

Optical module orders for the second half of the year



Overview

According to a market research report, global optical module sales are projected to grow by 10% month-on-month. This growth is primarily driven by increasing demand for 800G Ethernet modules. Another contributing factor is the first commercial shipment of 1. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider. Samsung Electronics said it is currently in talks with several major global customers on commercialization and plans to begin mass production. The 26th China International Optoelectronic Expo (CIOE) has concluded, and this year's edition saw record-breaking attendance and exhibitor numbers—living up to predictions of being the most vibrant yet. A week prior to the expo, the A-share optocommunication sector surged collectively, with share. Coherent's Q2 FY 2026 results highlight accelerating AI datacenter optics demand, rising mix of 800G and 1.6T transceivers, and improving non-GAAP profitability. Management emphasized exceptional bookings visibility, ongoing 6-inch indium phosphide (InP) capacity ramp, and growing traction in. Recently, industry insiders reported that Nvidia will increase its order volume for 800G optical modules in 2026, with an expected increase of 35%. During the National Day holiday, the mutual investment among American tech giants, with a spiraling ascent on both feet, has also brought tangible. BOSTON (May 7, 2025) – After explosive growth in 2024, 800G Datacom optics for AI and general computing applications will be the fastest growing segment of the market in 2025, according to the latest Optical Components Report from research firm Cignal AI.

Article Content

Feast for Optical Module Enterprises: 3.2T Optical Engine Layout ...

Investors vied to get a close look at physical products like 800G optical modules, OCS (Optical Circuit Switching), FAU (Fiber Array Unit), and DSP (Digital Signal Processor) chips; some

MXL Q1 2026 Earnings Report on 4/23/2026

MaxLinear announced their Q1 2026 earnings on 4/23/2026. View MXL's earnings results, press release, and conference call transcript at MarketBeat.

LightCounting :: Component shortages limit growth in

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

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Coherent Corp. (COHR) Q1 2026 Earnings Call Transcript

Coherent Corp. (COHR) Q1 2026 Earnings Call November 5, 2025 5:00 PM EST
Company Participants Paul Silverstein - Vice President of Investor Relations James...

800G optical modules drive market recovery in Q2 2025

According to a market research report, global optical module sales are projected to grow by 10% month-on-month. This growth is primarily driven by increasing demand for 800G Ethernet modules. Another

The Financial Express | First Financial Daily of Bangladesh

The Financial Express | First Financial Daily of Bangladesh ... ## Build Setup

Renowned analyst predicts that the iPhone 18 will have

Sunny Optical's supply of lenses to Apple is expected to gradually increase from the second half of 2024, which will increase the company's market

Samsung Foundry Reportedly Wins Optical Module Order,

Samsung Electronics said it is currently in talks with several major global customers on commercialization and plans to begin mass production with a leading optical communication module

POET Technologies Receives \$5M Order for 800G

POET (NASDAQ: POET) received a production order valued at over \$5 million for POET Infinity™ optical engines targeted at AI data servers.

Global optical module sales reach \$2.293 billion in Q1 2022

Global optical module sales reached \$2.287 billion in 2021Q4, exceeding \$2 billion in a single quarter for the first time. This figure was \$2.293 billion in 2022Q1, a year-on-year increase of

Nvidia Orders Surge: InnoLight and Eoptolink Dominate 60% of 800G

InnoLight previously stated during investor relations activities that in the second quarter of this year, 1.6T optical modules had begun phased shipments, with continuous mass production or

800GbE Optics Shipments to Grow 60% in 2025

“Operators will also begin a large-scale transition to 1.6T optics and coherent 800ZR modules in the second half of this year.” The datacom optical component market will grow 60%+ to

LITE Q3 2026 Earnings Report on 5/5/2026

Lumentum announced their Q3 2026 earnings on 5/5/2026. View LITE's earnings results, press release, and conference call transcript at MarketBeat.

SMTC Q4 2026 Earnings Report on 3/16/2026

Semtech announced their Q4 2026 earnings on 3/16/2026. View SMTC's earnings results, press release, and conference call transcript at MarketBeat.

Coherent Q2 FY 2026: AI Datacenter Demand Lifts Revenue

Futurum Research analyzes Coherent's Q2 FY 2026 results, highlighting AI datacenter optics demand, 6-inch indium phosphide capacity expansion, and growing OCS/CPO traction

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 400G and 800G shipments. Innolight,

Global optical module sales reach \$4.25 billion in H1 2022

According to the latest statistics from LightCounting, the global optical module market size reached USD 2.016/2.235 billion in Q1 and Q2 2022, respectively the first half of 2022, the

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POET Technologies Sees \$5M Production Order as Key S-Curve

- AI infrastructure faces bandwidth bottlenecks as east-west GPU communication demands 800G optical interconnects to sustain training workloads. - POET Technologies POET

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 in data center optics and AI infrastructure investment.

Coherent (COHR): In this round of AI optical interconnects, which ...

This is a leading indicator of advanced-node capacity expansion, but most people have their eyes glued to COHR's optical modules and seldom connect this line back to industrial lasers.

Aehr Receives Record \$41 Million Production Order from Lead

"This \$41 million follow-on order from our lead hyperscale package-level burn-in customer brings our bookings in the second half of our fiscal year to more than \$92 million to date with six

Record Earnings, Collective Decline After Hours—What Exactly

Second, 6-inch InP wafers yield over 4x the chips per wafer compared to 3-inch at under half the cost—this is engineering-level improvement, not financial adjustment, and once implemented

Optical Module Package Market 2025

The optical module market experiences rapid technology transitions that can make products obsolete within 3-4 years. This short lifecycle creates inventory management challenges and requires

COHR Q1 2026 Earnings Report on 11/5/2025

Coherent announced their Q1 2026 earnings on 11/5/2025. View COHR's earnings results, press release, and conference call transcript at

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

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