

Global Chip-on-Carrier Package Market Growth 2026-2032

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Abstracts

The global Chip-on-Carrier Package market size is predicted to grow from US\$ 1277 million in 2025 to US\$ 2347 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

Chip-on-Carrier package is a first-level packaging format for active optoelectronic chips. Its core approach is to mount a laser diode, electro-absorption modulated laser, semiconductor optical amplifier, gain chip, or photodetector chip onto a metallized ceramic, aluminum nitride, C-Mount, or other high-thermal-conductivity carrier, and to establish electrical interconnection and thermal paths through soldering, wire bonding, flip-chip assembly, or termination structures. It addresses the handling difficulty of bare dies, burn-in and screening needs, thermal path limitations, customer integration complexity, and high-frequency signal-integrity requirements. Therefore, it is widely used as an intermediate device in optical transceiver sub-assemblies, external light sources for silicon photonics, LiDAR light sources, pump sources, gas absorption spectroscopy sources, medical lasers, and scientific optical systems. The product normally does not prioritize a complete housing or fiber pigtail. Instead, it emphasizes open mounting, low thermal resistance, testability, customization, ease of optical coupling, and compatibility with non-hermetic or customer-owned package platforms. Common delivery forms include standard-wavelength off-the-shelf products, CoC devices screened by wavelength and power, high-speed communication CoCs with RF termination, OEM carriers with NTC or TEC compatibility, and customized package supply for high-volume optical module and laser system manufacturers.

Chip-on-Carrier packaging is becoming a critical intermediate format in the active optoelectronic device industry, connecting bare dies with system-level packages. As optical communications, LiDAR, quantum optics, and industrial laser systems

increasingly require open integration, efficient thermal dissipation, and rapid validation, direct bare-die delivery can no longer fully satisfy customer requirements for handling, screening, burn-in, testing, and secondary assembly. Complete TO, butterfly, or fiber-coupled modules, by contrast, may reduce design flexibility and increase cost. CoC mounts the chip on a metallized carrier, ceramic carrier, aluminum nitride carrier, or C-Mount carrier, allowing the chip to obtain basic electrical interconnection, thermal paths, and testability before it enters the customer's module. For high-speed EMLs, DFB lasers, SOAs, APDs, and high-power laser diodes, this format balances thermal resistance, signal integrity, non-hermetic package compatibility, and OEM assembly efficiency. In the future, the value of this product will not lie only in the device itself, but also in the engineering capability built around carrier design, solder materials, termination structures, burn-in screening, and customer optical-path adaptation.

From the demand perspective, the growth of CoC chip packaging will be jointly driven by higher-speed communications and the diversification of laser applications. Data centers and access networks continue to move toward higher speed, lower power consumption, and higher integration density, creating clear demand for EML, DFB, and APD CoC devices in optical sub-assemblies. Automotive and industrial LiDAR are driving the development of CoC devices with high peak power, eye-safe wavelengths, and multi-junction structures, with the 1550 nm direction emphasizing long range, stronger return signals, and a higher safety margin. Gas detection, environmental monitoring, aerospace, and life-science applications require narrow-linewidth, tunable, and custom-wavelength light sources, supporting the delivery of DFB, FP, SLD, and gain chips in open carrier formats. Medical aesthetics, pumping, illumination, and materials processing focus more on high power, high efficiency, long lifetime, and controllable cost. Therefore, CoC is not a single package specification, but a family of application-oriented packaging platforms built around different chips, wavelength bands, power levels, and system integration methods.

The competitive landscape will reflect regional specialization and capability stratification. European, American, and Japanese suppliers have stronger accumulated capabilities in high-speed communications, narrow-linewidth devices, custom scientific light sources, APD receivers, and high-reliability customer projects, with products emphasizing data rate, wavelength accuracy, reliability standards, and complex system adaptation. Chinese suppliers are expanding rapidly in high-power laser diodes, CoS and CoC pump devices, and industrial and medical applications, with advantages in wavelength coverage, cost, delivery speed, and customization response. Future competition will not depend only on the ability to provide a specific chip, but on the ability to build an end-to-end capability covering epitaxial chips, facet processing, die attach, carrier materials,

wire bonding, burn-in, testing, and batch consistency. As non-hermetic optical modules, external light sources for silicon photonics, and high-power laser systems expand shipments, companies with platform-based packaging, long-term reliability data, and customer co-development capabilities will be better positioned to increase pricing power and move from single-device suppliers to key optoelectronic sub-assembly partners.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chip-on-Carrier Package and breaks down the forecast by Active Device 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 Chip-on-Carrier Package.

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

Segmentation by Active Device Type:

Laser Diode CoC Chip Package

Electro-Absorption Modulated Laser CoC Chip Package

Semiconductor Optical Amplifier CoC Chip Package

Gain Chip CoC Chip Package

Avalanche Photodiode CoC Chip Package

Other

Segmentation by Operating Mode:

Continuous-Wave CoC Chip Package

Quasi-Continuous-Wave CoC Chip Package

Pulsed CoC Chip Package

High-Speed Modulated CoC Chip Package

Segmentation by Thermal Management Process:

AuSn Hard-Solder CoC Chip Package

Indium Soft-Solder CoC Chip Package

P-Side-Down CoC Chip Package

Flip-Chip CoC Chip Package

Passive-Cooling CoC Chip Package

Segmentation by Integration Interface:

Wire-Bond Pad CoC Chip Package

RF-Terminated CoC Chip Package

Face-Down APD CoC Chip Package

Free-Space Optical CoC Chip Package

Silicon Photonics Coupled CoC Chip Package

Other

Segmentation by Application:

Data Center Optical Interconnect

LiDAR

Fiber Laser Pumping

Defense Ranging and Targeting

Quantum Optics Experiment

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.

Coherent Corp.

Broadcom Inc.

NTT Innovative Devices Corporation

Anritsu Corporation

Modulight Corporation

SemiNex Corporation

Innolume GmbH

Sacher Lasertechnik GmbH

nanoplus Nanosystems and Technologies GmbH

Shenzhen Box Optonics Technology Co., Ltd.

Hangzhou Brandnew Technology Co., Ltd.

Dogain Skyera Laser Technology (Danyang) Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Chip-on-Carrier Package market?

What factors are driving Chip-on-Carrier Package market growth, globally and by region?

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

How do Chip-on-Carrier Package market opportunities vary by end market size?

How does Chip-on-Carrier Package break out by Active Device Type, by Application?

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