

Key Takeaways: 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 ...

According to LightCounting, sales of lasers and photonic integrated circuits for optical transceivers are expected to grow from \$2.4B in 2023 to \$5.9B by 2029, fueled largely by AI data ...

By 2026, the shipment volume of 800G optical modules is expected to exceed 40 million units, with demand showing a pattern dominated by North America and followed by China.

Why Optical Modules Matter Now Exponential Demand Growth: Shipments of 400G and 800G modules exceeded 20 million units in 2024, generating nearly \$9 billion in revenue. The optical ...

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 ...

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.

The use of nano-photonic materials in optical modules is projected to reduce device size by 50% by 2026, with early prototypes showing 40% size reduction in 2023.

LightCounting releases April 2026 Market Forecast report The Ethernet transceiver market was up 93% in 2024 and our latest estimates for 2025 suggest another 82% growth. We now forecast 65% growth ...

Yole Group reports that datacom optical component revenue exceeded \$18 billion in 2025, up more than 70% year over year, with over 55 million high-speed 400G+ datacom modules shipped. ...

At OFC 2026, several key themes are especially worth watching: With AI clusters rapidly expanding to multi-hundred-thousand GPU scale, optical interconnects are becoming one of the ...

Web: <https://cgaroofing.co.za>