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UPDATE

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Greater China Technology Hardware | Asia Pacific

Huawei unveiled new NPO solution for the Ascend 960 SuperPoD AI infrastructure

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GREATER CHINA TECHNOLOGY HARDWARE
Asia Pacific
Industry View **In-Line**

Key Takeaways

- Huawei's adoption of NPO technology supports our view that China is likely to establish a competitive edge in this new product.
- The progression from discrete optics in the Atlas 910C to LPO in the Atlas 950 and NPO in the Atlas 960 highlights Huawei's rapid optical-interconnect evolution.

At Huawei Connect 2026 in Shanghai on September 17, Huawei unveiled its third-generation optical interconnect architecture using Near-Packaged Optics (NPO) for the Ascend 960 SuperPoD AI infrastructure.

The 7.2 Tbps NPO optical engine operates across 36 channels at 200 Gbps per lane, exceeding the 6.4 Tbps, 32-lane interfaces under development by groups such as the OIF, while reducing communication latency to 10 ns and lowering power consumption.

The Ascend 960 SuperPoD can scale to 4,096 NPU cards via UnifiedBus, delivering up to 8 Exaflops of FP8 computing power and 1 PB of unified HBM.

Huawei also launched the "OPEN NPO" initiative and MSA with China Mobile Research Institute, JD Cloud, and more than 20 domestic partners.

We also observed other Chinese companies' initiatives in NPO during CIOE last week: Key Takeaways from 2026 CIOE (13 Sep 2026).

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Research as only a single factor in making their investment decision.

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