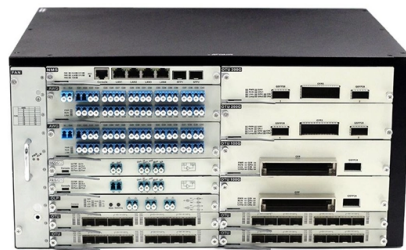


# Tenfold increase in optical module quantity



## 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

Aug 18, 2025

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Corning and Nvidia are forming a partnership to drastically expand U.S. fiber and optical connectivity production, the companies announced Wednesday. Corning, the glass and fiber maker, will...

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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 ...

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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 ...

Apr 27, 2026

## AI Data Centers Fuel 10x Growth for 800G Optical Modules

A Bank of America report predicts the market for 800G optical modules will grow nearly tenfold by 2026, driven by a shift in AI data center architecture to a "Scale-Across" model.

Sep 03, 2025

## 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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## Contact Us

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