

# Demand for optical modules explodes



## Overview

The demand for optical modules surged this year (2026), primarily driven by the explosive growth of AI computing clusters, bandwidth upgrades, the shift from copper to fiber optic networks, and increased capital expenditure by cloud providers. Optical Module and DCI by Application (Communication Service Provider, Internet Content and Carrier Neutral Provider, Government/Research and Education, Other), by Types (Optical Transport Network, Data Center Core Network, WAN), by North America (United States, Canada, Mexico), by South America. Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. The global optical module market is forecast to grow 60% in 2026 and reach nearly \$60 billion by 2031, driven by AI demand. This transformed them from "optional components" into. Data centers will keep dominating optical module demand as AI and cloud drive revenue growth through 2030. With global R&D projected to. The Optical Modules Market encompasses the design, manufacturing, and deployment of compact, high-performance devices that facilitate the transmission and reception of optical signals over fiber optic networks. 5 billion in 2023 to an estimated USD 10. Key growth factors include the surging demand for high-speed data transfer, the escalating.

## Article Content

Why is the demand for optical modules so high this year (2026)?

The demand for optical modules surged this year (2026), primarily driven by the explosive growth of AI computing clusters, bandwidth upgrades, the shift from copper to fiber optic networks, and increased

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

Optical Modules Market Outlook The global optical modules market is projected to reach a valuation of approximately USD 20 billion by 2035, with a compound annual growth rate (CAGR) of around 12%

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

AI demand sends profit soaring for China optical vendor

AI demand sends profit soaring for China optical vendor Domestic AI demand surging in China with cloud giants boosting capex by 254%.

Optical Communication Industry Trends 2026: AI, 800G/1.6T Optical ...

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1.6T optical modules, silicon photonics, and next-generation data center connectivity solutions.

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Optical Transceiver Modules Driving AI & Telecom Upgrades

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

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Google's High-Speed Interconnect Architecture to Push

Google's next-generation TPU, Ironwood, integrates a 3D Torus network topology with the Apollo optical circuit switch (OCS) all-optical network,

Optical Module Market Growth Driven by AI Demand

Optical Module Market surges as AI clusters expand, boosting demand for 800G and Coherent-lite modules and reshaping global cloud

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Optical Component Revenue Reaches Nearly \$25B in

BOSTON (January 7, 2026) - AI-driven datacenter and transport builds will push the optical components market revenue to a record high in 2025, with datacom

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

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

Understanding Optics Module Trends and Growth Dynamics

Optics Module demand is primarily driven by data centers, telecommunications (5G infrastructure), and enterprise networking. The shift towards higher bandwidth requirements fuels

Optical Modules Market Research Report 2034

The optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034, growing at a CAGR of 11.5%.

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## China AI Optic Orders Booked to 2028 as Demand Spikes

Chinese fiber optic and optical module orders are booked through 2028 as global AI data center construction drives a massive surge in demand and prices.

## Comprehensive Overview of Optical Module and DCI Trends: 2026-2034

The optical module and data center interconnect (DCI) market is experiencing significant expansion, driven by the escalating demand for high-bandwidth connectivity, cloud computing, 5G

## LightCounting :: Scale-up networks in AI Clusters is a

A surge in AI development created a new wave in demand for optical connectivity in 2023-2025 and it will sustain the market's growth through 2030. The Figure

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## Optical Module Stocks Surge Over 6% as 1.6T Era Begins

Driven by accelerating AI infrastructure demand, key optical module stocks like InnoLight and Eoptolink surged after a Huatai Securities report confirmed 1.6T modules have entered

## Optical Modules Market Size, Growth Trends

Access detailed insights on the Optical Modules Market, forecasted to rise from USD 3.5 billion in 2024 to USD 8.2 billion by 2033, at a CAGR of

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## Global optical module sales reach \$4.25 billion in H1 2022

The global Ethernet optical module market share in Q1 and Q2 2022 amounted to USD 1,112/ 1,207 million respectively, and the sales revenue in Q2, although lower than the record high in

## Active Optical Module Market Report | Global Forecast From 2025 To

With the global rollout of 5G, there is an increasing demand for advanced optical modules that can support high-speed and low-latency communication. Companies investing in the development of

### Optical Modules Market Size, Growth Trends

The global rollout of 5G networks has created an unprecedented demand for high-speed, low-latency optical links. 5G infrastructure relies heavily

### Silicon Photonics and Co-Packaged Optics at the Heart

Yole Group unveils its latest photonic market and technology analyses, Silicon Photonics 2025 and Co-Packaged Optics for Data Centers

### AI Chip and Optical Module Demand Explodes, Fueling Supply Chain

The insatiable demand for artificial intelligence infrastructure is triggering a seismic shift in the semiconductor and photonics supply chains, driving major stock moves and forcing industry

### The Technological Evolution and Application Trends of

Future optical modules will continue evolving toward greater density, higher speeds, affordability, extended reach, and ease of maintenance. With

### 2024 Semiconductor Industry Outlook | Deloitte Global

Led by generative AI, chip sales look to bounce back in 2024—but geopolitics could complicate growth in the semiconductor industry. Learn more about trends and

### China AI Optical Module Exports Jump 30%, Factory Orders Hit 2028

Driven by global AI data center demand, Chinese exports of 1.6T optical modules and fiber optics surged in Q1, with factory orders booked through 2028.

### 2025 Optical Module Market Share and Demand Report

Market Scale & Demand Reality Global AIDC CAPEX is projected at \$400-480 billion in 2025, with optical modules accounting for 3% of total costs,

## Contact Us

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