

Global DAC and AEC Market Growth 2026-2032

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Abstracts

The global DAC and AEC market size is predicted to grow from US\$ 1963 million in 2025 to US\$ 5275 million in 2032; it is expected to grow at a CAGR of 15.0% from 2026 to 2032.

In 2025, global DAC and AEC sales volume reached approximately 16,310.7 K Units, with a average price of 102.4 USD/Unit.

Data Center DAC (Direct Attach Copper) and AEC (Active Electrical Cable) are short-reach high-speed interconnect solutions widely used inside data centers to connect servers, switches, and networking equipment. DAC is a passive copper cable with no active electronic components, offering very low cost, zero power consumption, and reliable performance over short distances (typically up to 1–3 meters at high data rates). AEC, by contrast, integrates active signal-conditioning components such as redrivers or retimers within the cable connectors, enabling improved signal integrity and longer reach (generally 2–7 meters) while still using copper rather than optical fiber. Together, DAC and AEC form cost- and power-efficient alternatives to optical interconnects, with DAC favored for ultra-short links and AEC used where higher data rates or longer copper reach are required in modern high-density data centers.

DAC and AEC are two categories of high-speed short-reach copper interconnect solutions used inside modern data centers to connect servers, GPU clusters, network interface cards, switches, routers, storage systems, and equipment within or between adjacent racks. DAC, or Direct Attach Copper, is typically built with high-speed twinax copper cable, pluggable form factors such as QSFP, QSFP-DD, OSFP or SFP-DD, and identification EEPROMs, but without active signal-processing devices. It relies mainly on the host SerDes for transmission and reception, offering low cost, low latency, low power consumption, and high reliability for very short links, typically around 1–3 meters. AEC, or Active Electrical Cable, integrates active components such as redrivers,

retimers, DSPs or SerDes devices inside the cable-end modules to compensate for high-frequency loss, crosstalk, and bit-error issues. It is increasingly used in 400G, 800G and emerging 1.6T data center architectures where copper reach, signal integrity, and cabling density are critical. For a narrow industry-research scope, the market should be limited to high-speed data center copper cable assemblies, excluding AOC, optical transceivers, fiber cables, generic Ethernet cables, power cords, and low-speed consumer electronics cables.

The production model for DAC and AEC combines high-speed cable materials, precision connectors, automated cable assembly, signal-integrity validation, and customer qualification. DAC manufacturing is closer to precision cable and connector assembly, with key barriers in low-loss copper conductors, shielding design, impedance control, termination process, EMI management, and high-speed testing. AEC adds active signal-conditioning chips, retimers or redrivers, firmware, thermal design, and system-level interoperability, making it more of a “chip solution + cable assembly + platform validation” business. Estimated gross margin can be segmented as follows: mature or standard DAC products are generally around 15%–25%; high-end 400G/800G DAC and customized rack-level cabling solutions are typically around 20%–30%; AEC cable assembly suppliers may reach around 25%–40%, while platform suppliers with proprietary SerDes/DSP technology and reference designs can achieve higher margins. Upstream inputs include copper conductors, foamed insulation, shielding materials, connectors, cages, EEPROMs, retimer/redriver/DSP chips, and testing equipment. Midstream suppliers include connector, cable assembly, and active cable solution providers such as Amphenol, TE Connectivity, Molex, Luxshare, BizLink, Volex, and Credo. Downstream customers include cloud service providers, AI server vendors, switch vendors, OEM/ODM manufacturers, telecom equipment companies, and large enterprise data centers. Overall, DAC economics are more sensitive to cost control and manufacturing scale, while AEC is more exposed to chip supply, customer qualification cycles, and rapid high-speed standard transitions.

AI training, inference clusters, and cloud data centers are shifting competition from standalone compute performance to full-link bandwidth across GPUs, NICs, switches, and storage. This structurally increases the value of high-speed short-reach interconnects. As networks migrate from 400G to 800G and 1.6T, rack-level port density, cabling complexity, and power constraints are rising simultaneously. DAC will remain the fundamental choice for ultra-short in-rack links due to low cost, low latency, and minimal power consumption, while AEC is gaining a larger role in higher-speed, longer-reach copper links, high-density CLOS architectures, and liquid-cooled AI racks. Energy constraints further enhance the appeal of efficient copper interconnects, as data

center operators increasingly optimize cost per bit, power per bit, and maintainability across the network layer.

The core challenge for DAC and AEC is that high-speed signal integrity is approaching the physical limits of copper channels. As channel speeds move toward 112G and 224G SerDes, insertion loss, return loss, crosstalk, bend radius, thermal management, and bit-error control become much harder to manage. DAC is naturally limited by reach and data rate, while AEC improves copper reach but introduces additional power consumption, heat, chip cost, firmware compatibility, and customer qualification risks. At the same time, optical transceivers, AOC, silicon photonics, and future co-packaged optics will remain strong alternatives in longer-reach and higher-bandwidth scenarios. Copper price volatility, precious-metal costs, trade policy, customer concentration, and hyperscaler pricing power may also pressure profitability in mid- and low-end product segments.

Downstream demand is expected to follow a pattern of stable DAC volume growth, accelerating AEC penetration, and continued coexistence between copper and optical solutions. Traditional server-to-ToR links, in-rack switch interconnects, and short storage links will continue to rely heavily on DAC. AI servers, GPU clusters, liquid-cooled racks, 800G switches, and open Ethernet-based AI networks are pushing AEC from a complementary solution toward a critical interconnect layer. Customer purchasing criteria are moving beyond unit cable price toward system-level TCO, including network power consumption, port density, cable volume, serviceability, supply stability, and compatibility with mainstream switch and NIC platforms. Going forward, leading cloud and AI infrastructure customers are likely to deepen cooperation with suppliers that combine high-speed connector design, copper cable manufacturing, SerDes technology, signal-integrity simulation, and global delivery capabilities, supporting further industry concentration.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for DAC and AEC 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 DAC and AEC.

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

Segmentation by Type:

DAC (Direct Attach Copper)

AEC (Active Electrical Cable)

Segmentation by Data Rates:

?100G

200G

400G

800G

?1.6T

Segmentation by Application:

Data Centers

Enterprises

AI Servers

High-Performance Computing (HPC)

Others

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.

Credo

Amphenol

TE Connectivity

Molex

Voilex

Juniper Networks (HPE)

Luxshare Precision

NVIDIA

JPC Connectivity

Panduit

Approved Networks (Legrand)

Proterial, Ltd

Broadex Technologies

Kingsignal Technology

Zhaolong Interconnect

LevelOne (DDC)

10Gtek

Infraeo

Shenzhen HTD Information-Tech

Shenzhen Sopto Technology

C-FLINK Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global DAC and AEC market?

What factors are driving DAC and AEC market growth, globally and by region?

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

How do DAC and AEC market opportunities vary by end market size?

How does DAC and AEC break out by Type, by Application?

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