

Global Optical Switch Chips and Chip-Scale Optical Switching Engines 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 Optical Switch Chips and Chip-Scale Optical Switching Engines market size was valued at US\$ 295 million in 2025 and is forecast to a readjusted size of US\$ 1689 million by 2032 with a CAGR of 26.4% during review period.

Optical switch chips and chip-scale optical switching engines are semiconductor, micro-opto-electromechanical, electro-optic, liquid-crystal, or integrated-photonics devices that directly reconfigure the propagation path, port connectivity, spatial direction, or wavelength routing of optical signals within a die, photonic integrated circuit, packaged switching component, or compact optical core. Major product forms include MEMS and MOEMS mirror dies and arrays, silicon-photonics or InP waveguide switching matrices, PLZT and thin-film lithium-niobate electro-optic switches, semiconductor-optical-amplifier gate fabrics, LCOS wavelength-selective switching cores, piezoelectric beam-steering engines, and their packaged derivatives. Key performance parameters typically include port count, topology, insertion loss, crosstalk, return loss, polarization-dependent loss, switching time, repeatability, operating wavelength, optical power handling, endurance, control accuracy, die area, energy consumption, and fiber-coupling density. These products are deployed in AI computing fabrics, datacenter optical circuit switching, ROADM and wavelength-selective switching, optical cross-connects, network protection, fiber monitoring, automated photonic testing, fiber sensing, quantum networking, and other high-reliability optical communication systems.

Optical switch chips should not be treated as a direct optical equivalent of conventional Ethernet or InfiniBand switch ASICs. The addressable market is a specialized photonics segment that combines several product groups operating at different port counts,

switching speeds, and control granularities. Mature revenue pools include packaged MEMS switches, photonic test matrices, protection switches, fiber-monitoring components, and wavelength-selective switching cores. The emerging portion consists of high-radix optical circuit switches for AI datacenters, programmable silicon-photonic matrices, and distributed switching functions embedded in GPU-scale optical fabrics. A market definition based on complete OCS chassis, ROADMs, or electronic switches with optical interfaces would materially overstate the chip opportunity. This study therefore measures bare dies, packaged switching components, LCOS or MEMS cores, integrated-photonic switching PICs, and the internal transfer value of proprietary chip-scale engines.

No single technical architecture is expected to dominate every application. Three-dimensional MEMS offers low loss, broad wavelength compatibility, and favorable scalability for large port counts, while LCOS and liquid-crystal technologies retain advantages in wavelength-selective and spatially programmable switching. Integrated silicon photonics offers a path toward smaller form factors, faster reconfiguration, CMOS-compatible manufacturing, and closer electronic control integration, but must still overcome thermal power, accumulated insertion loss, crosstalk, fiber coupling, packaging yield, and calibration challenges. Product launches and manufacturing partnerships announced during 2025 and 2026 indicate that the sector is moving beyond laboratory prototypes toward engineered supply chains. Coherent reported initial revenue from its liquid-crystal OCS platform, while iPrionics expanded packaging and assembly arrangements and Saliency Labs established a manufacturing relationship with Tower Semiconductor. These developments support rapid growth, but optical switching is more likely to complement electronic packet switching in topology reconfiguration, long-lived high-volume flows, and physical-layer resource allocation than to replace electronic fabrics across all traffic patterns.

Industry adoption will depend on the interaction between hyperscale capital expenditure, open management standards, network architecture, and component reliability. The Open Compute Project's work on optical circuit switching can reduce integration friction and encourage common management and interoperability practices. At the same time, the market remains exposed to customer concentration and long qualification cycles. Large AI clusters require not only acceptable component insertion loss and switching speed, but also robust fault recovery, topology scheduling, control software, fiber management, and a clearly demonstrated total-cost-of-ownership benefit.

This report is a detailed and comprehensive analysis for global Optical Switch Chips and Chip-Scale Optical Switching Engines 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 Optical Switch Chips and Chip-Scale Optical Switching Engines market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Optical Switch Chips and Chip-Scale Optical Switching Engines market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Optical Switch Chips and Chip-Scale Optical Switching Engines market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Optical Switch Chips and Chip-Scale Optical Switching Engines market shares of main players, shipments in revenue (\$ Million), sales quantity (Million 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 Optical Switch Chips and Chip-Scale Optical Switching Engines

- 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 Optical Switch Chips and Chip-Scale Optical Switching Engines 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 Koch, Inc., Coherent Corp., Accelink Technologies Co., Ltd., Lumentum Holdings Inc., HUBER+SUHNER AG, santec Holdings Corporation, Orbray Co., Ltd., DiCon Fiberoptics, Inc., CALIENT Technologies, Inc., Agiltron Inc., etc.

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

Market Segmentation

Optical Switch Chips and Chip-Scale Optical Switching Engines 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

Packaged Optical Switch Chip

Other

Market segment by Port Configuration

M?N Matrix Switch

N?N Matrix Switch

Other Port Configurations

Market segment by Switching Speed

Nanosecond-Class

Microsecond-Class

Millisecond-Class

Market segment by Application

Data Center and AI Computing

Optical Component Manufacturing and Testing

Aerospace and Defense

Quantum Technology and Scientific Research

Medical and Life Sciences

Other

Major players covered

Koch, Inc.

Coherent Corp.

Accelink Technologies Co., Ltd.

Lumentum Holdings Inc.

HUBER+SUHNER AG

santec Holdings Corporation

Orbray Co., Ltd.

DiCon Fiberoptics, Inc.

CALIENT Technologies, Inc.

Agiltron Inc.

Sercalo Microtechnology Ltd.

Lightmatter, Inc.

Shanghai Xizhi Technology Co., Ltd.

Guilin GLSUN Science and Tech Group Co., Ltd.

EpiPhotonics Corporation

iPronics Programmable Photonics S.L.

Salience Labs Limited

Guangdong Lightwit Photonics Technology Co., Ltd.

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 Optical Switch Chips and Chip-Scale Optical Switching Engines product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Optical Switch Chips and Chip-Scale Optical Switching Engines, with price, sales quantity, revenue, and global market share

of Optical Switch Chips and Chip-Scale Optical Switching Engines from 2021 to 2026.

Chapter 3, the Optical Switch Chips and Chip-Scale Optical Switching Engines competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Optical Switch Chips and Chip-Scale Optical Switching Engines 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 Optical Switch Chips and Chip-Scale Optical Switching Engines 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 Optical Switch Chips and Chip-Scale Optical Switching Engines.

Chapter 14 and 15, to describe Optical Switch Chips and Chip-Scale Optical Switching Engines sales channel, distributors, customers, research findings and conclusion.

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