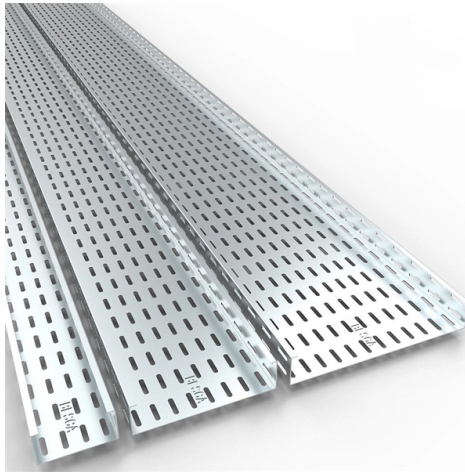


Demand for optical modules far exceeds expectations



Overview

BOSTON (January 7, 2025) - Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm Cignal AI. GMT EIGHT - Latest - Increased demand visibility exceeds expectations for the sustained prosperity of optoelectronic modules. Since the beginning of this year, the overall increase in A-share. Applied Optoelectronics says demand for data center optics is running ahead of supply, and it expects that gap to last through at least mid-2027. The company also reported its first shipments of 800G products and sees that business driving growth ahead of cable TV.



Article Content

Optical Module Industry Statistics 2026

Data centers will keep dominating optical module demand as AI and cloud drive revenue growth through 2030. Optical module demand is being pulled in two directions at once, faster

The Evolution of Optical Modules: Powering the Future

In an era dominated by artificial intelligence (AI), cloud computing, and big data, the demand for high-performance data transmission has never been

Understanding Optical Module Demand in Evolving

Explore optical module demands in evolving data center architectures. Learn about usage in traditional, improved, and two-tier setups for

Nvidia Orders Surge: InnoLight and Eoptolink Dominate

Under the current massive data center cluster demand, the consumption and value of optical modules are significant. Thanks to the

Optics in the Age of AI: A Market Update

Conclusions AI is driving unprecedented growth optics shipments and revenue Growth is across all speeds, but mostly in 800GbE right now 1.6T can't come fast enough Bandwidth and

LightCounting: The demand for 400G/800G optical

Currently, the demand for 4x100G and 8x100G optical modules exceeds the supply by 100%, and many customers have to wait until 2025 for

Optical Module Market Size, Competitors & Forecast to

The optical module market is navigating transformative shifts in technology, procurement, and network architecture, positioning itself at the heart of evolving

LightCounting :: January 2025 Vendors & Markets for

It analyses the impact of these projects on the demand for optical networking equipment, optical modules and components. It includes profiles of the leading

AI Fuels High-Speed Interconnects, NVIDIA,

Although shipment growth in 2029 is projected to slow to 8.7%, demand for high-end optical transceiver modules is forecast to surge. With 800G

Demand for Datacom Optical Modules Reaches Record

Spending on Datacom optical components was up more than 90% YoY as AI applications of 400GbE and 800GbE optical modules for AI

Record Earnings, Collective Decline After Hours—What Exactly

Its numbers contain no fluff; this quarter's revenue and EPS both set company records, with management explicitly stating on the call that data center optical module demand continues to

CPO Commercialization Exceeds Expectations, Creating Window for

The commercialization of Co-Packaged Optics (CPO) technology has accelerated significantly in 2026, driven by explosive demand for AI computing power. Three major market

Special Report on Optical Modules_the_and_in

Q: What impact has the explosion of AI demand had on the entire industry chain, especially the optical module industry? A: With the explosion of AI demand, major cloud vendors"

Optical Modules Market Size, Growth Trends

Optical Modules Market size was valued at USD 3.5 billion in 2025 & is estimated to reach USD 8.2 billion by 2034, exhibiting a CAGR of 10.3%from

800G Optical Modules Drive Market Recovery in 2025

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends in data center optics and AI

Optical Modules Market Research Report 2034

Optical Modules Market Outlook 2025-2034 The global optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034,

GMT EIGHT

The recent disclosure of customer demand and order visibility by leading companies reflects the industry's continued positive outlook, which may further boost the upward trend. It is worth noting that

Optical Module Package Market 2025

South America In South America, the Optical Module Package market is in a nascent growth phase, with Brazil leading in telecommunication infrastructure upgrades. Demand is concentrated in urban

Optical Modules Market Size, Trends & Forecast 2025-2035 | Core

Discover Optical Modules Market trends, growth analysis, key segments, and regional insights. Forecast 2025-2035. Explore industry opportunities now!

Hyperscaler demands drive up demand for optical

Driven by AI applications, spending on datacom optical components rose over 90% as 400GbE and 800GbE optical modules for AI applications drove demand to

Optical Module Chip Market 2025

The optical module chip market exhibits a fragmented yet competitive structure with global technology providers, semiconductor manufacturers, and specialized

China's Indium Phosphide Surge

Goldman Sachs projects that 800G optical module shipments will exceed 34 million units in 2026, with 1.6T modules surpassing 25 million units. These modules are the arteries of AI

Analysis Of The Development Prospects Of Optical

1. Current status and driving force of the development of the optical module industry
As the core component of the optical communication system,

High-Speed Optical Module Demand Soars: AI

Discovering the intersection of AI computing and escalating market trends, the reliance on optical modules has surged. From high-scale

Applied Optoelectronics Eyes 800G Ramp as Data Center Demand

Applied Optoelectronics (NASDAQ:AAOI) expects a sharp second-half ramp in its data center optics business as demand for higher-speed transceivers continues to outstrip the company's

Optical Transceiver Modules Driving AI & Telecom Upgrades

Explore product roadmaps, DSP integration, and telecom modernization accelerating demand for high-speed optical transceiver modules.

Over 20 Million 400G & 800G Datacom Optical Module

BOSTON (January 7, 2025) – Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest

Contact Us

For more information, pricing, or custom solutions, please contact us:

Website: <https://kilitech.co.za>

Email: info@kilitech.co.za

Phone: +44 20 7183 2649

Address: 1st Floor, The Shard, 32 London Bridge Street, London, SE1 9SG,
United Kingdom

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