

# Optical Module and Optical Communication Investment



## Overview

(Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry last quarter amid the explosive growth of artificial intelligence models. Public funds' holdings in the communication sector topped 13. 1 percent as of March 31. Key growth factors include the surging demand for high-speed data transfer, the escalating expansion of data center capacities, and the ongoing advancements in optical communication technologies. This market is characterized by rapid technological advancements and an increasing adoption across. Data centers will keep dominating optical module demand as AI and cloud drive revenue growth through 2030. With global R&D projected to. Global Optical Modules Market Size By Product Type (Transceivers, Transponders), By Technology Type (Single-Mode Fiber (SMF), Multi-Mode Fiber (MMF)), By Application (Telecommunications, Data Centers), By Data Rate (10 Gbps, 25 Gbps), By Form Factor (SFP (Small Form-Factor Pluggable), SFP+). 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.

## Article Content

Global AI Optical Transceiver Market to Reach US\$26 Billion in 2026 ...

The upgrade cycle offers significant structural growth opportunities for Taiwan's optical communications supply chain. Taiwanese firms have established solid capabilities in foundry ...

Optical Communications Market Report Size, Share and Trends 2035

The expansion of fiber optic infrastructure is a prominent trend in the Optical Communications Market. As demand for high-speed internet and reliable connectivity rises, ...

Active Optical Module Market Report | Global Forecast From 2025 To ...

Europe holds a significant share in the active optical module market, characterized by the extensive deployment of optical communication solutions across various industries.

Optical Modules Market Size, Future Growth and Forecast 2033

Increasing investments in data centers and the expansion of telecommunication infrastructure are propelling market growth. The growing need for energy-efficient and high-performance network ...

Chinese Funds Lift Investment in Optical Module Stocks Amid AI ...

The high-speed transmission capacity of massive data is the key to determining the ceiling of AI computing power. Optical communication uses a laser as the information carrier and ...

Optics Transceiver Module Market 2025

Mobile operators are deploying fronthaul and backhaul networks that require high-density, low-latency optical modules capable of handling advanced 5G services. Current projections show that over 50% ...

Deep Dive: Optical Module Market

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 ...

Optical Module Industry Statistics 2026

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

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 sector. It connects closely with adjacent markets such as fiber ...

Optical Networking And Communications Market Size & Share ...

The optical networking and communications market size stood at USD 20.25 billion in 2025 and is forecast to reach USD 28.65 billion by 2030, advancing at a 7.19% CAGR.

## Contact Us

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