

Domestic Optical Module Shipments in 2024



Overview

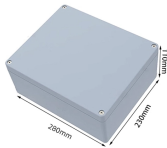
BOSTON (January 7, 2025) – Total shipments of leading-edge datacom optical modules are projected to tally over \$9 billion for 2024, according to the latest Optical Components Report from research firm Cignal AI. Well over 3 million high-speed datacom modules were shipped this quarter in support of. A research company reported that in the first quarter of 2024, 400GbE and 800GbE module shipments increased by more than 25% month-on-month. According to the research.



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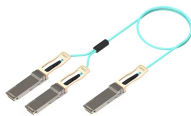
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Hyperscale network operator demand drove purchases of 400GbE and 800GbE datacom and 400ZR telecom optical modules to record levels, according to the latest Optical Components ...



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Datacom component revenue surged to nearly US\$2.5 billion in 2Q24 as Cloud operators rushed to support AI networking infrastructure, according to the latest Optical Components ...



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Research B further reports that the market for high-end data center optical modules will exceed \$9 billion USD in 2024, with 400G and 800G module shipments increasing nearly fourfold, reaching 20 million ...



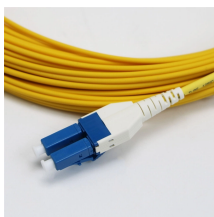
Spending on Datacom optical components was up more than 90% YoY as AI applications of 400GbE and 800GbE optical modules for AI applications drove demand to record levels.



Hyperscale network operator demand drove purchases of 400GbE and 800GbE datacom and 400ZR telecom optical modules to record levels, according to the 1Q24 Optical Components ...



TMCnet News Demand for Datacom Optical Modules Reaches Record Levels in 1Q24 [June 13, 2024]



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