

# Global PAM4 EML Laser Chip Market Growth 2026-2032

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## Abstracts

The global PAM4 EML Laser Chip market size is predicted to grow from US\$ 465 million in 2025 to US\$ 882 million in 2032; it is expected to grow at a CAGR of 10.3% from 2026 to 2032.

PAM4 EML laser chips are high-speed light source chips that integrate distributed feedback lasers and electro-absorption modulators. Supporting the PAM4 modulation format, they are used to achieve high-speed optical signal transmission at a single wavelength. They are core transmitting devices for 400G, 800G, and next-generation 1.6T optical modules and high-speed optical interconnect systems, primarily operating in the 1550nm and 1310nm wavelength bands. They are widely used in high-speed optical modules for data centers, data center interconnects, telecommunications backbones and metropolitan area networks, and optical interconnects for high-performance computing and AI computing clusters. In 2025, global sales of PAM4 EML laser chips were approximately 48.5 million units, with an average unit price of approximately US\$9.8 per unit and a capacity utilization rate of approximately 83%. The upstream mainly consists of indium phosphide epitaxial wafer and wafer foundries, high-speed epitaxy and chip manufacturing equipment manufacturers, pump and test laser suppliers, and high-precision packaging material and submicron lithography equipment suppliers. The downstream includes optical module manufacturers, silicon photonics and co-packaging optical solution providers, communication equipment manufacturers, and data center and cloud service providers. High-performance computing and AI server system manufacturers have an industry gross margin of approximately 46%. The product cost structure comprises approximately 29% for epitaxial wafers and wafer manufacturing, 18% for chip fabrication and lithography, 12% for electro-absorption modulation regions and waveguide processes, 10% for testing and aging screening, 7% for yield loss, 6% for pre-packaging wafer-level inspection and dicing, 6% for R&D and

process optimization, and 12% for logistics, management, and sales expenses. Demand primarily includes 400G and 800G optical module transmitters, AI data center optical interconnects, data center interconnect link upgrades, high-speed channels for telecom backbones and metropolitan area networks, and silicon photonics and CPO system support. Downstream customers include leading optical module manufacturers, silicon photonics platform manufacturers, communication equipment manufacturers, cloud computing and AI computing power operators, and high-performance computing system integrators. Business opportunities arise from the explosive growth of AI computing clusters, the rapid ramp-up of 800G and 1.6T optical modules, the advancement of silicon photonics and co-packaged optics, and changing consumer demands for higher speeds, lower power consumption, and higher single-channel bandwidth.

United States market for PAM4 EML Laser Chip 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 PAM4 EML Laser Chip 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 PAM4 EML Laser Chip is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key PAM4 EML Laser Chip players cover Coherent, Broadcom, Mitsubishi Electric, Lumentum, Applied Optoelectronics, 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 "PAM4 EML Laser Chip Industry Forecast" looks at past sales and reviews total world PAM4 EML Laser Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected PAM4 EML Laser Chip sales for 2026 through 2032. With PAM4 EML Laser Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world PAM4 EML Laser Chip industry.

This Insight Report provides a comprehensive analysis of the global PAM4 EML Laser Chip 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 PAM4 EML Laser Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an

accelerating global PAM4 EML Laser Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PAM4 EML Laser Chip 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 PAM4 EML Laser Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of PAM4 EML Laser Chip market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

28G

56G

100G

200G

Other

Segmentation by 3dB Bandwidth:

Below 53 GHz

53-65 GHz

Above 65 GHz

Segmentation by 1.5 Vpp TDECQ Value:

3-3.4 dB

2-3 dB

Below 2 dB

Segmentation by Application:

Fiber Access and Communication Network

Data Center

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.

Coherent

Broadcom

Mitsubishi Electric

Lumentum

Applied Optoelectronics

Macom

Yuanjie Semiconductor Technology

Suzhou Everbright Photonics

Source Photonics

Accelink Technologies

Leapteck Photonics, Inc.

Wuhan Elite Optronics

ZETTASEMI

Suzhou Etern-laser Optoelectronic Technology

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global PAM4 EML Laser Chip market?

What factors are driving PAM4 EML Laser Chip market growth, globally and by region?

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

How do PAM4 EML Laser Chip market opportunities vary by end market size?

How does PAM4 EML Laser Chip break out by Type, by Application?

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