

ACTIVE OPTICAL CABLES AND EMBEDDED OPTICAL MODULES

DECEMBER 2019

Technology Scaling Trends

Exascale in 2021... and then what?

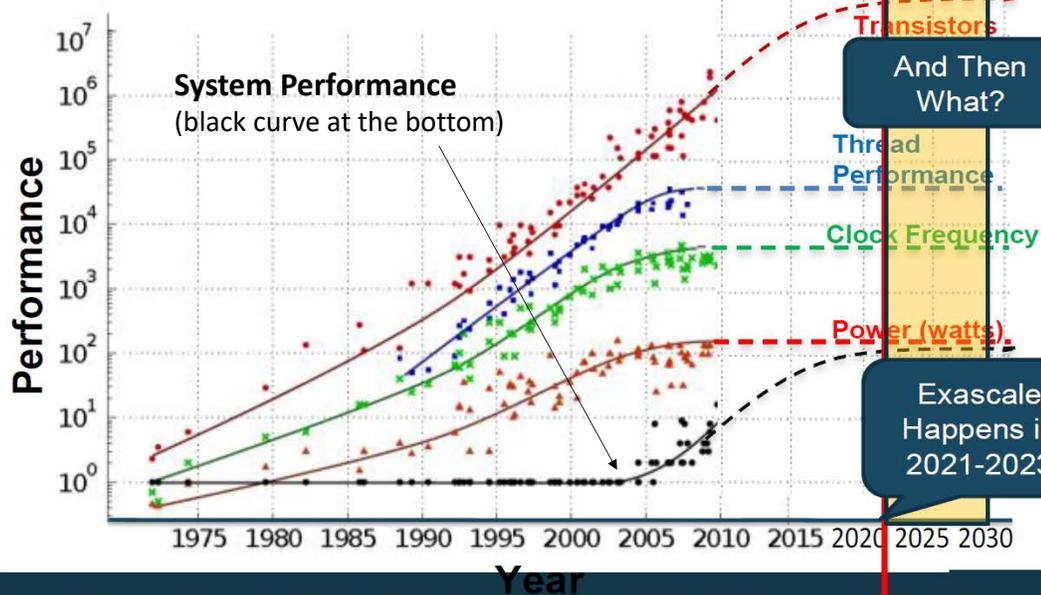


Figure courtesy of Kunle Olukotun, Lance Hammond, Herb Sutter, and Burton Smith

Source: John Shalf, Lawrence Berkeley National Laboratory,



Abstract	3
Executive Summary – Active Optical Cables	5
Executive Summary – EOMs.....	6
Chapter 1: AOC Features, Benefits and Technologies.....	10
AOCs vs. Direct Attach copper – Active and Passive	11
AOC Advantages from the Manufacturer’s Perspective	13
AOCs Find a Home for Advanced Photonics.....	14
Chapter 2: EOMs Still a Lumpy Business	16
Potential benefits of EOMs	17
Main EOM Adoption Limiting Factors	22
Chapter 3: Applications and Markets.....	28
High Performance Computing.....	29
Core Routing Systems	46
Cloud Data Centers	47
Telecom Network Equipment	59
Optical Backplanes	61
Military/Aerospace/Other Applications.....	65
Chapter 4: Products, MSAs & Protocols.....	69
AOC Transceiver MSA’s	69
AOC Product Configurations	75
Protocols & Roadmaps for AOCs.....	75
EOM Products and Trends.....	76
Chapter 6: Forecast and Analysis	92
AOC Forecast by Market Application	93
AOC Unit Shipments Forecast and Analysis	95
AOC Pricing Forecast and Analysis	98
AOC Revenue Forecast.....	99
EOM Forecast.....	100
EOM Forecast by Market Application	102

Combined AOC/EOM Unit Shipment Forecast by Rate	104
Appendix 1: Protocols and Roadmaps.....	106
Appendix 2: Electrical Interfaces for AOCs and EOMS	116
Appendix 3: Market Opportunity for Copackaged Optics	129
Is the co-packaged optics just around the corner?	130

ABSTRACT

This **two-part report** examines the optical interconnect segments that have long served as data bridges between elements of large systems or clusters.

The **active optical cable (AOC) product segment** embeds optical transceiver technologies into enclosed cables that hide the high-speed optics behind two transceiver ends with an electrical interconnect presented to the outside. This factor enables creating high aggregate data rate links at costs significantly below that of two separate connectorized transceivers and fibers.

This report also examines the product segment that embeds optical interconnect technologies inside computer and communication systems with on-board or **embedded optical modules (EOMs)**. As data rates continue to ramp, signal losses increase to the point that the effective reach of copper cabling and PCB traces on circuit boards shrinks considerably. Intra-system optical interconnects started at 2.5Gb/s two decades ago and have grown slowly to 50Gb/s interconnect fabrics, enabling massively-scalable multi-chassis systems from supercomputers to core routers. Proprietary interconnects are now supported by embedded optical modules and MSA-based active optical cables and transceivers, such as CXP.

At 25Gb/s and beyond, the amount of signal compensating electronics needed is growing along with cost and power consumption. When speed, reach, interconnect density and power limitations align to exceed the limits of copper, optical interconnects are finding use to support the next generations of system equipment.

Presented are data on annual AOC and EOM shipments, revenues and average selling prices for 2016-2018 and we forecast the market for 2019-2024. We analyze technologies, market trends, protocol transitions, data rates, and MSAs for InfiniBand, Ethernet and other protocols. Application segments are reviewed in detail and 20 categories of products are individually tracked, forecasted and mapped into

four application segments: High Performance Computing (HPC), Core Routing & Optical Transport, cloud (datacenter), and lastly Military/Aerospace/Other applications.

The report is based on confidential sales information and detailed analysis of publicly available data released by leading component and equipment manufacturers. It incorporates new information from numerous interviews across both the supply chain and the consumption side of the industry.

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LightCounting is a market research company focused on the in-depth study of high speed interconnects for the datacom, telecom, and consumer communications markets. Our research covers the whole supply chain from optical and semiconductor components, to modules, sub-systems and their applications in telecom and datacom systems.

Our industry reputation was built by providing solid market data and objective analysis to help industry executives in making tactical and strategic business decisions and seeing past all the market hype, rumors, press reports, blogs and other distortions that so often complicate and confuse many decision making processes.

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