

Preview

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. -- (BUSINESS WIRE)-- Lumentum Holdings Inc. ("Lumentum" or the "Company") today reported results for its fiscal second quarter ended December 27, 2025. "Lumentum delivered a standout second quarter, with over 65 percent year-over-year revenue growth and non-GAAP operating margin. Coherent's Q2 FY 2026 results highlight accelerating AI datacenter optics demand, rising mix of 800G and 1.6T transceivers, and improving non-GAAP profitability. Management emphasized exceptional bookings visibility, ongoing 6-inch indium phosphide (InP) capacity ramp, and growing traction in. Optics Module by Application (OEM, Aftermarket), by Types (Single Mode Optical Modules, Multi Mode Optical Modules), by North America (United States, Canada, Mexico), by South America (Brazil, Argentina, Rest of South America), by Europe (United Kingdom, Germany, France, Italy, Spain, Russia. The company logged fiscal Q2 revenue of \$665.5 million and flagged an Optical Circuit Switch backlog above \$400 million --that's a sign of steady demand for advanced photonics. The key growth driver is the rising demand for 800G Ethernet optical modules. The Optical Modules Market encompasses the design, manufacturing, and deployment of compact, high-performance devices that facilitate the transmission and reception of optical signals over fiber optic networks.

We added Lessengers as a new customer based in Korea, which has committed to a module development using POET's 800G optical engines. "In May, we closed a \$30 million private

Optical Module Supply Chain Financial Data Tracking · Issue 1, May 2026 This week covers the disclosure window from late April to early May. Core signals indicate that leading

Key differences between SR4, DR4, FR4, and LR4 400G optical modules. Expert advice from Asterfusion engineers to optimize your data center

While Marvell (MRVL) remains the 800lb gorilla in the room, MXL is successfully carving out a high-margin niche in the 400G and 800G transceiver markets, often acting as a preferred

Q2: What is 400G QSFP-DD? A2: It is a high-density, hot-pluggable optical module interface supporting 400Gbps data rates, featuring 8 electrical channels for enhanced bandwidth. Q3: What are the main

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.



Optical module q2

Q2 2024: Coherent Launches New 800G Optical Transceiver Module for Data Centers Coherent Corporation announced the launch of its new 800G

Coherent Corp. is positioned differently from Lumentum despite both receiving Nvidia investment for optical interconnects. Coherent's vertically integrated model spans materials,

The Optical Module market is a segment of the Optoelectronics industry that focuses on the production of optical components and modules. These components and

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

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

Coherent announced their Q2 2026 earnings on 2/4/2026. View COHR's earnings results, press release, and conference call transcript at

Find OSFP 400g SR8 Optical Modules at ETU-Link, we are committed to provide professional technical OSFP 400g SR8 Optical Modules. Competitive price!

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Emerging innovations, including silicon photonics, integrated photonic chips, and coherent optics, are transforming the landscape of optical

Built on decades of photonics innovation, Lumentum delivers high-performance lasers, modules, and optical subsystems that enable scalable, energy-efficient data center connectivity,

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