2026 CPO optical module orders



Overview

Welcome to the NextGenInfra OFC 2026 Showcase. With the recent AI boom, optical is hot again. This year''s OFC saw close to 18,000 attendees from all over the world.

Article Content

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

2026 OFC Showcase

Welcome to the NextGenInfra OFC 2026 Showcase. With the recent AI boom, optical is hot again. This year''s OFC saw close to 18,000 attendees from all over the world. NextGenInfra was on site at the

Co-Packaged Optics (CPO)Co-Packaged Optics (CPO)

IDTechEx''s "Co-Packaged Optics (CPO) 2026-2036" explores technical innovations and packaging trends, analyzing the value chain. It evaluates industry players

Coherent Demonstrates Multiple Technologies for Co

Coherent announced it will demonstrate multiple co-packaged optics (CPO) technologies at OFC 2026 in Los Angeles.

GlobalFoundries accelerates adoption of co-packaged optics for

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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) --

Co-Packaged Optics (CPO) Market Analysis: 1.6T Transition & AI

Strategic analysis of the Co-Packaged Optics (CPO) market, tracking the 2026 inflection point for 1.6T modules. Explores value migration, supply chain bottlenecks, and thermal

Co-Packaged Optics (CPO) Market Trends 2026: AI Data Center

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

CPO Optical Transmission inevitable is changing data transmission ...

Due to the supply shortage in AI data center construction, there''s also a shortage of CPO optical transmission modules. With few suppliers to begin with, market demand is booming and is

Lumentum Orders Booked Through 2028: Can Optical

TradingKey - April 10, 2026. Optical communications leader Lumentum (LITE) ignited the market with a major announcement: Driven by accelerating demand

GlobalFoundries accelerates adoption of co-packaged optics with

SCALE CPO solution is said to be the industry''s first OCI MSA capable platform and built with GF''s proven silicon photonics technology. GlobalFoundries has introduced its SCALE™ optical

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.

GlobalFoundries launches SCALE optics for AI data centers | GFS

GlobalFoundries (Nasdaq: GFS) on May 4, 2026 introduced the SCALE optical module solution for co-packaged optics (CPO), billed as the industry''s first OCI MSA-capable platform.

Nvidia Invests $4 Billion in CPO: The Next Stop for AI Factory ...

Nvidia remains a pioneer in Scale-out CPO. Optical engine shipments are projected to reach 600,000 to 1 million units in 2026, with switch shipments around 23,000 units, where Spectrum is a key product;

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AI infrastructure accelerates the shift to scalable optical systems ...

Emerging themes and trends OFC 2026 showed that AI scale-up is reshaping optical roadmaps. Optical interconnect is increasingly central not just to networking, but to AI system

CPO hype vs. hyperscaler reality: NPO is the near-term winner GS''

Convequity (@convequity). 88 likes 7 replies. CPO hype vs. hyperscaler reality: NPO is the near-term winner GS'' $91B CPO TAM forecast for 2026-28 has investors fired up as part of the AI

Optical Module Market Analysis and Forecast in 2026

AI computing power has driven explosive growth in the optical module market,with 800G and 1.6T technologies leading the industry transformation. Chinese companies occupy a dominant

NVIDIA Rubin GPU: 336B Transistors, T Orders

NVIDIA GTC 2026 unveiled Rubin with 336B transistors, 288GB HBM4, and 50 PFLOPS. Plus the 7B Nebius-Meta deal. Full architecture

Co Packaged Optics (CPO) – Scaling with Light for the

Co-Packaged Optics (CPO) has long promised to transform datacenter connectivity, but it has taken a long time for the technology to come to market,

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African project coordination: Century City, Cape Town, Western Cape, South Africa

This document is for preliminary research. Verify specifications against current standards, product documentation and project requirements.

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