

# Is it still worth investing in optical modules



## Overview

Lumentum's order book is full through 2028, reflecting surging demand for 800G and 1.6T optical modules, amplified by Nvidia's strategic investment. This sector mirrors the memory market's "prosperity spillover" logic due to demand surges and supply constraints in high-end optical chips. According to the latest June 2025 Quarterly Market Update by renowned research firm LightCounting, the global optical transceiver market is set to rebound in Q2 2025 with a projected 10% quarter-over-quarter growth. The key growth driver is the rising demand for 800G Ethernet optical modules. Data centers accounted for 45% of global optical module revenue in 2022, driven by rising cloud computing and AI workloads. Telecommunication networks (wireless and wired) are the second-largest application, contributing 28% of market revenue in 2022. 8% during the forecast period 2025-2031. 5 billion in 2024 and is estimated to reach USD 8. The Optical Modules Market encompasses the design, manufacturing, and deployment of compact, high-performance devices that facilitate.





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 ...



With data transmission speeds increasing to 20 Gbps or higher in 5G networks, there's growing demand for 100G and 400G optical modules that can handle these bandwidth requirements.



Modern optical modules are designed to consume less power while maintaining high performance, which is critical for large-scale data centers and telecom networks. The push for cost-effective ...



The long-term outlook for the optical module and DCI market remains highly favorable, fueled by continuous digital transformation across industries. Emerging technologies such as ...



The 5G infrastructure deployment contributed 22% to the optical module market growth in 2022, with an increasing demand for small-cell and macro-cell base station modules. China accounts for over 70% ...

## Contact Us

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