 Corning, Sumitomo Electric Industries, TFC Communication, Kohoku Kogyo, Zesum, Orbray, Shijia Photons Technology, PHIX, HYC, SENKO Advanced Components, 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 Fiber Array Units 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 Fiber Array Units Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Fiber Array Units Market, Segmentation by Type:

SMF Type

MMF Type

PMF Type

Others

Global Fiber Array Units Market, Segmentation by Fiber Arrangement:

1D

2D

Others

Global Fiber Array Units Market, Segmentation by Channel Number:

4 Channels Below

4-8 Channels

9-16 Channels

17-32 Channels

32 Channels Above

Global Fiber Array Units Market, Segmentation by Application:

Planar Lightwave Circuits (PLC) Device

Optical Transceiver Modules

Silicon Photonics & CPO & Optical Engines

Others

Companies Profiled:

Corning

Sumitomo Electric Industries

TFC Communication

Kohoku Kogyo

Zesum

Orbray

Shijia Photons Technology

PHIX

HYC

SENKO Advanced Components

EverProX Technologies

Molex

Browave Corporation

Vlink optics (Advanced Fiber Resources)

Yilut Technology

Yangtze Optical Electronic (YOEC)

HIYAMA INDUSTRY

HATAKEN

Kawashima Manufacturing

SQS Vlaknova optika

SEIKOH GIKEN

Shenzhen Seacent Photonics

OZ Optics Limited

Neptec

Fiberwe

FiberBridge Photonics

Fiber Optics Group

JPT

Beijing Reful

FOCI

Key Questions Answered:

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

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