

New Orders for Optical Modules



Overview

An AI infrastructure revolution ignited by 1.6T optical modules. In the late autumn of 2025, a market rumor exploded like a thunderclap: Google had placed an additional order for 1.6T optical modules. AI orders drive the southward shift of the optical module industry. The "Yizhongtian" group represented by Zhongji Innolight, New Photonics, and Tianfu. ATW Technology, a high-technology company specializing in intelligent inspection equipment for semiconductor and optoelectronic applications, today announced that it has received a bulk purchase order for dozens of optical module AOI systems from a major domestic optical communications customer. Orders cover HDI-ML and mSAP production equipment, with major wins in China, Taiwan, South Korea and incremental European business. As a technology giant with a total market value of over US\$4 trillion, Nvidia's influence has far exceeded the scope of a technology company. This surge in new business is directly tied to clients ramping up investments in advanced PCB and substrate manufacturing for artificial.



Article Content

The Rise of Co-Packaged Optics (CPO) and Silicon Photonics in

As generative AI models scale, traditional pluggable optical transceivers face a power-performance wall. Co-packaged Optics (CPO) and Silicon Photonics address this by integrating

QSFP-DD Optical Module Overview: What is the differ?

This article will introduce the next generation optical module in detail, QSFP-DD, also known as quad small factor pluggable, and this article will also

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

Poet Technologies Inc. (via Public) / POET Technologies Reports First ...

POET Technologies Reports First Quarter 2026 Financial Results TORONTO, May 14, 2026 (GLOBE NEWSWIRE) -- POET Technologies Inc. (" POET " or the " Company ") (NASDAQ:

SCHMID Group Secures €26M in Orders Since Mid-May for AI,

SCHMID Group secured over €26 million in order intake since mid-May 2026, lifting H1 total to €43 million, driven by AI infrastructure and optical module demand. Orders cover HDI-ML and

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

According to sources, the additional 800G optical module orders from Nvidia are primarily captured by InnoLight and Eoptolink, accounting for 60%, with the remaining 40% divided among

Lumentum's AI Optics Backlog Reshapes Growth Outlook And Risk

NasdaqGS:LITE Earnings & Revenue Growth as at Feb 2026 Lumentum's record optical circuit switch backlog of more than US\$400m, largely tied to shipments expected in the second half

SCHMID Group Secures Over EUR 26 Million in New

SCHMID Group announces more than EUR 26 million in new order intake since mid-May, driven by customer investments in advanced PCB and substrate manufacturing for AI and optical

Optical Communication Industry Trends 2026: AI, 800G/1.6T Optical ...

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1.6T optical modules, silicon photonics, and next-generation data center connectivity solutions.

Optical module orders in 2026

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1.6T optical modules, silicon photonics, and next-generation data center connectivity solutions.

Optical Module Market Analysis And Forecast In 2026--ETU-LINK

New Eoptolink's 800G LPO module reduces power consumption by 50% and has already secured orders from leading customers such as Meta and Amazon. It is projected that LPO module

POET Technologies and Lumilens Advance Wafer-Level Photonic

Joint development and sale of high-speed optical modules based on the Electrical-Optical Interposer (EOI) — a new paradigm for scale in the optical layer of AI compute SAN JOSE,

Global AI Optical Transceiver Market to Reach US\$26 Billion in 2026 ...

TrendForce's latest research indicates that the global market for AI-focused optical transceivers has entered a phase of rapid growth, with market size projected to expand from

Optical Modules" Overseas Expansion: Southeast Asia as a Key

AI orders drive the southward shift of the optical module industry. Optical modules are becoming one of the hottest businesses in AI infrastructure. This growth is directly reflected in the

Nvidia places additional orders for optical modules: Top 10 core ...

In this issue, we have sorted out the hot events of NVIDIA's additional orders, and based on business relevance and the latest financial data, we have selected the top ten core suppliers that

AI Data Center Optical Transceiver Module Market 2025-2030

The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential expansion of AI computing clusters and the accelerated migration from traditional copper

Optical Transceiver Market Size, Growth Drivers

The Optical Transceiver Market worth USD 15.42 billion in 2026 is growing at a CAGR of 13.67% to reach USD 29.26 billion by 2031. Coherent

Google's High-Speed Interconnect Architecture to Push 800G+ Optical ...

From a supply-chain perspective, TrendForce expects Innolight, leveraging its close collaboration with Google on silicon photonics and 1.6T platforms, together with second-tier supplier

Coherent Demonstrates Technologies for Next-Generation Pluggable ...

Coherent will showcase a comprehensive portfolio of next-generation pluggable optical technologies at OFC 2026, spanning 1.6T, 3.2T, and emerging architectures for 12.8T and beyond.

The Most Comprehensive Guide Of Optical Modules

Explore the ultimate guide to optical modules. Learn types, functions, performance metrics & how to choose the right module for your fiber network.

POET Stock Shot Up Over 6% Today: What's In The New \$5M Order

POET Technologies Inc. (POET) announced on Wednesday that it has secured a production order valued at more than \$5 million for its advanced optical engines. The purchase order

AIXTRON Received Multiple Orders from

On May 19, MOCVD equipment maker AIXTRON announced that it had secured multiple orders from optical communications company Lumentum

Google places additional order for 1.6T optical modules ...

In the late autumn of 2025, a market rumor exploded like a thunderclap: Google had placed an additional order for 1.6T optical modules with InnoLight Technology, locking in the

Zhongji Innolight Q1 profit surges 262% on strong AI-driven demand

On May 15, 2026, management for optical module manufacturer Zhongji Innolight confirmed in an investor Q& A that orders and shipments for its high-end 800G/1.6T optical modules are continuously

ATW Announces Bulk Repeat Order for Optical Module AOI ...

The order covers our BM316A (WB) and BM316B (DA) optical module AOI systems, together forming a comprehensive inline inspection solution covering key stages of the optical

Lumentum

Lumentum is a global leader in optical and photonic technologies that power the networks and infrastructure behind AI, cloud computing, and next-generation communications. Built on

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