

Optical module prices skyrocket



Network Cabinet & Rack

Overview

The price of new technologies is higher, with 800G optical modules being 50%-100% higher than 400G. Technological barriers and R&D investment: Leading manufacturers enjoy pricing power, R&D costs increase, and rapid technological iteration increases barriers. TrendForce's latest research indicates that the global market for AI-focused optical transceivers has entered a phase of rapid growth, with market size projected to expand from US\$16.5 billion in 2025 to \$26 billion in 2026, representing over 57% YoY growth. This surge is driven not only by supply and demand: Exploding demand for AI computing power is driving data center expansion, and 800G/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.

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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 ...



Optical module supplier Eoptolink saw profits triple to 9.53 billion CNY and stock soar 12x due to high demand from AI giants like Nvidia. A Chinese optical module company supplying global ...



The price of new technologies is higher, with 800G optical modules being 50%-100% higher than 400G. Technological barriers and R& D investment: Leading manufacturers enjoy pricing power, R& D costs ...



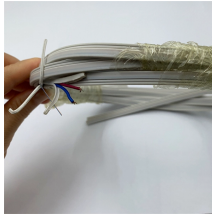
This report aims to provide a comprehensive presentation of the global market for Optical Modules, focusing on the total sales volume, sales revenue, price, key companies market share and ...



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 ...



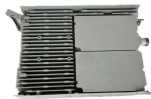
Competition in the 400G optical module segment intensified in 2023, with over 20 manufacturers entering the market, leading to a 12% decrease in average selling prices.



Media Kit Download & Details News: Markets 20 March 2026 AI optical transceiver market to grow 57% to US\$26bn in 2026 Market analyst firm TrendForce forecasts that the global AI-focused optical ...



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Explore the booming Optical Module Chip market forecast (2025-2033). Discover key drivers like 5G, data centers, and AI, alongside growth trends for 100G, 200G, 400G, and 800G ...



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 ...

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