

Global Optical Switch Chips and Chip-Scale Optical Switching Engines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Optical Switch Chips and Chip-Scale Optical Switching Engines market size is expected to reach \$ 1689 million by 2032, rising at a market growth of 26.4% CAGR during the forecast period (2026-2032).

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 studies the global Optical Switch Chips and Chip-Scale Optical Switching Engines production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Optical Switch Chips and Chip-Scale Optical Switching Engines total production and demand, 2021-2032, (Million Units)

Global Optical Switch Chips and Chip-Scale Optical Switching Engines total production value, 2021-2032, (USD Million)

Global Optical Switch Chips and Chip-Scale Optical Switching Engines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Optical Switch Chips and Chip-Scale Optical Switching Engines consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Optical Switch Chips and Chip-Scale Optical Switching Engines domestic production, consumption, key domestic manufacturers and share

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

Global Optical Switch Chips and Chip-Scale Optical Switching Engines production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Optical Switch Chips and Chip-Scale Optical Switching Engines production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

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, production, value, 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 Fiber optics, Inc., CALIENT Technologies, Inc., Agiltron Inc., 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 Optical Switch Chips and Chip-Scale Optical Switching Engines market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million 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 Optical Switch Chips and Chip-Scale Optical Switching Engines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Optical Switch Chips and Chip-Scale Optical Switching Engines Market, Segmentation by Type:

Packaged Optical Switch Chip

Other

Global Optical Switch Chips and Chip-Scale Optical Switching Engines Market, Segmentation by Port Configuration:

M×N Matrix Switch

N×N Matrix Switch

Other Port Configurations

Global Optical Switch Chips and Chip-Scale Optical Switching Engines Market, Segmentation by Switching Speed:

Nanosecond-Class

Microsecond-Class

Millisecond-Class

Global Optical Switch Chips and Chip-Scale Optical Switching Engines Market, Segmentation 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

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Optical Switch Chips and Chip-Scale Optical Switching Engines market?

2. What is the demand of the global Optical Switch Chips and Chip-Scale Optical Switching Engines market?
3. What is the year over year growth of the global Optical Switch Chips and Chip-Scale Optical Switching Engines market?
4. What is the production and production value of the global Optical Switch Chips and Chip-Scale Optical Switching Engines market?
5. Who are the key producers in the global Optical Switch Chips and Chip-Scale Optical Switching Engines market?
6. What are the growth factors driving the market demand?

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