

# CPO phases out optical modules





## Overview

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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.



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### **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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