

Valuation of the Optical Module Sector



Overview

Our in-depth market data report on optical module industry. Explore verified statistics and the latest research.

Key Takeaways

The global optical module market is valued at approximately USD 12.73 billion in 2025 and projected to reach USD 19.37 billion in 2026, with strong growth driven by 5G, data centers, and AI infrastructure demands.

The optical transceiver segment, a core component of optical modules, was valued at USD 14.7 billion in 2025 and is expected to grow to USD 17.15 billion in 2026, reaching USD 46.12 billion by 2034 at a CAGR of 17% due to rising 5G deployments, data center expansion, and fiber optic technology advancements (Fortune Business Insights) . Goldman Sachs projects the total optical module market to reach USD 12.73 billion in 2025 and USD 19.37 billion in 2026, reflecting strong year-on-year growth driven by the adoption of 800G and 1.6T modules in AI and high-performance computing applications . The sales volume of 800G modules is expected to increase significantly, with 33.5 million units projected in 2026, highlighting the sector's rapid expansion .

Regional Insights



North America dominated the optical transceiver market in 2025 with a 35.9% share, while the Asia Pacific region is experiencing the fastest 5G rollout, which is a key driver for optical module demand . China, the United States, and Europe are major contributors to the global market, with China and the U.S. showing strong growth in data center and telecommunication infrastructure .

Technological Trends and Market Drivers

- **5G Networks:** By 2025, 5G is expected to cover one-third of the global population, increasing demand for high-speed optical modules .
- **AI and HPC Infrastructure:** The ratio of GPUs/ASICs to optical transceivers is rising, driving higher module adoption in AI clusters .
- **Co-Packaged Optics (CPO):** Innovations like Nvidia's CPO technology are reshaping the market by integrating optical engines directly into ASICs, potentially reducing traditional module sales but increasing component-level demand .
- **Data Centers:** Expansion of hyperscale data centers continues to fuel demand for high-bandwidth optical modules .

Outlook

Despite technological shifts such as CPO, the optical module sector remains robust, with strong near-term growth in 2025–2026. Market capitalization for leading manufacturers is expected to rise, and the sector continues to attract investment due to its critical role in telecommunications, AI, and cloud infrastructure . In summary, the optical module market is currently valued around USD 12.7–14.7 billion, with projections exceeding USD 19 billion in 2026, supported by 5G, AI, and data center expansion, though emerging technologies like CPO may alter traditional module dynamics.

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