

News on Data Communication Optical Modules



Overview

December 2025 Update: Datacom optical market growing 60%+ to exceed \$16B in 2025. 6T transceivers entering production for NVIDIA and hyperscale applications. NVIDIA announcing silicon photonics co-packaged optics switches. 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. Unit shipments of 400G and 800G modules have grown nearly fourfold over the past 12 months and are expected to. 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 US\$16.5 billion in 2025 to \$26 billion in 2026, representing over 57% YoY growth. In early 2024, primary North American. MALTA, N. GF's SCALE solution, or Silicon photonics Co-packaged Advanced Light Engine solution, is the industry's first Optical. Although co-packaged optics (CPO) and on-board optics (OBO) have been proposed to increase bandwidth density, these approaches introduce significant challenges in field serviceability, scalability, and manufacturability, making them difficult to deploy widely in hyperscale environments. As hyperscale AI data centers

continue to scale.

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In addition to providing high-speed (800G, 1.6T and above) optical engines and optical modules for AI clusters and hyperscale data centers, POET has designed and produced novel light ...



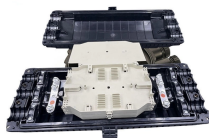
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OFC 2026 confirmed that AI infrastructure is now the main demand driver for optical networking, with most major announcements focused on bandwidth scaling, power efficiency, and ...



Learn how 400G, 800G, 1.6T, and 3.2T optical transceivers—powered by silicon photonics and CPO—are updating AI, cloud, and hyperscale networks.



To address these challenges, Arista Networks, together with an ecosystem of more than 45 industry partners, introduces eXtra-dense Pluggable Optics (XPO) . XPO represents a new class of 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.



In summary, the surging demand for 800G and 1.6T optical modules—driven by AI computing clusters, hyperscale data centers, and next-generation cloud architectures—has positioned high-speed optical ...



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 ...



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) -- ...



The datacom optical component market will grow over 60% to exceed \$16 billion in revenue during 2025, driven primarily by continued growth in 400G and 800G shipments.¹ Shipments ...

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