

Infrastructure investment drives orders for optical modules



Overview

Ciena reported record orders of \$7.8B for fiscal 2025, driven by hyperscaler demand for optical networking gear to support AI data centers. The buildout reflects a. Optical communications are emerging as the next AI computing infrastructure frontier, driven by data interconnection bottlenecks. 6T optical modules, amplified by Nvidia's strategic investment. During the National Day holiday, the mutual investment among American tech giants, with a spiraling ascent on both feet, has also brought tangible. According to the latest June 2025 Quarterly Market Update by renowned research firm LightCounting, the global optical transceiver market is set to rebound in Q2 2025 with a projected 10% quarter-over-quarter growth. The orders span Veeco's Spector Ion Beam Deposition (IBD), Lumina MOCVD, and WaferEtch wet. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider. Samsung Electronics said it is currently in talks with several major global customers on commercialization and plans to begin mass production.

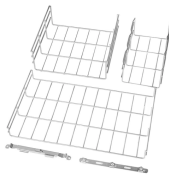
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Optical communications are emerging as the next AI computing infrastructure frontier, driven by data interconnection bottlenecks. Lumentum's order book is full through 2028, reflecting ...



The 5G infrastructure deployment contributed 22% to the optical module market growth in 2022, with an increasing demand for small-cell and macro-cell base station modules. China accounts for over 70% ...



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 ...



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 ...



Ciena logged \$7.8B in orders for 2025, up 64% year-over-year, as hyperscalers race to expand optical networking and cooling infrastructure for AI workloads. Micron broke ground on a New ...



This requires a lossless, high-bandwidth fabric where optical transceivers are the critical enablers. Data indicates that the deployment of 800G optical transceivers is expected to double in ...



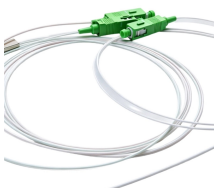
800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends in data center optics and AI infrastructure investment.



It is foreseeable that with the follow-up orders from Nvidia and AMD's AI servers gradually coming to fruition, the performance of optical module manufacturers will continue to be ...



BOSTON (January 7, 2025) - Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm ...



Veeco said its Spector IBD systems are being deployed to produce low-absorption laser facet coatings required for high-power InP laser operation. The company positioned the orders as ...



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