

Three batches of 800G optical module orders



AI Overview

Recent 800G optical module orders include confirmed multi-million-dollar contracts from EG Industries, Nvidia, and hyperscalers, reflecting surging demand driven by AI and data center expansion.

EG Industries Orders

EG Industries' subsidiary, SMT Technologies, secured confirmed purchase orders worth US\$241.6 million (approximately RM949.4 million) for high-speed 800G optical modules and wireless access products from a key existing customer, referred to as Customer C. These orders are scheduled to be fulfilled in stages over the next 12 months, contributing positively to the company's earnings for the financial years ending June 30, 2026 and 2027 .

Nvidia-Related Orders

Nvidia has significantly increased its 800G optical module orders in 2026, with a 35% expected rise in volume due to AI infrastructure expansion. The orders are primarily captured by InnoLight and Eoptolink, which together account for 60% of the supply, while the remaining 40% is distributed among vendors like Coherent, Lumentum, and Broadcom. For example, Nvidia's GB200 server clusters require thousands of 800G DR8 optical modules, with Eoptolink shipping over 4.17 million units, representing more than 60% of its total shipments .

Hyperscaler Volume Orders



Article Content

800GbE Optics Shipments to Grow 60% in 2025

Additional Findings from the 4Q24 Optical Component Report: The datacom optical component market will grow 60%+

Nvidia places additional orders for optical modules: Top 10 core ...

On October 10, NVIDIA officially announced that it plans to increase orders for 800G optical modules by 35% in 2026 .

Applied Optoelectronics Inc. Secures First Volume Order for 800G

Received first volume order for 800G data center transceivers from a major hyperscale customer, indicating strong

Understanding 800G Optical Modules: Types, Applications, and

Optech: A Leader in Optical Transceivers and Network Solutions Optech, a professional optical transceiver manufacturer, provides a

Market Insights: 800G & 1.6T Silicon Photonics Optical Modules

Explore the transition from 800G to 1.6T transceiver technologies with NADDOD's market insights. Understand how

800GbE optics shipments to grow 60% in 2025 - report

The datacom optical component market will grow 60%+ to reach over US\$16 billion in revenue during 2025, based

Optical Modules Evolution and Innovation From 400G to 1.6T

Explore the evolution of optical modules in speed and form factors from 400G to 1.6T, stressing key enhancement

Over 800G optical transceiver shipments to soar 2.6× by 2026

High-speed optical interconnects are now central to performance and scalability, especially as AI data centers grow

Nvidia added 35% of its 800G optical module orders, while Zhongji ...

On October 10, Nvidia announced an additional 35% order for 800G optical modules in 2026. As core suppliers of

The Evolution of Optical Modules: 400G → 800G → 1.6T – A Strategic ...

Discover the evolution from 400G to 800G and 1.6T optical modules. Learn key technologies, CPO vs pluggable, and

LightCounting :: Component shortages limit growth in transceiver sales

Chinese optical module manufacturers will report Q4 results together with the full year results in April, but several of them have

800G Optical Module Cost Analysis | TCO Optimization Guide

Complete guide to 800G optical module costs and TCO optimization for AI data centers. Includes pricing analysis,

800GbE optics shipments to grow 60% in 2025 – report

Innolight, Coherent, and Eoptolink are the largest suppliers of Datacom modules, with Coherent, Broadcom, and

Nvidia Orders Surge: InnoLight and Eoptolink Dominate 60% of 800G

According to sources, the additional 800G optical module orders from Nvidia are primarily captured by InnoLight and

Demystifying 800G Transceiver: Types, Applications, and FAQs

As the demand for faster data transmission continues to surge, 800G transceiver has gained significant attention due

AOI Receives New Upsized Order for 800G Data Center Transceivers

We anticipate completing delivery of the initial order in the third quarter, with this new order by end of this year. We also recently

EG Industries (EG MK)

EG secures a US\$242m order for 800G optical modules, raising target price to RM2.10 with a BUY rating, driven by AI

Powering the Next Data Race: How 800G & 1.6T Optical Modules Are ...

In summary, the surging demand for 800G and 1.6T optical modules—driven by AI computing clusters, hyperscale

800G Client Optics in the Data Center

The next key development is 800G, and the industry is already gearing up to deploy this next generation of client optics in hyperscale

800G Optical Communication Module Market

Rapidly growing data volumes are fueling a paradigm shift in high-speed connectivity. Against this backdrop, 800G optical

InnoLight: Large-Scale Deployment of 800G Optical Modules in 2025

Although shipments of 1.6T optical modules fell short of expectations, it is projected that they will gradually increase in

800G Optical Modules Drive Market Recovery in 2025

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends

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