Latest News on Optical Module Acquisitions



Overview

□□ Future competition in the optical module industry will fundamentally be competition in chip capability, and M&A is one of the fastest ways to acquire high-end optical chip technologies.

Key Takeaways

Recent optical module acquisitions highlight global consolidation, with US firms expanding in Europe and Samsung Foundry entering silicon photonics production. Key Recent AcquisitionsUS Companies Expanding in Europe: Rocket Lab acquired Mynaric AG (Germany), a developer of laser communication terminals for air, space, and ground applications, in a deal valued at US$155. 3 million, including cash and stock.

This acquisition gives Rocket Lab its first European location in Munich and strengthens its capabilities in optical inter-satellite links for high-speed satellite communications. Marvell Technology Inc. purchased Polariton Technologies, further emphasizing US interest in European optical and quantum technology firms.

Global Photonics M&

A Activity (H1 2025): SCHOTT (Germany) acquired QSIL (Germany). Edmund Optics (USA) acquired son-x (Germany). Thorlabs (USA) acquired Praevium Research (USA).

4JET (Germany) acquired Corning Laser Technologies (Germany). Exail (France) acquired Leukos (France).

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Essilor

Luxottica (France) acquired Pulse Audition (France) and Cellview Imaging (Canada). Teledyne (USA) acquired the Select Aerospace and Defense Electronics Businesses of Excelitas (USA). Leica Microsystems (Germany) acquired ATTO-TEC (Germany).

Wave Photonics (UK) acquired Chiplet IP assets of Phoelex (UK). Fiber Optics Group (France) acquired IDIL Fibres Optiques (France) and FiberTech Optica (Canada). These deals reflect a trend of cross-border consolidation, with Germany and France leading European acquisitions and the US actively acquiring European photonics companies.

Samsung Foundry's Optical Module InitiativesSamsung Foundry has secured orders from a major optical communication module provider and is preparing for mass production in H2 2026. The company is entering the silicon photonics market, targeting photonic integrated circuits (PICs) for data center optical modules and co-packaged optics (CPO). Samsung plans to offer turnkey CPO services by 2029, addressing the growing demand for high-speed optical transmission in AI data centers, where traditional copper-based electrical transmission faces limitations.

Production readiness has been achieved on a 300mm wafer platform, with a process design kit (PDK) completed to accelerate customer design integration.

Market Implications

Optical communication modules are increasingly critical for AI infrastructure, satellite communications, and high-speed data centers. Co-packaged optics (CPO) adoption is expected to grow, potentially reaching 35% penetration in AI data centers by 2030. The combination of US-European acquisitions and Samsung's silicon photonics push indicates a global consolidation trend and strategic focus on advanced optical technologies.

These developments suggest that optical module acquisitions are not only reshaping company portfolios but also accelerating technological deployment in high-demand sectors like AI, space communications, and next-generation data centers.

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Article Content

Mergers and acquisitions in the high-end optical module chip sector

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December 2025 Mergers, Acquisitions and Investment Highlights

Photonics is experiencing a large boom leading to thousands of inventions and new applications. Mergers and Acquisitions (M&As) and investments play a critical role in sustaining the

Top 10 Optical Module Manufacturers'' Annual Reports ...

By 2025, its 800G optical module shipments will exceed 5 million units, making it the global "shipment champion" in the optical module industry, demonstrating significant economies of

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Innolight and Eoptolink are estimated by industry sources to supply roughly 60% of NVIDIA''s 800G volume, controlling the critical plumbing of AI data center optical interconnects. Yet

After Acquisition Turmoil, Dongshan Precision''s Subsidiary Plans $1.2 ...

①Dongshan Precision''s subsidiary Source Photonics and its subsidiaries plan to implement an expansion project for optical chips and optical modules in Changzhou and other

GlobalFoundries to Acquire Advanced Micro Foundry, InfiniLink

GlobalFoundries (GF) plans to acquire InfiniLink, a startup specialized in advanced optical data connectivity chips, based in Cairo, Egypt. This follows last week''s acquisition of Taiwan-based

NVIDIA Optical Interconnect 2026, $500M Ayar Labs Round

NVIDIA Optical Interconnect Partnerships for 1.6 T and Co-Packaged Optics Strategic partnerships formed in 2025 and 2026 centered on accelerating the manufacturing and standardization of next

Silicon Photonics 2025: The $10B Battle for AI Interconnects

In late May, AMD broke its relative silence in the photonics space by acquiring Enosemi, a move designed to aggressively fortify its optical I/O capabilities for next-generation AI infrastructure.

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Source Photonics to Expand Optical Chip and Module Production

On June 16, Dongshan Precision (DSBJ) announced that its wholly owned subsidiary, Source Photonics Holdings (Cayman) Limited, and its affiliated entities will invest in optical chip and

Mergers & Acquisitions Highlights for the First Half of 2025

Mergers and acquisitions (M&As) remain a key driver of growth in the photonics industry. Although 2025 has only reached its halfway point, the sector has already witnessed a remarkable

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Optical networks

The Nokia optical network portfolio leverages highly vertically integrated coherent optical engines to build an advanced-connectivity foundation for the AI

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