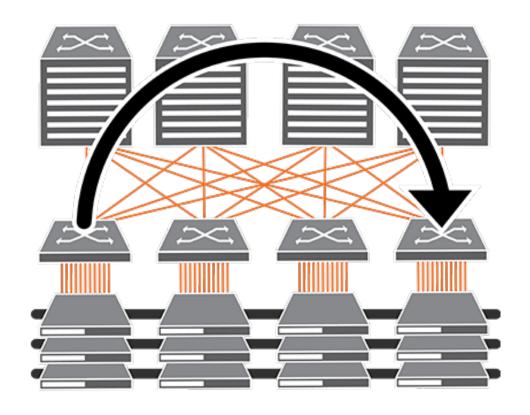


## ETHERNET, INFINIBAND AND OPTICAL SWITCHES FOR CLOUD DATACENTERS

**APRIL 2023** 







## **Table of Contents**

Abstract	∠
Executive Summary	5
InfiniBand and Optical Switches	6
Optical Circuit Switches	7
Adoption of co-packaged optics	8
Forecast methodology and Adoption of 200G SerDes	g
Summary of merchant Ethernet switch ASIC offerings	10
Chapter 1: Applications and Technologies	11
How it all started	11
Where we are now	14
Improving power and cost efficiency	16
Keeping up with the servers	17
Scaling Al Clusters Using InfiniBand	20
Optical Switches in Al Clusters	22
Chapter 2: Switching ASIC Supply Chain, Catching up with Broadcom	
Broadcom	23
Cisco	27
Marvell (Innovium)	29
Nvidia (Mellanox)	31
Other Vendors	32
Chapter 3: Ethernet Switch Equipment manufacturers in pursuit of Cloud Customers	35
Arista	35
Cisco	37
Edgecore Networks	38
Huawei	39
Juniper	41
Ragile Networks	42
ZTE	44
Chanter 1: Forecast Models and Assumptions	15



## ETHERNET, INFINIBAND AND OPTICAL SWITCHES FOR CLOUD DATACENTERS

	Data traffic growth in mega-datacenters	45
	Optical Transceiver Forecast assumptions	46
	From Optical Transceivers to Ethernet switches	48
	Forecast model for Meta	49
	Forecast model for Google	55
	Forecast model for Amazon	
2	hapter 5: Optics Co-Packaged with switching ASICs	62
	CPO demos at OFC 2023	63
	Linear Drive pluggable transceivers	64
	It is all about power consumption	
	Market adoption	66
	Forecast for CPO	67



## **Abstract**

This report offers analysis and a forecast for the most interesting segment of the switching ASIC market – high bandwidth (3.2T and above), low latency chips deployed in Cloud datacenters. In addition to Ethernet switches, the report now includes InfiniBand and Optical Circuit Switch markets. It excludes products developed for enterprise and telecom networks as well as switch ASICs developed for routers.

Demand for Ethernet switches from Cloud companies created a new market segment for very high bandwidth switches and switch ASICs. It also transformed the industry supply chain as Cloud companies started using internally designed Ethernet switches and opening these "white box" designs to a broader community.

Increasing focus on AI applications, boosted demand for low latency InfiniBand switches. Google also disclosed their work on using optical circuit switches to improve performance, while reducing cost and power consumption of AI Clusters. We expect both solutions to be widely adopted by the industry.

The report offers brief profiles of the leading suppliers of merchant switch ASIC and system integrators, offering products to Cloud companies, and includes a forecast for sales of 25.6T and 51.2T switch ASICs with co-packaged optics (CPO).

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 wireless to optical and semiconductor components, to modules, sub-systems, and their applications in telecom, datacom and Al clusters.

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 to see 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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