

Optical module orders are overflowing



Overview

Lumentum's order book is full through 2028, reflecting surging demand for 800G and 1.6T optical modules, amplified by Nvidia's strategic investment. This sector mirrors the memory market's "prosperity spillover" logic due to demand surges and supply constraints in high-end. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider. It is the core technological direction for ultra-high-speed. Optical communications are emerging as the next AI computing infrastructure frontier, driven by data interconnection bottlenecks. This sector mirrors. >> China's AI High-Speed Optical Module Orders Booked Through Q4; Key Optics Valley Companies Running at Full Capacity Even During Chinese New Year - According to sources from China's Optics Valley (Wuhan East Lake High-Tech Development Zone), numerous companies and research institutions kept. The growth in demand for computing power driven by AI continues unabated. Recently, industry insiders reported that Nvidia will increase its order volume for 800G optical modules in 2026, with an expected increase of 35%.

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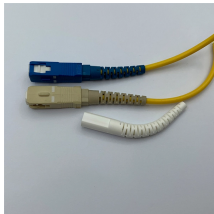
Demand is outstripping supply - the order backlog now stretches 3 quarters deep. The AI infrastructure race is only accelerating. 2□ Aggressive Production Ramp: Houston & Taiwan facilities ...



Cambridge Technology stated that customer demand for 1.6T optical modules is urgent, as the supporting 200G switches have already reached technological maturity and are ready for use.



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 ...



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Its AI high-speed optical module production lines, in particular, are running 24/7 at full utilization.



Leading optical module manufacturers are fully occupied with traditional 800G/1.6T orders and have no spare capacity to expand CPO production. This provides a window for second - ...



The global demand for high-speed optical modules is accelerating, and 800G modules are at the forefront of this shift. This article explores the competitive landscape, key market drivers, ...



Goldman Sachs points out that AI server reference designs show a significant increase in the attach ratio of GPUs/ASICs to optical modules, leading to a substantial upward revision in ...



It is foreseeable that with the follow-up orders from Nvidia and AMD's AI servers gradually coming to fruition, the performance of optical module manufacturers will continue to be ...



TrendForce forecasts that 800G+ optical transceiver shipments will exceed 60% by 2026, driven by demand for nearly 4 million TPUs. The Apollo OCS system enhances energy efficiency, ...

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