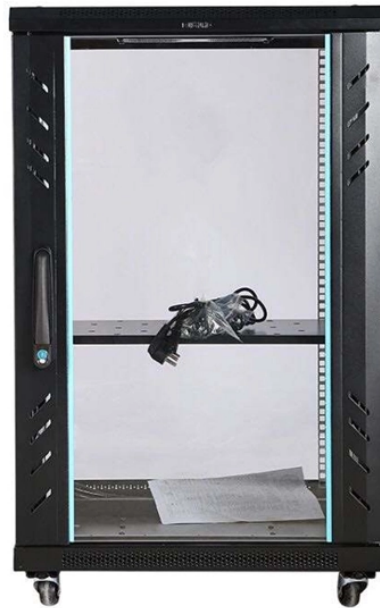


Will optical modules see a surge in demand in the second half of the year



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. Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. Telecommunication networks (wireless and wired) are the second-largest application, contributing 28% of market revenue in 2022. During the National Day holiday, the mutual investment among American tech giants, with a spiraling ascent on both feet, has also brought tangible. BOSTON (May 7, 2025) - After explosive growth in 2024, 800G Datacom optics for AI and general computing applications will be the fastest growing segment of the market in 2025, according to the latest Optical Components Report from research firm Cignal AI. 6T optics will enter volume production in. In July 2025, LightCounting released its Cloud Data Center Optics Report, revealing that cloud companies' increasing investments in data center and network infrastructure have created a highly dynamic new segment within this market.

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<p>Strengthed door locks More durable and anti-theft/plugging</p> <p>Grounding screw More anti-theft/plugging and safer</p> <p>Removable hinges More convenient to use and transport</p> <p>Sealing strip More anti-theft/plugging</p>	<p>“Hyperscale operator deployment of optics for connectivity both inside and between datacentre will continue to grow dramatically in 2025, although at reduced growth rates compared to ...</p>
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	<p>The key growth driver is the rising demand for 800G Ethernet optical modules, alongside the initial commercial shipments of 1.6T modules, which are beginning to contribute modest revenue.</p>
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<p>Length:44mm Small-end inner diameter:3.6mm Large-end inner diameter:5.5mm</p>	<p>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 transceiver modules becoming ...</p>
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	<p>In summary, the surging demand for 800G and 1.6T optical modules—driven by AI computing clusters, hyperscale data centers, and next-generation cloud architectures—has positioned high-speed optical ...</p>
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Optical Module Market surges as AI clusters expand, boosting demand for 800G and Coherent-lite modules and reshaping global cloud network infrastructure.



Fueling a rally in hardware stocks, the optical module industry has officially entered the 1.6T era as accelerating demand from AI applications forces a rapid upgrade cycle.



“Operators will also begin a large-scale transition to 1.6T optics and coherent 800ZR modules in the second half of this year.” The datacom optical component market will grow 60%+ to ...



The demand for low-power optical modules is increasing due to data center energy efficiency mandates, with 70% of operators prioritizing modules with <3W power consumption.



Under the current massive data center cluster demand, the consumption and value of optical modules are significant. Thanks to the explosive growth in demand from AI data centers, all ...

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