

Global Si Photonics Integration Chips Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Si Photonics Integration Chips market size is expected to reach \$ 3462 million by 2032, rising at a market growth of 24.6% CAGR during the forecast period (2026-2032).

In 2025, global Si Photonics Integration Chips production reached approximately 30468 K Units, with an average global market price of around 18 USD per Unit.

Si Photonics Integration Chips refer to photonic integrated circuits built on silicon or silicon-based material platforms, using CMOS-compatible processes to integrate optical waveguides, modulators, photodetectors, couplers, splitters, multiplexers, demultiplexers, and other photonic devices on a single chip. Their core function is to enable on-chip optical transmission, modulation, detection, and wavelength management, often working together with electronic ICs, lasers, driver ICs, TIAs, DSPs, and advanced packaging structures. These chips are widely used in high-speed optical communications, data center interconnects, AI/HPC optical interconnects, coherent communications, co-packaged optics, near-packaged optics, sensing, and photonic computing.

Si Photonics Integration Chips create value by integrating optical functions that were traditionally built with discrete components?such as waveguides, modulators, photodetectors, multiplexers, and demultiplexers?onto a silicon-based chip platform, while leveraging CMOS-compatible processes to achieve higher integration density, smaller form factor, lower power consumption, and better scalability for volume manufacturing. As AI data centers, high-performance computing, and cloud networks move toward ever-higher bandwidth, conventional copper interconnects and discrete optical component architectures are increasingly constrained by transmission distance,

power consumption, packaging density, thermal management, and cost control. Silicon photonics directly addresses these pain points by providing a more compact and energy-efficient optical interconnect solution. Driven by the adoption of 800G, 1.6T and next-generation optical modules, as well as the rising demand for CPO/NPO, optical I/O chiplets, AI cluster scale-up/scale-out interconnects, and coherent communications, silicon photonics chips are expanding beyond data center transceivers into switch ASIC packaging, AI accelerator interconnects, optoelectronic co-packaging, and emerging computing architectures. Looking ahead, the market potential of Si Photonics Integration Chips will be shaped not only by optical communication speed upgrades, but also by the long-term demand for low-power, high-bandwidth, and low-latency connectivity in AI infrastructure; as foundry processes mature, heterogeneous integration advances, and wafer-level testing and packaging efficiency improve, silicon photonics is expected to become one of the most strategically important foundational technologies for next-generation data centers and intelligent computing infrastructure.

The upstream raw materials for Si Photonics Integration Chips mainly include SOI wafers, optical modulators, photodetectors, and optical couplers. Typical raw material suppliers include Soitec, Shin-Etsu Chemical, GlobalWafers, Intel, Broadcom, Cisco/Acacia, Marvell, Tower, OpenLight, Ayar Labs, and others. The downstream applications are mainly in silicon photonic modules used in the telecommunications and data communications sectors. Typical users include NVIDIA, AMD, Intel, Broadcom, Zhongji Innolight, Accelink, and others.

The single-line capacity of Si Photonics Integration Chips varies greatly depending on the technology route, process stability, and yield level. The industry's gross profit margin is usually in the range of 35-45%.

Report Scope

This report studies the global Si Photonics Integration Chips production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Si Photonics Integration Chips 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 Si Photonics Integration Chips that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Si Photonics Integration Chips total production and demand, 2021-2032, (Million Units)

Global Si Photonics Integration Chips total production value, 2021-2032, (USD Million)

Global Si Photonics Integration Chips production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Si Photonics Integration Chips consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Si Photonics Integration Chips domestic production, consumption, key domestic manufacturers and share

Global Si Photonics Integration Chips production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Si Photonics Integration Chips production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Si Photonics Integration Chips production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Si Photonics Integration Chips 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 Intel, Acacia (Cisco Systems), Marvell Technology, Coherent Corp., Broadcom Inc., NVIDIA, AyarLabs, Ranovus Inc., Credo Technology Group, OpenLight, 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 Si Photonics Integration Chips 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 Si Photonics Integration Chips Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Si Photonics Integration Chips Market, Segmentation by Type:

400G

800G

1.6T

3.2T

Others

Global Si Photonics Integration Chips Market, Segmentation by Transmission Distance:

DR

FR

Others

Global Si Photonics Integration Chips Market, Segmentation by Application:

Data Center Communications

Telecommunications Network Communications

Companies Profiled:

Intel

Acacia (Cisco Systems)

Marvell Technology

Coherent Corp.

Broadcom Inc.

NVIDIA

AyarLabs

Ranovus Inc.

Credo Technology Group

OpenLight

SCINTIL Photonics

Zhongji Innolight

Chengdu New Yisheng Communication Technology

Accelink

Suzhou Dawning Semi Technology

Innovoptotech

Lightelligence

HGTECH CO., LTD.

XPHOR

Hyper Photonix (Xinsulian HangZhou Technology Co. Ltd)

Saili Technology

Siluxtek

Key Questions Answered:

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

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