

# Optical module orders are booked until the fourth quarter



## Overview

Coherent conference call: Orders are booked until 2028; 1. 6T optical modules are ramping up production "at an astonishing pace"; 6-inch indium phosphide production capacity has doubled ahead of schedule. (COHR), a global leader in photonics and optical communications, reported its Q3 fiscal 2026 results on May 6, 2026, delivering a performance that cemented its role as a critical enabler of the AI infrastructure build-out while facing high market expectations. As of May 7, 2026, the. TradingKey - On May 6, ET, optical component supplier Coherent Corp ( COHR) released its third-quarter fiscal results, with revenue and earnings per share beating Wall Street expectations across the board; however, its shares tumbled more than 16% at one point during the following day's trading and. Recently, industry insiders reported that Nvidia will increase its order volume for 800G optical modules in 2026, with an expected increase of 35%. During the National Day holiday, the mutual investment among American tech giants, with a spiraling ascent on both feet, has also brought tangible. It is an innovative optical interconnection architecture that integrates high - speed optical engines/optical modules with switch chips (Switch ASIC) or large - scale AI computing chips on the same packaging substrate or in the same chassis through 2. 5D/3D advanced packaging technology. Its core. OCS and pump laser production are described as being on a "tight rope," with ramp pace gated by ongoing supply chain constraints and unexpected demand surges.

## Article Content

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 Eoptolink, accounting for 60%, with the remaining 40% divided among ...

Lumentum Orders Booked Through 2028: Can Optical ...

In the first quarter of 2026, the optical module sector saw an overall increase of nearly 30%, with several leading stocks doubling in value, establishing it as a clear "alpha" sector alongside memory chips.

Coherent conference call: Orders are booked until 2028; 1.6T optical ...

Demand is growing exponentially, with orders booked until 2028. During the conference call, Coherent CEO Jim Anderson gave the current industry boom extremely high marks.

Is CPO Finally Coming?

Customer orders have filled up the whole of 2026, and most of the orders are scheduled until 2027 and are even expected to extend to 2028. This long - term order cycle fully demonstrates ...

Lumentum (LITE) Q3 2026 Earnings Transcript | The Motley Fool

We anticipate net revenue for the fourth quarter of fiscal year '26 to be in the range of \$960 million to \$1.01 billion. The \$985 million midpoint would represent another new all-time quarterly ...

The SiPho Foundry Behind the AI Optical Boom | Ben Pouladian

Tower's Q4 earnings confirm what the optical supply chain already knew: the 1.6T transition may be bottlenecked by one foundry. Good morning. I'm sending this early Saturday ...

Lumentum Growth Doubles, Coherent Orders Booked Through 2028, ...

TradingKey - On May 6 (ET), optical component supplier Coherent Corp (COHR) reported fiscal third-quarter results that beat Wall Street estimates for both revenue and earnings per share ...

\$SITM KEY READ-THROUGHS FROM SITIME Q1 2026 EARNINGS ...

That combination supports higher optical module volumes, higher technical requirements, and potentially higher component content per module. The positive read-through is strongest for ...

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 technologies, and paths to achieving high-speed optical modules.

## Contact Us

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