

# Negative News for Optical Modules



## Overview

TrendForce reports that Nvidia has purchased EMLs for its own machinations to such an extent that rival optical module makers could face wait times for components beyond 2027, in what could even lead to a worldwide shortage. Packet loss?

Random link drops?

Auto-negotiation. Optical module demand is being pulled in two directions at once, faster bandwidth for dense networks and tighter constraints on power, security, and lead times. With global R&D projected to exceed \$2. 1 billion by 2025 and 35 percent of manufacturers reporting lead times beyond 12 weeks, the. Recently, there have been rumors in the market that North American manufacturers have updated their 800G demand guidelines. According to rumors, industry-wide demand will increase significantly compared to previous market expectations. Affected by this, on May 18, Zhongji Innolight (300308) and. Demand for optical connectivity remains strong, but component shortages hobbled growth in sales of optical transceivers in Q4 2024. Alphabet, Amazon, Meta, Microsoft and Oracle continued to spend significantly more in 2024 than in 2023, with their. May 15, 2026 Intel Corporation, an American multinational technology company, has announced the appointment of Alex Katouzian to lead the Client Computing and Physical AI Group and Pushkar Ranade as Chief Technology Officer, strengthening the company's core pr. Read More May 15, 2026 GoPhotonics.

## Article Content

The need for current sensing in optical modules for 100G and beyond

In this post, I'll discuss various current-sensing functions in high-bandwidth data communication applications for pluggable optical modules. These pluggable modules remain relatively the same size

The shortage of chips continues to affect the optical

However, for the optical module industry, optical chips and electrical chips are more important. At present, the supply of such chips is relatively stable.

Why Nvidia's GTC could be a negative for Marvell and other optical

Vinh said that the potential CPO news has negative implications for Marvell, although he thinks the news has been widely anticipated and may be priced in.

Can Arista's Latest XPO Optical Modules for AI Networks Drive Growth?

ANET unveils liquid-cooled XPO optical modules delivering 12.8 Tbps each, boosting rack capacity 4x for AI data centers needing extreme bandwidth and efficiency.

Optical Modules Market Research Report 2034

The optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034, growing at a CAGR of 11.5%.

Embedded optical modules to grow at a CAGR of 50

A new Counterpoint Research report forecasts that the shipments of OBO, CPO, and NPO solutions are projected to grow at a CAGR of 50% through 2033.

Enabling Higher Data Rates for Optical Modules With Small and

**ABSTRACT** A constant trend in optical modules is to offer higher data rates within the size-limited and thermally-limited form factor by using smaller, integrated Power and Data-Converter solutions.

Demand for datacom optical modules reaches record

Hyperscale network operator demand drove purchases of 400GbE and 800GbE datacom and 400ZR telecom optical modules to record levels,

Why Some "Optics Problems" Are Not Actually Optics Problems

When Unstable Fiber Links Have Nothing to Do with the Optical Module In modern enterprise and telecom networks, optical transceivers are often the first components blamed when

Traction of embedded optical modules highlighted in

Embedded or integrated semiconductor optical modules are starting to gain traction, with the shipments of On-Board Optics (OBO), Near-Packaged

Huawei Unveils StarryLink Optical Modules That Deliver

BARCELONA, Spain, March 6, 2025 /PRNewswire/ -- At the Mobile World Congress 2025 (MWC 2025), Huawei launched the StarryLink optical modules, designed to

Audio Science Review (ASR) Forum

Audio Reference Library Formal educational posts and articles on science and engineering of digital audio. Only site admin can create new threads. But anyone can comment.

Analysis Of The Development Prospects Of Optical

1. Current status and driving force of the development of the optical module industry  
As the core component of the optical communication system, the

Optical Modules Market Research Report 2034

Beyond hyperscale buildouts, national broadband expansion programs in Asia Pacific, Europe, and North America are driving fresh demand for coherent optical

NewPhotonics Introduces NPG102 Transmitter-on-Chip

Our integrated NPG102 PIC transmitter on chip family delivers low latency, reduced power in optical transceiver modules for all-optics connectivity.

The Security Risks of SFP Optical Transceivers

Small form-factor pluggable (SFP) optical transceivers, also called optics or Mini-GBICs, are an integral component of the Layer 1 Physical Layer of

2025 Optical Module Market Share and Demand Report

The 2025 optical communication industry is driven by AI data centers (AIDCs) and 5G rollouts, with high-speed optical modules (400G/800G/1.6T)

Global optical module sales reach \$4.25 billion in H1 2022

The global Ethernet optical module market share in Q1 and Q2 2022 amounted to USD 1,112/ 1,207 million respectively, and the sales revenue in Q2, although lower than the record high in

Optical Module Industry Statistics 2026

Our in-depth market data report on Optical Module Industry. Explore verified statistics and the latest research.

Nvidia's aggressive laser procurement spurs supply

Optical module makers could face component shortage as Nvidia reportedly hoards EML supply

Optics Transceiver Module Market 2025

Optics Transceiver Module Market size was valued at US\$ 12.67 billion in 2024 and is projected to reach US\$ 28.94 billion by 2032, at a CAGR of 10.84%

LightCounting :: Component shortages limit growth in

Demand for optical connectivity remains strong, but component shortages hobbled growth in sales of optical transceivers in Q4 2024. The first half of 2025 will be

The Evolution of Optical Modules: Powering the Future

Enter optical modules, which leverage the power of light to transmit data efficiently over long distances, driving the next generation of technological

Optoelectronics News

Optical Brain Research Pushes Smaller Implants, Sharper Imaging Cornell, MIT, and HKUST teams have reported laser- and photonics-based devices that record neurons, image deeper, and tame

Embedded Optical Modules Set for Explosive Growth

Source:Counterpoint Research Silicon Photonics (SiPh) and Co-Packaged Optics (CPO) Report In essence, the embedded optical modules market is on the cusp

Study of deformation of optical device modules for transmitting ...

14 August 2025 Study of deformation of optical device modules for transmitting parameters at low negative temperatures Boris V. Popov, Victor B. Popov Author Affiliations +

Understanding Optics Module Trends and Growth Dynamics

The optics module market is experiencing significant growth, driven primarily by the explosive growth of data traffic and the burgeoning deployment of 5G and cloud computing.

LightCounting sees optical component and module

The good news, according to LightCounting, is that optical component and module sales should grow 14% this year, despite supply chain issues and

Optical modules are polarized! Zhongji InnoLight VS

At present, optical module products are also iterating from 200G and 400G transmission rates to products above 800G. That's why the opening scene

## Contact Us

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