

800g optical module price increase



Overview

EG secures a US\$242m order for 800G optical modules, raising target price to RM2.10 with a BUY rating, driven by AI data center demand and strong revenue growth prospects. EG announced that it has secured a US\$241. Customer C is a reputable optical networking solution provider with exposure to high-speed optical module used in data centre interconnect. In reality, the physical layer physics of 800G and 1. As we push PAM4 signaling to its absolute limits, the unit cost of a transceiver is no longer the primary driver of Total Cost of Ownership (TCO). Calculating the costs across 1,200 switch ports using standard Cisco list pricing, David watched the total QSFP-DD spend multiply. According to our latest research, the global 800G Optical Module market size reached USD 1. The market is expected to grow at a robust CAGR of 25. The key growth driver is the rising demand for 800G Ethernet optical modules. BOSTON (May 7, 2025) – After explosive growth in 2024, 800G Datacom optics for AI and general computing applications will be the fastest growing segment of the market in 2025, according to the latest Optical Components Report from research firm Cignal AI. 6T optics will enter volume production in.



Article Content

Jan 05, 2026

Global 800G Optical Module Market Research Report 2025

The 800G Optical Module market size, estimations, and forecasts are provided in terms of output/shipments (K Units) and revenue (\$ millions), considering 2024 as the base year, with

Dec 16, 2025

AI Drives Doubling of 800G Optical Transceiver Shipments in 2025

AI Drives Doubling of 800G Optical Transceiver Shipments in 2025 Posted on Oct-13-2025 Within data centers, bandwidth is experiencing explosive growth. In 2024, deployments of high-speed optical

Dec 03, 2025

800G Optical Module Market's Growth Blueprint

By 2033, the market is expected to see a significant shift towards cost-effective, energy-efficient, and standardized 800G optical modules. This trend is closely tied to the growth of cloud computing and

May 23, 2026

Optical Transceiver Market Price Trends 2026: TCO & Risks

Optical Transceiver Market Price Trends 2026: The 800G Shift Procurement forecasts frequently project aggressive price drops for 800G optics by 2026, ignoring the non-linear power

Apr 16, 2026

Over 20 Million 400G & 800G Datacom Optical Module

Unit shipments of 400G and 800G modules have grown nearly fourfold over the past 12 months and are expected to surpass 20 million for 2024. "Optical

Apr 26, 2026

EG Industries (EG MK)

EG secures a US\$242m order for 800G optical modules, raising target price to RM2.10 with a BUY rating, driven by AI data center demand and strong revenue growth prospects.

Jul 24, 2025

400G, 800G, and Terabit Pluggable Optics:

Full range of 400G / 800G pluggable modules Copper cables Multimode Fiber – 100m
Single Mode Fiber inside DC – 500m & 2km Single Mode Fiber Campus – 10 km

Aug 22, 2025

AI Data Center Optical Transceiver Module Market 2025–2030

AI Data Center Optical Transceiver Module Market 2025–2030 Posted on Apr-03-2026
The AI data center optical transceiver market has entered a historic growth phase,
driven by the exponential

Apr 20, 2026

QSFP-DD Price Guide 2026: 400G/800G Costs & TCO Analysis

QSFP-DD price guide with 400G/800G module costs, OEM vs third-party comparison,
volume discounts, and 3-year TCO analysis for data center buyers.

Nov 14, 2025

Global AI Optical Transceiver Market to Reach US\$26 Billion in 2026 ...

TrendForce's latest research indicates that the global market for AI-focused optical
transceivers has entered a phase of rapid growth, with market size projected to
expand from

Jan 28, 2026

Innovation Trends in OSFP Optical Module: Market

The OSFP optical module market is booming, driven by high-bandwidth demands in
data centers and HPC. Explore market size, CAGR, key players (II-VI, Cisco,

Jun 30, 2025

800GbE Optics Shipments to Grow 60% in 2025

Innolight, Coherent, and Eoptolink are the largest suppliers of Datacom modules, with
Coherent, Broadcom, and Lumentum as key sources of

Jan 31, 2026

800G Optical Communication Module Market

In response, this report delves into the multifaceted impacts of tariff policies, regional
dynamics, and segment-specific growth drivers that influence the adoption trajectory
of 800G modules.

Sep 11, 2025

Market Insights: 800G & 1.6T Silicon Photonics Optical

Traditional modules require additional lenses and mirrors to combine the eight laser beams into one before entering the fiber. These optical

May 25, 2026

BRKOPT-2699

High-Speed Interconnects: Backend network requires high speed 100G/200G or 800G optics to connect servers and network switches. These high bandwidth connections are essential for handling the data

Mar 31, 2026

LightCounting :: Sales of 800G transceivers will return the market to ...

June 12, 2025 LightCounting expects a 10% sequential growth in sales of optical transceivers in the current quarter, after a flat Q1. Most of the growth will come from sales of 800G Ethernet

Feb 03, 2026

Optical Communication Industry Trends 2026: AI, 800G/1.6T Optical ...

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1.6T optical modules, silicon photonics, and next-generation data center connectivity solutions.

May 15, 2026

Global 800G Optical Module Market Research Report 2025 (Status

The global 800G Optical Module market size was estimated at USD 2002.2 million in 2024 and is projected to grow at a compound annual growth rate (CAGR) of 25.00% during the

Sep 28, 2025

Optical Module Chip Market 2025

The Global Optical Module Chip market was valued at US\$ 823 million in 2024 and is projected to reach US\$ 1.52 billion by 2032. Segmentation Analysis: Detailed breakdown by product type (Laser &

Apr 03, 2026

Optical Transceiver Market Size, Share, Industry Report

Co-packaged optics development initiatives. Challenges Thermal management complexity in dense racks. High 800G module power consumption. Opportunity

Jun 01, 2026

Optical Module Package Market 2025

However, price sensitivity in developing markets often delays the adoption of premium optical solutions, and trade restrictions occasionally impact regional dynamics. South America In South America, the

May 19, 2026

800G Optical Module Cost Analysis | TCO Optimization Guide

Complete guide to 800G optical module costs and TCO optimization for AI data centers. Includes pricing analysis, cost comparison, vendor strategies, and ROI calculations for informed

Feb 10, 2026

OSFP Packaged Optical Module Dynamics and Forecasts: 2026-2034 ...

The OSFP Packaged Optical Module market is booming, driven by surging data demands and the adoption of high-speed technologies like 400G and 800G. Explore market size, growth

Oct 08, 2025

Charting the Path Toward 1.6T and 3.2T Optical Module

The path to 1.6T and 3.2T Transitioning from 800G to 1.6T optical modules as AI workloads in data centers escalate will effectively double the bandwidth capacity

Oct 26, 2025

Opinion: optical transceivers at the chokepoint of AI growth and supply ...

Marvell's 1.6T LPO chipset, for example, combines 200G-per-lane TIAs and laser drivers for 800G and 1.6T linear-drive pluggable optics. LPO will not eliminate DSPs, but it will segment the

Oct 23, 2025

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

May 04, 2026

800G Optical Module Market Research Report 2033

Vendors are investing in research and development to enhance the performance, reliability, and interoperability of their 800G modules, while also exploring next-generation solutions that can

May 12, 2026

Over 800G optical transceiver shipments to soar 2.6× by 2026

The report predicts that worldwide shipments of optical transceivers of 800G and higher will hit 24 million units in 2025, then jump by 2.6 times to nearly 63 million units in 2026.

Contact Us

For more information, pricing, or custom solutions, please contact us:

Website: <https://www.moletenare-ew.co.za>

Email: info@moletenare-ew.co.za

Phone: +86 138 1658 3346

Address: Ningbo, China

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