

# Global AI Optical Chips Market Growth 2026-2032

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## Abstracts

The global AI Optical Chips market size is predicted to grow from US\$ 3458 million in 2025 to US\$ 16061 million in 2032; it is expected to grow at a CAGR of 26.5% from 2026 to 2032.

Aimed at high-speed optical interconnects for artificial intelligence computing infrastructure, high-performance computing, and hyperscale data centers, AI optical chips are core photonic/optoelectronic semiconductor chips used to realize the generation, modulation, transmission, multiplexing, and reception of optical signals. AI optical chips are not single devices, but rather a high-speed photonic chip system formed around AI servers, GPU/XPU clusters, switches, and data center networks. This system mainly includes laser chips such as EML, DFB/CW Laser, and VCSEL; high-speed photodetector chips such as PIN/APD; and integrated photonic chips such as silicon photonic PICs, modulators, waveguides, and MUX/DEMUX.

1) AI computing power demand is becoming the core structural growth driver of the optical chip market, with product speeds rapidly advancing from 400G/800G to 1.6T. Large-scale GPU/XPU clusters require increasingly higher inter-node communication bandwidth, while copper interconnects face increasingly significant limitations in terms of distance, power consumption, and bandwidth density. Therefore, high-speed optical interconnects are beginning to extend from traditional data center switching networks to AI Scale-Out, Scale-Up, and even rack-level interconnects.

2) 200G/lane is becoming a key technological dividing line for next-generation AI optical chips and is beginning to evolve towards 400G/lane. The 800G stage is mainly based on 100G/lane, while 1.6T is clearly shifting to an 8×200G architecture. The OIF has explicitly adopted 200G/lane signaling in its 12.8Tb/s NPO project in 2026, indicating that 200G single-channel is no longer just a laboratory technology but is entering a wider range of industry interface systems. In the coming years, the focus of competition

among optical chip manufacturers will shift from "the ability to provide 100G products" to the mass production yield, power consumption, bandwidth, temperature drift, and reliability of 200G chips, as well as the technological reserves for 400G/lane.

3) Silicon Photonics is accelerating its penetration, but it will not simply replace InP and GaAs optical chips. Instead, it will form a heterogeneous/hybrid integrated system. The advantage of silicon photonics lies in its ability to utilize mature semiconductor manufacturing and integration technologies to integrate a large number of photonic functions, such as modulators, waveguides, demultiplexers, and detectors, into a single PIC. Therefore, it is particularly suitable for high-density 800G, 1.6T, and CPO products; however, high-efficiency laser sources still heavily rely on III-V materials such as InP. The future mainstream architecture is more likely to be InP/GaAs responsible for high-performance light emission or detection + Silicon Photonics responsible for high-speed modulation and large-scale photonic integration, rather than a single material system monopolizing the entire AI optical chip market.

4) CPO, NPO, and Optical I/O are driving the upgrade of AI optical chips from "internal modules" to "core I/O chips near computing/switching chips." Traditional pluggable modules require long high-speed electrical channels to connect the switching ASIC and optical modules. As switching capacity and SerDes rates increase, electrical interconnect losses and power consumption continue to rise. In the future, the application of optical chips will gradually shift from inside the pluggable module on the switch panel to near the switch ASIC, GPU/XPU, and even inside the package, thereby increasing the unit system value of SiPh PIC, CW Laser, and high-density optical engines.

5) The three transmitter technologies-EML, CW Laser, and VCSEL-will coexist for a long time, rather than one technology completely replacing another. EML, with its high speed, high signal quality, and good short-to-medium distance transmission performance, remains an important solution for 200G/lane and 1.6T pluggable modules; the widespread adoption of Silicon Photonics is rapidly driving demand for high-power CW Laser; and in short-distance AI interconnects within 100 meters, VCSEL remains highly competitive due to its low cost, low power consumption, and mature GaAs mass production capabilities. Coherent has already demonstrated a 1.6T-SR8 system based on 200G VCSEL and PD.

6) Market competition is shifting from simple chip performance to a focus on "wafer manufacturing capabilities + yield + packaging collaboration + large-scale delivery capabilities." AI optical chips, especially 200G EML, high-power CW Laser, and high-

speed PD, place higher demands on epitaxy, lithography, etching, material uniformity, thermal management, chip testing, and long-term reliability. Therefore, leading companies with their own InP/GaAs wafer fabs and mature mass production platforms have a significant advantage. As 1.6T enters the large-scale deployment stage, production capacity, yield, and supply chain security are becoming crucial competitive barriers for AI optical chips.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the "AI Optical Chips Industry Forecast" looks at past sales and reviews total world AI Optical Chips sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Optical Chips sales for 2026 through 2032. With AI Optical Chips sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Optical Chips industry.

This Insight Report provides a comprehensive analysis of the global AI Optical Chips landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Optical Chips portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Optical Chips market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Optical Chips 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 AI Optical Chips.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Optical Chips market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### **Segmentation by Type:**

EML Chips

DFB & CW Laser Chips

VCSEL Chips

PIN/APD Chips

Silicon Photonics / PIC Chips

Others

## **Segmentation by Data Rate:**

?50G/lane

100G/lane

200G/lane

?400G/lane

## **Segmentation by Function:**

Active Optical Chips

Passive Optical Chips

## **Segmentation by Application:**

Data Centers and AI Computing

5G/6G and Telecommunications Networks

Optical Computing

LiDAR

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 analysing the company's coverage, product portfolio, its market penetration.

Coherent

Lumentum

Broadcom

Sumitomo Electric

Mitsubishi Electric

NTT Innovative Devices

Albis Optoelectronics

Source Photonics (Suzhou Dongshan Precision)

Wooriro

Marvell

Ayar Labs

LinkStar Microtronics

Accelink Technology

Yuanjie Semiconductor Technology

Ligent Technologies

Wuhan Mindsemi

Sanan IC

Suzhou Everbright Photonics

Qianmu Laser

Berxel Photonics

Vertilite Co., Ltd

Huagong Genuine Optoelectronics

Wuhan Elite Optronics

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global AI Optical Chips market?

What factors are driving AI Optical Chips market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Optical Chips market opportunities vary by end market size?

How does AI Optical Chips break out by Type, by Application?

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