

Will there be any leftover optical modules



Article Overview

Yes, leftover optical modules are likely to be available, particularly as older models reach end-of-life or are replaced by higher-speed modules.

Reasons for Leftover Modules

End-of-Life and Upgrades: Optical modules such as the Cisco 400ZR OSFP are reaching end-of-sale and end-of-life dates, with the last order date in June 2025. After this, some units may still be available through certified refurbished programs or trade-in initiatives, but supply will be limited and on a first-come, first-served basis . **Market Dynamics:** As data centers and hyperscalers upgrade from 400G to 800G and 1.6T modules, older 400G modules are being phased out. These replaced modules, while still functional, may not meet the performance requirements for high-speed applications and often enter the secondary market for lower-speed or budget-constrained scenarios . **Used and Refurbished Modules:** Manufacturers and resellers often reintroduce slightly downgraded or used modules into the market. These modules may have minor cosmetic defects or slightly out-of-spec parameters but remain operational, providing a cost-effective option for internal monitoring, backup links, or smaller-scale deployments . **Supply Chain Considerations:** Market forecasts indicate that while 800G and 1.6T modules are ramping up, there may be temporary oversupply or leftover inventory if demand slows or if adoption rates vary among cloud and enterprise customers . This could result in additional availability of older modules in the short term.

Practical Implications...

Article Content

Optical Module Market Size, Competitors & Forecast to 2032

The Optical Module Market, valued at USD 30.01B in 2026, is projected to reach USD 66.94B by 2032, growing at a 14.1% CAGR.

AI Data Center Optical Component Shortage: Nvidia's \$4B Laser

What is causing the optical transceiver shortage in 2026? The core constraint is the electro-absorption modulated

Exploring Optical Module Chip Market Evolution 2026-2034

Explore the booming Optical Module Chip market forecast (2025-2033). Discover key drivers like 5G, data centers,

LightCounting :: AI creates a new wave in demand for optical ...

LightCounting releases January 2025 edition of "Optics for AI Clusters" report The Figure below presents our forecast for sales 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 Module Evolution: From 400G to 3.2T

Speed Roadmap: From 400G to 3.2T Optical module development has converged on a de facto "speed-doubling"

Understanding Pluggable Optical Modules

Optical modules are available in various types to meet diversified requirements. Classified by transmission rate Currently, the

800G Optical Modules Drive Market Recovery in 2025

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends

LightCounting Predicts Explosive Growth for OCS and Optical Modules

LightCounting projected that the shipment volumes of optical transceiver modules and Optical Circuit Switches (OCS)

Global AI Compute Investment Spurs Surge in Optical Module Market

Global AI compute investment drives optical module market to \$23.8B in 2025, with forced upgrades to 800G/1.6T

AI Data Center Optical Component Shortage: Nvidia's \$4B Laser

AI data center optical component shortage is pushing 800G transceiver production 40-60% below demand through

Optical Modules Market Analysis 2026

Optical transmitter modules are a key driver of the increase in the optical modules market, as they enable high-pace information

Demand for Datacom Optical Modules Reaches Record Levels in 1Q24

Spending on Datacom optical components was up more than 90% YoY as AI applications of 400GbE and 800GbE

Deep Dive: Optical Module Market

Powering next-gen connectivity: How optical modules enable fast, reliable data transfer, and What are the

CPU Shortage Deepens, Optical Module Value Restructuring

In traditional data center interconnect (DCI) systems, optical modules held ~30% of total system value. That structure is

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Innolight and Eoptolink are estimated by industry sources to supply roughly 60% of NVIDIA's 800G volume, controlling

Shortage of chips for optical modules | Weyland

Conclusion Overall, the optical module “chip shortage” is fundamentally a structural contradiction between the

Optical Module Chip Market 2025

The optical module chip market exhibits a fragmented yet competitive structure with global technology providers, semiconductor

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Seven of the global top 10 optical module suppliers in 2024 were Chinese companies (including Source Photonics,

Traction of embedded optical modules highlighted in Counterpoint report

Embedded or integrated semiconductor optical modules are starting to gain traction, with the shipments of On-Board

Optical Module MCUs Become Critical as AI Data Centers Drive

MCU chips powering optical modules have emerged as a critical semiconductor segment driven by the AI data center

Optical module

An optical module is a typically hot-pluggable optical transceiver used in high-bandwidth data communications applications. Optical

Nvidia's official announcement, CPO mass production, and a changing ...

We need to understand one thing first: CPO is not going to eliminate all optical modules. Its essence is to package the

Reasons for the Collapse of Optical Modules: Top Institutions Report ...

On June 10, independent research institution SemiAnalysis, focused on semiconductors, AI infrastructure, and data

Shortage of chips for optical modules | Weyland

Demand for 400G, 800G, and even 1.6T optical modules continues to increase significantly. However, the industry is

LightCounting :: Component shortages limit growth in transceiver sales

LightCounting releases a research note on the early financial results for Q4 2024 Demand for optical connectivity remains strong, but

Everything You Need to Know About Optical Modules

Optical modules are electronic devices used in communication systems to transmit optical signals. These modules

Why Are Used Optical Modules Returning to the Market? — Unveiling

The following analysis examines the inevitability of the resale of used optical modules from three core scenarios,

LightCounting :: Component shortages limit growth in transceiver sales

Chinese optical module manufacturers will report Q4 results together with the full year results in April, but several of them have

Optical Module Investment Landscape 2026: Demand, Scarcity, CPO,

In late May 2026, AI optical modules are the most demand-certain link in the compute chain — and the easiest place to overpay.

Optical Module Package Market 2025

Optical Module Package Market was valued at 8942 million in 2024 and is projected to reach US\$ 20220 million by 2032, at a CAGR

CPO Technology Nvidia: Death of Optical Modules and the Future of

Analysis of Nvidia's announcement from June 3, 2026: why CPO is killing optical module suppliers, who the

Optical Modules Future-Proof Strategies: Market Trends 2026-2034

The optical modules market is booming, projected to reach \$27.4 billion by 2033 with an 8% CAGR. This

Understanding Optical Modules: A Comprehensive Guide

Optical Module Basics: Understanding the Core ConceptsOptical modules are compact devices that convert electrical

What Is the Lifespan of an Optical Transceiver?

Optical transceivers, sometimes called optical modules, are the small, pluggable devices that enable high-speed communication over

From optical modules to chips: China's tech supply chains sustain ...

BEIJING — With the global push for artificial intelligence (AI) computing power unleashing an unprecedented wave of

Contact Us

For more information, pricing, or custom solutions, please contact us:

Website: <https://www.watermanfinance.co.za>

Email: sales@watermanfinance.co.za

Phone: +49-176-8294713

Address: Neue Mainzer Str. 66-68, 60311 Frankfurt am Main, Germany

This document is for informational purposes only. Specifications subject to change without notice.

