

2023 Optical Module Sales



Overview

Optical Module Industry Statistics 2026 The automotive industry's demand for optical modules grew by 30% in 2023, fueled by ADAS and vehicle-to-LightCounti.

Key Takeaways

Global optical module sales in 2023 experienced a mixed performance, with datacom modules recovering slightly while telecom and industrial segments faced declines. Market Overview

In 2023, the global optical module market faced challenges due to declining demand in the first half of the year, leading to excess inventories and revenue drops for leading vendors. Overall, the market saw a modest decline of around 3% year-over-year in datacom revenues, while telecom and industrial segments experienced sharper declines, with industrial optical component revenue down 12% and consumer optical components down 38% for tracked companies.

Segment Performance

- Datacom Modules: Datacom optical component revenue showed a -3% YoY decline, but quarterly recovery was observed, particularly driven by the ramp-up of 800GbE shipments in preparation for 2024.
- Telecom Modules: Telecom revenue continued to lag, reflecting a decline in deployed bandwidth and reduced capex from service providers.



- Industrial and Consumer Modules: Industrial modules declined 12% YoY, while consumer optical components fell 38%, though this did not include new entrants like Sony .

Key Drivers and Trends

- AI and Cloud Computing: Investments in AI clusters and cloud data centers drove demand for high-speed optical modules, particularly 400G and 800G Ethernet transceivers, though these effects were more pronounced in late 2023 and projected to accelerate in 2024 .
- Automotive and Emerging Applications: The automotive sector saw a 30% growth in optical module demand in 2023, fueled by ADAS and V2X communication systems .
- Pricing and Competition: The 400G optical module segment became highly competitive, with over 20 manufacturers entering the market, resulting in a 12% decrease in average selling prices .

Regional Insights

China remained the dominant manufacturing hub, accounting for over 70% of global production, with Shenzhen and Suzhou as major centers . Supply chain disruptions from previous years continued to affect lead times, with some manufacturers reporting delays beyond 12 weeks .

Market Size

While precise global revenue for 2023 is not explicitly reported, the market was projected to grow from \$13.2 billion in 2022 to \$35.8 billion by 2030, implying a moderate growth trajectory despite 2023's temporary slowdown . Unit sales for optical modules in 2024 were estimated at 88-117 million units, suggesting 2023 volumes were slightly lower due to the market downturn .

Summary

In 2023, optical module sales were characterized by:

- Datacom recovery in the second half of the year, driven by high-speed Ethernet modules.
 - Telecom and industrial declines, reflecting reduced bandwidth deployment and slower capex.
 - Strong growth in automotive applications and emerging AI-driven data center demand.
 - Intensified competition in high-speed segments, leading to price reductions.
- Overall, 2023 was a transitional year, with the market poised for strong growth in 2024 as AI, cloud, and 5G infrastructure investments accelerate .

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The optical module market in 2023 was a fiercely contested and fragmented gold rush, where Cisco's broad \$2.1

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