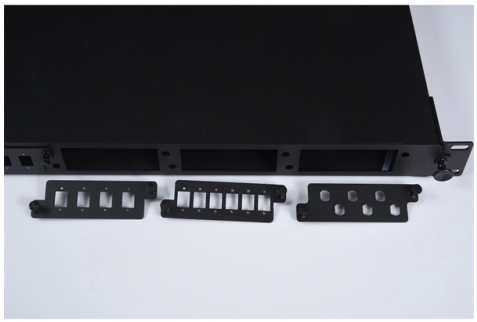
Latest Major News for Optical Modules



Overview

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Key Takeaways

The optical module industry is experiencing rapid growth driven by AI data center demand, CPO technology adoption, and record-high forecasts for 800G and 1. 6T transceiver modules.

Market Growth and Forecasts

Goldman Sachs has significantly raised its forecast for 800G optical transceiver module sales, projecting 19. 9 million units in 2025 and 33. 5 million units in 2026, representing increases of 10% and 58%, respectively.

The total market value is expected to reach $12. 73 billion in 2025 and $19. 37 billion in 2026, with strong year-on-year growth.

Additionally, 1. 6T modules are projected to reach 7 million units in 2026, reflecting the growing bandwidth requirements of AI chips and network upgrades. The increasing GPU/ASIC-to-optical transceiver ratio (e.g., 1: 3 for H100, 1: 8 for specific ASIC clusters) is a key driver of this growth, ensuring continued demand even if AI chip sales slow down (Goldman Sachs).

Technological AdvancementsCo-Packaged Optics (CPO) is gaining traction, particularly in AI data centers. NVIDIA's Spectrum-X Ethernet silicon photonics technology has entered full-scale mass production, integrating optical engines directly with ASIC chips. This approach reduces signal path lengths, lowers insertion loss by about five times, and improves energy efficiency and deployment speed.

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While CP

O targets high-speed cross-rack interconnections, traditional pluggable optical modules remain essential for short-distance and long-distance applications, indicating a coexistence rather than replacement scenario (NVIDIA).

Corporate Developments

Hamamatsu Photonics rebranded its former subsidiary NKT Photonics as the Lasers & Fibers Business Unit, consolidating its photonics operations (Photonics Spectra). Quantum Computing Inc. acquired NHanced Semiconductors for $73. 1 million, expanding its integrated photonics capabilities (Photonics Spectra).

Kopin Corporation announced a new Optics and Photonics Design Center in Dallas, strengthening U. S.-based optical system development (Photonics Spectra). Specim appointed a new CEO to drive global growth in hyperspectral imaging, a key optical sensing segment (GoPhotonics).

Investment and Industry Implications

The surge in 800G demand has tightened production capacity for first-tier manufacturers, creating opportunities for second-tier companies like HGTECH to scale production and capture market share. Goldman Sachs also highlights valuation convergence among optical module manufacturers, suggesting potential investment opportunities as market dynamics stabilize (Goldman Sachs).

Summary

The optical module industry is booming, fueled by AI-driven bandwidth needs, CPO adoption, and strong sales forecasts for high-speed transceivers.

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O is reshaping high-performance data center interconnects, traditional optical modules remain critical across diverse applications. Corporate acquisitions, new design centers, and leadership changes indicate ongoing consolidation and innovation, making this a pivotal period for both technology and investment in the optical module sector.

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Traction of embedded optical modules highlighted in Counterpoint report

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Embedded or integrated semiconductor optical modules are starting to gain traction, with the shipments of On-Board Optics (OBO), Near-Packaged Optics (NPO) and Co-Packaged Optics

LightCounting Archives

LightCounting''s latest report, Vendors and Markets for Optics in China, finds that while Chinese manufacturers of optical components and modules reached a milestone in 2021, when revenues of

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