

Optical Module News



Overview

BOSTON (January 7, 2025) – Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm Cignal AI. 9B by 2029, fueled largely by AI data centers. GF's SCALE solution, or Silicon photonics Co-packaged Advanced Light Engine solution, is the industry's first Optical. Dutch photonics startup says its radical approach can triple light sensitivity in imaging applications. Universities of Osaka and Ritsumeikan say such emitters are promising sources for micro-LEDs. Device suggests. Samsung Foundry is reportedly stepping up its silicon photonics efforts. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider.

Article Content

Nov 18, 2025

Five Key Trends of Co-Packaged Optics (CPO) in 2026

These pressures are driving renewed momentum behind co-packaged optics (CPO). According to LightCounting, sales of lasers and photonic integrated

Sep 12, 2025

Kyocera Develops Pluggable Optoelectronic Module

Kyocera has been developing onboard-type optoelectronic modules that support PCIe® 5.0 and convert electrical signals from CPUs, GPUs, and

Dec 14, 2025

Chinese Funds Lift Investment in Optical Module Stocks Amid AI

Zhongji Innolight, a core investment target among the optical module concept stocks, has become the top stock heavily held by public funds, while Eoptolink Technology and Dongshan

Apr 17, 2026

OFC 2025: The Future of Optical Connections

Explore the advancements showcased at OFC 2025 with 1.6T optical modules leading the future of data connectivity.

Oct 18, 2025

Pluggables, Power, and Geopolitics: Mapping the 800G and 1.6T Optical ...

Technologically, the industry is embroiled in a debate between Digital Signal Processor (DSP)-based retimed optics, which remain the standard for interoperability, and Linear Pluggable

May 21, 2026

GlobalFoundries Accelerates Adoption of Co-Packaged Optics for

GlobalFoundries (Nasdaq: GFS) (GF) today announced the introduction of its SCALE™ optical module solution for co-packaged optics (CPO). GF's SCALE solution, or Silicon photonics Co

Mar 04, 2026

2025 Optical Module Market Share and Demand Report

Overview of the optical communication module market demand and supply chain, and production capacity in various regions in 2025

Jun 08, 2026

Tower Semiconductor, NVIDIA advance 1.6T AI optics

New 1.6T optical modules on Tower's silicon photonics platform enable up to 2x data rates for NVIDIA-based AI infrastructure, boosting data

Feb 02, 2026

GlobalFoundries' Unveils Optical Module Solution Targeting CPO

MALTA, N.Y., May 5, 2026 — GlobalFoundries (GF) has introduced an optical module solution for co-packaged optics (CPO). According to the company, the Silicon photonics Co-packaged Advanced

Aug 02, 2025

Huawei Unveils StarryLink Optical Modules That

To address these challenges, Huawei's StarryLink optical modules deliver a high-quality network experience with three key capabilities: Spanning:

Sep 09, 2025

AI demand sends profit soaring for China optical vendor

AI demand sends profit soaring for China optical vendor Domestic AI demand surging in China with cloud giants boosting capex by 254%.

Feb 04, 2026

GlobalFoundries accelerates adoption of co-packaged optics for

SCALE CPO solution is the industry's first OCI MSA capable platform and built with GF's proven silicon photonics technology MALTA, N.Y., May 04, 2026 (GLOBE NEWSWIRE) --

May 12, 2026

Five Key Trends of Co-Packaged Optics (CPO) in 2026

New approaches to fiber coupling and optical alignment—ranging from edge and vertical coupling to advanced passive and active alignment

Apr 04, 2026

AI Data Center Optical Transceiver Module Market 2025–2030

AI Data Center Optical Transceiver Module Market 2025–2030 Posted on Apr-03-2026
The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential

Sep 07, 2025

News from the optics and photonics industry | optics

Dutch photonics startup says its radical approach can triple light sensitivity in imaging applications. Universities of Osaka and Ritsumeikan say such emitters are promising sources for

Nov 25, 2025

Samsung Foundry Reportedly Wins Optical Module Order,

Samsung Foundry is reportedly stepping up its silicon photonics efforts. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical

Apr 04, 2026

Pluggables, Power, and Geopolitics: Mapping the 800G

Technologically, the industry is embroiled in a debate between Digital Signal Processor (DSP)-based retimed optics, which remain the standard for

Dec 15, 2025

Huawei patent shows new optical module with

Huawei recently applied for an optical module and communication tech patent which aims to reduce the cost of manufacturing for effective camera

May 18, 2026

Co-Packaged Optics (CPO) Market Trends 2026: AI Data Center Optical ...

Explore the future of co-packaged optics (CPO) in AI data centers. Learn how silicon photonics, optical I/O, and high-speed optical interconnect technologies are shaping next-generation

Feb 05, 2026

GlobalFoundries accelerates adoption of co-packaged optics for

MALTA, N.Y., May 04, 2026 (GLOBE NEWSWIRE) -- GlobalFoundries (Nasdaq: GFS) (GF) today announced the introduction of its SCALE™ optical module solution for co-packaged optics (CPO).

Mar 07, 2026

Over 20 Million 400G & 800G Datacom Optical Module Shipments

BOSTON (January 7, 2025) – Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm

Jun 30, 2026

800GbE optics shipments to grow 60% in 2025 – report

The datacom optical component market will grow 60%+ to reach over US\$16 billion in revenue during 2025, based primarily on continued growth in

Sep 10, 2025

Optical Module Market Analysis and Forecast in 2026

AI computing power has driven explosive growth in the optical module market, with 800G and 1.6T technologies leading the industry transformation.

Nov 05, 2025

LPO MSA Announces Release of Specification for Linear Pluggable Optical ...

The specification defines the necessary optical and electrical requirements for a robust ecosystem of LPO-compatible switch, NIC and module products.

Aug 08, 2025

OFC 2026 Heralds Optical Shift for AI Factories

The vendor also has added 800-Gb/s capacity to its Cisco NCS 1014 transponder and is showing its new coherent pluggable optical modules based on Acacia technology for access and

May 24, 2026

LightCounting :: Scale-up networks in AI Clusters is a

A surge in AI development created a new wave in demand for optical connectivity in 2023-2025 and it will sustain the market's growth through 2030. The Figure

Feb 23, 2026

Co-Packaged Optics (CPO)Co-Packaged Optics (CPO)

Traditional pluggable optical modules are increasingly constrained by signal loss, power consumption, and latency because they require long electrical traces

Dec 29, 2025

AI drives ramp-up in datacom optics – report

Total shipments of leading-edge datacom optical modules are projected to tally over US\$9 billion for 2024, according to the latest Optical Components Report from research firm Cignal AI.

Jun 03, 2026

OFC 2025: POET demos light source, 1.6T optical engines, for AI apps

It is a crucial component to getting to 3.2T in pluggable optical modules and achieving the higher speeds, bandwidth and low-latency needed for chip-to-chip data communication links.” The

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