

Global Optical Chip for Data Center Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Optical Chip for Data Center market size is predicted to grow from US\$ 1503 million in 2025 to US\$ 2961 million in 2032; it is expected to grow at a CAGR of 11.1% from 2026 to 2032.

Optical Chip for Data Center generates, modulates, transmits, receives, or processes optical signals within high-speed fiber optic communication systems used in cloud, AI, hyperscale, and enterprise data centers, enabling ultra-high bandwidth, low latency, and energy-efficient data transmission for 100G, 200G, 400G, 800G, and emerging 1.6T interconnect architectures.

The Optical Chip for Data Center industry chain begins upstream with compound semiconductor wafers, silicon wafers, epitaxial growth materials, photoresists, specialty gases, DSP chips, and advanced packaging substrates, continues midstream with photonic chip design firms, silicon photonics foundries, InP device manufacturers, wafer fabrication and advanced optical packaging providers, and extends downstream to optical module integrators, switch and router manufacturers, system OEMs, hyperscale cloud operators, telecom carriers, and AI infrastructure providers that deploy high-speed optical interconnect solutions in large-scale data center and interconnection networks worldwide.

Multiple global projects are under construction or planned, including new 300mm silicon photonics fabrication lines in North America and Asia, capacity expansions for indium phosphide wafer production, advanced co-packaged optics assembly facilities, AI-focused optical engine manufacturing plants, DSP-photonics integration centers, high-speed 800G and 1.6T module pilot lines, and government-supported semiconductor photonics clusters aimed at strengthening domestic supply chains, increasing wafer

throughput, enhancing advanced packaging capabilities, and meeting rapidly growing demand from hyperscale cloud providers and AI data center deployments through 2027–2030.

2025 Global Market Average Gross Profit Margin: 34%.

The Optical Chip for Data Center market is in a rapid expansion phase driven primarily by AI model training, cloud computing growth, and bandwidth-intensive applications such as generative AI and distributed computing. The transition from 400G to 800G and the early commercialization of 1.6T architectures are accelerating technology upgrades across hyperscale infrastructure. Power efficiency per bit and bandwidth density have become the most critical performance metrics, pushing adoption of silicon photonics and co-packaged optics solutions. The market has shifted from traditional telecom-driven growth to AI-cluster-driven demand, significantly increasing shipment volumes for short-reach and mid-reach optical chips.

Regionally, North America leads in demand due to hyperscale cloud concentration and AI infrastructure investment, while Asia-Pacific dominates manufacturing capacity, particularly in silicon photonics packaging and compound semiconductor fabrication. China is expanding domestic photonic chip capacity to reduce reliance on imports, while the United States and Europe are strengthening local semiconductor ecosystems through industrial policy support. Taiwan and Southeast Asia play key roles in advanced packaging and module assembly.

Market development opportunities are strongest in AI cluster interconnects, co-packaged optics integration, and 1.6T migration cycles. Increasing rack power density and copper interconnect limitations create structural demand for optical solutions. However, risks include cyclical capital expenditure from hyperscalers, technology substitution risks between pluggable and co-packaged architectures, supply chain constraints in InP materials, and price erosion from rapid capacity expansion. Technical risks also include thermal management challenges and integration complexity at higher speeds.

Key trends include deeper photonic-electronic integration, increasing adoption of 300mm silicon photonics wafers, DSP-photonics co-optimization, and standardization of 800ZR and 1.6T coherent solutions. Energy efficiency targets are driving innovation toward lower pJ/bit performance and improved laser efficiency. Competitive characteristics show a mix of vertically integrated IDMs, fabless silicon photonics designers, and specialized InP manufacturers, with increasing strategic partnerships

between chip suppliers and hyperscale customers. Barriers to entry remain high due to capital intensity, yield optimization requirements, and advanced packaging know-how, reinforcing industry consolidation and long-term supply agreements.

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

This Insight Report provides a comprehensive analysis of the global Optical Chip for Data Center landscape and highlights key trends related to product 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 Optical Chip for Data Center portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Optical Chip for Data Center market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Optical Chip for Data Center 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 Optical Chip for Data Center.

This report presents a comprehensive overview, market shares, and growth opportunities of Optical Chip for Data Center market by product type, application, key players and key regions and countries.

Segmentation by Type:

DFB

EML

VCSEL

Others

Segmentation by Speed:

25G

50G

100G

200G

Segmentation by Data Center Scale:

Small and Medium-Sized Data Centers

Large Data Centers

Segmentation by Application:

Intra-Data Center Interconnect

Data Center Interconnect (DCI)

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 analyzing the company's coverage, product portfolio, its market penetration.

Lumentum

Coherent

Mitsubishi Electric

Source Photonics

Broadcom

Sumitomo Electric

Applied Optoelectronics

NTT Electronics

Yuanjie Semiconductor Technology

Eliteoptronics

TRUMPF

Vertilite

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