

Valuation Recovery in the Optical Module Sector

Preview

According to the latest June 2025 Quarterly Market Update by renowned research firm LightCounting, the global optical transceiver market is set to rebound in Q2 2025 with a projected 10% quarter-over-quarter growth. Valuation metrics for optical module companies refer to the financial ratios and analytical frameworks employed to assess the worth of firms engaged in designing and manufacturing optical transceivers and modules essential for telecommunications, data centers, and high-speed networking. The global market for Optical Modules was estimated to be worth US\$ 17590 million in 2024 and is forecast to a readjusted size of US\$ 56786 million by 2031 with a CAGR of 15. 8% during the forecast period 2025-2031. 52 billion by 2032, at a CAGR of 8. 0% during the forecast period 2025-2032 MARKET INSIGHTS The global Optical Module Chip Market size was valued at US\$ 823 million in 2024 and is projected to reach. Recently, LightCounting, a market organization in the optical communications industry, released a report stating that the artificial intelligence competition has had a meaningful impact on optical device module suppliers for the first time. In the fourth quarter of 2023, NVIDIA's demand for 4x100G. Optical module demand is being pulled in two directions at once, faster bandwidth for dense networks and tighter constraints on power, security, and lead times.

In Global Optical Modules Market, The VITA 66.5 draught standard, set to be published, defines NanoRF optical hybrid modules.

The global Optical Transceiver Market size in terms of revenue was estimated to be worth \$13.6 billion in 2024 and is poised to reach \$25.0 billion by 2029, growing

With a valuation of USD 3.5 billion in 2024, Optical Modules Market is anticipated to accelerate growth, attaining USD 8.2 billion by 2033 at a CAGR of 10.3% from 2026 to 2033.

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,

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The consumer electronics sector is also a significant driver, with optical devices increasingly integrated into smartphones and wearables. As the demand for high-quality imaging and fast data transmission

This market research report provides a comprehensive analysis of the global and regional Optical Module



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Chip markets, covering the forecast period 2025-2032. It offers detailed insights into market

Access detailed insights on the Optical Modules Market, forecasted to rise from USD 3.5 billion in 2024 to USD 8.2 billion by 2033, at a CAGR of

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With bold insights, proven expertise and tech that moves business forward, we help you drive your company to the leading edge.

On October 30, two leading companies in the optical module industry, InnoLight Technology (300308.SZ) and Eoptolink (300502.SZ), successively released their financial reports for the third

The global optical modules market is projected to reach a valuation of USD 15.8 billion by 2033, growing at a compound annual growth rate (CAGR) of 7.5% from 2025 to 2033.

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

The global optical transceiver market size is projected to grow from \$17.15 billion in 2026 to \$46.12 billion by 2034, exhibiting a CAGR of 17.00%

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