



Optical module shipments in Q2

"More than 10M 400G+ Datacom optical modules shipped last quarter for the first time, breaking \$5B in revenue," said Scott Wilkinson, Lead Analyst at Cignal AI.

The global rollout of 5G networks has created an unprecedented demand for high-speed, low-latency optical links. 5G infrastructure relies heavily on dense fiber deployments and high-capacity optical ...

According to a market research report, global optical module sales are projected to grow by 10% month-on-month. This growth is primarily driven by increasing demand for 800G Ethernet modules. Another ...

The goal? Embed Lumentum's lasers right into those transceiver modules and help margins as AI workload grows. Technology leadership in optical transceivers CTO Wupen Yuen laid ...

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.

Additionally, Research C observed that Ethernet optical module sales surpassed \$3 billion USD in Q2 2024, representing a 30% year-over-year increase, with 400G/800G modules driving the majority of ...

That combination supports higher optical module volumes, higher technical requirements, and potentially higher component content per module. The positive read-through is strongest for ...

The datacom optical component market will grow 60%+ to reach over \$16B in revenue during 2025, based primarily on continued growth in 400G and 800G shipments. Innolight, Coherent, ...

LightCounting expects a 10% sequential growth in sales of optical transceivers in the current quarter, after a flat Q1. Most of the growth will come from sales of 800G Ethernet transceivers, shown in the ...

Discover the evolution from 400G to 800G and 1.6T optical modules. Learn key technologies, CPO vs pluggable, and upgrade strategies for future-ready data centers.

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