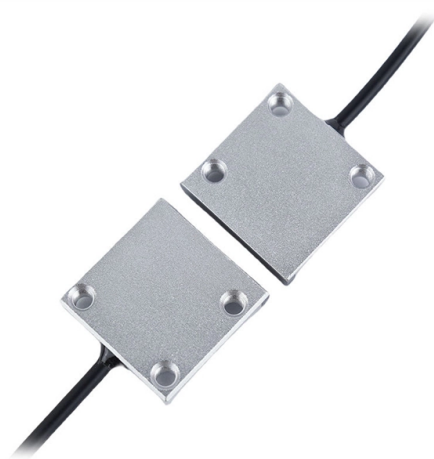


Bulk Delivery Status of Optical Modules



Overview

ATW Announces Bulk Repeat Order for Optical Module AOI. ATW Technology, a high-technology company specializing in intelligent inspection equipment for.

Key Takeaways

Bulk shipments of 400G and 800G optical modules are growing rapidly, with 800G modules expected to see a 60% increase in 2025, while 1.6T modules are entering initial production but remain limited in volume. Current Shipment Trends

The 400G and 800G optical module market has experienced explosive growth, with unit shipments exceeding 20 million in 2024 and revenue surpassing \$9 billion, driven primarily by AI and hyperscale data center deployments (Signal AI) . In 2025, the market is projected to grow over 60%, reaching more than \$16 billion, with 800G modules being the fastest-growing segment (Signal AI) . Despite the introduction of 1.6T modules, their volume remains below one million units for 2025, meaning they currently have minimal impact on the dominance of 400G and 800G technologies (Signal AI) .

Vendor Supply and Market Share

Leading suppliers of datacom optical modules include InnoLight, Eoptolink, Coherent, Broadcom, and Lumentum. In 2026, Nvidia's bulk orders for 800G modules are expected to increase by 35%, with InnoLight and Eoptolink capturing 60% of these orders, while the remaining 40% is distributed among American vendors like Coherent, Lumentum, and Broadcom (IP-Fiber) . Coherent remains a top supplier for 800G modules, while InnoLight leads in 400G shipments (Signal AI) .

Production and Delivery Status

- **800G Modules:** High demand from AI clusters and hyperscale data centers is driving rapid production and shipment. Bulk deliveries are ongoing, with vendors scaling capacity to meet Nvidia and other hyperscaler requirements (IP-Fiber) .
- **1.6T Modules:** Initial production has begun, including 1.6T-DR8 and OSFP modules, but mass shipments are limited and expected to ramp up in late 2025 and 2026 (IP-Fiber) .
- **400G Modules:** Shipments remain strong, particularly for active optical cables (AOCs) and QSFP-DD solutions, supporting short-reach interconnects within server racks (LightCounting) .

Market Drivers

The bulk delivery demand is fueled by:

- AI infrastructure expansion, including large GPU clusters requiring tens of thousands of 800G modules per deployment (IP-Fiber) .
- Hyperscale data center upgrades, with Amazon, Meta, and Nvidia transitioning from 400G to 800G and planning for 1.6T connectivity (LightCounting) .
- Telecom bandwidth growth, with hyperscale operators deploying coherent modules for datacenter interconnects (Signal AI) .

Summary

Bulk delivery of optical modules is robust for 400G and 800G, with vendors actively scaling production to meet hyperscale and AI-driven demand. 1.6T modules are in early production, with limited shipments expected in 2025, but they are poised for significant growth in 2026. Key suppliers like InnoLight, Eoptolink, and Coherent dominate the market, and hyperscale orders, particularly from Nvidia, are driving the current surge in bulk deliveries.

Article Content

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