

Optical Modules The Largest Product in Shipments



Overview

The report also includes a review of the latest mergers and acquisitions and their impact on the market landscape.

Key Takeaways

800GbE optical modules are currently the largest product in shipments, driving the fastest growth in the optical module market.

The global optical module market has experienced explosive growth, largely fueled by AI computing and hyperscale data center deployments. In 2025, 800G modules achieved a penetration rate of over 50%, with shipments exceeding 5 million units, making them the largest in terms of volume globally (inf.news) . Overall, datacom optical component revenue surpassed \$19 billion in 2025, marking a more than 70% increase over 2024, with 400G and 800G modules accounting for the bulk of shipments (Signal AI) .

Key Drivers of Growth

- **AI and Hyperscale Data Centers:** The surge in GPU deployments and larger cluster sizes has significantly increased demand for high-speed optical interconnects, particularly 800G modules (Converge Digest) .
- **Transition to Higher Speeds:** While 1.6T modules have begun ramping, their volume remains under 1 million units in 2025, so they do not yet surpass 800G in shipment numbers (Signal AI) .

- Telecom and Datacom Applications: 400ZR and ZR+ coherent modules continue to dominate WDM bandwidth deployment, supporting both intra- and inter-datacenter connectivity (Optical Connections News) .

Leading Suppliers

- Innolight, Coherent, and Eoptolink are the largest suppliers of datacom modules, with Innolight leading in revenue with over \$5 billion in 2025 (Signal AI) .

- Marvell, Acacia, and Ciena dominate 400ZR and ZR+ module shipments, while Nvidia's 800G solutions, sourced from Fabrinet, rank as a top supplier for AI applications (Converge Digest) .

- Emerging 1.6T modules are being adopted in select Nvidia and hyperscale applications, signaling the next wave of high-speed optical growth (Signal AI) .

Future Outlook

- Continued 800G Growth: Demand for 800GbE modules is expected to remain strong through 2027, even as 1.6TbE modules begin volume adoption (Signal AI) .

- Co-Packaged Optics (CPO): High-end chips, such as NVIDIA's GB300, are increasingly integrating CPO, which will further drive optical module performance and adoption (inf.news) .

- Revenue Expansion: The datacom optical market is projected to continue growing, with 400G and 800G modules remaining the primary revenue drivers until 1.6T technology reaches broader adoption (Signal AI) . In summary, 800GbE optical modules currently dominate global shipments, supported by AI-driven datacom demand, hyperscale data center expansion, and strong supplier ecosystems, while 1.6T modules are emerging as the next-generation growth segment.

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