

Global Chip-on-Board Optical Assembly Market Growth 2026-2032

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Abstracts

The global Chip-on-Board Optical Assembly market size is predicted to grow from US\$ 841 million in 2025 to US\$ 3478 million in 2032; it is expected to grow at a CAGR of 19.2% from 2026 to 2032.

Chip-on-Board Optical Assembly is a board-level optoelectronic integration component designed for high-speed optical interconnects and precision optical sensing. Its core approach is to directly mount lasers, photodetectors, silicon photonics chips, driver ICs, TIAs, passive optical components, and necessary control devices on printed circuit boards, ceramic substrates, optical engine boards, or dedicated carriers, and to complete high-density integration of the optoelectronic conversion unit through wire bonding, flip-chip bonding, SMT hybrid assembly, active optical coupling, encapsulation, and automated testing. This product addresses the trade-offs of traditional discrete optical devices in data rate, miniaturization, thermal management, cost, and assembly efficiency, enabling optical modules, active optical cables, on-board optical modules, near-package optical interconnects, and optical sensing modules to operate with shorter electrical paths, higher channel density, and lower cost per bit. Typical customers include optical module manufacturers, data center equipment suppliers, switch and server vendors, AI cluster system integrators, optical sensing and imaging equipment manufacturers, and advanced packaging foundries. Common delivery forms include COB optical engines, COB optical transceiver modules, AOC-embedded optical engines, on-board optoelectronic modules, CPO/NPO optical engines, and customized optical sensing board-level assemblies, with business models centered on standard product sales, custom development, ODM/OEM, and packaging manufacturing services.

Chip-on-Board Optical Assembly is evolving from a process choice inside conventional

optical modules into an important integration platform for high-speed optical interconnect systems. As switch chips, GPUs, server NICs, and optical module interfaces continue to move to higher data rates, signal loss, crosstalk, thermal density, and power consumption on PCBs are becoming increasingly severe, forcing shorter distances between optical chips and electrical chips. COB solutions directly integrate lasers, photodetectors, drivers, TIAs, and passive optical components on board-level carriers, enabling smaller size, shorter interconnects, higher automated assembly efficiency, and lower cost per bit. Compared with traditional TO-CAN or BOX packaging, COB has cost and density advantages in short-reach data center links, parallel multimode transmission, AOCs, SR-class optical modules, and selected PSM products. Its limitations mainly lie in hermeticity, contamination protection, reworkability, and extreme reliability, so BOX, ceramic packaging, and higher-order heterogeneous integration will continue to coexist in long-haul telecom and high-reliability industrial scenarios. Overall, COB is not a single package form, but a collection of high-density optoelectronic assembly capabilities. Competition will increasingly center on die placement, micron-level coupling, thermal paths, automated testing, and high-volume yield.

AI clusters and cloud data centers are significantly reshaping the demand structure for Chip-on-Board Optical Assembly. In the past, such components were mainly used in 10G, 25G, 40G, and 100G short-reach optical modules, with the core logic focused on cost optimization and module miniaturization. Now, demand for 800G, 1.6T, and future higher-speed interconnects is raising the strategic role of optical engines in system architecture. High-speed switches and GPU clusters require higher bandwidth density and lower power consumption. Front-panel pluggable optical modules will remain large in scale, but on-board optics, near-package optics, co-packaged optics, and optical I/O are becoming important complements to next-generation architectures. COB plays both a transitional and an extending role in this process. It provides a mature and cost-efficient optoelectronic assembly solution for pluggable optical modules and AOCs, while also building capabilities in multichannel placement, silicon photonics coupling, thermal management, and automated testing for OBO, NPO, and CPO. Future growth will be concentrated in high-speed Ethernet, AI back-end networks, GPU pooling interconnects, in-board optical interconnects, and high-density fiber array interfaces. Market competition will move from simple module price competition toward a combined contest of optical chip platforms, packaging yield, customer qualification cycles, system power consumption, and supply chain delivery capability.

From a regional perspective, the Chip-on-Board Optical Assembly supply chain has already formed a multi-location collaborative structure. Mainland China and Taiwan

have complete supply chains in optical module manufacturing, optical engine assembly, PCB production, and packaging services, covering high-volume demand from low-speed access modules to high-speed data center modules. Japanese companies have deep capabilities in on-board optical modules, precision connectors, ceramic substrates, and optical I/O technologies, making them well positioned to extend into system-level high-reliability optical interconnects. Korean companies are entering higher-integration optical engine markets through platforms such as O-SiP, creating technological substitution pressure on traditional COB. U.S. and Israeli companies participate in global competition mainly through high-speed connectors, silicon photonics platforms, optical engine design, and innovative interconnect architectures. On the demand side, key customers include North American cloud service providers, global switch vendors, Chinese communications equipment manufacturers, AI server supply chains, and high-performance computing users. As the optical transceiver and optical interconnect markets continue to expand, the packaging and assembly value associated with COB will continue to rise, although the industry will also face constraints from high-speed chip supply, customer qualification, automation equipment investment, and price erosion. Companies with platform-based products, scale manufacturing, and multi-region delivery capabilities are more likely to capture long-term share.

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

This Insight Report provides a comprehensive analysis of the global Chip-on-Board Optical Assembly 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 Chip-on-Board Optical Assembly portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chip-on-Board Optical Assembly market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chip-on-Board Optical Assembly and breaks down the forecast by Transmission Distance, 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 Chip-on-Board Optical Assembly.

This report presents a comprehensive overview, market shares, and growth opportunities of Chip-on-Board Optical Assembly market by product type, application, key manufacturers and key regions and countries.

Segmentation by Transmission Distance:

On-Board Interconnect COB Optical Assembly

Intra-System Interconnect COB Optical Assembly

In-Rack Short-Reach COB Optical Assembly

Data Center Short-Reach COB Optical Assembly

Medium-Reach Transmission COB Optical Assembly

Long-Reach Transmission COB Optical Assembly

Segmentation by Fiber Medium:

Multimode Fiber COB Optical Assembly

Single-Mode Fiber COB Optical Assembly

Parallel Multi-Fiber COB Optical Assembly

Board-Level Optical Waveguide COB Optical Assembly

Free-Space Coupled COB Optical Assembly

Segmentation by Primary Chip Platform:

VCSEL Array COB Optical Assembly

DFB Laser COB Optical Assembly

EML Laser COB Optical Assembly

Silicon Photonics PIC COB Optical Assembly

Photodetector Array COB Optical Assembly

CMOS Image Sensor COB Optical Assembly

Other

Segmentation by Application:

Data Center Short-Reach Interconnect

AI Cluster High-Speed Interconnect

Switch On-Board Interconnect

Server Intra-System Interconnect

Active Optical Cable Link

5G Transport Network

Other

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.

TRUELIGHT CORPORATION

Chengdu Tsuhan Technology Co., Ltd.

Xinsulian HangZhou Technology Co. Ltd

Broadex Technologies

ShunYun Technology

ETU-Link Technology Co., Ltd.

Optcore

FIC Global, Inc.

Pixon Technologies Corp.

KYOCERA Corporation

I-PEX Inc.

Samtec, Inc.

Advanced Semiconductor Engineering, Inc.

LIPAC Co., Ltd.

ColorChip Ltd.

Chengdu FTE Technology Co., Ltd.

Chengdu Eugenlight Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Chip-on-Board Optical Assembly market?

What factors are driving Chip-on-Board Optical Assembly market growth, globally and by region?

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

How do Chip-on-Board Optical Assembly market opportunities vary by end market size?

How does Chip-on-Board Optical Assembly break out by Transmission Distance, by Application?

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