

New Infrastructure for Optical Modules



Overview

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1. XPO represents a new class of optical pluggable module designed specifically for next-generation AI data center fabrics. 8Tbps of bandwidth using 64 electrical lanes and incorporates an integrated liquid-cooled cold plate capable of supporting 400W+ module power. 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 system density. 6T optics enabling new form factors XPO and CPX, while. MIGDAL HAEMEK, Israel - February 05, 2026 - Tower Semiconductor (NASDAQ/ TASE: TSEM), the leading foundry of high value analog semiconductor solutions, today announced it is scaling AI infrastructure deployments with high performance silicon photonics for 1. What was once a telecom-focused market is now evolving into a critical foundation for global computing systems. 6T optical modules advancing from proof-of-concept to early commercial adoption and broader deployment expected from 2026 as AI clusters grow in size, density, and. Joint development and sale of high-speed optical modules based on the Electrical-Optical Interposer (EOI) — a new paradigm for scale in the optical layer of AI compute SAN JOSE, CA, May 14, 2026 — POET Technologies Inc. ("POET" or the "Company") (NASDAQ: POET), a leader in highly integrated.



Article Content

Hot

Tower Semiconductor Teams with NVIDIA to Advance

Home » Press Releases Tower Semiconductor Teams with NVIDIA to Advance AI Infrastructure with 1.6T Data Center Optical Modules Tower's

Oct 20, 2025 Hot

Tower Semiconductor & Nvidia team up on 1.6T silicon

Tower Semiconductor and NVIDIA are teaming up to scale next-generation AI infrastructure with 1.6T optical modules for data centers. The

Aug 27, 2025 Hot

Tower Semiconductor Teams with NVIDIA to Advance AI Infrastructure

Tower's advanced Silicon Photonics platform enables optical and network infrastructure ecosystem with high-speed data transceivers for AI deployments
MIGDAL HAEMEK, Israel -

Feb 10, 2026 Hot

Plentisoft: AscentOptics Achieves Volume Delivery of 400G and 800G ...

Shenzhen, China--(Newsfile Corp. - January 26, 2026) - AscentOptics, a leading provider of optical transceiver solutions, today announced that its 400G and 800G AI optical modules have

Oct 18, 2025 Hot

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,

Mar 08, 2026 Hot

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.

Jul 11, 2025 Hot

Lumentum Unveils Next-Gen AI Data Center Optical

Optical tech leader debuts ELSFP modules for CPO architectures, 1.6T DR8 TRO OSFP transceiver, and ultrawideband nano-iTLA spanning 12.4

May 24, 2026 Hot

Tower Semiconductor and NVIDIA Advance 1.6T AI Optics

Tower Semiconductor teams with NVIDIA on 1.6T silicon photonics optical modules to boost AI data center speed and bandwidth.

Jul 13, 2025 Hot

Silicon photonics and co-packaged optics at the heart of

While linear-drive pluggable modules remain competitive, CPO is expected to offer unmatched customization and scalability, with large-scale

Jan 19, 2026 Hot

GlobalFoundries Accelerates Adoption of Co-Packaged Optics for

GlobalFoundries (Nasdaq: GFS) (GF) today announced the introduction of its SCALE™ optical module solution for co-packaged optics (CPO). GF's SCALE solution, or Silicon photonics Co

Oct 01, 2025 Hot

1.6T Optical Modules and Scale-Up Networks: Powering the Next ...

Explore how 1.6T optical modules and scale-up network architectures are transforming AI data centers with higher bandwidth, lower latency, and improved efficiency.

Oct 18, 2025 Hot

AI infrastructure accelerates the shift to scalable optical systems ...

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

Apr 14, 2026 Hot

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

Mar 23, 2026 Hot

Tower Semiconductor strikes Nvidia AI infrastructure deal (update)

Tower Semiconductor (TSEM) said Thursday it is teaming up with Nvidia (NVDA) to advance AI infrastructure with 1.6T data center optical modules. TSEM shares were down -2.25% at press time.

Oct 05, 2025 Hot

XPO Optics Emerge as Frontrunner for AI Infrastructure

At OFC 2026, XPO emerged as a scalable, liquid-cooled CPO alternative, enabling high density and efficiency for next-gen AI infrastructure.

Sep 22, 2025 Hot

Press Releases | Marvell Technology, Inc. (MRVL)

Press Releases News & Events Company Information Financial Information Stock Data SEC Filings Governance May 4, 2026 Marvell

Sep 07, 2025 Hot

Co-Packaged Optics: Scaling AI Data Center Network Capacity

Co-packaged optics (CPO) is quickly becoming a foundational technology for next-generation AI data centers. By moving optical components directly onto the switch chip, CPO

Apr 12, 2026 Hot

Lumentum shows AI data center optics at OFC 2026 | LITE Stock News

1.6T modules, 1.0 W lasers and 16-channel DWDM sources headline Lumentum's OFC 2026 demos, built to meet rising AI, cloud and long-haul network demands.

Aug 12, 2025 Hot

XPO: Redefining Pluggable Optics for AI Networking

This paper outlines the new requirements imposed by this AI-driven transformation and introduces a purpose-built optical architecture designed to meet these challenges.

Jun 14, 2026 Hot

Tower Semiconductor strikes Nvidia AI infrastructure deal (update)

Tower Semiconductor (TSEM) surges on Nvidia partnership to boost AI data center optical modules with silicon photonics.

Feb 03, 2026 Hot

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

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

Jan 03, 2026 Hot

Tower Semiconductor Teams with NVIDIA to Advance

Tower Semiconductor, the foundry of high value analog semiconductor solutions, announced it is scaling AI infrastructure deployments with high

Dec 01, 2025 Hot

Broadcom, Marvell set to benefit as 1.6T optical modules near mass ...

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.

Aug 14, 2025 Hot

POET Technologies and Lumilens Advance Wafer-Level Photonic

Joint development and sale of high-speed optical modules based on the Electrical-Optical Interposer (EOI) — a new paradigm for scale in the optical layer of AI compute
SAN JOSE, CA, May

Oct 06, 2025 Hot

1.6T Optical Module Market Report: Trends and Growth

Discover the booming 1.6T optical module market poised for explosive growth through 2033. This in-depth analysis reveals market size, CAGR, key

Apr 23, 2026 Hot

Credo Showcases 1.6T ZeroFlap AECs at OCP Global Summit | CRDO Stock News

Credo will demo 1.6T ZeroFlap AECs and 224Gbps PAM4 DSPs at Booth B23 during OCP Global Summit Oct 13-16; executives present Oct 14 on optical reliability.

Mar 12, 2026

Contact Us

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