

Global Co-Packaged Optics Engine Market Growth 2026-2032

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Abstracts

The global Co-Packaged Optics Engine market size is predicted to grow from US\$ 77.24 million in 2025 to US\$ 1346 million in 2032; it is expected to grow at a CAGR of 46.0% from 2026 to 2032.

In 2025, global Co-Packaged Optics Engine production reached approximately 105 K Units, with an average global market price of around 754 USD per Unit.

A Co-Packaged Optics Engine, or CPO Optical Engine, is an optoelectronic conversion component integrated within the same package or near-package area as high-bandwidth electronic chips such as switch ASICs, AI accelerators, or network processors. It typically consists of silicon photonic chips, modulators, photodetectors, drivers, TIAs, optical coupling structures, control circuits, fiber arrays, and advanced packaging elements, enabling high-speed conversion and transmission between electrical and optical signals close to the chip. Compared with conventional pluggable optical modules, a CPO optical engine is positioned much closer to the compute or switching silicon, helping shorten high-speed electrical links, reduce signal loss and power consumption, and improve system-level port density and interconnect efficiency.

The core value of a Co-Packaged Optics Engine lies in moving optical interconnect capability from external modules to the chip-adjacent domain, directly addressing the growing challenges of power consumption, signal integrity, thermal management, and front-panel density in AI data centers and high-performance computing networks. As AI training clusters scale, switch ASIC bandwidth increases, and 800G, 1.6T, 3.2T, and higher-speed architectures accelerate, traditional pluggable optics are increasingly constrained by system efficiency and physical space limitations. With advantages in lower power, higher density, shorter interconnect paths, and closer optoelectronic co-

integration, CPO optical engines are emerging as a critical technology direction for next-generation AI networking and high-end switching systems. Looking ahead, as silicon photonics processes, external laser sources, advanced packaging, automated optical coupling, and system-level validation continue to mature, CPO optical engines are expected to move from early high-end deployments into broader data center and HPC adoption, becoming a key value unit in the transition from module-level optical upgrades to system-level interconnect redesign.

The upstream raw materials for Co-Packaged Optics Engine mainly include silicon photonic chips, laser light sources, driver chips, DSPs, etc. Typical raw material suppliers include Intel, Marvell, Cisco, Lumentum, Coherent, Broadcom, etc. The downstream applications are mainly silicon photonic modules used in data centers, high-performance computing, and other fields. Typical downstream users include Amazon AWS, Microsoft Azure, Google Cloud, Huawei, ZTE, Alibaba, Tencent, etc.

The single-line capacity of Co-Packaged Optics Engine is mainly affected by the silicon photonics PIC wafer manufacturing yield, optoelectronic chip mounting accuracy, fiber array coupling efficiency, active/passive alignment process, packaging and testing cycle time, and high-speed optoelectronic performance screening time. Among these factors, packaging coupling and testing are usually the key bottlenecks for capacity ramp-up.

United States market for Co-Packaged Optics Engine 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 Co-Packaged Optics Engine 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 Co-Packaged Optics Engine is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Co-Packaged Optics Engine players cover Marvell Technology, Inc., Acacia (Cisco Systems), Broadcom Inc., Intel Corporation, Ayar Labs, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the "Co-Packaged Optics Engine Industry Forecast" looks at past sales and reviews total world Co-Packaged Optics Engine sales in 2025, providing a comprehensive analysis by region and market sector of projected Co-Packaged Optics Engine sales for 2026 through 2032. With Co-Packaged Optics Engine 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 Engine industry.

This Insight Report provides a comprehensive analysis of the global Co-Packaged Optics Engine 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 Co-Packaged Optics Engine 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 Engine market.

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

This report presents a comprehensive overview, market shares, and growth opportunities of Co-Packaged Optics Engine market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

400G and Below

800G

1.6T

3.2T

6.4T and Above

Segmentation by Function:

Transmitter Optical Engine

Receiver Optical Engine

Others

Segmentation by Application:

Data Center

High-performance Computing (HPC)

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.

Marvell Technology, Inc.

Acacia (Cisco Systems)

Broadcom Inc.

Intel Corporation

Ayar Labs

Lightmatter

Ranovus

DustPhotonics (Credo Technology)

SCINTIL Photonics

Sicoya

Accelink

SiFotonics

Elite Photonics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Co-Packaged Optics Engine market?

What factors are driving Co-Packaged Optics Engine market growth, globally and by region?

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

How do Co-Packaged Optics Engine market opportunities vary by end market size?

How does Co-Packaged Optics Engine break out by Type, by Application?

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