Latest news on additional orders for optical modules



Overview

On October 10, NVIDIA officially announced that it plans to increase orders for 800G optical modules by 35% in 2026. As a technology giant with a total market value of over US$4 trillion, Nvidia's influence has far exceeded the scope of a technology company. During the National Day holiday, the mutual investment among American tech. 2026 will be the first year of commercialization for 1. Samsung Electronics said it. BEIJING, June 7 (Xinhua) -- With the global push for AI computing power unleashing an unprecedented wave of infrastructure buildout, China-made optical modules that shuttle data and the chips that process it have become critical links. Featuring the world's leading market shares and accelerating. The 26th China International Optoelectronic Expo (CIOE) has concluded, and this year's edition saw record-breaking attendance and exhibitor numbers—living up to predictions of being the most vibrant yet. A week prior to the expo, the A-share optocommunication sector surged collectively, with share.

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Article Content

Nvidia places additional orders for optical modules: Top 10 core ...

In this issue, we have sorted out the hot events of NVIDIA''s additional orders, and based on business relevance and the latest financial data, we have selected the top ten core suppliers that

Nvidia added 35% of its 800G optical module orders, while Zhongji ...

On October 10, Nvidia announced an additional 35% order for 800G optical modules in 2026. As core suppliers of NVIDIA, Zhongji Xuchuan and Xinyi Sheng have won a combined 60%

Nvidia Orders Surge: InnoLight and Eoptolink Dominate 60% of 800G

According to sources, the additional 800G optical module orders from Nvidia are primarily captured by InnoLight and Eoptolink, accounting for 60%, with the remaining 40% divided among

Optical module orders in 2026

According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider.

From optical modules to chips -

Export orders for optical modules have stretched into 2028. Behind these figures lies a deeper shift: China is no longer just participating in the AI supply chain, but offers a supply chain that

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Innolight and Eoptolink are estimated by industry sources to supply roughly 60% of NVIDIA''s 800G volume, controlling the critical plumbing of AI data center optical interconnects. Yet

Feast for Optical Module Enterprises: 3.2T Optical Engine Layout ...

Investors vied to get a close look at physical products like 800G optical modules, OCS (Optical Circuit Switching), FAU (Fiber Array Unit), and DSP (Digital Signal Processor) chips; some

SCHMID Group Secures €26M in Orders Since Mid-May for AI,

SCHMID Group secured over €26 million in order intake since mid-May 2026, lifting H1 total to €43 million, driven by AI infrastructure and optical module demand. Orders cover HDI-ML and

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Veeco Instruments Inc.

Veeco Books Multi-System Lumina and Spector Orders for Manufacturing Indium-Phosphide (InP) based Optical Components February 27, 2026

SCHMID Group Secures Over EUR 26 Million in New Orders

SCHMID Group announces more than EUR 26 million in new order intake since mid-May, driven by customer investments in advanced PCB and substrate manufacturing for AI and optical

AI drives ramp-up in datacom optics – report

Total shipments of leading-edge datacom optical modules are projected to tally over US$9 billion for 2024, according to the latest Optical

LightCounting :: Component shortages limit growth in transceiver sales

LightCounting releases a research note on the early financial results for Q4 2024 Demand for optical connectivity remains strong, but component shortages hobbled growth in sales of optical transceivers

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

The reasons behind the recent sharp price increase of optical modules

The price increase of optical modules reflects the urgency and rapid development of AI computing infrastructure construction . In the long run, technological innovation and large-scale

Hyperscaler demands drive up demand for optical modules in Q1 2024

Ripe 800 GbE demand Driven by AI applications, spending on datacom optical components rose over 90% as 400GbE and 800GbE optical modules for AI applications drove demand to record levels.

Demand for Datacom Optical Modules Reaches Record Levels in 1Q24

Hyperscale network operator demand drove purchases of 400GbE and 800GbE datacom and 400ZR telecom optical modules to record levels, according to the latest Optical Components

POET Technologies Receives $5 Million Production Order for 800G Optical ...

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The purchase order for optical engines was made by a leading systems integrator that will manufacture and sell optical transceiver modules. The production order represents further proof of the commercial

POET Technologies Receives $5 Million Production Order for 800G Optical ...

SAN JOSE, Calif., Oct. 22, 2025 (GLOBE NEWSWIRE) — POET Technologies Inc. (“POET” or “the Company”) (NASDAQ: POET), a leader in the design and implementation of highly-integrated optical

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