

# Optical Components Intelligence Service

## Part of the Service Provider Networks Service Area Package

Global, in-depth coverage of the Optical Components market. Industry leading package of thought leadership and data covering optical components market share and forecast products.

“ The optical components (OC) market has bifurcated between meeting the requirements of the Communications Service Providers (CSPs) and the Internet Content Providers (ICPs.) The ICPs desire quicker innovation cycles and have the spending power to significantly influence the technology agenda. Component suppliers are under intensifying pressure to compete and with limited R&D budgets, are forced to make critical decisions on which technologies and products to develop. ”

**Lisa Huff**  
Senior Principal Analyst

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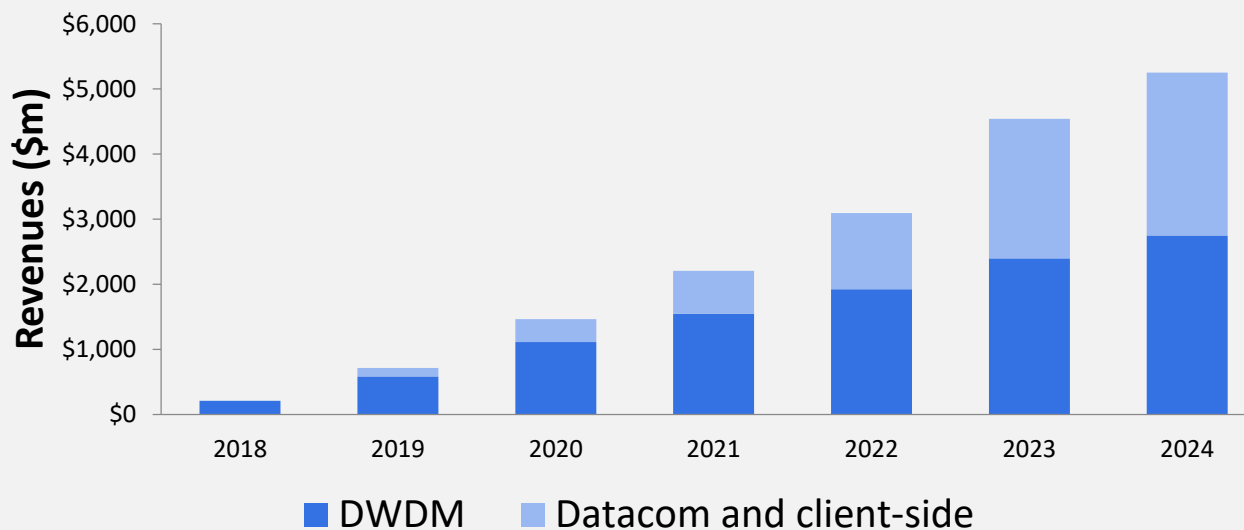
## HOW OMDIA HELPS YOU

- Quantify technologies and platforms volumes, pricing and revenue.
- Size component market segments and identify high growth opportunities.
- Identify disruptive technologies and threats.
- Assess key differentiating and winning component technologies and vendor strategies

## KEY QUESTIONS ADDRESSED

- What are the size, share, and forecasts for the key segments for the optical components market?
- What is the impact of key industry events and announcements?
- How can companies identify and target high growth markets and opportunities?
- Which new technologies and market players present disruptive threats?

“400G is the fastest growing segment of the overall OC market. For Datacom applications, ICPs are driving it. For Telecom, coherent 400G and beyond components are being pushed by both ICPs and CSPs.”



# Optical Components: Our Expert Analysts



**Ian Redpath**  
Practice Leader  
Transport Networks



**Lisa Huff**  
Senior Principal Analyst  
Optical Components



**Julie Kunstler**  
Senior Principal Analyst  
Broadband Access

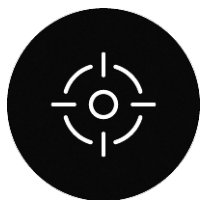


**Tim Munks**  
Senior Principal Analyst  
Optical Components



**Tanya Harris**  
Principal Analyst  
Optical Networks  
Routing & Switching

# Optical Components: Deliverables



## MARKET DATA

—Various: Quarterly to Annual—

Optical Components Global Market Share and Forecast  
 Datacom Transceiver and AOC Forecast  
 High Speed Coherent Optics Forecast  
 Silicon Photonics Forecast



## SURVEYS

—Annual—

Optical Components Survey



## REPORTS

—Various—

Trends to Watch and thematic reports



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



## PRESENTATIONS

—Ongoing—

Analyst briefings



## ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions

# Optical Components: Market Data

## Optical Components Global Market Share

Global market share and analysis for optical components and accompanying commentary

### DETAILS

**Frequency:** Quarterly

#### Measures

- Market share
- Revenues

#### Regions

- Worldwide
- North America
- EMEA
- Asia-Oceania
- Latin America and the Caribbean

### COVERAGE

#### Market Share Segment:

- Telecom
- Datacom
- Access

#### Market Share Super Segments:

- Transport
- Transceivers
- Transmission

## Optical Components Forecasts

A forecast series covering all aspects of optical components used inside the data center, access and telecom applications. Companion reports and analysis round out the coverage.

### DETAILS

**Frequency:** Annual

#### Measures

- Units
- Revenues
- ASP

#### Regions

- Global

### COVERAGE

#### The Total OC

- Telecom
- Datacom
- Access: FTTX and PON
- Modules and discrettes

#### Datacom Transceiver and AOC Forecast

- Datacom

#### High-Speed OC Forecast

- High speed coherent optics

#### ICP Data Center Network Optical Components Forecast

- Optical transceivers, AOCs, and DACs

#### Silicon Photonics Forecast

- SiPh optical transceivers

# Optical Components: Reports, Surveys and Analysis

## Trends to Watch & Thematic Research Reports

An annual snapshot of the major trends in the optical components segment. Identification and analysis of key trends that will impact and reshape the market in the years to come

### DETAILS

**Frequency:** Annual

Our yearly roundup of all events and developments that are expected to impact the optical component market in the years to come. Typically includes an analysis of emerging technologies and optical centric capabilities. Also typically include and readout on major geo-political events, that will impact the sector. The analysis typically includes an overview and analysis of key business model progression, application adoption, and the growth of the market.

### Optical Components 2020-2021 Research Themes

**Frequency:** Quarterly and event driven

Topical reports delving deeper into major research themes typically triggered off of a major industry event.

# Optical Components: 2020-2021 Research Themes

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## **ICPs recasting the industry structure and driving integration**

ICPs are a heterogeneous group delivering social, search, cloud, and e-commerce capabilities. The ICPs applications, business, and territory growth drive an entire optical ecosystem worth billions of dollars. In addition, the ICPs are quick to adopt the next generation of technology.

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## **Maturation and scaling of silicon photonics and potential of co-packaged optics**

The promise of silicon photonics is to transform the boutique manufacturing of optics into a massively scalable silicon-chip-style production reaping silicon-chip-like economics with speed of manufacture and test. As data rates continue to increase, optics that are co-packaged with switch and/or compute chips will be needed.

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## **High speed coherent optics: The Coherent DSP arms race continues**

To cost effectively meet exponentially increasing bandwidth demand in ON, ICPs and CSPs are moving from 100G, one size fits all, to 100G-800G multi-rate and application specific coherent modems. Implementations include space-power optimized solutions typically for DCI and performance optimized solutions for metro and core networks.

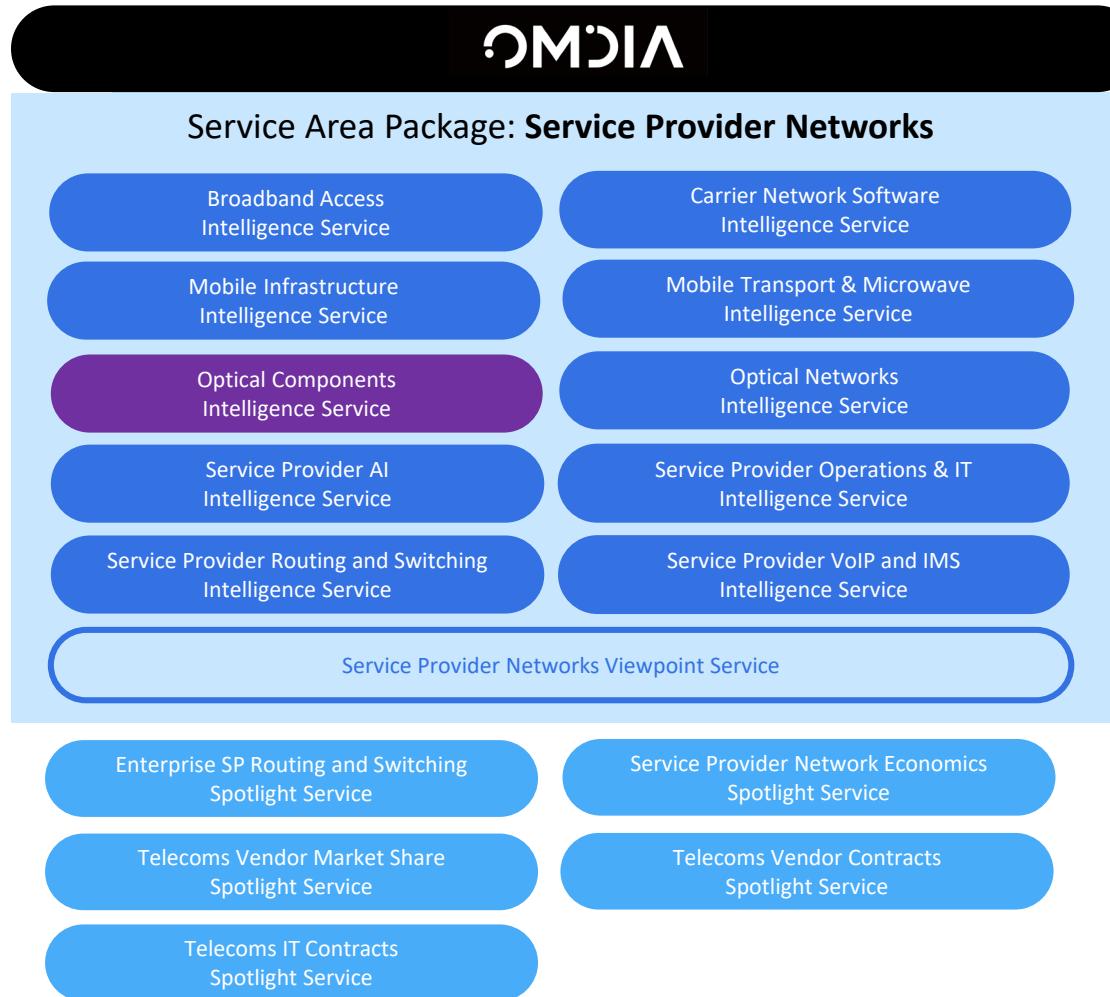
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## **The emerging 3D Sensors and Lidar markets (2021)**

3D sensors leverages optical supplier core capabilities and opens the door into the new consumer, automotive and robotic markets, supplementing vendor revenue streams.

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# Related Content: Service Provider Networks Service Area Coverage



## About Omdia’s Service Provider Networks Coverage

Omdia’s Service Provider Networks research services provide expert analysis and data across the complete landscape of telecoms networks, including infrastructure, software and operations. The Networks team supports the broadest coverage in the industry, from mobile access, fixed access and mobile core, to transport, microwave, routing/switching, optical networks and components. Offering specialist coverage on service providers’ own transformation, including telecoms operations and IT, carrier network software, and service provider AI, Omdia’s Networks research provides the unique ability to both deep dive into specific technologies as well as gain higher-level strategic analysis and insight.

Omdia’s Network research complements our Service Provider Consumer and Enterprise research services, enabling us to advise key vendors on their customers’ customers, and guide service providers themselves on the evolving technology supplier and partner landscape. Omdia helps both vendors and service providers assess which applications and products will drive future growth, forecast the adoption and impact of new technologies, benchmark key competitors, target customers, and select suppliers, providing a holistic view of service provider investments across the industry.

Through our coverage of mobile and broadband access and core networks, transport networks, optical networks and components, and service provider transformation, our global team of expert analysts offers unparalleled data and insight as the transformation of service provider networks gathers pace.



# Optical Components: Migration to a Combined Product

## Relevant to Subscribers of Legacy Products

- ✓ Components (Ovum)
- ✓ Optical Networks Intelligence Service (IHS Markit Technology)

The new combined Optical Networks Intelligence Service will incorporate legacy IHSM Markit Technology and Ovum research coverage

### BENEFITS AND FEATURES OF NEW SERVICE

- **All Subscribers:**
  - Continued coverage with expanded team supporting the research
- **Legacy Ovum Components Subscribers:**
  - Access to expanded analyst team
- **Legacy IHSM Optical Networks Intelligence Service Subscribers:**
  - New dedicated product for IHSM subscribers

### OTHER CHANGES

- Dedicated Optical Networks coverage will be available exclusively through the Optical Networks Intelligence Service.

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

- Make the right decisions
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- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager



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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.