

Co-Packaged Optics & Optical Interconnects

Patent Landscape Analysis – 2026

Who are the key players and newcomers in the global IP race shaping the future of optical links in semiconductor packaging?

REPORT OVERVIEW

Topic: CPO & Optical Interconnects

Type: Patent Landscape Analysis

Publication: January 2026

Reference: KM26001

Deliverables

- Report (>100 slides)
- Database (>1,300 patent families)
- Interactive dashboard (optional)

Pricing

- €4,990 - Report+Database
- €7,990 - Report+Database+Dashboard



KEY FEATURES

- **Global patenting trends**, including time evolution of patent publications, countries of patent filings, etc.
- **Main patent assignees and IP newcomers**.
- Key players' **IP position** and the relative **strength** of their patent portfolio.
- **IP leadership evolution** of patent assignees since 2020.
- **IP profile of 10 key players** (patent portfolio overview, technical coverage, geographical coverage, notable patents, recent IP activity).
- **Technical analysis of core patents** (crowded vs. white spaces, emerging trends, targeted value chain segments).
- **Excel database** with all patents analyzed in the report, including hyperlinks to an **updated online database**.
- **Interactive dashboard** enabling dynamic exploration of the patent landscape, allowing users to instantly drill down into key insights and tailor the analysis to their specific needs.

RELATED REPORTS

[Hybrid Bonding Patent Landscape Analysis 2024](#)

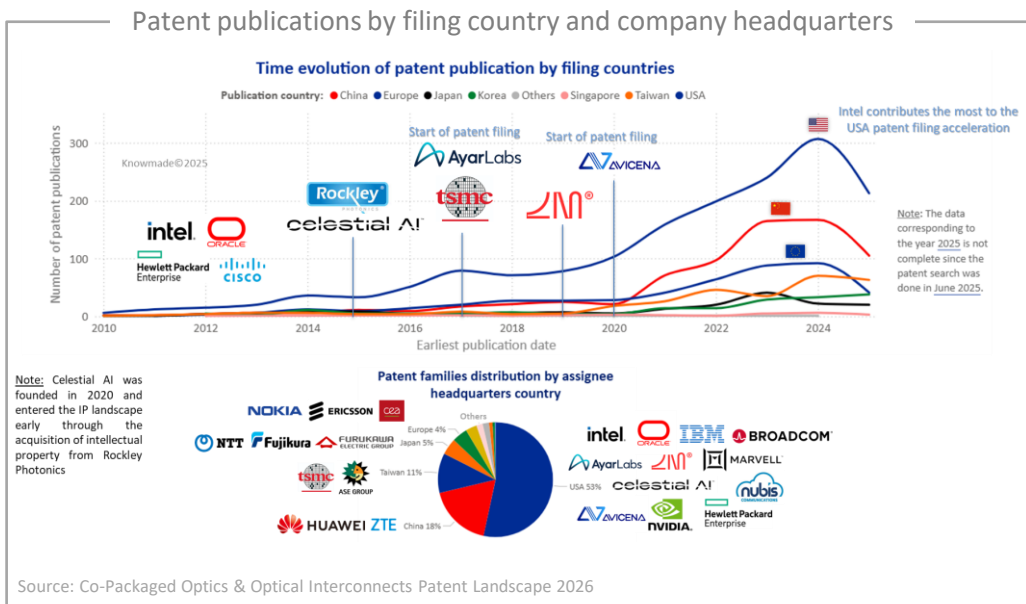
Co-packaged optics is now a key enabler of next-gen electronics

Artificial intelligence (AI) is reshaping industries at their core, fueling unprecedented data growth and accelerating the demand for energy-efficient computing. As data volumes surge, hardware innovation has become essential, particularly in rethinking data center architectures to deliver faster computation, lower power consumption, higher performance, and reduced latency. In this context, silicon photonics has emerged as a pivotal technology, replacing traditional copper interconnects with high-speed, light-based data transmission. As demand for data-intensive computing continues to rise, the semiconductor industry has built a substantial portfolio of patents aimed at integrating photonic and electronic systems at the package level. Together, these inventions highlight the industry's transition from conventional electrical interconnects to optical input/output (I/O) architectures that unlock higher bandwidth, lower latency, and improved energy efficiency across compute and networking platforms. Among the most significant advances is **Co-Packaged Optics (CPO)**, an innovative packaging approach that brings optical components directly into or near electronic devices to maximize efficiency and scalability.

Over the past 10 years, **CPO and optical I/O** technologies has become a key enabler of advanced semiconductor packaging, leading to a strong increase in patenting activity and a significant evolution of the competitive intellectual property (IP) landscape. **Major patent owners** have strengthened their IP positions in the US, China, and Europe, while **pure players have entered the patent landscape**. It is now crucial for companies operating in the semiconductor advanced packaging industry to closely examine the technology and competitive landscape from an IP perspective.

In this context, **Knowmade** is releasing a **new patent landscape report** to map the patent activity and competitive dynamics shaping this rapidly evolving field. Over **4,000 individual patents** from more than **1,300 patent families** (inventions) have been selected. This report aims to provide insights into current IP activities, the positions of key IP players, the applications they target in their patents, and how their patent portfolios can support their market strategies.

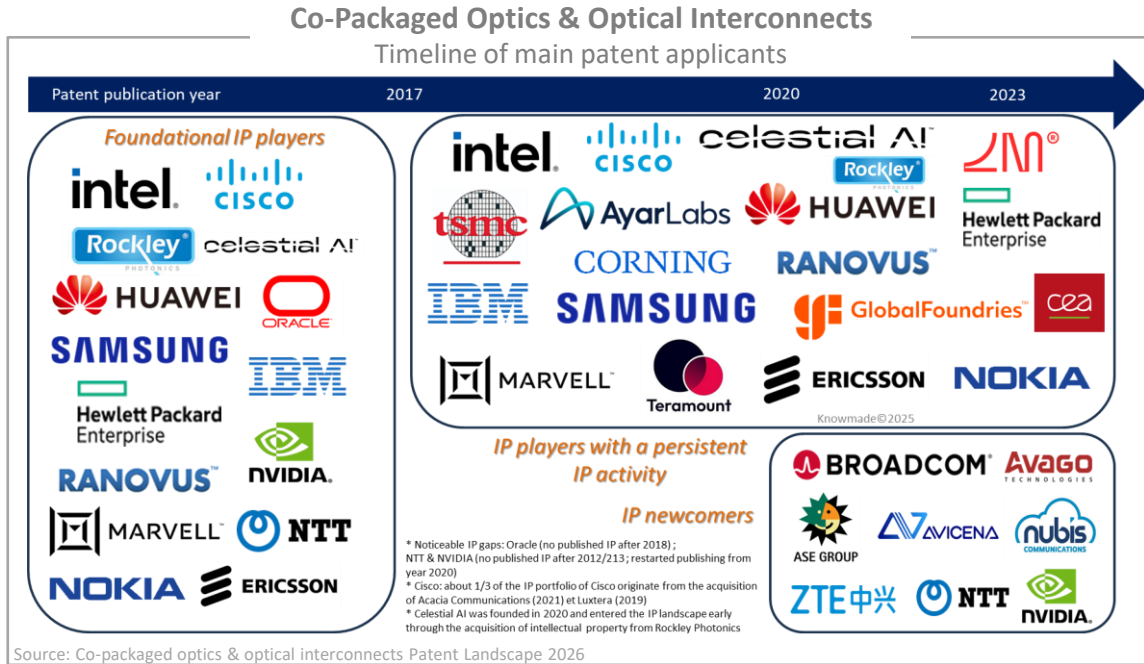
Co-Packaged Optics & Optical Interconnects



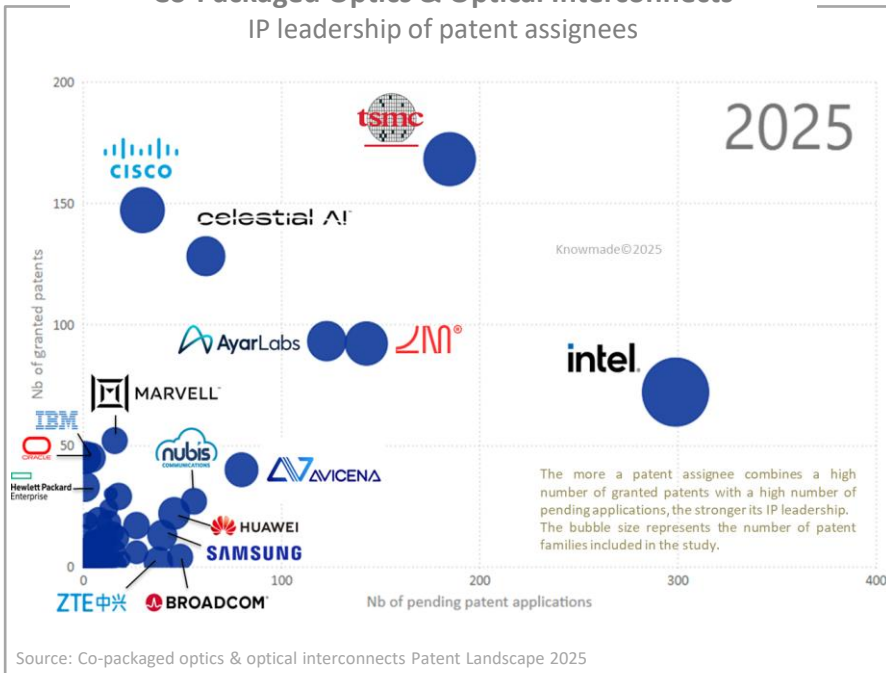
Understanding the main trends, the key players’ IP position and IP strategy

Through patent analysis, we describe the position of IP players, unveil their strategies to strengthen their IP portfolio, highlight their capability to limit the patenting activity and freedom-to-operate of other firms, identify promising new players, and forecast what would be the future IP leaders. IP competition analysis should reflect the vision of players with a strategy to enter and develop their business in the **advanced semiconductor packaging** market.

In this report, we provide a comprehensive overview of the competitive IP landscape and latest technological developments related to **CPO and optical I/O** technology. The report covers **IP dynamics** and **key trends** in terms of patents applications, patent assignees, filing countries, patented technologies, and targeted applications. It also identifies the **IP leaders**, most **active patent applicants**, and sheds light on **under-the-radar companies and new players** in this field. Besides, we have identified **over 270 key inventions** that are most critical in terms of geographic coverage in key technology markets.



Co-Packaged Optics & Optical Interconnects
IP leadership of patent assignees



A dynamic IP landscape: evolution of leading players’ positions and pure players

TSMC and Intel are leading the patent landscape, increasing patenting activity, and expanding invention protection in key countries. As pioneer Intel has adopted an aggressive strategy to assert its patents. Later TSMC and pure players (Lightmatter, Celestial AI, Ayar Labs, Avicena Tech) joined the IP landscape and developed strategic portfolios.

In recent years, more IP players have become involved in the IP landscape, and OSATs and materials suppliers have entered the IP arena. In this report, we provide an overview of the IP portfolios held by the key players emerging from the IP landscape and describe the related inventions and technologies.



USEFUL PATENT DATABASE

This report includes an extensive **Excel database** with all patents analyzed in this study, including:

- Key patent information (numbers, dates, assignees, titles, abstracts, etc.)
- Hyperlinks to an up-to-date online database (original documents, legal status, etc.)
- Identification of core inventions (i.e., patents clearly focused on CPO for networking/computing performance)

Family number (Questel unique family ID from FamPat database)	Patent numbers (publication numbers)	Current patent assignees (as mentioned in the patent database)	Patent assignee name used in the report	Title	Abstract	Biblio Summary (Link to full patent description and original documents)	Earliest application date of the family (yyyy-mm-dd)	Earliest publication date of the family (yyyy-mm-dd)	Expected expiry dates (yyyy-mm-dd)	Current legal status (Pending, Granted, Revoked, Expired, Lapsed)	Core invention (*)
1	US20230398188	LIGHTMATTER	Lightmatter	(US20230314711)	(US20230314711)	Open	2023-03-27	2023-09-28	(US20230314711)	(US20230314711)	x
2	US20230097942	LIGHTMATTER	Lightmatter	(US20230097942)	(US20230097942)	Open	2023-03-27	2023-09-28	(US20230097942)	(US20230097942)	x
3	US20250046775	LIGHTMATTER	Lightmatter	(US20250046775)	(US20250046775)	Open	2024-07-31	2025-02-06	(US20250046775)	(US20250046775)	x
4	US20200355880	AYAR LABS	Ayar Labs	(US20240310589)	(US20240310589)	Open	2020-07-23	2020-11-12	(US20240310589)	(US20240310589)	x
5	US20240353614	LIGHTMATTER	Lightmatter	(US20240353614)	(US20240353614)	Open	2024-04-18	2024-10-24	(US20240353614)	(US20240353614)	x
6	US20250294055	CA3113155	LIGHTMATTER	(US20250294055)	(US20250294055)	Open	2020-03-05	2020-09-10	(US20250294055)	(US20250294055)	x
7	US20240310593	LIGHTMATTER	Lightmatter	(US20240310593)	(US20240310593)	Open	2024-03-07	2024-09-19	(US20240310593)	(US20240310593)	x
8	US20210242124	LIGHTMATTER	Lightmatter	(US20210242124)	(US20210242124)	Open	2021-02-02	2021-08-05	(US20210242124)	(US20210242124)	x
9	US20210112369	AYAR LABS	Ayar Labs	(US20240176081)	(US20240176081)	Open	2020-10-28	2021-05-06	(US20240176081)	(US20240176081)	x
10	US20210257021	AYAR LABS	Ayar Labs	(US20230370170)	(US20230370170)	Open	2021-02-09	2021-08-19	(US20230370170)	(US20230370170)	x
11	US20240201444	LIGHTMATTER	Lightmatter	(US20240201444)	(US20240201444)	Open	2023-12-18	2024-06-20	(US20240201444)	(US20240201444)	x
12	US20240178923	LIGHTMATTER	Lightmatter	(US20240178923)	(US20240178923)	Open	2023-11-22	2024-05-30	(US20240178923)	(US20240178923)	x
13	US20210257288	AYAR LABS	Ayar Labs	(US20210257288)	(US20210257288)	Open	2021-01-09	2021-08-19	(US20210257288)	(US20210257288)	x
14	US20220035107	AYAR LABS	Ayar Labs	(US20220035107)	(US20220035107)	Open	2021-07-26	2022-02-03	(US20220035107)	(US20220035107)	x
15	US20240045464	LIGHTMATTER	Lightmatter	(US20240045464)	(US20240045464)	Open	2023-08-01	2024-02-08	(US20240045464)	(US20240045464)	x
16	US20200164666	AYAR LABS	Ayar Labs	(EP4004617)	(EP4004617)	Open	2020-07-23	2021-02-28	(EP4004617)	(EP4004617)	x
17	US20200116930	LIGHTMATTER	Lightmatter	(US20200116930)	(US20200116930)	Open	2019-10-15	2020-04-16	(US20200116930)	(US20200116930)	x
18	US20210301149	CISCO TECHNOLOGY	Cisco	(US20210301149)	(US20210301149)	Open	2012-08-07	2012-11-29	(US20210301149)	(US20210301149)	x
19	US20190126296	CISCO TECHNOLOGY	Cisco	(US20190126296)	(US20190126296)	Open	2018-04-24	2019-10-24	(US20190126296)	(US20190126296)	x
20	US20230060862	CISCO TECHNOLOGY	Cisco	(US20230060862)	(US20230060862)	Open	2018-08-14	2019-10-29	(US20230060862)	(US20230060862)	x
21	US20230060862	CISCO TECHNOLOGY	Cisco	(US20230060862)	(US20230060862)	Open	2021-08-25	2023-03-02	(US20230060862)	(US20230060862)	x
22	US20180246018	CISCO TECHNOLOGY	Cisco	(US20180246018)	(US20180246018)	Open	2016-05-02	2016-08-25	(US20180246018)	(US20180246018)	x
23	US2020113480	CISCO TECHNOLOGY	Cisco	(US2020113480)	(US2020113480)	Open	2020-10-14	2022-04-14	(US2020113480)	(US2020113480)	x
24	US20180234189	AMERICAN MERCHANT	AMERICAN MERCHANT	(US20180234189)	(US20180234189)	Open	2016-06-02	2016-12-12	(US20180234189)	(US20180234189)	x
25	US9964719	CISCO TECHNOLOGY	Cisco	(US9964719)	(US9964719)	Open	2017-04-28	2018-05-08	(US9964719)	(US9964719)	x



INTERACTIVE DASHBOARD (optional)

Optional add-on: One-year access to the interactive dashboard for unlimited authorized users within your organization.

This solution transforms the analysis into a true decision-support tool.

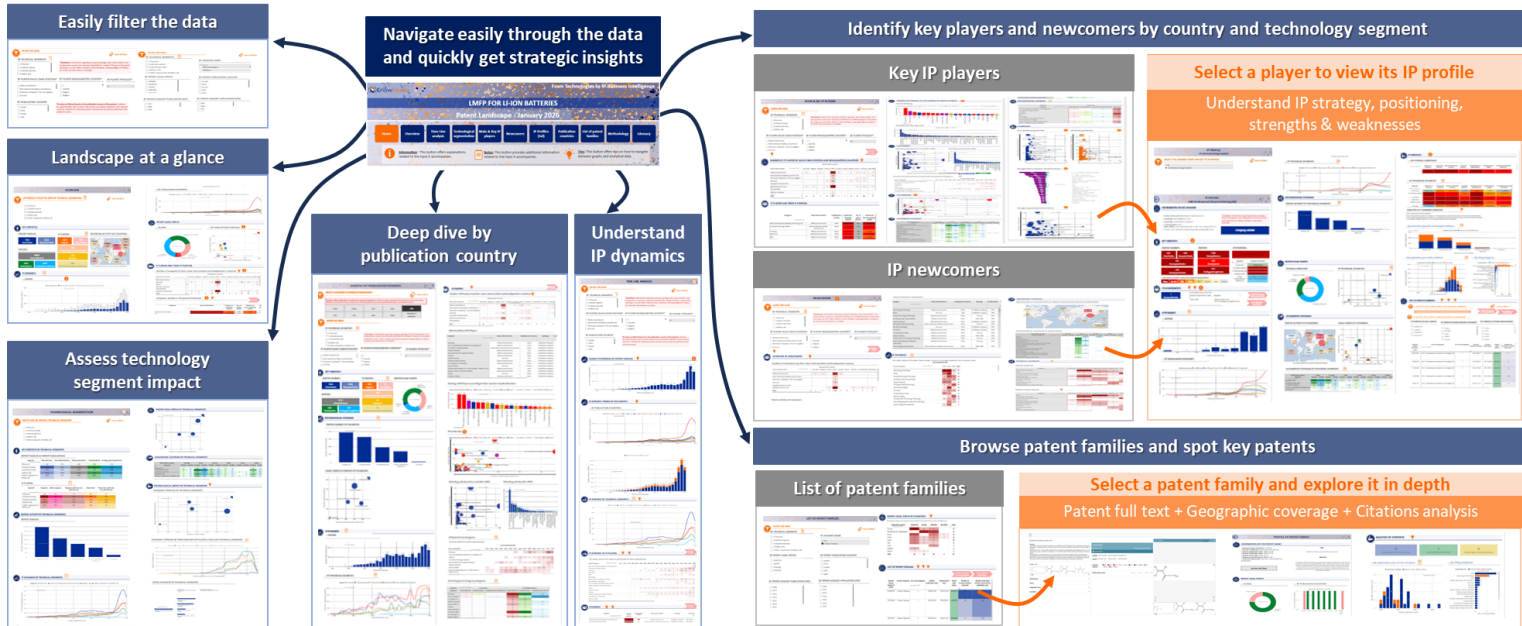
Key features:

- Dynamically explore the patent landscape based on your priorities
- Access clear, interactive visualizations for immediate insights
- Filter and analyze data by players, technologies, countries, dates, and legal status
- Drill down instantly from high-level trends to specific players, technologies, and patents
- Tailor insights to the needs of each team (R&D, IP, strategy, business development)

Benefits:

- Get immediate answers to your key questions
- Save time and accelerate decision-making
- Focus on the insights that matter most

Discover the dashboard



Companies mentioned in the report (non-exhaustive)

Intel, TSMC, Huawei, Broadcom, Cisco, Lightmatter, Avicena, Celestial AI, Rockley Photonics, Ayar Labs, Ranovus, Samsung Group, NVIDIA, Teramont, ZTE, Resonac, Marvell, Nokia, Oracle, Micron, Senko Group, VTT, Alphabet, Accelink Technologies, Ruijie Networks, Eliyan, Mitsubishi Electric, LIPAC, RTX Corporation, HP - Hewlett Packard Development, UniC (Tsinghua Unigroup), Yangzhou Xinli Integrated Circuit, Juniper, Suzhou Singularity Photon Intelligent Technology, Huagong Tech, NCAP, CEA, ASTAR, Sumitomo Electric, JCET Group, Apple, GlobalFoundries, ASE Group, Nubis communications, Amkor Technology, Lightelligence, Zhejiang Lingxin Optoelectronics Technology, Corning, Zhongshan Meisu Technology, Nano Photonics, Guangbenwei Technology, Wuxi institute of interconnect technology, Li Hong Electronic, Yongjiang Laboratory, SMIC, Tsinghua University, Sky Semiconductor, Elphic, Lightip Technologie, NTT - Nippon Telegraph & Telephone, Innolux, Shanghai Xizhi Technology, United Test and Assembly Center, University College Cork, Lumentum, Hanyang University, Furukawa Electric, Raytek, Hangzhou Guangzhijuan Technology, Dongguan Luxshare Technology, PICAdvanced, SPIL, Wuhan Optics Valley Information Optoelectronics Innovation Center, MACOM Technology Solutions, Ciena, MaxLinear, AIP - Advanced Integrated Photonics, Lyte AI, Browave, Xunyun Electronic Technology, Xperi/Adeia, HKUST - Hong Kong University of Science And Technology, ITRI - Industrial Technology Research Institute.

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ABOUT KNOWMADE

KnowMade is a technology intelligence and IP strategy firm specializing in the analysis of patents and scientific publications. We assist innovative companies, investors, and research organizations in understanding the competitive landscape, anticipating technological trends, identifying opportunities and risks, improving their R&D, and shaping effective IP strategies.

KnowMade's analysts combine their strong technology expertise and in-depth knowledge of patents with powerful analytics tools and methodologies to transform patent and scientific data into actionable insights to support decision-making in R&D, innovation, investment, and intellectual property.

KnowMade has solid expertise in Semiconductors and Packaging, Power Electronics, Batteries and Energy Management, RF and Wireless Communications, Photonics, MEMS, Sensing and Imaging, Medical Devices, Biotechnology, Pharmaceuticals, and Agri-Food.

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⁽²⁾Access to the interactive dashboard is granted for **one year (12 months) to an unlimited number of authorized users** within the purchasing organization. Access codes must not be shared with any third party. The dashboard must not be used to produce analyses or reports that are resold, sublicensed, or otherwise made available to any external user or entity outside the purchasing organization.

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TERMS AND CONDITIONS OF SALES

Definitions

“Acceptance”: Action by which the Buyer accepts the terms and conditions of sale in their entirety. It is done by signing the purchase order which mentions “I hereby accept KnowMade’s Terms and Conditions of Sale”.

“Buyer”: Any business user (i.e. any person acting in the course of its business activities, for its business needs) entering into the following general conditions to the exclusion of consumers acting in their personal interests.

“Contracting Parties” or “Parties”: The Seller on the one hand and the Buyer on the other hand.

“Intellectual Property Rights” (“IPR”) means any rights held by the Seller in its Products, including any patents, trademarks, registered models, designs, copyrights, inventions, commercial secrets and know-how, technical information, company or trading names and any other intellectual property rights or similar in any part of the world, notwithstanding the fact that they have been registered or not and including any pending registration of one of the above mentioned rights.

“License”: For the reports and databases, 2 different licenses are proposed. The buyer has to choose one license:

1. Single user license: a single individual at the company can use the report.

2. Multi user license: the report can be used by unlimited users within the company. Subsidiaries and Joint Ventures are not included.

“Products”: Reports are established in PowerPoint and delivered on a PDF format and the database may include Excel files.

“Seller”: Based in Sophia Antipolis (France headquarters), KnowMade is a technology intelligence company specialized in the research and analysis of scientific and technical information. We provide patent landscapes and scientific state of the art with high added value to businesses and research laboratories. Our intelligence digests play a key role to define your innovation and development strategy.

1. Scope

1.1 The Contracting Parties undertake to observe the following general conditions when agreed by the Buyer and the Seller. Any additional, different, or conflicting terms and conditions in any other documents issued by the buyer at any time are hereby objected to by the seller, shall be wholly inapplicable to any sale made hereunder and shall not be binding in any way on the seller.

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non-conformity shall be sent in writing to the Seller within 8 days of receipt of the Products. For this purpose, the Buyer agrees to produce sufficient evidence of such defects.

2.6 No return of Products shall be accepted without prior information to the Seller, even in case of delayed delivery. Any Product returned to the Seller without providing prior information to the Seller as required under article 2.5 shall remain at the Buyer’s risk.

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To ensure the payments, the Seller reserves the right to request down payments from the Buyer. In this case, the need of down payments will be mentioned on the order.

3.3 Payment is due by the Buyer to the Seller within 30 days from invoice date, except in the case of a particular written agreement. If the Buyer fails to pay within this time and fails to contact the Seller, the latter shall be entitled to invoice interest in arrears based on the annual rate Refi of the «BCE» + 7 points, in accordance with article L. 441-6 of the French Commercial Code. Our publications (report, database, tool...) are delivered only after reception of the payment.

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4.2 The Seller shall only be liable for (i) direct and (ii) foreseeable pecuniary loss, caused by the Products or arising from a material breach of this agreement

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b) any claim attributable to errors, omissions or other inaccuracies in the Product or interpretations thereof.

4.4 All the information contained in the Products has been obtained from sources believed to be reliable. The Seller does not warrant the accuracy, completeness adequacy or reliability of such information, which cannot be guaranteed to be free from errors.

4.5 All the Products that the Seller sells may, upon prior notice to the Buyer from time to time be modified by or substituted with similar Products meeting the needs of the Buyer. This modification shall not lead to the liability of the Seller, provided that the Seller ensures the substituted Product is similar to the Product initially ordered.

4.6 In the case where, after inspection, it is acknowledged that the Products contain defects, the Seller undertakes to replace the defective products as far as the supplies allow and without indemnities or compensation of any kind for labor costs, delays, loss caused or any other reason. The replacement is guaranteed for a maximum of two months starting from the delivery date. Any replacement is excluded for any event as set out in article 5 below.

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4.8 The Seller does not make any warranties, express or implied, including, without limitation, those of saleability and fitness for a particular purpose, with respect to the Products. Although the Seller shall take reasonable steps to screen Products for infection of viruses, worms, Trojan horses or other codes containing contaminating or destructive properties before making the Products available, the Seller cannot guarantee that any Product will be free from infection.

5. Force majeure

The Seller shall not be liable for any delay in performance directly or indirectly caused by or resulting from acts of nature, fire, flood, accident, riot, war, government intervention, embargoes, strikes, labor difficulties, equipment failure, late deliveries by suppliers or other difficulties which are beyond the control, and not the fault of the Seller.

6. Protection of the Seller’s IPR

6.1 All the IPR attached to the Products are and remain the property of the Seller and are protected under French and international copyright law and conventions.

6.2 The Buyer agreed not to disclose, copy, reproduce, redistribute, resell or publish the Product, or any part of it to any other party other than employees of its company. The Buyer shall have the right to use the Products solely for its own internal information purposes. In particular, the Buyer shall therefore not use the Product for purposes such as:

- Information storage and retrieval systems;
- Recordings and re-transmittals over any network (including any local area network);
- use in any timesharing, service bureau, bulletin board or similar arrangement or public display;
- Posting any Product to any other online service (including bulletin boards or the Internet);
- Licensing, leasing, selling, offering for sale or assigning the Product.

6.3 The Buyer shall be solely responsible towards the Seller of all infringements of this obligation, whether this infringement comes from its employees or any person to whom the Buyer has sent the Products and shall personally take care of any related proceedings, and the Buyer shall bear related financial consequences in their entirety.

6.4 The Buyer shall define within its company point of contact for the needs of the contract. This person will be the recipient of each new report in PDF format. This person shall also be responsible for respect of the copyrights and will guaranty that the Products are not disseminated out of the company.

7. Termination

7.1 If the Buyer cancels the order in whole or in part or postpones the date of mailing, the Buyer shall indemnify the Seller for the entire costs that have been incurred as at the date of notification by the Buyer of such delay or cancellation. This may also apply for any other direct or indirect consequential loss that may be borne by the Seller, following this decision.

7.2 In the event of breach by one Party under these conditions or the order, the non-breaching Party may send a notification to the other by recorded delivery letter upon which, after a period of thirty (30) days without solving the problem, the non-breaching Party shall be entitled to terminate all the pending orders, without being liable for any compensation.

8. Miscellaneous

All the provisions of these Terms and Conditions are for the benefit of the Seller itself, but also for its licensors, employees and agents. Each of them is entitled to assert and enforce those provisions against the Buyer.

Any notices under these Terms and Conditions shall be given in writing. They shall be effective upon receipt by the other Party.

The Seller may, from time to time, update these Terms and Conditions and the Buyer, is deemed to have accepted the latest version of these terms and conditions, provided they have been communicated to him in due time.

9. Governing law and jurisdiction

9.1 Any dispute arising out or linked to these Terms and Conditions or to any contract (orders) entered into in application of these Terms and Conditions shall be settled by the French Commercial Courts of Grasse, which shall have exclusive jurisdiction upon such issues.

9.2 French law shall govern the relation between the Buyer and the Seller, in accordance with these Terms and Conditions.