

# Optical modules are poised for a boost



## Overview

The report indicates that high-speed datacom modules – especially 800GbE and emerging 1.2T+ embedded optics drive a renewed multi-year bandwidth expansion. Optical module demand is being pulled in two directions at once, faster bandwidth for dense networks and tighter constraints on power, security, and lead times. With global R&D projected to exceed \$2.1 billion by 2025 and 35 percent of manufacturers reporting lead times beyond 12 weeks, the. 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 revenue forecast to exceed \$18 billion and coherent module revenue to reach nearly \$6 billion, according to research firm Cignal AI's Optical. 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. The Optical Module and DCI Market Size was valued at 9.7% during the forecast. 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.

## Optical modules are poised for a boost



Zhongji Xuchuang forecast a near-doubling of 2025 net profit to RMB 9.8-11.8 billion, driven by surging demand for high-speed optical modules from data-centre and compute expansion.



- The Global Optical Module and DCI Market is projected to witness significant growth, with an expected CAGR of 10.7% from 2025 to 2035, driven by increasing demand for high-speed ...



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 ...



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 ...



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 revenue forecast to exceed \$18 billion and ...



800G and 1.6T optical modules are poised to become cornerstone technologies for large-scale data center upgrades. Data Center Interconnect (DCI) and Financial Trading Networks



As the optical supply chain continues to evolve, vertical consolidation, regional diversification, and new market entrants will reshape competitive dynamics, driving further shifts in the industry landscape.



The optical module and DCI market is booming, projected to reach \$40 billion by 2033, driven by cloud computing, 5G, and data-intensive applications. Learn about market trends, key players (Ciena, ...



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 ...



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 10.3%. ...

## Contact Us

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

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

Email: [sales@samastersbaseball.co.za](mailto:sales@samastersbaseball.co.za)

Phone: +27 63 874 2095

Address: 15 Innovation Drive, Technopark, Stellenbosch, 7600, South Africa

This document is for informational purposes only. Specifications subject to change without notice.

