

Investment Recommendations for Optical Modules



AI Overview

The optical module market is projected to grow from \$13.2 billion in 2022 to \$35.8 billion by 2030, driven by AI, cloud computing, and data center demand, making it a promising sector for strategic investments.

Market Overview The optical module industry is experiencing strong growth due to AI workloads, cloud computing, and high-speed data center interconnects. Data centers accounted for 45% of global revenue in 2022, while telecommunications contributed 28%, and automotive applications, including ADAS and V2X systems, are growing rapidly at 30% annually . The market is projected to grow at a CAGR of 11.6% from 2023 to 2030, reaching \$35.8 billion . Investors should note that competition in high-speed segments like 400G modules is intensifying, which can affect pricing and margins .

Public Companies and ETFs Investors can gain exposure through publicly traded companies involved in optical communications and photonics. Key players include:

- Lumentum Holdings (LITE) – optical components and lasers
- Ciena (CIEN) – network infrastructure and optical modules
- Corning (GLW) – fiber optics and connectivity solutions
- Marvell (MRVL) – silicon photonics and AI data center interconnects
- Coherent (COHR) – lasers and photonic systems
- Applied Optoelectronics (AAOI) – vertically integrated transceivers

For diversified exposure, the Corgi Lithography & Semiconductor Photonics ETF (EUV) invests at least 80% in companies materially involved in photonics, EUV lithography, and related semiconductor tools, including TSMC (9.6%) and ASML (8%) . This ETF provides a way to participate in the broader photonics and optical module growth trend while mitigating single-stock risk.

Emerging Startups Venture-backed startups are driving innovation in silicon photonics, optical interconnects, and all-optical processors. Notable examples include:

- Ayar Labs – optical I/O chiplets for AI data ce...

Article Content

Optical Modules Market Research Report 2034

Optical Modules Market Outlook 2025-2034 The global optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034,

Optical Network Components Market: Strategic Insights ...

Investment in optical components is increasingly viewed as a strategic enabler for digital economies, fostering innovation and competitive differentiation.

Optical Module Market Analysis and Forecast in 2026

AI computing power has driven explosive growth in the optical module market, with 800G and 1.6T technologies leading the industry transformation.

Don't Just Buy the Light: Who Actually Makes Money in Optical

From an investment perspective, optical modules matter because they have three characteristics: If AI data centers continue to scale and the industry keeps stepping through 400G ->

Optical Module Chip Market 2025

Investments in smart cities and subsea cable projects are boosting demand for optical modules. However, the market struggles with low local manufacturing capabilities and geopolitical

Optical Transceiver Market Size, Growth Drivers

The Optical Transceiver Market worth USD 15.42 billion in 2026 is growing at a CAGR of 13.67% to reach USD 29.26 billion by 2031. Coherent

POET Technologies Details Production Ramp and AGM Outcomes as

POET Technologies confirmed its optical engine production ramp for late 2026, targeting capacity of up to 1 million units per month by the end of 2027, funded by recent equity raises and

NVIDIA Strategic Investments in Optical Interconnects

Executive Summary Following newly announced investments, NVIDIA has committed over \$4 billion in direct strategic investments across two optical interconnect companies, Lumentum and

Nvidia invests \$4B in co-packaged optics suppliers

Nvidia Corp. today announced plans to invest in Lumentum Holdings Inc. and Coherent Corp., two publicly traded suppliers of optical networking

Optical stocks are booming. Here's how to invest in one of the most ...

Investors looking for new ways to play the artificial-intelligence rush have found ample opportunity among optical-connectivity stocks.

Understanding Optics Module Trends and Growth

Investment in the Optics Module sector focuses on R&D for next-generation modules, capacity expansion, and strategic acquisitions. Key

Optical Module Investment Landscape 2026: Demand,

In late May 2026, AI optical modules are the most demand-certain link in the compute chain — and the easiest place to overpay. This piece first quantifies

Top Optical Components Stocks and ETFs to Buy

Discover the best Optical Components stocks and ETFs to buy now. Ranked by Danelfin AI based on their probability of beating the market. Updated

Co-Packaged Optics Market Report 2025-2030

Co-Packaged Optics Market Co-Packaged Optics Market Dublin, April 03, 2025 (GLOBE NEWSWIRE) -- The "Co-Packaged Optics Market by Product

McKinsey Direct Opportunities in networking optics ...

— Coherent-lite optics. This technology delivers cost-effective, lower-power coherent transmission for shorter reaches—such as data center interconnect and metro inter-data center optics (front

Optical Modules Market Research Report 2034

Beyond hyperscale buildouts, national broadband expansion programs in Asia Pacific, Europe, and North America are driving fresh demand for coherent optical modules in metropolitan and long-haul

Active Optical Module Market Research Report 2034

Active Optical Module Regional Outlook 2025-2034 Asia Pacific represents the dominant regional market for active optical modules, commanding 42.3% of

Optical Modules Market Size, Growth Trends & Forecast

Optical Modules Market Future Outlook & Investment Strategies Over the next five years, the Optical Modules Market is poised for sustained growth,

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Hier sollte eine Beschreibung angezeigt werden, diese Seite lässt dies jedoch nicht zu.

Optical Modules Future-Proof Strategies: Market Trends 2026-2034

The optical modules market is booming, projected to reach \$27.4 billion by 2033 with an 8% CAGR. This comprehensive analysis explores market size, drivers, trends, restraints, and key

Lumentum

Lumentum is a global leader in optical and photonic technologies that power the networks and infrastructure behind AI, cloud computing, and next-generation communications. Built on

Monitoring Laser Bias Current for Optics Health

Monitor laser bias current in QSFP/QSFP-DD modules to predict optical link degradation. Track I_{bias}, Pre-FEC BER, and temperature to prevent PAM4 errors and maintain network uptime.

Sivers Semiconductors Collaborates With Jabil on Energy Efficient

Through this collaboration, Jabil plans to develop a 1.6T linear receive optical (LRO) transceiver module using Sivers' high-performance Distributed Feedback (DFB) lasers. The new

Optical module design resources | TI

View the TI Optical module block diagram, product recommendations, reference designs and start designing.

Deep Dive: Optical Module Market

Today, I'm excited to share an in-depth analysis of the global optical module market, an industry I find particularly compelling due to its critical role in data center networks for the

Contact Us

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