

800g Optical Module Order Ranking



Overview

On October 10, Nvidia announced an additional 35% order for 800G optical modules in 2026. As core suppliers of NVIDIA, Zhongji Xuchuan and Xinyi Sheng have won a combined 60% share of orders, further consolidating their dominant position in the global high-speed optical module. The growth in demand for computing power driven by AI continues unabated. The market is expected to grow from USD 15.1 billion in 2024, at a CAGR of 13%. It is not a single-chip product market, but a full-stack ecosystem covering: and optical engine integration systems. This tier defines the. The global market for 800G Optical Module was estimated to be worth US\$ million in 2024 and is forecast to a readjusted size of US\$ million by 2031 with a CAGR of % during the forecast period 2025-2031.



Article Content

Nvidia Orders Surge: InnoLight and Eoptolink Dominate

AI-driven data center demand propels optical module growth, with Nvidia's 800G orders dominating, pushing market value beyond \$12 billion by 2025.

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.

Behind the \$27.4 Billion Market Cap: Huagong Tech's Optical Module ...

On the order front, the company has sent positive signals. According to institutional research information from March, domestic computing center optical module order backlogs have

800G Optical Modules Drive Market Recovery in 2025

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends in data center optics and AI

Optical Transceiver Market Size, Share, Industry Report

Industrial cloud deployments and edge data center growth supporting Industry 4.0 initiatives further drive adoption of high-speed 100G to 800G optical modules.

800G Optical Module

The global market for 800G Optical Module was estimated to be worth US\$ million in 2024 and is forecast to a readjusted size of US\$ million by 2031 with a CAGR of %during the forecast

Ranking of Optical Module Chips | Weyland

Tier 1: Global Optical Chip Technology Leaders This tier defines the performance ceiling of 800G and future 1.6T optical systems, covering EML, VCSEL, and silicon photonics core

Global 800G Optical Module Market Research Report 2025 (Status

Global 800G Optical Module Market: Market Segmentation Analysis This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type,

AI Optics Stocks Surge: LITE, AAOI Lead 2026 Boom

AI optical stocks like Lumentum, Applied Optoelectronics, and Coherent are outperforming the Nasdaq by up to 20x. Explore how AI data center demand drives massive gains, key risks, and how traders

Optical Transceiver Market Size, Growth Drivers

Optical Transceiver Market Analysis by Mordor Intelligence The optical transceiver market size reached USD 15.42 billion in 2026 and is

Economic Watch: From optical modules to chips -

The competitiveness of optical modules also largely hinges on the synergy of the complete upstream industrial chain, covering optical chips, ceramic packages and precision structural

800G Optical Module

This report aims to provide a comprehensive presentation of the global market for 800G Optical Module, focusing on the total sales volume, sales revenue, price, key companies market

Global 800G Optical Module Supply, Demand and Key Producers,

An 800G Optical Module refers to a high-speed optical transmission module used in data centers and telecommunications networks. It is designed to transmit data at a rate of 800 Gigabits per second

Global 800G Optical Module Market Size, Share,

The 800G optical module market exhibits a predominantly consolidated structure, characterized by a handful of industry leaders

Linktel Technologies Files for Hong Kong IPO in Pursuit of "A+H" Dual ...

Linktel Technologies, already listed on the Shenzhen Stock Exchange, has officially filed for a Hong Kong IPO, pursuing an "A+H" dual listing. The company has benefited from AI computing

Global 800G Optical Module Market Research Report 2025 (Status

This report offers a comprehensive and in-depth analysis of the global 800G Optical Module market, covering all critical facets from a broad macroeconomic overview to detailed micro

800G Optical Communication Module

This report provides a comprehensive view of the global market for 800G Optical Communication Module, covering total sales volume, sales revenue, pricing, the market share and ranking of key

Optical Transceiver Market Size, Share, Analysis 2030

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

800GbE optics shipments to grow 60% in 2025 – report

The datacom optical component market will grow 60%+ to reach over US\$16 billion in revenue during 2025, based primarily on continued growth in 400G and 800G shipments. Innolight,

800G vs. 1.6T Transceivers for AI Data Centers:

Compare 800G and 1.6T transceivers for AI data centers in 2026. Learn the differences in performance, power efficiency, use cases, and

Eoptolink: The development history of a domestic optical module giant

In 2024, Eoptolink's 800G LPO optical module was favored by Meta, passed Meta verification, adapted to its AI chip ecosystem, and successfully obtained Meta's additional purchase order.

The Complete Optical Transceiver Procurement Landscape of

The implications for Chinese optical module vendors operate on two layers. On the NVIDIA pathway, Oracle is the fastest-growing source of overseas orders in 2026 — a direct tailwind for ...

Nvidia added 35% of its 800G optical module orders, while Zhongji ...

On October 10, Nvidia announced an additional 35% order for 800G optical modules in 2026. As core suppliers of NVIDIA, Zhongji Xuchuan and Xinyi Sheng have won a combined 60%

Global 800G Optical Module Supply, Demand and Key Producers,

The global 800G Optical Module market size is expected to reach \$ million by 2030, rising at a market growth of % CAGR during the forecast period (2024-2030).

Contact Us

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