

Global Coherent DSP ASIC Market Growth 2026-2032

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Abstracts

The global Coherent DSP ASIC market size is predicted to grow from US\$ 4696 million in 2025 to US\$ 10496 million in 2032; it is expected to grow at a CAGR of 12.2% from 2026 to 2032.

A coherent DSP ASIC is a digital application-specific integrated circuit used in coherent optical communications. It maps high-speed electrical data into phase, amplitude, and polarization-multiplexed optical signals at the transmitter side, and performs sampling, equalization, chromatic dispersion compensation, carrier recovery, polarization demultiplexing, forward error correction, link monitoring, and data recovery at the receiver side. It is the core electronic device in coherent optical modules, coherent optical engines, and optical transport systems. These chips address signal distortion, noise accumulation, spectral efficiency, and power constraints in high-speed long-distance fiber transmission, and typically work together with silicon photonics, indium phosphide, thin-film lithium niobate modulators, coherent receivers, drivers, transimpedance amplifiers, and tunable lasers. Product forms include standalone merchant ASICs, module-embedded DSPs, DSP-optics co-packaged devices, line-card embedded coherent engines, and pluggable digital coherent optical modules. Customers include cloud service providers, telecom operators, optical module vendors, transport equipment vendors, and high-speed router vendors. Applications extend from data center interconnect, metro transport, regional long haul, backbone networks, and submarine cables to cross-data-center AI cluster connectivity, while technology development focuses on higher baud rates, advanced CMOS process nodes, stronger FEC and PCS algorithms, lower power per bit, smaller packaging, and broader open-standard interoperability.

The value of coherent DSP ASICs is rapidly expanding from traditional long-haul transport systems into cloud data center interconnects and AI infrastructure. The key driver is the need to move larger volumes of data between AI training and inference

clusters across campuses and data centers, while conventional short-reach direct-detection solutions face increasing pressure under longer reach, higher spectral efficiency, and lower error-rate requirements. Marvell's Orion targets 800G ZR/ZR+ pluggable modules, Cisco Acacia's Jannu supports 1.2T single-carrier multi-haul transmission, and NTT Innovative Devices' ExaSPEED GAIA supports 1.2T per wavelength, demonstrating that high-end coherent DSPs are becoming critical bottleneck components for cross-data-center and carrier optical transport networks.

The competitive landscape is forming around three routes: merchant chip suppliers, vertically integrated system vendors, and new AI interconnect chip entrants. At 400G, Acacia and Marvell were key forces, while at 800G, system vendors such as Ciena and Nokia are more actively competing for pluggable coherent market share. Retym is entering the AI infrastructure and cloud connectivity segment with a 5 nm programmable coherent DSP, adding a new competitive layer to the existing supply chain.

Technology upgrades are centered on CMOS process nodes, baud rate, PCS algorithms, FEC capability, silicon photonics co-packaging, and power per bit. Ciena WaveLogic 6 uses a 3 nm CMOS coherent DSP, Nokia PSE-6s integrates its DSP with CSTAR silicon photonics, and Infinera ICE7, now under Nokia after the acquisition, uses a 5 nm CMOS DSP. These developments indicate that high-end products are moving from pure chip-performance competition toward integrated competition across silicon, optical front end, packaging, and system-level control.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Coherent DSP ASIC and breaks down the forecast by Transmission Reach Class, 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 Coherent DSP ASIC.

This report presents a comprehensive overview, market shares, and growth opportunities of Coherent DSP ASIC market by product type, application, key manufacturers and key regions and countries.

Segmentation by Transmission Reach Class:

Access Edge Short-Reach Coherent DSP ASIC

Metro Mid-Reach Coherent DSP ASIC

Regional Long-Reach Coherent DSP ASIC

Backbone Ultra-Long-Reach Coherent DSP ASIC

Submarine Transmission Coherent DSP ASIC

Segmentation by Packaging Integration Method:

Bare-Die Packaged Coherent DSP ASIC

BGA Packaged Coherent DSP ASIC

Multi-Chip Module Coherent DSP ASIC

DSP-Optics Co-Packaged Coherent DSP ASIC

Other

Segmentation by Primary Algorithm Capability:

Fixed Baud-Rate Coherent DSP ASIC

Adaptive Baud-Rate Coherent DSP ASIC

Probabilistic Constellation Shaping Coherent DSP ASIC

Channel-Matched Shaping Coherent DSP ASIC

Low-Complexity Access Coherent DSP ASIC

Other

Segmentation by Standards Adaptation:

400ZR Standard Coherent DSP ASIC

OpenZR+ Standard Coherent DSP ASIC

OpenROADM Standard Coherent DSP ASIC

Other

Segmentation by Application:

Data Center Interconnect

Metro Optical Transport

Long-Haul Backbone Optical Transport

Submarine Cable Transmission

Access Edge Aggregation

DWDM Router Interconnect

5G Transport Network

AI Cluster Cross-Data-Center Interconnect

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.

Cisco Systems, Inc.

NTT Innovative Devices Corporation

Nokia Corporation

Ciena Corporation

EFFECT Photonics B.V.

Credo Technology Group Holding Ltd

Retym, Inc.

Huawei Technologies Co., Ltd.

ZTE Corporation

FiberHome Telecommunication Technologies Co., Ltd.

Coherent Corp.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Coherent DSP ASIC market?

What factors are driving Coherent DSP ASIC market growth, globally and by region?

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

How do Coherent DSP ASIC market opportunities vary by end market size?

How does Coherent DSP ASIC break out by Transmission Reach Class, by Application?

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