

CPO phases out optical modules





Overview

Due to the rise of 5G, IoT, AI, and high-performance computing applications, datacenter traffic has grown at a compound annual growth rate of nearly 30%. The conventional pluggable optics increases at a much slower rate than that of datacenter traffic. Finally, this section remarks on the next milestone in the future of pho-tonic interconnect for HPC networking. Co-packaged Optics (CPO) is an advanced packaging tech-nology for optoelectronic devices that involves upgrades in system architecture, chip fabrication, and packaging.



CPO phases out optical modules

Co-Packaged Optics -- a deep dive , APNIC Blog

Thermal Management: Integrating heat-sensitive optical components inside ASIC packages poses significant thermal challenges, and liquid cooling is

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The Rise of Co-Packaged Optics

In this scenario, Co-Packaged Optics (CPO) is now gaining momentum, emerging mainly as an alternative to the pluggable optical modules

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When Light Replaces Copper: Lumentum (LITE) -- The Optical Heart

TradingKey - When copper maxes out in AI data centers, Lumentum is the optics company Nvidia is betting billions on.

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Where co-packaged optics (CPO) technology stands in

Find out CPO's 2025 scorecard and what lies ahead for this optical interconnect technology in 2026 and beyond.

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Optical Component Startup Tracker

The number of venture-backed optical component startups has exploded - the Optical Component Start-Up Tracker identifies these companies

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Nvidia to deploy light based GPU interconnects by 2026

Nvidia is planning to implement light-based communication between its artificial intelligence GPUs by 2026, utilizing silicon photonics interconnects

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Pluggables, Power, and Geopolitics: Mapping the 800G

2.3 The 1.6T Transition Timeline The progression to 1.6T is predicated on the maturity of 200G per lane electrical and optical interfaces. 2025

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Co-Packaged Optics - End of Pluggables? What It Is,

In January 2021, Broadcom CEO Hock Tan introduced Co-Packaged Optics (CPO) to the



world at the J.P. Morgan Auto/Tech Forum, calling it a

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Global Optical Transceiver Market Strategic Audit 2026

The physics of AI data centers have fundamentally broken the traditional DSP-based optical module paradigm. Scale-up and Scale-out architectures (Scale-Across) demand high

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Where co-packaged optics (CPO) technology stands in

Co-packaged optics (CPO) technology, a key enabler for next-generation data center architectures, promises unprecedented bandwidth density

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I am long Clearfield, Inc. \$CLFD Here's my thesis: I've been

A major challenge for CPO is that lasers are heat sensitive and fail often if they are buried inside a hot AI chip package. The industry is moving toward ELS, placing the lasers at the front of the

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GlobalFoundries Announces New Co-Packaged Optics Solution for AI

GlobalFoundries (GF) announced the introduction of its SCALE(TM) optical module solution for co-packaged optics (CPO). GF's Silicon photonics Co-packaged Advanced Light Engine (SCALE)

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Nvidia's \$4B Photonics Venture: What You Need to Know

Enter CPO, which packages optical components directly with the GPU while eliminating



redundant hardware layers. Nvidia's investment in two large InP

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\$LITE EXECUTIVE OVERVIEW The OFC 2026 briefing materially

Lumentum's slide framework says phase 1 scale-up is 3X to 4X larger than initial scale-out CPO and phase 2 is another 3X to 4X versus phase 1 as optics penetrates more deeply into intra

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CPO Emerges as the New Sought-After as JCET

Industry analysts point out that as AI-driven data traffic continues to surge, traditional copper interconnects are increasingly constrained by bandwidth

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Co-Packaged Optics Gain Traction in Data Centers

2026 will mark the year when co-packaged optics (CPO), a form of optoelectronic integration, enters the full-scale mass production and practical roll-out phase. As power consumption continues to surge

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I asked Grok to compare \$SIVE to its much larger peers \$LITE

All three operate in the exploding photonics/optical semiconductor space--lasers, beamformers, and modules critical for AI data centers, 5G/6G, SATCOM, LiDAR, and defense.

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Nvidia Invests \$4 Billion in CPO: The Next Stop for AI Factory

Nvidia remains a pioneer in Scale-out CPO. Optical engine shipments are projected to reach 600,000 to 1 million units in 2026, with switch shipments around 23,000 units,



where Spectrum is a key product;

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Optics Transceiver Module Market 2025

While still in early adoption phases, CPO technology is projected to capture nearly 15% of the high-speed optical interconnect market within the next five years.

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Optics Primer, Part 3: Co-Packaged Optics (CPO)

The optical engine is the core of CPO; it converts between the optical and electrical domains. Since the OE is on-package, fiber runs directly to the

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Five Key Trends of Co-Packaged Optics (CPO) in 2026

Meeting market expectations and building confidence in co-packaged optics will require more than performance demonstrations. CPO adoption

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?GF Overseas Electronics & Communications? ? March 16 GTC

The outlook for OCS demand is also positive, and in addition to CSP customers, another CSP is currently under discussion. COHR occupies an important position in the optical module and

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Co-packaged optics (CPO): status, challenges, and

Co-packaged optics (CPO) is a disruptive approach to increasing the interconnecting bandwidth density and energy efficiency by dramatically

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Opinion: optical transceivers at the chokepoint of AI growth and supply

As AI infrastructure accelerates at an unprecedented pace, optical connectivity has become one of the defining enablers and constraints of next-generation data centers. In this Opinion

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A-Share AI Infrastructure Boom: CPO Optical Modules Lead Rally as

On April X, A-share tech stocks surged, with CPO optical modules, optical components, and AI computing infrastructure stocks hitting daily limits. NewEase Communications' market

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The Rise of Co-Packaged Optics: A Deep Dive into CPO

This article provides a comprehensive overview of CPO optical modules, exploring their technology, benefits, challenges, and the pivotal role

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Lumentum Orders Booked Through 2028: Can Optical

TradingKey - April 10, 2026. Optical communications leader Lumentum (LITE) ignited the market with a major announcement: Driven by accelerating demand from massive U.S. AI data centers, the

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