Optical Module Industry in Q2



Overview

Recently, a market research institution released the "Quarterly Update Report on the Optical Communication Market in June 2025". 8 billion in 2025 and is projected to reach $39. 5% during the forecast period from 2026 to 2034. Optical modules, which encompass transceivers, cables, amplifiers. 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. This growth is primarily driven by increasing demand for 800G Ethernet modules. At the same time, China's. 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 demand is being pulled in two directions at once, faster bandwidth for dense networks and tighter constraints on power, security, and lead times.

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Article Content

800G Optical Modules Drive Market Recovery in 2025

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

800G optical modules drive market recovery in Q2 2025

Recently, a market research institution released the "Quarterly Update Report on the Optical Communication Market in June 2025". The report indicates that optical module sales remained flat in

Optical Module Industry Statistics 2026

Our in-depth market data report on Optical Module Industry. Explore verified statistics and the latest research.

Optical Component Revenue Reaches Nearly $25B in

Cignal AI''s Optical Components Report is published quarterly and provides revenue-based market share of company sales into four optical

Optical Module Market Size, Competitors & Forecast to

The Optical Module market is a segment of the Optoelectronics industry that focuses on the production of optical components and modules. These components and

Optical Modules Market Size, Growth Trends & Forecast

Emerging innovations, including silicon photonics, integrated photonic chips, and coherent optics, are transforming the landscape of optical

Optical Components Market Update

•AEC/direct attach copper cables (DACs), AOCs, and optical transceiver capacity:While there is already a high demand for AECs/DACs, AOCs, and optical transceivers to support new AI deployments, it

Optical Modules

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

Optical Modulators Market Size, Share, Trends, Analysis

Compare market size and growth of Optical Modulators Market with other markets in Technology, Media and Telecom Industry

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Applied Optoelectronics Rips 24%, Lumentum Jumps 17%, Coherent

The optical-networking complex is ripping higher at midday Monday, with all three of the group''s marquee names posting double-digit gains. Applied Optoelectronics (NASDAQ:AAOI) is

Global Optical Module Sales Reach $4.25 Billion In H1 2022

Lightcounting published the latest quarterly report on Global Optical Module Market, updating the global Optical Module market size statistics of Q1 and Q2 2022, and releasing the latest

Lam Research Investor Relations

Lam Research Corp. Lam Research Corporation is a global supplier of innovative wafer fabrication equipment and services to the semiconductor industry. Lam''s equipment and services

Optical Modules Market Research Report 2034

Optical Modules Market Outlook 2025-2034 The global optical modules market was valued at $14.8 billion in 2025 and is projected to reach $39.6 billion by 2034,

Active Optical Module Market Research Report 2034

Active Optical Module market valued at $10.7 billion in 2025, projected to reach $35.6 billion by 2034 at 14.2% CAGR, driven by data center expansion and 5G deployment.

Optical Modules Market Size, Share, Industry Growth Analysis Report ...

Optical Modules Market - Significant Industry Insights This research report is a meticulous assessment of the optical modules industry, which contains a complete overview. With respect to distinct regions

Optical Modules Market Size, Growth Trends & Forecast

Situated within the broader optical communications industry, the Optical Modules Market is a vital subset of the telecommunications equipment

Optical Module Package Market 2025

Report Scope This market research report provides a comprehensive analysis of the global and regional Optical Module Package markets, covering the forecast period 2025–2032. It offers detailed insights

Understanding Optics Module Trends and Growth Dynamics

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Optics Module Company Market Share Material Science & Performance Drivers The industry''s technical trajectory is heavily influenced by advancements in semiconductor materials.

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This document is for preliminary research. Verify specifications against current standards, product documentation and project requirements.

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