

Latest Investment in Optical Modules



Overview

NVIDIA has made its most aggressive move yet to secure the future of AI data center connectivity, committing a combined \$4 billion in strategic investments to silicon photonics leaders Lumentum Holdings and Coherent Corp. Announced in early March 2026, the twin deals — each worth. Nvidia's \$4 billion investment in optical component suppliers Lumentum and Coherent marks the AI hardware linchpin's commitment to optical networking at a time when AI scaling shifts from compute limitations to interconnect bandwidth constraints inside massive GPU clusters. Public funds' holdings in the communication sector topped 13. 1 percent as of March 31. 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+. Active Optical Module Market was valued at 5916 million in 2024 and is projected to reach US\$ 15140 million by 2032, at a CAGR of 14. 7% during the forecast period MARKET INSIGHTS The global Active Optical Module Market was valued at 5916 million in 2024 and is projected to reach US\$ 15140 million. Optical Module and DCI by Application (Communication Service Provider, Internet Content and Carrier Neutral Provider, Government/Research and Education, Other), by Types (Optical Transport Network, Data Center Core Network, WAN), by North America (United States, Canada, Mexico), by South America.



Article Content

How Industry Collaboration Fosters NVIDIA Co

NVIDIA is developing a co-packaged optics (CPO) platform that integrates optical and electrical components to improve data-center connectivity,

Global Leader in Materials, Networking, and Lasers

Communications Transform global communications networks with our comprehensive portfolio of coherent transceivers and modules, lasers, amplifiers,

NVIDIA Announces Strategic Partnership With

NVIDIA today announced multiyear strategic agreements with Lumentum Holdings Inc. (NASDAQ: LITE) to accelerate innovation in advanced

GF Overseas Electronics & Communications March 16 GTC

Jukan (@jukan05). 89 likes 5 replies. GF Overseas Electronics & Communications March 16 GTC 2026 Keynote + Silicon Valley Channel Check Call Summary * Key

Chinese Funds Lift Investment in Optical Module Stocks Amid AI

Zhongji Innolight, a core investment target among the optical module concept stocks, has become the top stock heavily held by public funds, while Eoptolink Technology and Dongshan

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

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

Nvidia is investing \$2 billion in each optical component supplier; these investments constitute joint R& D along with purchase commitment and future

Global AI Optical Transceiver Market to Reach US\$26 Billion in 2026 ...

TrendForce's latest research indicates that the global market for AI-focused optical transceivers has entered a phase of rapid growth, with market size projected to expand from

Global Optical Modules Market Outlook, In-Depth Analysis & Forecast

Our research indicates that demand for 400G/800G and even 1.6T optical modules for cloud data centers and AI training clusters has been accelerating over the past two years, with the

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 Market Size, Trends & Forecast 2025-2035 | Core

Discover Optical Modules Market trends, growth analysis, key segments, and regional insights. Forecast 2025-2035. Explore industry opportunities now!

AI data centers hit interconnect limits, boosting optical module demand

The surge in optical module stocks reflects a deeper shift in AI infrastructure: the bottleneck is no longer computing power alone, but how that power is connected.

Global optical module sales reach \$4.25 billion in H1 2022

According to the latest statistics from LightCounting, the global optical module market size reached USD 2.016/2.235 billion in Q1 and Q2 2022, respectively the first half of 2022, the

Optical Modules Market Size, Growth Trends & Forecast

Optical Modules Market Future Outlook & Investment Strategies Over the next five years, the Optical Modules Market is poised for sustained growth,

Top 5 Stocks For AI's Optical Revolution In 2026

Nvidia's \$6B March investments highlight the critical role of optical connectivity, benefiting Marvell, Lumentum, Coherent, Ciena, and Applied Optoelectronics. MRVL's NVLink integration and

Optical Modules Market Research Report 2034

Optical Modules Market Outlook 2025-2034 The global optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034,

Nvidia invests \$4B in co-packaged optics suppliers Lumentum ...

Nvidia Corp. today announced plans to invest in Lumentum Holdings Inc. and Coherent Corp., two publicly traded suppliers of optical networking equipment. Each company is set to receive

POET Technologies and LITEON Announce Joint Development of Optical ...

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

Google's High-Speed Interconnect Architecture to Push

Google's next-generation TPU, Ironwood, integrates a 3D Torus network topology with the Apollo optical circuit switch (OCS) all-optical network,

Active Optical Module Market 2025

This market research report provides a comprehensive analysis of the global Active Optical Module market, covering the forecast period 2024–2032. It offers detailed insights into market dynamics,

Comprehensive Overview of Optical Module and DCI Trends: 2026-2034

The optical module and DCI market is booming, projected to reach \$40 billion by 2033, driven by cloud computing, 5G, and data-intensive applications. Learn about market trends, key

Optical Module Industry Statistics 2026

Our in-depth market data report on Optical Module Industry. Explore verified statistics and the latest research.

Silicon photonics and co-packaged optics at the heart of

Yole Group unveils its latest photonic market and technology analyses, Silicon Photonics 2025 and Co-Packaged Optics for Data Centers 2025, which

Optics Transceiver Module Market 2025

The optics transceiver module market is experiencing robust growth driven by the exponential rise in data center investments globally. Hyperscale data center operators are deploying 400G and 800G

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Optical Module Market Size, Competitors & Forecast to

The Optical Module Market, valued at USD 30.01B in 2026, is projected to reach USD 66.94B by 2032, growing at a 14.1% CAGR.

NVIDIA's \$4B Photonics Play: Lumentum vs Coherent

NVIDIA is spending \$4 billion on silicon photonics through Lumentum and Coherent deals. Here's which partnership looks stronger heading into 2026.

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