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Global Co-Packaged Optics (CPO) Technology Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Co-Packaged Optics (CPO) Technology market size is predicted to grow from US$ 110 million in 2025 to US$ 1392 million in 2032; it is expected to grow at a CAGR of 44.5% from 2026 to 2032.

Co-Packaged Optics (CPO) is an advanced heterogeneous integration of optics and silicon on a single packaged substrate aimed at addressing next generation bandwidth and power challenges. CPO brings together a wide range of expertise in fiber optics, digital signal processing (DSP), switch ASICs, and state-of-the-art packaging & test to provide disruptive system value for the data center and cloud infrastructure. Generally, CPOs offer power saving in several different ways:

No lossy copper traces: Unlike pluggable optics, CPO design eliminates the need for signals to traverse from the application-specific integrated circuit (ASIC) chip over energy-sapping copper links across the board up to the front panel. Instead, CPO design brings the fiber directly to the switch enabling short, low-loss communication between the chip and the optical engine.

Fewer digital signal processors (DSPs): In current architectures for speeds higher than 25G/lane, DSP-based retimers have become necessary components in pluggable optics to actively analyze and compensate for signal degradation, distortions, and timing issues. The DSP contributes to driving up the overall system power by as much as 25-30%. However, given that CPOs eliminate the off-chip lossy copper traces between the ASIC and the optics, designers can safely eliminate one DSP level to save power and reduce costs.

Integrated lasers: There are two schools of thought regarding laser source placement.

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The prevalent approach involves an external laser, necessitating the transmission of light through a fiber and coupling it into the CPO and typically incurring an optical power loss of 30-50%. The alternative approach integrates the laser directly onto the chip, offering a notably higher optical coupling compared to the latter approach, provided that thermal management and laser reliability are viable.

High bandwidth and low latency: CPOs can enable higher bandwidth and lower latency, mainly because of fewer DSPs and the removal of long copper traces. Additional blocks like DSPs as well as the parasitics in copper traces all introduce delays that signals won?t see in a CPO solution.

The AI revolution is a recurring theme across industries, with projections of the AI sector reaching $280 billion by 2030. CPO technology, which integrates optical engines with compute chips (e.g., AI/ML accelerators), could benefit from AI-driven demand for high-speed, low-latency data transmission in data centers and HPC clusters.

Tech giants like Google, Amazon, Microsoft, and Meta are exploring CPO to enhance power efficiency and data transmission speeds. CPO is expected to replace traditional pluggable optics in data center switches by 2026?2028.

Traditional pluggable optics consume 50-60% more power than CPO. CPO enables energy-efficient data transmission, reducing cooling costs in data centers. Growing focus on green data centers and carbon footprint reduction is accelerating CPO deployment.

Industry alliances like OIF (Optical Internetworking Forum) and Open Compute Project (OCP) are working on CPO specifications. Companies like Cisco, Intel, Broadcom, etc. are collaborating to develop standardized CPO modules for commercial deployment.

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

This Insight Report provides a comprehensive analysis of the global Co-Packaged Optics (CPO) Technology landscape and highlights key trends related to product

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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 Co-Packaged Optics (CPO) Technology portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Co-Packaged Optics (CPO) Technology market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Co-Packaged Optics (CPO) Technology 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 Co-Packaged Optics (CPO) Technology.

This report presents a comprehensive overview, market shares, and growth opportunities of Co-Packaged Optics (CPO) Technology market by product type, application, key players and key regions and countries.

Segmentation by Type:

Less than 1.6 T

1.6 to 3.2 T

More than 3.2 T

Segmentation by Application:

Data Center and HPC

Telecommunication and Networking

This report also splits the market by region:

Americas

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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

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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.

Broadcom

NVIDIA

Cisco

Ranovus

Intel

Marvell Technology

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