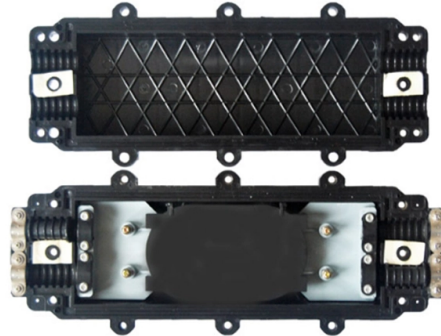


Optical module demand increased to 2030



Overview

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 networks and tighter constraints on power, security, and lead times. With global R&D projected to. •AI infrastructure race fueled a Capex surge in 2024 to approximately \$200bn •2025 Capex Projection to near \$350bn and 2030 Capex projection to near \$545bn •Capex funding facilities expansion, xPU acquisition •Expectations of continued growth through 2030 with generative AI adoption both at the. The global Optical Modules market is projected to grow from US\$ million in 2024 to US\$ million by 2030, at a Compound Annual Growth Rate (CAGR) of % during the forecast period. A surge in AI development created a new wave in demand for optical connectivity in 2023-2025 and it will sustain the market's growth. The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential expansion of AI computing clusters and the accelerated migration from traditional copper-based interconnects to high-speed optical connectivity. The market, projected to reach \$14.7 billion in 2025, is forecast to.

Article Content

Pluggable Optics for Data Centers Business Analysis Report 2024 ...

The global market for Pluggable Optics for Data Centers was estimated at US\$5.6 Billion in 2024 and is projected to reach US\$9.9 Billion by 2030, growing at a CAGR of 9.8% from 2024 to ...

Global Optical Modules Market 2024-2030

For VPX-based embedded computing systems in military applications that demand higher bandwidth and radio frequency (RF) signalling, TE Connectivity has unveiled a new line of optical ...

Optical Networking And Communications Market Size, Share & 2030 ...

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.

Optical Module Industry Statistics 2026

The rise of quantum computing is expected to create new demand for specialized optical modules by 2030, as quantum communication systems require high-precision photon manipulation.

AI Data Center Optical Transceiver Module Market 2025-2030

AI Data Center Optical Transceiver Module Market 2025-2030 Posted on Apr-03-2026

The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential ...

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Use of optical connectivity in AI scale-up networks will contribute to the market's expansion in 2026-2030. We expect that CPO will emerge as the best option for ...

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 ...

Global Optical Modules Market Insights, Forecast to 2030

In terms of production side, this report researches the Optical Modules production, growth rate, market share by manufacturers and by region (region level and country level), from 2019 to 2024, and ...

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Use of optical connectivity in AI scale-up networks will contribute to the market's expansion in 2026-2030. We expect that CPO will emerge as the best option for connectivity in scale-up networks, ...

Comprehensive Overview of Optical Module and DCI Trends: 2026-2034

The optical module and data center interconnect (DCI) market is experiencing significant expansion, driven by the escalating demand for high-bandwidth connectivity, cloud computing, 5G networks, and ...

Global Optical Module Package Market Overview, 2030

As data centers transition to more energy-efficient and software-defined infrastructures, the demand for compact, high-speed, and power-optimized optical modules is expected to intensify.

Contact Us

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