

New infrastructure projects drive orders for optical modules



Overview

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 system density. The strongest commercial momentum centered on 1.6T optics enabling new form factors XPO and CPX, while. The growth in demand for computing power driven by AI continues unabated. During the National Day holiday, the mutual investment among American tech. Leading systems integrator to receive shipments of POET Infinity™ optical engines for AI data servers SAN JOSE, CA (October 22, 2025) – POET Technologies Inc. Semiconductor suppliers positioned in optical. Major purchase orders for co-packaged optics lasers and optical circuit switches signal accelerating enterprise investment in AI infrastructure.



Article Content

1.6T Optical Modules and Scale-Up Networks: The Dual Engines

For data center architects, optical component vendors, and AI infrastructure planners, the convergence of 1.6T optical modules and scale-up networking marks a defining upgrade cycle rather than an ...

LPO vs CPO: Which Will Dominate the Data Center

In the rapidly evolving landscape of data center optical interconnects, the competition between LPO (Laser Phased-locked Oscillator)

Optical Communication Industry Trends 2026: AI, 800G/1.6T 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.

Optical Modules Evolution and Innovation From 400G

Explore the evolution of optical modules in speed and form factors from 400G to 1.6T, stressing key enhancement technologies, and paths to

LightCounting :: Scale-up networks in AI Clusters is a

Investments by Cloud companies in data centers and supporting networking infrastructure have created a new and very dynamic segment in the optical

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

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

Key Technology Trends Shaping Data Center and

Explore the latest trends in data center technology for 2025 with Semtech, focusing on AI-driven evolution, optical module advancements, and

AI Datacenter Optical Switching Orders Surge as Tech Giants Race to ...

Technology companies are placing significant purchase orders for optical circuit switch equipment and co-packaged optics lasers, indicating a major capital cycle in AI datacenter

McKinsey Direct Opportunities in networking optics ...

Opportunities in networking optics: Boosting supply for data centers Potential shortfalls in networking optics supply could hinder data center and AI expansion. How can players boost supply and seize

Unleashing the Amazing Power of 800G Optical

Within this transformative milieu, multi-mode modules claim a dominant stance, surpassing single-mode modules in quantity. Notably,

1 Metropolitan Optical Networks: A Survey on New Architectures and ...

Metropolitan optical networks are undergoing major transformations to continue being able to provide services that meet the requirements of the applications of the future. The arrival of the 5G will expand

Nvidia Orders Surge: InnoLight and Eoptolink Dominate

AI-driven data center demand propels optical module growth, with Nvidia's 800G orders dominating, pushing market value beyond \$12 billion by

A Guide to Fiber Optic Network Planning and Design

From vision to reality: Mastering fiber optic network planning and design with Intellias
While planning and designing fiber networks, operators face

IBM Brings the Speed of Light to the Generative AI Era

IBM has unveiled breakthrough research in optics technology that could dramatically improve how data centers train and run generative AI models.

Report: In 2029, 800G Optical Modules Will Occupy

A recent report released by McKinsey, an internationally renowned research organization, pointed out that the supply chain bottleneck of optical transceivers

Optical Modules Evolving for Tomorrow's Data Centers

New optical module concepts will be necessary, and optical module vendors must work closely with networking equipment manufacturers and data center operators to ensure the

Optical Interconnect Market Size | Industry Report, 2030

Optical Interconnect Market Summary The global optical interconnect market size was estimated at USD 16.06 billion in 2024 and is projected to reach USD 34.54

Optical Interconnect Orders Surge as AI Datacenters Race to Scale

Co-packaged optics laser orders are accelerating as AI infrastructure providers bet on optical circuit switching to eliminate GPU communication bottlenecks. The shift addresses bandwidth

Optical Fibre Infrastructure

Optical fiber infrastructure refers to a network of optical fibers, sheathed in protective cladding and laid inside conduits, that facilitates the transmission of data through light signals. It enables the creation

POET Technologies Receives \$5 Million Production Order for 800G

POET is a design and development company offering high-speed optical modules, optical engines and light source products to the artificial intelligence systems market and to hyperscale data

Optical Networking in 2024

Illuminating the way forward in 2024 Despite the industry's new and lingering macro challenges in 2023, advances in optical networking continued to

How a new AWS optical network solution delivers

As the only cloud provider with custom DWDM transponder technology at this scale, AWS delivers unmatched global performance and

Powering the Next Data Race: How 800G & 1.6T

In summary, the surging demand for 800G and 1.6T optical modules—driven by AI computing clusters, hyperscale data centers, and next

Co-packaged optics can supercharge generative AI computing

Scientists at IBM Research have announced a new set of advancements in chip assembly and packaging, called co-packaged

Future All-optical Network Architecture and Key Technologies

New Solutions Future All-optical Network Architecture and Key Technologies Evolving towards the 2030 optical communications network system and architecture is a key issue facing the optical

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800G Optical Modules Drive Market Recovery in 2025

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends in data center optics and AI

400G, 800G, and Terabit Pluggable Optics:

Equipment and electrical serdes can evolve through 3 generations (25 Gb/s, 50 Gb/s or 100 Gb/s) without changing the optical interface that interconnects your equipment.

Contact Us

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