

VCSEL Market by Type (Single-mode and Multimode), Material (GaAs, InP, GaN), Wavelength, Application (Sensing, Data Communication, Industrial Heating & Printing, Emerging), Data Rate, Industry and Region - Global Forecast to 2028

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Report description:

The global VCSEL market is projected to grow from USD 1.6 billion in 2023, to USD 2.9 billion by 2028, at a CAGR of 13.6% between 2023 and 2028. One of the factors driving the growth of the VCSEL market high preference for adopting 3D sensing technologies, and integration of the Internet of Things (IoT) across buildings, utilities, manufacturing, logistics, retail, and healthcare.

VCSELs are made of gallium arsenide (GaAs) and indium phosphide (InP) with single-mode and multimode functionality. VCSELs are highly efficient and cost-effective for applications, such as data communication, industrial heating, and 3D sensing & gesture recognition. They are widely used in consumer electronics, data centers, automobiles, commercial & industrial applications, as well as healthcare and military industries.

"VCSEL for red wavelength is the second largest segment of VCSEL market during the forecast period"

Red VCSELs offer benefits, such as improved performance and low power consumption, and are used in applications that include laser printing, optical mouse, and low-cost, high-speed interconnects based on plastic optical fiber (POF). However, material design challenges make it more difficult to achieve the desired performance than at the well-developed wavelength of 850 nm. Ams-OSRAM (Austria) is one of the market players offering VCSELs in the red band segment.

"Emerging and other application segment is the fastest growing segment of VCSEL market during forecast period"

This segment includes VCSELs for emerging applications, such as LiDAR, driver monitoring/gesture recognition, 3D sensing in vehicles, security & night vision systems/cameras, pulse oximeter, and OCT. The growth in the emerging and other application segments is closely tied to the use of VCSELs in automotive LiDARs. For instance, in August 2020, automotive LiDAR specialist Ibeo Automotive Systems (Germany) announced that it would deploy VCSELs in LiDAR for 'Level 3' semi-autonomous driving in cars built by the automotive manufacturer Great Wall Motors (China). Hence, VCSEL-based solid-state LiDAR systems show great

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potential as the next evolution in LiDAR technology, which can replace traditional bulky and expensive mechanical spinning and microelectromechanical systems (MEMs) that are currently in use. The size of VCSELs also makes it easier to integrate photonic and electronic components in a LiDAR system. These factors are projected to contribute to the high growth rate of emerging and other applications.

"Above 25 Gbps segment is the fastest growing segment of VCSEL market by 2028"

With the growing adoption of 5G network and smart city developments, data traffic is increasing at a significant rate. This is increasing the connectivity load on data centers, wherein a faster data transmission medium for a short distance is required. Hence, many hyperscale data center operators, such as Facebook (US), Apple (US), Microsoft (US), Amazon (US), and Google (US), as well as government institutions, are focusing on the adoption of high-speed transceivers and AOCs, which operate at 100G, 200G, and 400G data rates. These optical transceivers initially used edge-emitting lasers (EELs) that are now being quickly replaced by VCSELs. VCSELs capable of 25 Gbps data rate are the most widely deployed type due to their lower cost. However, it is expected that VCSELs with data rates above 25 Gbps will be adopted at a faster rate due to the increase in traffic on data communications worldwide.

"Automotive segment is the fastest growing application of VCSEL market by 2028"

Surge in the adoption of VCSELs in automobiles for driver monitoring and infotainment systems results in the high growth in the automotive segment for VCSEL market. VCSELs are finding increased applications in systems, such as advanced driver assistance systems (ADAS), due to the evolution of autonomous vehicles. LiDAR is one of the latest technology used in automotive safety developments and solutions that are being used to make solid-state LiDARs using VCSELs. This evolution toward the adoption of autonomous vehicles in the long term is projected to drive the growth of the automotive segment.

"North America is the second fastest growing market for VCSEL market by 2028"

North America is one of the major markets for VCSELs due to applications, such as consumer electronics, data centers, and commercial & industrial segments. Lumentum (US), II-VI Incorporated (US), and Broadcom (US) are some of the major players operating in this region. Chipmakers and OEM buyers of VCSELs are expected to face the impacts of the recession and the resultant decrease in demand for consumer electronics such as laptops, PCs, and smartphones. These factors are likely to lead to a decline in the growth of the VCSEL market in 2023. The market is expected to register moderate growth in the next 2-3 years in North America.

Breakdown of the profiles of primary participants:

- By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%
- By Designation: C-level Executives - 40%, Directors - 40%, and Others - 20%
- By Region: North America - 40%, Europe - 30%, Asia Pacific - 20%, and RoW - 10%

The VCSEL market is dominated by a few globally established players such as Lumentum (US), Coherent Corporation (US), ams-OSRAM (Austria), TRUMPF (Germany), Broadcom (US), Leonardo Electronics (US), MKS Instruments (US), Santec (Japan), VERTILAS (Germany), Vertilite (China), Alight Technologies (Denmark), Inneos (US), IQE (UK), Thorlabs (UK), TT Electronics (UK), Ushio America (US), WIN Semiconductors (Taiwan), and Frankfurt Laser Company (Germany).

Research Coverage

The report segments the VCSEL market and forecasts its size, by value and volume, based on region (Asia Pacific, Europe, North America, and RoW), type (multi-mode, single mode), wavelength (red, NIR, SWIR), material (GaAs, InP, other), data rate, application, and industry (consumer electronics, data center, automotive, commercial & industrial, healthcare, and military). The report also provides a comprehensive review of market drivers, restraints, opportunities, and challenges in the VCSEL market. The report also covers qualitative aspects in addition to the quantitative aspects of these markets.

Key Benefits of Buying the Report:

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the VCSEL market and provides them information on key market drivers, restraints,

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challenges, and opportunities.

Table of Contents:

1	INTRODUCTION	27
1.1	STUDY OBJECTIVES	27
1.2	MARKET DEFINITION	27
1.2.1	INCLUSIONS AND EXCLUSIONS	28
1.3	STUDY SCOPE	29
FIGURE 1	VCSEL MARKET: SEGMENTATION	29
1.3.1	YEARS CONSIDERED	30
1.4	CURRENCY CONSIDERED	30
1.5	UNITS CONSIDERED	30
1.6	STAKEHOLDERS	30
1.7	LIMITATIONS	31
1.8	SUMMARY OF CHANGES	31
2	RESEARCH METHODOLOGY	32
2.1	RESEARCH DATA	32
FIGURE 2	VCSEL MARKET: RESEARCH DESIGN	32
2.1.1	SECONDARY AND PRIMARY RESEARCH	33
2.1.1.1	Key industry insights	34
2.1.2	SECONDARY DATA	34
2.1.2.1	List of key secondary sources	34
2.1.2.2	Key data from secondary sources	35
2.1.3	PRIMARY DATA	35
2.1.3.1	Breakdown of primaries	36
2.1.3.2	Key data from primary sources	37
2.2	MARKET SIZE ESTIMATION	37
2.2.1	BOTTOM-UP APPROACH	38
2.2.1.1	Approach to arrive at market size using bottom-up analysis (demand side)	38
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	39
FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: (DEMAND SIDE)- DEMAND FOR VCSELS	39
2.2.2	TOP-DOWN APPROACH	40
2.2.2.1	Approach to obtain market size using top-down analysis (supply side)	40
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	40
FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: (SUPPLY-SIDE)-IDENTIFICATION OF REVENUES GENERATED BY COMPANIES FROM VCSEL MARKET	41
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	42
FIGURE 7	DATA TRIANGULATION	42
2.4	RESEARCH ASSUMPTIONS	43
2.4.1	ASSUMPTIONS	43
2.5	PARAMETERS CONSIDERED TO ANALYZE IMPACT OF RECESSION	43
2.5.1	RISK ASSESSMENT	44
3	EXECUTIVE SUMMARY	45
3.1	RECESSION IMPACT ANALYSIS	45
FIGURE 8	GDP GROWTH PROJECTION TILL 2023 FOR MAJOR ECONOMIES	46
FIGURE 9	RECESSION IMPACT ON VCSEL MARKET	46
FIGURE 10	MULTIMODE SEGMENT TO CAPTURE HIGHER MARKET SHARE IN 2023	47

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FIGURE 11	GAAS SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD	48
FIGURE 12	NIR SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD	48
FIGURE 13	10.1 TO 25 GBPS SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	49
FIGURE 14	EMERGING AND OTHER APPLICATIONS SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	49
FIGURE 15	AUTOMOTIVE SEGMENT TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	50
FIGURE 16	VCSEL MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	51
4	PREMIUM INSIGHTS	52
4.1	ATTRACTIVE OPPORTUNITIES FOR VCSEL MARKET PLAYERS	52
FIGURE 17	ADVANTAGES OF SOLID-STATE TECHNOLOGY, COMPACT DESIGN, AND ROBUSTNESS TO DRIVE VCSEL MARKET	52
4.2	VCSEL MARKET, BY TYPE	52
FIGURE 18	MULTIMODE SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	52
4.3	VCSEL MARKET, BY MATERIAL	53
FIGURE 19	GAAS SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	53
4.4	VCSEL MARKET, BY WAVELENGTH	53
FIGURE 20	NIR SEGMENT TO CAPTURE LARGEST MARKET SHARE DURING 2023-2028	53
4.5	VCSEL MARKET, BY DATA RATE	54
FIGURE 21	10.1 TO 25 GBPS SEGMENT TO DOMINATE MARKET DURING 2023-2028	54
4.6	VCSEL MARKET, BY APPLICATION	54
FIGURE 22	SENSING APPLICATION TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	54
4.7	NORTH AMERICA: VCSEL MARKET, BY INDUSTRY AND COUNTRY	55
FIGURE 23	CONSUMER ELECTRONICS AND US TO BE LARGEST SHAREHOLDERS OF VCSEL MARKET IN NORTH AMERICA IN 2028	55
4.8	VCSEL MARKET, BY COUNTRY	55
FIGURE 24	VCSEL MARKET TO RECORD HIGHEST CAGR IN ASIA PACIFIC IN 2028	55
5	MARKET OVERVIEW	56
5.1	INTRODUCTION	56
5.2	MARKET DYNAMICS	56
FIGURE 25	IMPACT OF DRIVERS ON VCSEL MARKET	56
FIGURE 26	IMPACT OF OPPORTUNITIES ON VCSEL MARKET	57
FIGURE 27	IMPACT OF RESTRAINTS AND CHALLENGES ON VCSEL MARKET	57
5.2.1	DRIVERS	58
5.2.1.1	Growing adoption of 3D sensing applications in smartphones	58
5.2.1.2	Increasing application of VCSELs in data communication	58
5.2.1.3	Increased market investment for VCSEL manufacturing	58
5.2.2	RESTRAINTS	59
5.2.2.1	Limited data transmission range	59
5.2.2.2	Limitations of semiconductor materials hampering performance of VCSELs	59
5.2.3	OPPORTUNITIES	59
5.2.3.1	Use of VCSELs in LiDAR systems for automotive applications	59
5.2.3.2	Growing IoT market and data processing across commercial and government sectors	60
5.2.3.3	Growing adoption of VCSELs in consumer electronic devices	60
5.2.4	CHALLENGES	60
5.2.4.1	Manufacturing defects in VCSELs	60
5.2.4.2	Recession impact on smartphone market	61
5.3	TARIFFS AND REGULATIONS	61
5.3.1	TARIFF RELATED TO VCSELS	61
5.4	REGULATIONS	62
5.4.1	GLOBAL	62

5.4.1.1	International Electrotechnical Commission (IEC)	62
5.4.2	EUROPE	62
5.4.2.1	Restriction of Hazardous Substances (RoHS)	62
5.4.2.2	European Standards (EN)	62
5.4.3	US	63
5.4.3.1	American National Standards Institute (ANSI)	63
5.4.3.2	Food and Drug Administration (FDA)	64
5.5	CASE STUDY ANALYSIS	64
5.5.1	AMS-OSRAM PROVIDED VCSEL ARRAY FOR USE IN XIAOMI MI8 EXPLORER EDITION	64
5.5.2	OSRAM AND CHRONOPTICS COOPERATED ON DEVELOPMENT OF 3D TOF CAMERA KIT	64
5.5.3	AMBARELLA, LUMENTUM, AND ON-SEMICONDUCTOR COLLABORATED ON AI PROCESSING-BASED 3D SENSING FOR NEXT-GEN AIOT DEVICES	65
5.5.4	LUMENTUM SHOWCASED PHOTONIC SOLUTIONS AT ECOC 2020	65
5.5.5	LEONARDO ELECTRONICS OFFERS LIDAR SYSTEMS LEVERAGING COMPANY VCSELS	65
5.5.6	ALIGHT TECHNOLOGIES DEVELOPING 10 GBPS 1,300 NM VCSEL	65
5.5.7	INNEOS DEVELOPED VCSELS FOR USE IN SATELLITES	65
5.5.8	IQE REACHED KEY MILESTONES WITH IQDN-VCSEL TECHNOLOGY	65
5.5.9	WIN SEMICONDUCTORS SUPPLIES VCSELS TO APPLE	66
5.6	AVERAGE SELLING PRICE OF VCSELS FOR VARIOUS END PRODUCTS	66
TABLE 1	ASP OF VCSELS USED IN VARIOUS END PRODUCTS	66
FIGURE 28	AVERAGE SELLING PRICE FORECAST OF VCSELS, 2020-2026 (USD)	66
TABLE 2	AVERAGE SELLING PRICE FORECAST OF VCSELS, 2020-2026 (USD)	67
5.7	VALUE CHAIN ANALYSIS	68
FIGURE 29	VALUE CHAIN ANALYSIS OF VCSEL ECOSYSTEM: R&D AND MANUFACTURING PHASES CONTRIBUTE MAXIMUM VALUE	68
5.8	ECOSYSTEM/MARKET MAP	70
FIGURE 30	VCSEL MARKET ECOSYSTEM	70
5.8.1	MANUFACTURERS	70
5.8.2	SUPPLIERS	70
5.8.3	DISTRIBUTORS	71
5.8.4	OEMS	71
5.9	TECHNOLOGY ANALYSIS	71
5.9.1	KEY TECHNOLOGIES	71
5.9.1.1	3D camera	71
5.9.1.2	LiDAR	71
5.9.2	ADJACENT TECHNOLOGY	72
5.9.2.1	Edge emitter lasers (EELs)	72
5.10	TECHNOLOGY ANALYSIS	72
5.10.1	NEW MATERIALS USED IN MANUFACTURING OF VCSELS	72
5.10.2	MINIATURIZATION OF VCSELS	72
5.10.3	UNDER-DISPLAY VCSELS	72
5.11	PATENT ANALYSIS	73
FIGURE 31	PATENT APPLICATION TRENDS FOR VCSELS, 2016-2020	75
5.12	TRADE DATA	75
5.12.1	TRADE DATA FOR HS CODE 854140	75
TABLE 3	IMPORT DATA FOR HS CODE 854140, BY COUNTRY, 2016-2020 (USD BILLION)	76
TABLE 4	EXPORT DATA FOR HS CODE 854140, BY COUNTRY, 2016-2020 (USD BILLION)	76
5.13	PORTER'S FIVE FORCES ANALYSIS	77

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TABLE 5	VCSEL MARKET: PORTER'S FIVE FORCES ANALYSIS	77
5.13.1	INTENSITY OF COMPETITIVE RIVALRY	77
5.13.2	BARGAINING POWER OF SUPPLIERS	77
5.13.3	BARGAINING POWER OF BUYERS	77
5.13.4	THREAT OF SUBSTITUTES	78
5.13.5	THREAT OF NEW ENTRANTS	78
5.14	VCSEL MARKET: SUPPLY CHAIN	78
5.15	TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS	79
FIGURE 32	REVENUE SHIFTS FOR VCSEL MARKET	79
6	VCSEL FABRICATION METHODS	80
6.1	INTRODUCTION	80
6.2	SELECTIVE OXIDIZATION	80
6.2.1	LEADS TO PRODUCTION OF STRONG ELECTRICAL AND OPTICAL CONFINEMENT	80
6.3	ION IMPLANTATION	80
6.3.1	PROVIDES HIGHLY CONTROLLED APERTURE THAT LEADS TO HIGHER AND MORE STABLE PRODUCTIVITY OF VCSELS	80
7	APPLICATIONS OF VCSEL TECHNOLOGY IN SMARTPHONES	81
7.1	INTRODUCTION	81
7.2	DOT PROJECTOR	81
7.2.1	ENABLES FACIAL RECOGNITION FEATURE IN SMARTPHONES	81
7.3	TIME-OF-FLIGHT (TOF)	81
7.3.1	TOF MODULES USE VCSELS TO RELEASE INFRARED LIGHT	81
7.3.2	PROXIMITY SENSING	82
7.4	FLOOD ILLUMINATOR	82
7.4.1	VCSELS USED BY FLOOD ILLUMINATORS TO PROJECT INFRARED LIGHT USED TO ILLUMINATE FACE OF USERS	82
8	VCSEL MARKET, BY TYPE	83
8.1	INTRODUCTION	84
FIGURE 33	MULTIMODE SEGMENT TO HOLD LARGER MARKET SHARE DURING FORECAST PERIOD	84
TABLE 6	VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	84
TABLE 7	VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	84
8.2	SINGLE-MODE	85
8.2.1	SINGLE-MODE VCSELS USED FOR LOW-POWER APPLICATIONS	85
TABLE 8	SINGLE-MODE: VCSEL MARKET, BY MATERIAL, 2018-2022 (USD MILLION)	85
TABLE 9	SINGLE-MODE: VCSEL MARKET, BY MATERIAL, 2023-2028 (USD MILLION)	85
TABLE 10	SINGLE-MODE: VCSEL MARKET, BY WAVELENGTH, 2018-2022 (USD MILLION)	86
TABLE 11	SINGLE-MODE: VCSEL MARKET, BY WAVELENGTH, 2023-2028 (USD MILLION)	86
8.3	MULTIMODE	86
8.3.1	MULTIMODE VCSELS USED FOR HIGH-POWER APPLICATIONS	86
TABLE 12	MULTIMODE: VCSEL MARKET, BY MATERIAL, 2018-2022 (USD MILLION)	86
TABLE 13	MULTIMODE: VCSEL MARKET, BY MATERIAL, 2023-2028 (USD MILLION)	87
TABLE 14	MULTIMODE: VCSEL MARKET, BY WAVELENGTH, 2018-2022 (USD MILLION)	87
TABLE 15	MULTIMODE: VCSEL MARKET, BY WAVELENGTH, 2023-2028 (USD MILLION)	87
9	VCSEL MARKET, BY WAVELENGTH	88
9.1	INTRODUCTION	89
FIGURE 34	NIR SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD	89
TABLE 16	VCSEL MARKET, BY WAVELENGTH, 2018-2022 (USD MILLION)	89
TABLE 17	VCSEL MARKET, BY WAVELENGTH, 2023-2028 (USD MILLION)	89
9.2	RED	90

9.2.1	VCSELS IN RED BAND HAVE WAVELENGTHS IN BETWEEN 650 NM AND 750 NM	90
TABLE 18	RED: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	90
TABLE 19	RED: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	90
9.3	NEAR-INFRARED (NIR)	91
9.3.1	VCSELS IN NIR BAND HAVE WAVELENGTHS BETWEEN 750 NM AND 1,400 NM	91
TABLE 20	NIR: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	91
TABLE 21	NIR: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	91
9.4	SHORTWAVE INFRARED (SWIR)	92
9.4.1	VCSELS IN SWIR BAND HAVE WAVELENGTHS BETWEEN 1,400 NM AND 3,000 NM	92
TABLE 22	SWIR: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	92
TABLE 23	SWIR: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	92
10	VCSEL MARKET, BY MATERIAL	93
10.1	INTRODUCTION	94
FIGURE 35	GAAS-BASED VCSEL TO DOMINATE MARKET DURING FORECAST PERIOD	94
TABLE 24	VCSEL MARKET, BY MATERIAL, 2018-2022 (USD MILLION)	94
TABLE 25	VCSEL MARKET, BY MATERIAL, 2023-2028 (USD MILLION)	94
10.2	GALLIUM ARSEIDE (GAAS)	95
10.2.1	GAAS-BASED VCSELS TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	95
TABLE 26	GAAS: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	95
TABLE 27	GAAS: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	95
10.3	INDIUM PHOSPHIDE (INP)	96
10.3.1	MORE EXPENSIVE THAN GAAS DUE TO MATERIAL COSTS AND SMALL WAFER SIZE	96
TABLE 28	INP: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	96
TABLE 29	INP: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	96
10.4	OTHERS	97
10.4.1	VCSELS IN THE SWIR BAND HAVE WAVELENGTH BETWEEN 1,400 NM AND 3,000 NM	97
TABLE 30	OTHERS: VCSEL MARKET, BY TYPE, 2018-2022 (USD MILLION)	97
TABLE 31	OTHERS: VCSEL MARKET, BY TYPE, 2023-2028 (USD MILLION)	97
11	VCSEL MARKET, BY APPLICATION	98
11.1	INTRODUCTION	99
FIGURE 36	SENSING SEGMENT TO HOLD LARGEST SHARE OF VCSEL MARKET DURING FORECAST PERIOD	99
TABLE 32	VCSEL MARKET, BY APPLICATION, 2018-2022 (USD MILLION)	99
TABLE 33	VCSEL MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	100
11.2	SENSING	100
11.2.1	3D SENSING	101
11.2.1.1	ToF camera	101
11.2.1.1.1	Proximity sensing	101
11.2.1.1.1.1	Proximity sensing widely used in smartphones	101
11.2.1.2	Structured light illumination	101
11.2.1.2.1	Increasing adoption of face recognition technologies in smart devices to create lucrative opportunities	101
11.2.1.3	Facial & gesture recognition	102
11.2.1.3.1	Increase in adoption of biometric technologies in smart devices to drive market	102
11.2.2	GAS SENSING	102
11.2.2.1	Single-mode VCSELS used for gas sensing in industrial environments	102
11.2.3	OPTICAL MICE	102
11.2.3.1	VCSEL-based optical mouse enables operations on various surfaces	102
11.3	DATA COMMUNICATION	102

11.3.1	OPTICAL TRANSCEIVERS & ACTIVE OPTICAL CABLES	103
11.3.1.1	Growing adoption of high data rate optical components in data centers to propel market	103
11.4	INDUSTRIAL HEATING & LASER PRINTING	103
11.4.1	ADDITIVE MANUFACTURING	103
11.4.1.1	VCSEL heating reduces thermal gradient in additive manufacturing	103
11.4.2	LASER PRINTING	104
11.4.2.1	Laser printing requires low-cost, single-mode VCSELs	104
11.5	EMERGING & OTHER APPLICATIONS	104
11.5.1	LIDAR	104
11.5.1.1	Developments in autonomous vehicles to create opportunities for applications of VCSELs in automotive LiDARs	104
11.5.2	IN-CABIN SENSING	104
11.5.2.1	Innovations in vehicle infotainment systems to boost demand for VCSELs	104
11.5.3	ATOMIC CLOCK & GPS	105
11.5.3.1	VCSELs make for compact and low-cost solutions for use in atomic clocks	105
11.5.4	MAGNETOMETER	105
11.5.4.1	Highly accurate detection of magnetic fields made possible with use of VCSEL-based magnetometers	105
11.5.5	INFRARED ILLUMINATION FOR SURVEILLANCE	105
11.5.5.1	VCSELs improve performance and visibility in security & surveillance applications	105
11.5.6	PULSE OXIMETRY	106
11.5.6.1	VCSELs provide benefits of narrower spectral linewidth emission for pulse oximetry applications	106
12	VCSEL MARKET, BY DATA RATE	107
12.1	INTRODUCTION	108
FIGURE 37	ABOVE 25 GBPS SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	108
TABLE 34	VCSEL MARKET FOR DATA COMMUNICATION, BY DATA RATE, 2018-2022 (USD MILLION)	108
TABLE 35	VCSEL MARKET FOR DATA COMMUNICATION, BY DATA RATE, 2023-2028 (USD MILLION)	109
12.2	UP TO 10 GBPS	109
12.2.1	VCSELS WITH DATA RATES UP TO 10 GBPS USED IN DATA COMMUNICATION APPLICATIONS	109
TABLE 36	VCSELS WITH DATA RATE UP TO 10 GBPS	110
12.3	10.1 TO 25 GBPS	110
12.3.1	VCSELS WITH DATA RATE OF 10.1 TO 25 GBPS DOMINATED MARKET IN 2022	110
TABLE 37	VCSELS WITH DATA RATE OF 10.1 TO 25 GBPS	111
12.4	ABOVE 25 GBPS	111
12.4.1	VCSELS WITH DATA RATE ABOVE 25 GBPS TO RECORD HIGHEST GROWTH DURING FORECAST PERIOD	111
TABLE 38	VCSELS WITH DATA RATE ABOVE 25 GBPS	112
13	VCSEL MARKET, BY INDUSTRY	113
13.1	INTRODUCTION	114
FIGURE 38	CONSUMER ELECTRONICS INDUSTRY TO BE LARGEST SHAREHOLDER OF VCSEL MARKET DURING FORECAST PERIOD	114
TABLE 39	VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	114
TABLE 40	VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	115
13.2	CONSUMER ELECTRONICS	116
13.2.1	CONSUMER ELECTRONICS HELD DOMINANT MARKET SHARE IN 2022	116
TABLE 41	CONSUMER ELECTRONICS: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	116
TABLE 42	CONSUMER ELECTRONICS: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	116
TABLE 43	CONSUMER ELECTRONICS: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD MILLION)	117
TABLE 44	CONSUMER ELECTRONICS: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD MILLION)	117
TABLE 45	CONSUMER ELECTRONICS: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD MILLION)	117
TABLE 46	CONSUMER ELECTRONICS: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	118

TABLE 47	CONSUMER ELECTRONICS: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD MILLION)	118
TABLE 48	CONSUMER ELECTRONICS: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD MILLION)	118
TABLE 49	CONSUMER ELECTRONICS: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD MILLION)	119
TABLE 50	CONSUMER ELECTRONICS: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD MILLION)	119
13.3	DATA CENTER	119
13.3.1	INCREASE IN DATA BANDWIDTH IN DATA CENTERS TO DRIVE DEMAND FOR VCSELS	119
TABLE 51	DATA CENTER: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	120
TABLE 52	DATA CENTER: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	120
TABLE 53	DATA CENTER: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD MILLION)	120
TABLE 54	DATA CENTER: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD MILLION)	121
TABLE 55	DATA CENTER: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD MILLION)	121
TABLE 56	DATA CENTER: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	121
TABLE 57	DATA CENTER: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD MILLION)	122
TABLE 58	DATA CENTER: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD MILLION)	122
TABLE 59	DATA CENTER: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD MILLION)	122
TABLE 60	DATA CENTER: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD MILLION)	123
13.4	AUTOMOTIVE	123
13.4.1	ADOPTION OF VCSELS IN AUTOMOTIVE LIDAR TO BOOST MARKET IN REST OF THE WORLD	123
TABLE 61	AUTOMOTIVE: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	123
TABLE 62	AUTOMOTIVE: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	124
TABLE 63	AUTOMOTIVE: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD THOUSAND)	124
TABLE 64	AUTOMOTIVE: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD THOUSAND)	124
TABLE 65	AUTOMOTIVE: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD THOUSAND)	125
TABLE 66	AUTOMOTIVE: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD THOUSAND)	125
TABLE 67	AUTOMOTIVE: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD THOUSAND)	125
TABLE 68	AUTOMOTIVE: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD THOUSAND)	126
TABLE 69	AUTOMOTIVE: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD THOUSAND)	126
TABLE 70	AUTOMOTIVE: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD THOUSAND)	126
13.5	COMMERCIAL & INDUSTRIAL	127
13.5.1	ADOPTION OF VCSELS ACROSS VARIOUS INDUSTRIAL APPLICATIONS TO FAVOR MARKET	127
TABLE 71	COMMERCIAL & INDUSTRIAL: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	127
TABLE 72	COMMERCIAL & INDUSTRIAL: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	128
TABLE 73	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD MILLION)	128
TABLE 74	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD MILLION)	128
TABLE 75	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD MILLION)	129
TABLE 76	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	129
TABLE 77	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD MILLION)	129
TABLE 78	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD MILLION)	130
TABLE 79	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD THOUSAND)	130
TABLE 80	COMMERCIAL & INDUSTRIAL: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD THOUSAND)	130
13.6	HEALTHCARE	131
13.6.1	VCSELS USED FOR SCANNING AND IMAGING APPLICATIONS IN HEALTHCARE INDUSTRY	131
TABLE 81	HEALTHCARE: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	131
TABLE 82	HEALTHCARE: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	131
TABLE 83	HEALTHCARE: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD MILLION)	132
TABLE 84	HEALTHCARE: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD MILLION)	132
TABLE 85	HEALTHCARE: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD MILLION)	132

TABLE 86	HEALTHCARE: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	133
TABLE 87	HEALTHCARE: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD MILLION)	133
TABLE 88	HEALTHCARE: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD MILLION)	133
TABLE 89	HEALTHCARE: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD THOUSAND)	134
TABLE 90	HEALTHCARE: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD THOUSAND)	134
13.7	MILITARY	134
13.7.1	VCSELS USED FOR TACTICAL SURVEILLANCE AND OBSTACLE DETECTION IN MILITARY TASKS	134
TABLE 91	MILITARY: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	134
TABLE 92	MILITARY: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	135
TABLE 93	MILITARY: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2018-2022 (USD MILLION)	135
TABLE 94	MILITARY: VCSEL MARKET IN NORTH AMERICA, BY COUNTRY, 2023-2028 (USD MILLION)	135
TABLE 95	MILITARY: VCSEL MARKET IN EUROPE, BY COUNTRY, 2018-2022 (USD MILLION)	136
TABLE 96	MILITARY: VCSEL MARKET IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	136
TABLE 97	MILITARY: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2018-2022 (USD MILLION)	136
TABLE 98	MILITARY: VCSEL MARKET IN ASIA PACIFIC, BY COUNTRY, 2023-2028 (USD MILLION)	137
TABLE 99	MILITARY: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2018-2022 (USD THOUSAND)	137
TABLE 100	MILITARY: VCSEL MARKET IN REST OF THE WORLD, BY REGION, 2023-2028 (USD THOUSAND)	137
14	VCSEL MARKET, BY REGION	138
14.1	INTRODUCTION	139
FIGURE 39	VCSEL MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	139
TABLE 101	VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	139
TABLE 102	VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	140
14.2	NORTH AMERICA	140
14.2.1	RECESSION IMPACT ON NORTH AMERICA	140
FIGURE 40	NORTH AMERICA: VCSEL MARKET SNAPSHOT	141
TABLE 103	NORTH AMERICA: VCSEL MARKET, BY COUNTRY, 2018-2022 (USD MILLION)	141
TABLE 104	NORTH AMERICA: VCSEL MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	142
TABLE 105	US: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	142
TABLE 106	US: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	142
TABLE 107	CANADA: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	143
TABLE 108	CANADA: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	143
TABLE 109	MEXICO: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	143
TABLE 110	MEXICO: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	144
14.2.2	US	144
14.2.2.1	US to dominate global VCSEL market during forecast period	144
14.2.3	CANADA	144
14.2.3.1	Data communication applications to drive market	144
14.2.4	MEXICO	145
14.2.4.1	Automotive industry to provide opportunities for market growth	145
14.3	EUROPE	145
14.3.1	RECESSION IMPACT ON EUROPE	145
FIGURE 41	EUROPE: VCSEL MARKET SNAPSHOT	146
TABLE 111	EUROPE: VCSEL MARKET, BY COUNTRY, 2018-2022 (USD MILLION)	146
TABLE 112	EUROPE: VCSEL MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	147
TABLE 113	UK: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	147
TABLE 114	UK: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	147
TABLE 115	GERMANY: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	148

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TABLE 116	GERMANY: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	148
TABLE 117	FRANCE: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	148
TABLE 118	FRANCE: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	149
TABLE 119	REST OF EUROPE: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	149
TABLE 120	REST OF EUROPE: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	149
14.3.2	GERMANY	150
14.3.2.1	Germany to hold largest share of VCSEL market in Europe during forecast period	150
14.3.3	UK	150
14.3.3.1	Consumer electronics and communications sectors to drive market in UK	150
14.3.4	FRANCE	150
14.3.4.1	Demand from automotive industry to substantiate market growth	150
14.3.5	REST OF EUROPE	150
14.4	ASIA PACIFIC	151
14.4.1	RECESSION IMPACT ON ASIA PACIFIC	151
FIGURE 42	ASIA PACIFIC: VCSEL MARKET SNAPSHOT	152
TABLE 121	ASIA PACIFIC: VCSEL MARKET, BY COUNTRY, 2018-2022 (USD MILLION)	152
TABLE 122	ASIA PACIFIC: VCSEL MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	153
TABLE 123	CHINA: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	153
TABLE 124	CHINA: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	153
TABLE 125	JAPAN: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	154
TABLE 126	JAPAN: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	154
TABLE 127	SOUTH KOREA: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	154
TABLE 128	SOUTH KOREA: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	155
TABLE 129	REST OF ASIA PACIFIC: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD MILLION)	155
TABLE 130	REST OF ASIA PACIFIC: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	155
14.4.2	CHINA	156
14.4.2.1	China to account for largest share of VCSEL market in Asia Pacific during forecast period	156
14.4.3	JAPAN	156
14.4.3.1	Demand from consumer electronics and data center verticals to drive VCSEL market	156
14.4.4	SOUTH KOREA	156
14.4.4.1	VCSEL market in South Korea dominated by consumer electronics and telecommunications industries	156
14.4.5	REST OF ASIA PACIFIC	157
14.5	REST OF THE WORLD	157
14.5.1	RECESSION IMPACT ON REST OF THE WORLD	157
TABLE 131	REST OF THE WORLD: VCSEL MARKET, BY REGION, 2018-2022 (USD MILLION)	157
TABLE 132	REST OF THE WORLD: VCSEL MARKET, BY REGION, 2023-2028 (USD MILLION)	157
TABLE 133	SOUTH AMERICA: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	158
TABLE 134	SOUTH AMERICA: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	158
TABLE 135	MIDDLE EAST & AFRICA: VCSEL MARKET, BY INDUSTRY, 2018-2022 (USD THOUSAND)	158
TABLE 136	MIDDLE EAST & AFRICA: VCSEL MARKET, BY INDUSTRY, 2023-2028 (USD THOUSAND)	159
14.5.2	SOUTH AMERICA	159
14.5.2.1	South America to hold larger share of VCSEL market in RoW during forecast period	159
14.5.3	MIDDLE EAST AND AFRICA	159
14.5.3.1	VCSEL market in Middle East & Africa at nascent stage	159
15	COMPETITIVE LANDSCAPE	160
15.1	OVERVIEW	160
15.2	STRATEGIES ADOPTED BY KEY PLAYERS	160

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TABLE 137	OVERVIEW OF STRATEGIES DEPLOYED BY VCSEL MANUFACTURERS	160
15.2.1	PRODUCT PORTFOLIO	160
15.2.2	REGIONAL FOCUS	160
15.2.3	MANUFACTURING FOOTPRINT	161
15.2.4	ORGANIC/INORGANIC GROWTH STRATEGIES	161
15.3	MARKET SHARE ANALYSIS: VCSEL MARKET, 2022	161
TABLE 138	DEGREE OF COMPETITION, 2022	161
15.4	FIVE-YEAR COMPANY REVENUE ANALYSIS	162
FIGURE 43	FIVE-YEAR REVENUE ANALYSIS OF TOP FOUR PLAYERS IN VCSEL MARKET	162
15.5	COMPANY EVALUATION QUADRANT	162
15.5.1	STARS	162
15.5.2	EMERGING LEADERS	163
15.5.3	PERVASIVE PLAYERS	163
15.5.4	PARTICIPANTS	163
FIGURE 44	VCSEL COMPANY EVALUATION QUADRANT, 2022	164
15.5.5	COMPANY FOOTPRINT	165
TABLE 139	OVERALL COMPANY FOOTPRINT	165
TABLE 140	COMPANY PRODUCT TYPE FOOTPRINT	166
TABLE 141	COMPANY INDUSTRY FOOTPRINT	167
TABLE 142	COMPANY REGION FOOTPRINT	168
15.6	START-UP/SME EVALUATION MATRIX	169
TABLE 143	LIST OF START-UP/SME COMPANIES IN VCSEL MARKET	169
15.6.1	PROGRESSIVE COMPANIES	170
15.6.2	RESPONSIVE COMPANIES	170
15.6.3	DYNAMIC COMPANIES	170
15.6.4	STARTING BLOCKS	170
FIGURE 45	VCSEL MARKET, START-UP/SME EVALUATION MATRIX, 2022	171
15.7	COMPETITIVE SCENARIOS AND TRENDS	172
15.7.1	PRODUCT LAUNCHES	172
TABLE 144	PRODUCT LAUNCHES, 2019-2022	172
15.7.2	DEALS	175
TABLE 145	DEALS, 2019-2022	175
16	COMPANY PROFILES	178
16.1	KEY PLAYERS	178
(Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats)*		
16.1.1	COHERENT CORP.	178
TABLE 146	COHERENT: BUSINESS OVERVIEW	178
FIGURE 46	COHERENT: COMPANY SNAPSHOT	179
16.1.2	LUMENTUM	184
TABLE 147	LUMENTUM: BUSINESS OVERVIEW	184
FIGURE 47	LUMENTUM: COMPANY SNAPSHOT	185
16.1.3	AMS-OSRAM	188
TABLE 148	AMS-OSRAM: BUSINESS OVERVIEW	188
FIGURE 48	AMS-OSRAM: COMPANY SNAPSHOT	189
16.1.4	TRUMPF	193
TABLE 149	TRUMPF: BUSINESS OVERVIEW	193

FIGURE 49	TRUMPF: COMPANY SNAPSHOT	194
16.1.5	BROADCOM	197
TABLE 150	BROADCOM: BUSINESS OVERVIEW	197
FIGURE 50	BROADCOM: COMPANY SNAPSHOT	198
16.1.6	MKS INSTRUMENTS	200
TABLE 151	MKS INSTRUMENTS: BUSINESS OVERVIEW	200
FIGURE 51	MKS INSTRUMENTS: COMPANY SNAPSHOT	201
16.1.7	SANTEC	203
TABLE 152	SANTEC: BUSINESS OVERVIEW	203
FIGURE 52	SANTEC: COMPANY SNAPSHOT	204
16.1.8	LEONARDO ELECTRONICS	206
TABLE 153	LEONARDO ELECTRONICS: BUSINESS OVERVIEW	206
16.1.9	VERTILAS	208
TABLE 154	VERTILAS: BUSINESS OVERVIEW	208
16.1.10	VERTILITE	209
TABLE 155	VERTILITE: BUSINESS OVERVIEW	209
16.2	OTHER KEY PLAYERS	210
16.2.1	ALIGHT TECHNOLOGIES	210
16.2.2	TELEDYNE FLIR	211
16.2.3	INNEOS	212
16.2.4	IQE	213
16.2.5	THORLABS	214
16.2.6	TT ELECTRONICS	215
16.2.7	USHIO AMERICA	216
16.2.8	WIN SEMICONDUCTORS	217
16.2.9	FRANKFURT LASER COMPANY	218
16.2.10	INPHENIX, INC.	218
*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.		
17	APPENDIX	219
17.1	DISCUSSION GUIDE	219
17.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	223
17.3	CUSTOMIZATION OPTIONS	225
17.4	RELATED REPORTS	225
17.5	AUTHOR DETAILS	226

VCSEL Market by Type (Single-mode and Multimode), Material (GaAs, InP, GaN), Wavelength, Application (Sensing, Data Communication, Industrial Heating & Printing, Emerging), Data Rate, Industry and Region - Global Forecast to 2028

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