

Are optical modules already in mass production



Overview

Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. 2T and CPO is making. Between 2024 and 2025, as hyperscale data center operators worldwide accelerate the deployment of next-generation AI clusters, 1. This milestone not only signifies a breakthrough. As the core technology for next-generation optical interconnection, CPO (Co-Packaged Optics) integrates the optical engine and switch chip through co-packaging, achieving reduced power consumption, increased density, and optimized costs. These components form the backbone of fronthaul, midhaul, and backhaul networks, converting electrical signals into optical signals for 1.6T have made significant progress.

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According to a TrendForce report, 800G and 1.6T optical transceiver modules have entered mass production, and higher bandwidth silicon photonics/CPO platforms are expected to be ...



1.6T optical communication modules are set for broad adoption in AI data centers in 2026, with optical transceiver vendors and key IC design houses preparing for shipments. ...



The mass commercialization of 1.6T optical modules did not happen overnight. In the third quarter of 2024, leading manufacturers began small-volume shipments, and by the first quarter of 2025, major ...



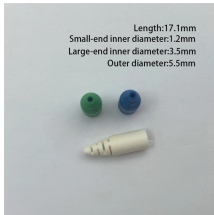
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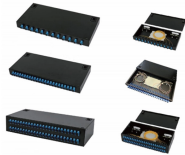
In terms of performance, the company's CPO business has achieved a breakthrough from "R & D" to "mass production". In 2025, the shipment volume of AI - related optical modules was ...



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China accounts for over 70% of global optical module manufacturing, with Shenzhen and Suzhou as major production hubs. The global production capacity of 400G optical modules is expected to reach ...



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1.6T optical modules will be put into commercial use in 2025 and are expected to enter mass production in 2026. The key technologies of 1.6T have ...



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After years of development and pilot deployment, 2026 will see large-scale production and shipment of 25G, 50G, and 100G optical modules for 5G fronthaul networks.



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800G modules will become mainstream in 2026, with 1.6T CPO modules entering mass production by 2027. 3.2T modules are already in R& D, targeting 2030 AI supercomputers.



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Driven by accelerating AI infrastructure demand, key optical module stocks like InnoLight and Eoptolink surged after a Huatai Securities report confirmed 1.6T modules have entered ...



The 1.6T OSFP 2VR4 optical module based on VCSEL technology plans to enter mass production in the fourth quarter of this year, and the 1.6T LRO optical modules have already secured ...



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