

Global 3.2T NPO Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global 3.2T NPO market size is predicted to grow from US\$ 92.93 million in 2025 to US\$ 386 million in 2032; it is expected to grow at a CAGR of 22.8% from 2026 to 2032.

3.2T NPO refers to a next-generation optical interconnect architecture that integrates optical transceiver engines with speeds up to 3.2Tbps into switching chips or AI computing chips in a near-packaged manner over ultra-short distances in AI data centers and high-performance computing (HPC) systems. Its core objective is to significantly shorten electrical interconnect distances, reduce power consumption and signal loss without fully adopting co-packaged optics (CPO), thereby supporting the ultra-high bandwidth communication requirements for training large AI models.

Currently, 3.2T NPO is still in the early commercialization/engineering verification stage, and very few vendors worldwide have truly 'released or verified' it. 3.2T NPO is considered a key technology in the transition of AI data center optical interconnects from pluggable modules to co-packaged optics (CPO). In the next 5-8 years, it will rapidly penetrate the market with the expansion of GPU clusters, the upgrade of switching chip speeds from 51.2T to 102.4T, and the explosive growth of AI training traffic. Its core value lies in solving the physical limits of 800G/1.6T pluggable modules in terms of power consumption, thermal density, and signal integrity, and providing 20-50Tbps of optical interconnect capability per node for ultra-large-scale AI training clusters. Therefore, it is regarded as an 'infrastructure-level upgrade technology for AI computing power networks' and will be deployed on a large scale by ultra-large-scale cloud vendors in the future.

United States market for 3.2T NPO is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for 3.2T NPO is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for 3.2T NPO is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key 3.2T NPO players cover Accelink, InnoLight, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LPI (LP Information)' newest research report, the '3.2T NPO Industry Forecast' looks at past sales and reviews total world 3.2T NPO sales in 2025, providing a comprehensive analysis by region and market sector of projected 3.2T NPO sales for 2026 through 2032. With 3.2T NPO sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world 3.2T NPO industry.

This Insight Report provides a comprehensive analysis of the global 3.2T NPO landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on 3.2T NPO portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 3.2T NPO market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 3.2T NPO and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 3.2T NPO.

This report presents a comprehensive overview, market shares, and growth opportunities of 3.2T NPO market by product type, application, key players and key regions and countries.

Segmentation by Type:

Short-range IMDD type NPO

Silicon photonics NPO

Coherent NPO

CPO transitional NPO

Segmentation by Industry Chain Position:

Chip Layer

Optical Engine Layer

Module Layer

Segmentation by Application:

Data Center

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Accelink

InnoLight

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