

Investment in the Optical Module Field



Overview

We'll look at advances in EML laser output, indium phosphide capacity expansion, new high-speed transceivers, and MEMS-based optical circuit switching. There's also some big strategic capex moves, like a Qorvo manufacturing acquisition and those NVIDIA-related funding decisions. (Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry last quarter amid the explosive growth of artificial intelligence models. Public funds' holdings in the communication sector topped 13.1 percent as of March 31. Corning is opening three new advanced manufacturing plants in the U. dedicated entirely to optical technologies for Nvidia. Nvidia's new Spectrum-X Photonics network switches, scheduled to ship from the second half of 2026, include multiple configurations, for example 128 ports of 800Gb/s or 512. The strategic investment in optical component suppliers Lumentum and Coherent heralds a new era of optical interconnects inside AI data centers. 7% during the forecast period MARKET INSIGHTS The global Optical Module Package Market was valued at 8942 million in 2024 and is projected to reach US\$ 20220 million. Global Optical Modules Market Size By Product Type (Transceivers, Transponders), By Technology Type (Single-Mode Fiber (SMF), Multi-Mode Fiber (MMF)), By Application (Telecommunications, Data Centers), By Data Rate (10 Gbps, 25 Gbps), By Form Factor (SFP (Small Form-Factor Pluggable), SFP+.

Article Content

Top Silicon Photonics Stocks 2026: Breaking the Copper Wall

Lumentum is investing heavily in expanding its San Jose InP fab, and analysts expect double-digit price increases on 200G EMLs in 2026 due to the lack of viable second sources. ...

Nvidia backs Lumentum and Coherent with \$4BN cash investment

Nvidia, the chip developer whose products are critical to the AI revolution, has invested \$4 billion as part of two new strategic supply deals signed with photonics companies Coherent and ...

Optical Modules Market Size, Growth Trends & Forecast

Access detailed insights on the Optical Modules Market, forecasted to rise from USD 3.5 billion in 2024 to USD 8.2 billion by 2033, at a CAGR of 10.3%. The report examines critical market trends, key ...

Optical Module Package Market 2025

North America remains a dominant force in the Optical Module Package market, primarily driven by robust investments in 5G infrastructure and data center expansions across the U.S. and Canada.

Nvidia, Corning partner on three new optical factories NC, Texas

Nvidia to invest up to \$3.2 billion in Corning as part of massive optical fiber deal with 3 new factories focused on AI

Nvidia's \$4B Photonics Venture: What You Need to Know

Nvidia's \$4B investment in optical component suppliers Lumentum and Coherent heralds an era of optical interconnects inside AI data centers.

Chinese Funds Lift Investment in Optical Module Stocks Amid AI ...

(Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry last quarter amid the explosive growth of artificial intelligence models.

NVIDIA Corporation

NVIDIA to Invest \$2 Billion in Lumentum to Grow Capacity, Advance US-Based Manufacturing and Deepen R& D Collaboration in Data Center Optics SANTA CLARA, Calif. and SAN JOSE, Calif., ...

Lumentum Aims \$2B Quarter as AI Optics, 1.6T Transceivers Surge

The goal? Embed Lumentum's lasers right into those transceiver modules and help margins as AI workload grows. Technology leadership in optical transceivers CTO Wupen Yuen laid ...

Damnang's Optical Investment Map v1.0

Layer 6: Photonic Packaging, Optical Engine & Module The layer that packages and assembles PIC die into final form. This is the highest-revenue-volume layer in the chain, and at the ...

Contact Us

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