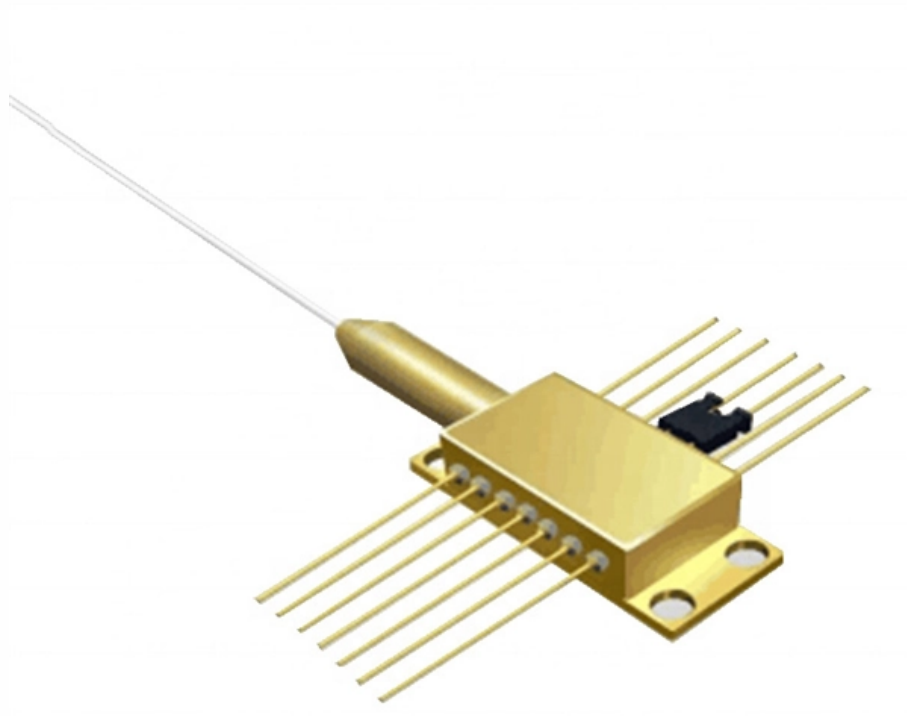




ZTP Thermal & Power

Latest News from Optical Module Companies





Overview

Conference on computer vision and physical AI to become part of SPIE Photonics West. US firm posts record quarterly revenues and launches new 'Hades' family of scalable high-energy systems. AI, an AI infrastructure company developing a suite of fabless semiconductor technologies for next-generation "AI factories," has announced the appointment of Bill Maffucci as Head of Development for the jointly developed Neural I/o™ chip p. Dutch photonics startup says its radical approach can triple light sensitivity in imaging applications. Universities of Osaka and Ritsumeikan say such emitters are promising sources for micro-LEDs. Yole Group unveils its latest photonic market and technology analyses, Silicon Photonics 2025 and Co-Packaged Optics for Data Centers 2025, which explore how AI-driven demand is reshaping connectivity, from transceivers to packaging innovation. According to ZDNet, the company said in its 1Q26 earnings release that its foundry has secured orders from a major optical communication module provider. Today, the company released two new AI software products at Sensors Converge, SensorGPT, for creating sensor data at scale, and SensorStage to accelerate. Lumentum joining Nasdaq-100 Index on 18 May Inclusion underscores critical role of optical products in AI-driven infrastructure Canadian Photonics Fabrication Centre being spun off as commercial pure-play III-V foundry CPFC fully transitioning to 4-inch wafers while it constructs new 8000ft².



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Latest Ranking of Top 10 Global Optical Module Suppliers

Recently, LightCounting, a well-known market research organization in the optical communication industry, released the latest issue of its market report and updated the TOP10 ranking of global

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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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Optical Component Startup Tracker

The number of venture-backed optical component startups has exploded - the Optical Component Start-Up Tracker identifies these companies

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How AI Revolutionizes the Optical Module Industry



AI-driven demand fuels global optical module industry growth, with Chinese firms leading innovation and market share expansion.

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ECOC 2025 presents latest developments in optical communications

The three-day ECOC Exhibition 2025, focused on optical communications, held last week in Copenhagen, Denmark, hosted 340 companies and more than 8300 global attendees, according

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Optoelectronics News

Recent research has pushed LED and OLED performance into new territory, from photothermal cancer therapy to nano-OLEDs capable of directional light control. Recent advances in photonic platforms,

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Next-Generation Connectivity: The Rise of 800G OSFP 2*FR4 Optical

Discover the details of Next-Generation Connectivity: The Rise of 800G OSFP 2*FR4 Optical Transceivers in AI Data Centers at LonRise Equipment Co. Ltd., a leading supplier in China for

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Wall Street AI chip love moves from Nvidia to Intel, AMD and Micron



Representatives from Intel and Apple declined to comment. Elsewhere in the new AI stack, some companies are directly benefiting from partnerships with Nvidia.

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Samsung Foundry Reportedly Wins Optical Module Order,

Please note that this article cites information from ZDNet, Maeil Business Newspaper, and The Elec. Samsung Foundry is reportedly stepping up its silicon photonics efforts. According to

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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

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News from the optics and photonics industry , optics

Dutch photonics startup says its radical approach can triple light sensitivity in imaging applications. Universities of Osaka and Ritsumeikan say such emitters are promising sources for

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Optoelectronics News

Google Moonshot Company Taara Debuts 'Radical' Silicon Photonics Platform Taara Photonics integrates 1,000+ light emitters in a finger-sized module, enabling electronic beam steering without

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Traction of embedded optical modules highlighted in

Embedded or integrated semiconductor optical modules are starting to gain traction,



with the shipments of On-Board Optics (OBO), Near-Packaged

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Optoelectronics Semiconductor News

Canadian Photonics Fabrication Centre being spun off as commercial pure-play III-V foundry. CPFC fully transitioning to 4-inch wafers while it constructs new 8000ft² building. AOI

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NVIDIA Announces Strategic Partnership With

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

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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

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Optical Transceiver Module : Products & Solutions , NEC

NEC has been developing and manufacturing optical transceivers for more than 30 years since the dawn of the optical communications era. Based on this extensive

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Photonics

Photonics Spectra is a global photonics resource and magazine with news, products, research, and applications covering optics, lasers, imaging, and sensing.

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Optics Transceiver Module Market 2025

Which key companies operate in Global Optics Transceiver Module Market? -> Key players include TDK, Hamamatsu Photonics, Cisco, HP, Juniper, Huawei, Broadcom, among others. What are the

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company news about Why does NVIDIA need Rubin?

Discover the details of Why does NVIDIA need Rubin? at LonRise Equipment Co. Ltd., a leading supplier in China for Optical Transceiver Module and SFP Optical Transceiver. Stay informed

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2025 Optical Module Market Share and Demand Report

The 2025 optical communication industry is driven by AI data centers (AIDCs) and 5G rollouts, with high-speed optical modules (400G/800G/1.6T)

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