



**Adam Tas Corridor Energy**

# **Indium Phosphide Requirements for Optical Modules**





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### Yunnan Germanium Hits Record High on AI Optical Material Demand

Yunnan Germanium (002428.SZ) stock hit a record high on May 13, driven by surging AI demand for Indium Phosphide wafers used in high-speed optical modules.

### Engineered Substrates on Indium Phosphide Basis

High-quality and cost-effective solutions for the next generation of optoelectronic components based on indium phosphide (InP) and gallium arsenide (GaAs).



### Indium Phosphide Platform for High-Speed Optical Transceivers (Invited)

InP-based optoelectronics plays a crucial role in enabling high-speed and energy-efficient data transmission for future optical interconnects. This presentation.

### \$SIVE Photonics & @imec\_int

Together with imec (the world-leading independent nanoelectronics and digital-tech research institute in Leuven) and ASM AMICRA



Microtechnologies, Siviers has successfully



## Indium Phosphide (InP) Wafers and Substrates

Kingwin Optics offers high-quality Indium Phosphide (InP) wafers and substrates, tailored to meet the demanding requirements of optoelectronic and electronic

## The Advantages of Indium Phosphide Photonic Integration in High

The Advantages of Indium Phosphide Photonic Integration in High-performance Coherent Optics d by 5G, DAA, and next-generation PON, are driving the need for ever more optical bandwidth. To deliver



## Recent Trends in the Manufacturing of InP Photonic Integrated Circuits

the need to discard failed units late in the manufacturing process. The electro-optic effect in indium phosphide provides a phase change up to 10x larger per uni.



## AAOI Q1 2026 Earnings Call Transcript

Indium Phosphide: A semiconductor compound used as the material base for high-performance optical laser devices in modern transceivers. Full Conference Call Transcript

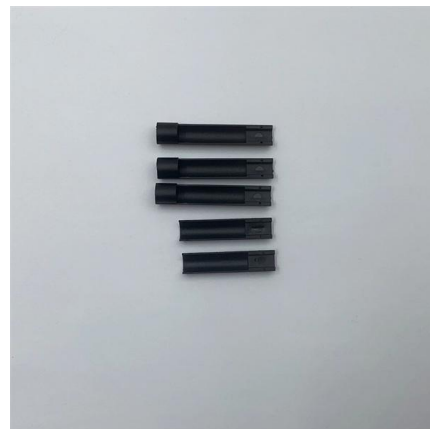


## Lumentum

North Carolina site expands domestic production of Indium Phosphide (InP) devices Lumentum Holdings Inc. ("Lumentum"), a global leader in optical and photonic solutions for cloud

## Indium Price Hits 10-Year High as AI Optical Demand Rises

Indium rose to about 4,950 yuan per kilogram as AI optical modules tightened demand for indium phosphide wafers.



## Opportunities and Applications of Silicon Photonics

Silicon photonics is gaining traction in high-speed optical modules, particularly in data centers and coherent communication systems. This article explores its



### **\$LITE \$COHR \$CIEN \$AAOI EXECUTIVE OVERVIEW Across the**

LightCounting's repeated emphasis on InP laser demand, easing shortages, and capacity additions directly supports InP substrate demand, and AXT itself said in February 2026 that Q1



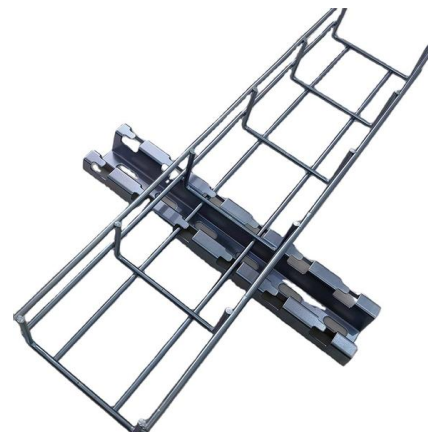
### **Coherent to Unveil Breakthrough AI-Scale Optical Innovations and**

Coherent will unveil AI-scale optical innovations at OFC 2026, showcasing technologies that advance bandwidth, scalability, and energy efficiency.



### **#Coherent CEO Jim Anderson stated during the earnings call that**

SemiVision?? (@semivision\_tw). 22 likes.  
#Coherent CEO Jim Anderson stated during the earnings call that orders are undergoing a "step-function" increase, with backlog reaching an all





## **AXTI Q1 2026 Earnings Report on 4/30/2026**

This includes Tier 1 laser manufacturers and optical transceiver module makers, both around the globe and in China. In alignment with our customers' technical requirements and

## **Lumentum Touts AI Optics Boom, \$2B Quarterly Target,**

Key Points Lumentum says AI-driven optics demand is outpacing supply--it's "under shipping" the market by roughly 25-30% --and is ramping



## **Indium Phosphide Guide: Properties & PIC Applications**

Is InP right for your project? Read our guide on Indium Phosphide PICs, covering active functionality, material benefits, and path to foundry fabrication.

## **InP-Based Foundry PICs for Optical Interconnects**

This paper describes a fabrication process for realizing Indium-Phosphide-based photonic-integrated circuits (PICs) with a high level of



## Applications of Indium Phosphide in optoelectronics and

Explore this detailed blog post that delves into the fascinating applications of Indium Phosphide in optoelectronics and photonics. Learn how



## NVIDIA's \$4B Optics Bet Signals Photonics as AI's Next

Brendan Burke, Research Director at Futurum, shares insights on NVIDIA's \$4 billion investment in Coherent and Lumentum to address the



## AXTI Transcript

Indium Phosphide Wafers: Backlog reached over \$60 million, driven by AI and data center build-outs. Expanded customer base includes Tier 1 laser manufacturers and optical





## Indium phosphide (InP) for optical interconnects

Unlike silicon, InP offers monolithic integration of active and passive components, which can simplify packaging of optical circuits used in data centers, significantly reducing the form factor and the cost.



## Yunnan Germanium Hits Record on AI Optical Materials Demand

Its main businesses include germanium mining, germanium-series products, and compound semiconductor materials such as gallium arsenide wafers and indium phosphide wafers.

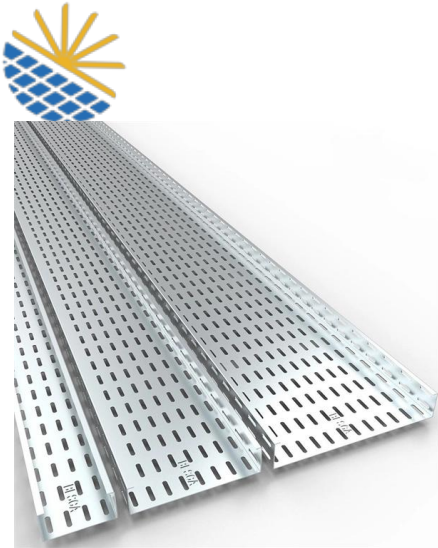
## How to Understand the Performance Parameters of Optical Modules

The transmission rate of an optical module depends on the performance of the optical chip, which is influenced by cost factors such as indium phosphide chips and components.



## Indium Phosphide Integrated Photonics for CMOS

Outlook Density roadmap: Indium phosphide and imos nanophotonics providing component density scaling 100GHz class components demonstrated. Limited primarily by design and test rather than



### The most important line from photonics earnings last week was \$LITE

Indium phosphide lasers. InP is the semiconductor platform behind many of the lasers that make high-speed datacenter optics work. Silicon photonics can guide and modulate light, but silicon



### Growth Roadmap for 100G Optical Transceivers Market 2026-2034

Indium Phosphide (InP) remains critical for high-performance laser diodes and electro-absorption modulated lasers (EMLs) in 100G transceivers, particularly for long-reach applications,

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