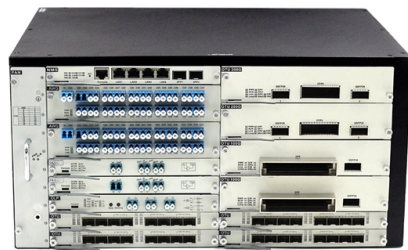


Tenfold increase in optical module quantity



Overview

The market for 800G optical modules is projected to grow nearly tenfold by 2026, with Bank of America forecasting an 83% compound annual growth rate for revenues through 2030. Applied Optoelectronics reported its fourth consecutive quarter of record revenue, citing accelerating AI-related demand; Q1 revenue was \$151. Data center sales jumped 154%. AI infrastructure is shifting from a 'Scale-Up' model to a 'Scale-Across' architecture, dramatically increasing demand for high-speed connections between data centers. A 20% gap-up is justified because it de-risks near-term orders from Nvidia's AI rack-scale push. BOSTON (January 7, 2025) – Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm Cignal AI. From 2020 to 2026, internet traffic will likely increase 5-fold. To meet this demand, datacom, and telecom operators need constantly upgrade their transport networks.



Article Content

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He also discussed plans to scale external light source modules (ELSFP) for co-packaged optics, saying production is currently “very limited” but is expected to ramp later this year and into ...

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Corning, NVIDIA Partner to Expand U.S. AI Optics Manufacturing

Under the agreement, Corning plans to increase its U.S. optical connectivity manufacturing capacity tenfold and boost domestic fiber production by more than 50 percent to meet ...

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Nvidia Deal Helps Corning Increase Optical Capacity Tenfold. Its ...

Corning and Nvidia stocks rise. The companies drastically will expand U.S. fiber and optical connectivity production capacity.

Contact Us

For more information, pricing, or custom solutions, please contact us:

Website: <https://ntmmgroup.co.za>

Email: sales@ntmmgroup.co.za

Phone: +27 82 471 2596

Address: Unit 7, Optic Park, 24 High-Tech Lane, Century City, Cape Town,
7441, South Africa

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