



Price Increase of Upstream Materials for Optical Modules

The industry is moving towards using 1.6T modules primarily for model training, while 800G modules, which are currently heavily used for training, are expected to be more focused on ...

Rising raw material prices are being passed on from the cost side to business operations, and optical module manufacturers are facing the dual challenges of squeezed profits and supply...

The explosive growth in demand for AI computing power is driving up prices for indium phosphide (InP), a crucial material for high-end optical modules, with prices nearly tripling in just over ...

Our research indicates that demand for 400G/800G and even 1.6T optical modules for cloud data centers and AI training clusters has been accelerating over the past two years, with the ...

We manufacture optical fiber in Georgia and Massachusetts, and Fiber Optic cable in Georgia and Connecticut, and have invested \$139M to expand production in recent years.

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 infrastructure investment.

According to a research report released by China Galaxy Securities on the Zhitong Finance app, as export control policies tighten, the supply of germanium, an upstream raw material for optical fiber ...

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Costs are driving optical chip shortages and price increases. High-speed optical chips (such as those above 25G) are in short supply, leading to rising costs. The self-sufficiency rate for high-speed ...

With the increasing demand for overseas 800G optical modules and the increase in domestic demand for high-speed optical modules such as 400G, most upstream optical device manufacturers will open ...



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