

# Optical module boom



## Overview

Chinese exports of optical fibre and transceiver modules posted double-digit growth in Q1 2026. Demand is outpacing production capacity: prices on specialised products have risen tenfold year-on-year, and order books are already filled through to 2028. eeRecently, market research firm YOLE Group stated in its latest market report that the AI-driven optical module market will see a 45% year-on-year growth. The AI-driven optical transceiver market in data communications is expected to witness a whopping 45% year-on-year growth through 2024. (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. Optical modules are the core devices that convert electrical signals into optical signals and then restore optical signals back to electrical signals. 52 billion by 2032, at a CAGR of 8.



## Article Content

Optical Transceiver Market Size, Share, Industry Report – 2035

Optical Transceiver Market Size The global optical transceiver market was valued at USD 13.4 billion in 2025. The market is

Optical Module Chip Market 2025

This market research report provides a comprehensive analysis of the global and regional Optical Module Chip markets, covering the

Chinese Funds Lift Investment in Optical Module Stocks Amid AI

(Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry

Design and dynamics of a deployable assembly module via rollable booms

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Optical module

An optical module is a typically hot-pluggable optical transceiver used in high-bandwidth data communications applications. Optical

Why China's optical communications sector is the latest AI boom ...

Optical modules, also known as optical transceivers, convert electrical signals to optical signals, and vice versa, for high-speed data

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