

Optical Module Target Price in 2026

On the day, Lumentum shares rose 4.8% in pre-market trading, and JPMorgan sharply raised its price target from \$565 to \$950. Boosted by this momentum, the "Big Three" of A-share ...

Long expansion cycles lead to a continued short-term supply-demand imbalance. The high growth of the optical module market in 2026 is a result of the combined effects of AI demand, technological ...

Our in-depth market data report on Optical Module Industry. Explore verified statistics and the latest research.

Overall, in 2026, the optical module industry will be in a dual dividend period of technological iteration and demand explosion. The market growth will be driven by the dual wheels of 800G and 1.6T, and ...

The Commercial Grade Optical Modules Market stands to benefit from the transition to co-packaged optics in next-gen data centers, with the technology projected to capture 15% market ...

At the same time, it has raised its net profit forecast for covered optical module manufacturers from 2025 to 2027 by 42%, and increased its target price by 23% to 82%.

On April 20, 2026, a Morgan Stanley report stated that due to sold-out capacity in the optical communication sector from AI demand, investor focus has shifted from revenue to profit margins. ...

The long-term outlook for the optical module and DCI market remains highly favorable, fueled by continuous digital transformation across industries. Emerging technologies such as ...

Coupled with the explosive growth in AI inference demand and the expansion of emerging application scenarios, the high prosperity of the optical module industry will continue in 2026.



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