

2020 Optical Module Shortage



Overview

The shortages were intensified by COVID-19 disruptions in the first half of 2020, triggering a new spike in orders. Large customers are concerned with the small size of their optics suppliers and they are terrified of shortages. Between 2020 and 2023, there was a worldwide chip shortage affecting more than 169 industries, which led to major price increases, long queues, and reselling among consumers and manufacturers for automobiles, graphics cards, video game consoles, computers, household appliances, and other. The global semiconductor shortage that has largely coincided with the COVID-19 pandemic-and affected virtually all industries including the photonics industry-shows few signs of easing up, though businesses and supply chain managers say they are learning to cope. "I think global companies probably. The COVID-19 pandemic has impacted global industries of all kinds. However, few have felt greater supply chain pressures than semiconductor companies. The United States President on 8 June released the findings and recommendations of a 100-day review into the security of critical supply chains. A key vulnerability identified is the semiconductor "famine" that, since December 2020, has disrupted the recovery of several industrial sectors and. On April 7, Samsung reported Q1 2026 operating profit of KRW 57. It exceeded Samsung's entire 2025 full-year result.



Article Content

OPTICS REMAINS THE WEAKEST LINK IN THE INDUSTRY

In the report we suggest that the main problem with the optical components and modules business is that it is a tiny part of a very large industry. Size matters when it comes to negotiating

OSFP Packaged Optical Module Dynamics and Forecasts: 2026-2034 ...

The OSFP Packaged Optical Module market is booming, driven by surging data demands and the adoption of high-speed technologies like 400G and 800G. Explore market size, growth

The shortage of chips continues to affect the optical

However, from the stable commercial performance of mainstream optical module manufacturers in the first half of the year, the supply can be

in the Current Fiber Broadband Supply Chain UPDATE

Unfortunately, the COVID-19 pandemic created a perfect storm of challenges for the companies working to make fiber broadband the standard in more markets. While the U.S. had a 10% excess cable

The long view of the chip shortage

In the spring of 2020, automobile sales began to drop precipitously as showrooms closed their doors. With a bleak outlook for the automotive industry due to the pandemic, companies forecasted a

Critical supply chains: The semiconductor shortage | S& P Global

A key vulnerability identified is the semiconductor "famine" that, since December 2020, has disrupted the recovery of several industrial sectors and spotlighted the complexity and strategic importance of the

QSFP Optical Module Planning for the Future: Key Trends 2026-2034

Explore the dynamic QSFP optical module market, forecast to reach \$14.7 billion by 2025 with a 4.5% CAGR. Discover key drivers, trends, and applications in high-speed networking and data

The Global Semiconductor Chip Shortage: Causes, Implications, and ...

Abstract: Since 2020, there has been a major supply shortage of semiconductors across the globe with no end in sight. As almost all modern devices and electronics require semiconductors,

2020-2023 global chip shortage

Between 2020 and 2023, there was a worldwide chip shortage affecting more than 169 industries, which led to major price increases, long queues, and reselling among consumers and manufacturers

Global shortage of fiber-optic cable threatens digital growth

A worldwide shortage of fiber-optic cable has driven up prices and lengthened lead times, endangering companies' ambitious plans to roll out state-of-the-art telecommunications infrastructure ...

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The global semiconductor shortage that has largely coincided with the COVID-19 pandemic-and affected virtually all industries including the photonics

Global logistics for optics: 2026 Lead times & Risks

Navigating Global logistics for optics: 2026 Lead times Procurement teams relying on outdated 12-week forecasting models are hitting a wall. 2026 shortages in 3nm DSPs have pushed

Seeking Balance: The Photonics Industry Grapples with

He says the current auto chip shortage began during the second quarter of 2020, when automakers reduced production and chip purchases as the

LightCounting :: Component shortages limit growth in

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

AI Data Centers Driving Laser Shortages

Optical module manufacturers and CSPs are now actively searching for secondary suppliers and alternative designs. High-speed optical interconnects

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The shortage of chips continues to affect the optical

The mainstream large-scale optical module manufacturers, after all, have planned in advance in terms of inventory and delivery cycle, and will

Supply Chain Shortage And IC Chip Price Increase, Optical Module

Although the demand for traditional low-speed products began to decline at the end of 2020, it rebounded again in the first half of 2021. LightCounting believes that this is unexpected.

OFC50-Looking Back to Move Forward: Revisiting the 2020 CPO

This is more than an order of magnitude stricter than traditional pluggable modules, posing a substantial reliability challenge, especially considering the number of active optical channels and laser sources

LightCounting :: February 2025 Component shortages

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

Nvidia's aggressive laser procurement spurs supply

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

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 reversing in 2026 — optical module value share is climbing toward...

Optical Transceiver Market Size, Share, Industry Report

Optical Transceiver Market Trends The deployment of dis-aggregated coherent optics is accelerating within telecom as well as cloud networks. The trend was

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This is the official code for the paper "Systematically Exploring Redundancy Reduction in Summarizing Long Documents". - Wendy-Xiao/redundancy_reduction_longdoc

2025 Update: Electronic Component Shortages

Electronic component shortages are still disrupting supply chains in 2025. See what's fueling delays and how to adapt your sourcing strategy.

LightCounting :: Optics Remains a Weak Link in the Industry Supply ...

Shortages started again at the end of 2019, as demand for optics picked up sharply. The shortages were intensified by COVID-19 disruptions in the first half of 2020, triggering a new spike in orders. Large

Strategic Trends in High Speed Optical Modules Market 2026-2034

Explore the dynamic High Speed Optical Modules market, projected to reach \$14.6 billion in 2024 with a 14.2% CAGR. Discover drivers like Cloud Services, AI, and 800G, alongside regional

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