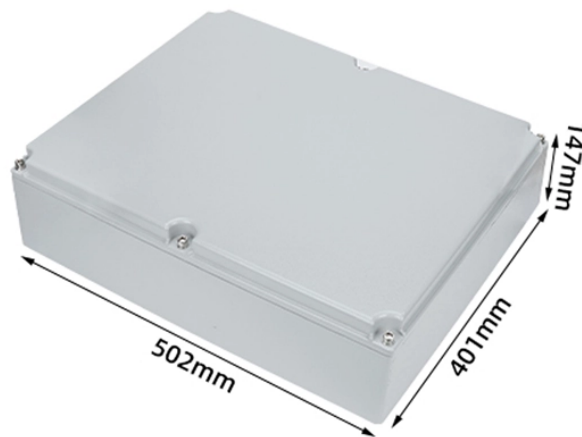


CPO Optical Module Investment Portfolio



Overview

Co-packaged Optical (CPO) Modules by Application (Data Center, Cloud Computing, 5G Communication, Other), by Types (Vertical Co-packaging Module, Planar Co-packaging Module, Hybrid Packaging Module), by North America (United States, Canada, Mexico), by South America. Co-packaged Optical (CPO) Modules by Application (Data Center, Cloud Computing, 5G Communication, Other), by Types (Vertical Co-packaging Module, Planar Co-packaging Module, Hybrid Packaging Module), by North America (United States, Canada, Mexico), by South America. Over the coming years, CPO is poised to see a dramatic uptick in demand, as data center operators push to expand the limits of AI. CPO provides key benefits over the two networking systems that dominate today: copper and optical transceivers. This includes up to 5x power efficiency versus. Coherent Corp. used its OFC 2026 investor presentation to raise its co-packaged optics (CPO) serviceable addressable market (SAM) to \$15 billion, double its optical circuit switch (OCS) SAM to \$4 billion, and introduce a \$2 billion thermal management SAM, bringing its combined growth segment. MALTA, N., May 05, 2026 (GLOBE NEWSWIRE) -- GLOBALFOUNDRIES Inc. (GF) (Nasdaq: GFS) today announced preliminary

financial results for the first quarter ended March 31, 2026. Key First Quarter Financial Highlights “GF delivered strong results in the first quarter, with all of our Non-IFRS. Data Insights Market is one of the leading providers of syndicated and customized research reports, consulting services, and analytical information on markets and companies across the world. 9B by 2029, fueled largely by AI data centers., May 5, 2026 — GlobalFoundries (GF) has introduced an optical module solution for co-packaged optics (CPO).

CPO Optical Module Investment Portfolio



In May 2026, GF launched its optical module solution for co-packaged optics (CPO) known as SCALE, or Silicon Photonics Co-packaged Advanced Light Engine. GF's SCALE CPO solution is ...



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 ...



To address the energy demand from AI, co-packaged optics (CPO) brings optical engines directly adjacent to switch ASICs, accelerators, and chiplets. By collapsing electrical distances from ...



Last month, Nvidia made \$2 billion equity investments in two separate optical component suppliers: Coherent and Lumentum. Nvidia is securing its supply chain as it ramps its co-packaged ...



Nvidia's investment not only benefits existing optical module leaders but also points the way for future technological evolution. With the deployment of Rubin Ultra racks and the volume ramp-up of CPO ...



CEO Jim Anderson disclosed that a \$2 billion investment from NVIDIA would fund a substantial portion of this expansion, with the supply agreement covering multiple CPO-related ...



The Co-packaged Optical (CPO) Modules market is booming, projected to reach \$7.38 Billion by 2033 with a 40% CAGR. Driven by AI, 5G, and cloud computing, this report analyzes ...



Nvidia Corp. today announced plans to invest in Lumentum Holdings Inc. and Coherent Corp., two publicly traded suppliers of optical networking equipment. Each company is set to receive ...



The SCALE CPO solution uses both coarse and dense wavelength-division multiplexing (CWDM and DWDM) for bi-directional data transmission over each optical fiber, delivering significant ...



Co-packaged transceivers integrate multiple optical and electrical components in a single module, significantly reducing power consumption and physical footprint compared to traditional ...

Contact Us

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