Will there be a shortage of optical modules

In summary, the surging demand for 800G and 1.6T optical modules--driven by AI computing clusters, hyperscale data centers, and next-generation cloud architectures--has positioned high-speed optical ...

In traditional data center interconnect (DCI) systems, optical modules held ~30% of total system value. That structure is reversing in 2026 -- optical module value share is climbing toward...

The optical transceiver market is riding a wave of unprecedented growth, fueled by advancements in AI-powered data centers, 5G networks, and cloud computing. But this surge comes ...

AI applications have become the absolute dominant force in the Ethernet optical module market. Sales quadrupled from 2023 to 2025 after doubling in 2024. However, insufficient indium ...

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 bandwidth for dense ...

The key growth driver is the rising demand for 800G Ethernet optical modules, alongside the initial commercial shipments of 1.6T modules, which are beginning to contribute modest revenue.

Chinese optical module suppliers, led by Zhongji Innolight, dominate global market share on AI demand, even as a severe optical chip shortage looms for 2025. The global surge in AI model ...

Learn how engineers plan for optical module shortages during supply chain disruptions, using IEEE 802.3 optics, DOM checks, and staged inventory strategies.

As AI data center buildout scales, optical connectivity is becoming a supply chain bottleneck, positioning Lumentum and Ciena as critical suppliers to hyperscalers who face multi-year ...

Currently, the demand for 4x100G and 8x100G optical modules exceeds the supply by 100%, and many customers have to wait until 2025 for delivery. LightCounting has raised its forecast ...

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