

Optical module prices can still rise



Overview

The optical module market has become increasingly competitive, with average selling prices declining at approximately 15-20% annually for mainstream products. Chinese manufacturers have significantly expanded their production capacity, intensifying price competition across all product. 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. 7% during the forecast period MARKET INSIGHTS The global Optical Module Package Market was valued at 8942 million in 2024 and is projected to reach US\$ 20220 million. Citigroup stated that there is potential upside in the demand for the optical module industry, and the buying opportunity has increased after the stock price adjustment. Citigroup noted that the GPU ratio of the VR200 NVL144 rack's 1.8% (2025-2031), driven by critical product segments and diverse end-use applications, while evolving U.

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The share prices of three closely watched optical module concept stocks, including Yi Zhongtian, have recently fluctuated at high levels. On September 11th, Xinyi Sheng, Zhongji ...



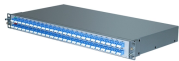
Indium prices have climbed to their highest level in nearly a decade as AI data center demand pushes more pressure onto indium phosphide, a key material used in high-speed optical ...



The Optical Module Market is entering a stage of rapid expansion, as global AI clusters continue to scale at an unprecedented pace.



Our research indicates that demand for 400G/800G and even 1.6T optical modules for cloud data centers and AI training clusters has been accelerating over the past two years, with the ...



The demand for optical modules in the A-share market has potential upside. Citigroup analysis points out that Zhongji Innolight, TFC, and Eoptolink saw significant stock price increases, ...



Competition in the 400G optical module segment intensified in 2023, with over 20 manufacturers entering the market, leading to a 12% decrease in average selling prices.



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 ...



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 infrastructure investment.



Today, I'm excited to share an in-depth analysis of the global optical module market, an industry I find particularly compelling due to its critical role in data center networks for the ...



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Contact Us

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