

Latest news in the co-packaged optics sector



Overview

Spain coordinates Europe's €400 million PIXEurope initiative to turn photonics research into scalable semiconductor manufacturing capacity. The strategic investment in optical component suppliers Lumentum and Coherent heralds a new era of optical interconnects inside AI data. These pressures are driving renewed momentum behind co-packaged optics (CPO). According to LightCounting, sales of lasers and photonic integrated circuits for optical transceivers are expected to grow from \$2.9B by 2029, fueled largely by AI data centers. This approach significantly reduces electrical I/O distance. Co-packaged optics (CPO) technology, a key enabler for next-generation data center architectures, promises unprecedented bandwidth density and power efficiency by tightly integrating optical engines with switch silicon. As power consumption continues to surge with the rapid expansion of AI data centers, expectations are high that CPO will dramatically.



Article Content

Can Credo Sustain Momentum in Optical Business Amid Competition?

In March 2025, Broadcom announced the expansion of its portfolio of optical interconnect solutions to enable AI infrastructure. The expansion includes advancements in co-packaged optics

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Ayar Labs secures \$500m funding to scale co-packaged

Ayar Labs plans global expansion and increased production of co-packaged optics following a major investment round.

Co-Packaged Optics (CPO) Market Trends 2026: AI Data Center

Explore the future of co-packaged optics (CPO) in AI data centers. Learn how silicon photonics, optical I/O, and high-speed optical interconnect technologies are shaping next-generation

Coherent Slides 7.3% as AI Optics Trade Cools | COHR Stock News

Recent market commentary described a broad retreat across optical-communications names, with pressure linked to stretched valuations, softer momentum in the tech tape, and

Co-Packaged Optics: powering the next wave of AI

Get the news on Co-Packaged Optics powering the next wave of AI. Explore photonics packaging trends and join our live with Lam Research.

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Co-packaged optics (CPO) is rapidly emerging as a foundational architecture for next-generation AI infrastructure. With Nvidia's latest Scale-Up CPO switch roadmap now taking shape,...

Co-Packaged Optics (CPO) Market 2026

Strategic partnerships between silicon vendors and optical foundries are further shortening time-to-market, ensuring that the Co-Packaged Optics (CPO) Market

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Photonics and high-speed data movement is the next

Broadcom has been leading the debate on co-packaged optics (CPO), betting that moving optics closer to silicon is the only realistic way to get past

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co-packaged optics Semiconductor Engineering

In the next five years, scale-up interconnects will transition from copper to optical interconnects — primarily co-packaged optics (CPO), with some near-packaged optics (NPO), and

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Where co-packaged optics (CPO) technology stands in

Find out CPO's 2025 scorecard and what lies ahead for this optical interconnect technology in 2026 and beyond.

Micro-LED CPO optical transceiver market to reach \$848m by 2030

Therefore, shipments of micro-LED CPO optical transceivers are expected to begin scaling significantly in second-half 2028, eventually contributing about \$848m in market value by

Five Key Trends of Co-Packaged Optics (CPO) in 2026

These pressures are driving renewed momentum behind co-packaged optics (CPO). According to LightCounting, sales of lasers and photonic integrated

MTC and Changelight Forge Strategic Partnerships to

The AI era is creating a historic opportunity for the upgrade of high-speed, short-reach optical interconnects. According to the latest forecast from TrendForce, the market value of Micro

Semiconductor Packaging and Testing Capacity Race

On the technology front, Wu noted that co-packaged optics (CPO) is set to enter mass production in 2026. To support rapid expansion, ASE has also launched a new round of hiring,

Co-Packaged Optics Gain Traction in Data Centers

2026 will mark the year when co-packaged optics (CPO), a form of optoelectronic integration, enters the full-scale mass production and practical roll-out phase. As power consumption continues to surge

Co-Packaged Optics News and Analysis

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Lumentum Stock Skyrockets 700% in a Year: Is It Still a Buy?

The long-term opportunity extends well beyond current demand. Lumentum is ramping 1.6T transceivers, expanding ultra-high-power laser production for co-packaged optics (CPO) and

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Co-Packaged Optics: Market and Technology Update

This report dives deeper into CPO for insight on the technology and applications, the benefits and issues, its impact on pluggable optics, and Signal AI's predictions for CPO's future.

Co-Packaged Optics: The Future of High-Speed Data Infrastructure

It examines how Co-Packaged Optics (CPO) serves as a transformative solution to the power and bandwidth bottlenecks currently hindering artificial intelligence and high-performance

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