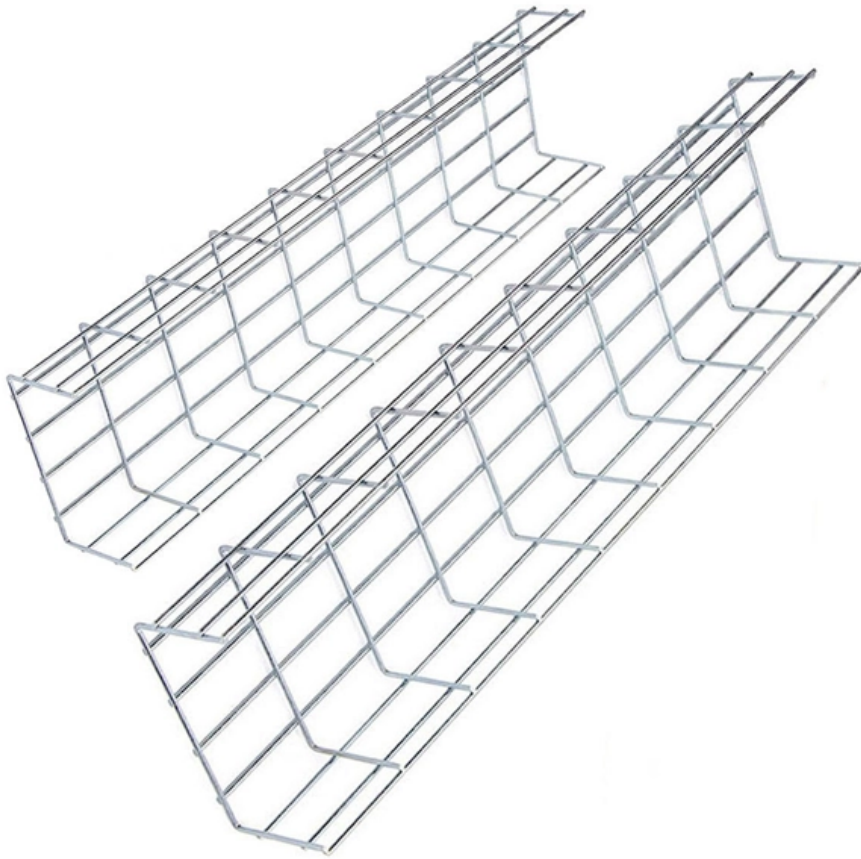




ZTP Thermal & Power

CPO Optical Module Investment





Overview

In early March 2026, Nvidia injected \$2 billion each into photonics manufacturers Lumentum and Coherent, securing future production capacity and technology rights for advanced optical components with a total investment of \$4 billion. GF's SCALE solution, or Silicon photonics Co-packaged Advanced Light Engine solution, is the industry's first Optical Compute Interconnect Multi-Source Agreement (OCI MSA) capable platform, exceeding the requirements for the OCI MSA's optical interconnect specification for modern AI scale-up. , May 5, 2026 — GlobalFoundries (GF) has introduced an optical module solution for co-packaged optics (CPO). Signal AI initiates its first quantitative CPO forecast; Over 30 million CPO ports expected to be shipped annually by 2030. Over the coming years, CPO is poised to see a dramatic uptick in demand, as data center operators push to expand the limits of AI.



CPO Optical Module Investment

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,

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?GF Overseas Electronics & Communications? ? March 16 GTC

The outlook for OCS demand is also positive, and in addition to CSP customers, another CSP is currently under discussion. COHR occupies an important position in the optical module and

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Co-Packaged Optics (CPO) Market Analysis: 1.6T Transition & AI

Strategic analysis of the Co-Packaged Optics (CPO) market, tracking the 2026 inflection point for 1.6T modules. Explores value migration, supply chain bottlenecks, and thermal

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2026 Silicon Photonics Explained: How CPO Breaks the

Silicon Photonics fundamentally rewrites the unit economics of the data center. In legacy architectures, data transmission consumes up to 30% of total system

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Inside Nvidia's \$4B Optical Strategy--and Why CPO Changes

Last month, Nvidia made \$2 billion equity investments in two separate optical component suppliers: Coherent and Lumentum. Nvidia is securing its supply chain as it ramps its co-packaged

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9 Public Photonics Stocks to Watch Before the AI Optical Wave

Discover 9 public photonics stocks tied to AI optical infrastructure, with direct exposure, ranking logic, risks, and investor use cases.

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GlobalFoundries accelerates adoption of co-packaged optics for

SCALE CPO solution is the industry's first OCI MSA capable platform and built with GF's proven silicon photonics technology MALTA, N.Y., May 04, 2026 (GLOBE NEWSWIRE) --

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Where co-packaged optics (CPO) technology stands in



Co-packaged optics (CPO) technology, a key enabler for next-generation data center architectures, promises unprecedented bandwidth density

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GlobalFoundries accelerates adoption of co-packaged optics for

GlobalFoundries accelerates adoption of co-packaged optics for advanced AI data centers with SCALE optical module solution PRESS RELEASE GlobeNewswire May. 4, 2026, 08:30

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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

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Top Silicon Photonics Stocks 2026: Breaking the

The industry knows it. The true endgame is called Co-Packaged Optics (CPO). Instead of plugging a separate optical module into the front of a switch,

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Coherent's \$23B Opportunity Lifted by NVIDIA's Optical Ambitions

Coherent's market on track to reach \$23 billion as NVIDIA's Spectrum-6 and Kyber drive structural demand for co-packaged optics components.

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Optical Module Stocks Surge Over 6% as 1.6T Era Begins



Key Takeaways: Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. The global optical module

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AI Data Center Optical Transceiver Module Market 2025-2030

AI Data Center Optical Transceiver Module Market 2025-2030 Posted on Apr-03-2026
The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential

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Top 5 Stocks For AI's Optical Revolution In 2026

Moving forward, the company expects its Vesta 200 6.4T CPX, a CPO-based optical solution targeted at hyperscalers, to be a strong growth vector for Ciena, in addition to the

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How open ecosystems will advance CPO adoption

Figure 5. Vesta 200 6.4T CPX pluggable CPO module The path to an open CPO ecosystem We are at the brink of a new age of optical connectivity as CPO emerges as the next

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Nvidia Invests \$4 Billion in CPO: The Next Stop for AI Factory

Nvidia injected \$2 billion each into photonics manufacturers Lumentum and Coherent, securing future production capacity and technology rights for advanced optical components with a total investment of

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Five Key Trends of Co-Packaged Optics (CPO) in 2026



These pressures are driving renewed momentum behind co-packaged optics (CPO). According to LightCounting, sales of lasers and photonic integrated

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NVIDIA Corporation

1.6 Terabits Per Second Per Port Switches to Deliver 3.5x Energy Savings and 10x Resilience in AI Factories Joint Inventions and Collaborations

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ELSFP Module Market to Exceed \$1.5 Billion by 2030

BOSTON (May 12, 2026) - Market research firm Signal AI recently published Co-Packaged Optics and ELSFP, an Active Insight report that debuts the company's new quantitative forecasts for

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Lpo Vs Cpo: Which Optical Module Packaging Will Dominate Data

LPO will be the pragmatic near-term dominant upgrade for most enterprises and colo providers; CPO will dominate in hyperscale and AI-intensive fabrics where absolute density and power efficiency

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These 6 stocks could be major winners of an upcoming optics

Meanwhile, the realm of fiber-optic networking is seeing a generational shift toward co-packaged optics, which refers to the optical-transceiver component being integrated directly onto the

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GlobalFoundries' Unveils Optical Module Solution Targeting CPO



The SCALE CPO solution uses both coarse and dense wavelength-division multiplexing (CWDM and DWDM) for bi-directional data transmission over each optical fiber, delivering significant

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