GB200 Optical Module Manufacturers



Overview

Major optical modules manufacturers and suppliers: Innolight, Eoptolink, Huagong Tech, Linktel, Accelink, CIG ShangHai CO. With AI computing power demands growing exponentially, next-generation supercomputing architectures like the NVIDIA GB200 have emerged. For example, in a GB200 cluster with 576 GPUs, 18,432 single-end 800G DR8 optical modules are required. Thanks to the. The NVIDIA GB200 (Grace/Blackwell) high-end AI accelerator represents one of the most complex and demanding hardware products ever assembled. The optical module is in the middle of the industrial chain, and the upstream industry of optical modules mainly includes PCB, optical chips, optical. The NVIDIA GB200 NVL72 connects 36 Grace CPUs and 72 Blackwell GPUs in a rack-scale, liquid-cooled design. It boasts a 72-GPU NVIDIA NVLink™ domain that acts as a single, massive GPU and delivers 30x faster real-time trillion-parameter large language model (LLM) inference, with 10x greater. The SemiAnalysis GB200 Component & Supply Chain BoM Model details the components within a GB200 NVL72/NVL36 and GB200A NVL36 system as well as the different customized SKUs. We also map out the supplier.



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Article Content

GB200 Hardware Architecture

Today we are going to go from A to Z on the different form factors of GB200 and how they changed versus the prior 8 GPU HGX baseboard servers.

1.6T Optical Interconnect Solution for NVIDIA GB200

These modules are rigorously tested with original NVIDIA equipment to ensure full compatibility and long-term reliability in demanding environments. By leveraging advanced 5nm DSP technology and a

Pluggables, Power, and Geopolitics: Mapping the 800G and 1.6T

Manufacturing vs. IP: Chinese vendors (Innolight, Eoptolink) have effectively won the battle for module manufacturing dominance, leveraging speed, scale, and efficient execution to

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

Currently, Nvidia uses 800G optical modules in GB200 servers. For example, in a GB200 cluster with 576 GPUs, 18,432 single-end 800G DR8 optical modules are required. Under the current

NVIDIA GB200 Supply Chain: The Global Ecosystem Explained

NVIDIA can sell GB200 modules to Foxconn for one customer, while directly supplying Dell for another. Some OEMs like Dell/HPE might design their own PCBs and simply purchase Blackwell GPUs from

10 companies in the optical transceiver industry chain 2024

To help you choose the best partner, this article will analyze and introduce 10 companies in the optical transceiver industry chain for you.

GB200 NVL72 | NVIDIA

Powering the era of accelerated computing. The NVIDIA GB200 NVL72 connects 36 Grace CPUs and 72 Blackwell GPUs in a rack-scale, liquid-cooled design.

GB200 & GB200A Component & Supply Chain Model – SemiAnalysis

We provide pricing and quantity of each component, which differs depending on the GB200 SKU. We also map out the supplier landscape for each component. The quantity of

Hardware — NVIDIA DGX GB Rack Scale Systems User Guide

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DGX Grace Blackwell rack scale systems are rack scale solutions for graphics processing units (GPUs) connected by NVLink through the NVLink passive copper cable cartridge backplane.

Eric Litvin on 800G Transceivers for NVIDIA GB200 | Luma Optics

NVIDIA GB200 made the optical layer of AI infrastructure impossible to ignore. Eric Litvin and Luma Optics have been building for this exact moment for twenty years. 800G transceivers, ML

Global Optical Transceiver Market Strategic Audit 2026

Figure 17 Dongshan Precision Manufacturing Co. Ltd. Optical Transceiver Market Share (2021-2026) 78 Figure 18 Accelink Technologies Optical Transceiver Market Share (2021-2026) 82

Huawei AI CloudMatrix 384 – China''s Answer to Nvidia

Huawei AI CloudMatrix 384 – China''s Answer to Nvidia GB200 NVL72 China Abundance of Power, 100% Optics, 0% Copper, Power

Global Optical Transceiver Market Strategic Audit 2026

The current super-normal profits generated by 800G modules have incentivized aggressive brownfield capacity expansions. As upstream optical chip yields improve and assembler

Deep Dive: Optical Module Market

Optical modules are typically defined by their bandwidth capacity, with the highest currently available being 800G modules. Next-generation 1.6T modules are expected to begin

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NVIDIA GB300 AI Server Launch Sparks 1.6T Module Demand

NVIDIA''s GB300 AI server will launch in H2 2025, boosting demand for 1.6T optical modules and accelerating advancements in AI computing and data center interconnects.

Economic Watch: From optical modules to chips -

Huagong Tech, an optical module manufacturer based in central China''s Wuhan, launched the world''s first 12.8-terabit XPO module in March, bundling the capacity of eight 1.6T modules into a

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800G Optical Transceivers Clear the Path for NVIDIA

The fabric requirements for GB200 deployments push optical transceivers on latency, density, thermal performance, and signal integrity simultaneously.

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