

Are optical modules currently out of stock



Overview

NVIDIA has been aggressively pre-allocating capacity at the world's top EML (electro-absorption modulated laser) suppliers, pushing lead times out past 2027 and triggering a supply shortage across the industry. Optical module makers and hyperscalers have been scrambling for secondary. According to the latest June 2025 Quarterly Market Update by renowned research firm LightCounting, the global optical transceiver market is set to rebound in Q2 2025 with a projected 10% quarter-over-quarter growth. The key growth driver is the rising demand for 800G Ethernet optical modules. Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. The global optical module market is forecast to grow 60% in 2026 and reach nearly \$60 billion by 2031, driven by AI demand. The. On April 7, Samsung reported Q1 2026 operating profit of KRW 57. It exceeded Samsung's entire 2025 full-year result.



Article Content

Apr 02, 2026

Lumentum Orders Booked Through 2028: Can Optical ...

Optical communications are emerging as the next AI computing infrastructure frontier, driven by data interconnection bottlenecks. Lumentum's order book is full through 2028, reflecting ...

Mar 10, 2026

Pluggables, Power, and Geopolitics: Mapping the 800G ...

As of December 5, 2025, pure-play transceiver vendors with high exposure to the Nvidia supply chain have delivered triple-digit year-to-date (YTD) returns.

Jun 03, 2026

Optics Transceiver Module Market 2025

Carriers like Verizon and AT& T are accelerating fiber deployments, creating sustained demand for single-mode optical modules. However, supply chain constraints and component shortages continue ...

Jan 04, 2026

Top Silicon Photonics Stocks 2026: Breaking the Copper Wall

Optical module makers and hyperscalers have been scrambling for secondary suppliers. The EML market is dominated by a handful of names: Lumentum, Coherent, Mitsubishi, Sumitomo, ...

Aug 06, 2025

800G Optical Modules Drive Market Recovery in 2025

After a typical seasonal dip in Q1, DWDM, FTTx, and wireless fronthaul (WFH) optical modules are bouncing back in Q2. Sales of AOCs, particularly 400G and 800G, remain robust.

Feb 27, 2026

Nvidia Orders Surge: InnoLight and Eoptolink Dominate 60% of 800G ...

Under the current massive data center cluster demand, the consumption and value of optical modules are significant. Thanks to the explosive growth in demand from AI data centers, all ...

Jul 30, 2025

Optical Transceiver Boom: Lumentum, Coherent, and Fabrinet's ...

The optical transceiver market is riding a wave of unprecedented growth, fueled by advancements in AI-powered data centers, 5G networks, and cloud computing. But this surge comes ...

Nov 30, 2025

Pluggables, Power, and Geopolitics: Mapping the 800G and 1.6T Optical ...

As of December 5, 2025, pure-play transceiver vendors with high exposure to the Nvidia supply chain have delivered triple-digit year-to-date (YTD) returns.

Jun 26, 2026

Optical Module Stocks Surge Over 6% as 1.6T Era Begins

Driven by accelerating AI infrastructure demand, key optical module stocks like InnoLight and Eoptolink surged after a Huatai Securities report confirmed 1.6T modules have entered ...

Sep 23, 2025

AI Fuels High-Speed Interconnects, NVIDIA, Google, AWS ...

Although shipment growth in 2029 is projected to slow to 8.7%, demand for high-end optical transceiver modules is forecast to surge. With 800G transceiver modules becoming ...

May 05, 2026

CPU Shortage Deepens, Optical Module Value Restructuring

In traditional data center interconnect (DCI) systems, optical modules held ~30% of total system value. That structure is reversing in 2026 — optical module value share is climbing toward...

Contact Us

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

Website: <https://www.chromadecksigns-eastrand.co.za>

Email: sales@chromadecksigns-eastrand.co.za

Phone: +32 2 318 5792

Address: Avenue Louise 500, 1050 Brussels, Belgium

This document is for informational purposes only. Specifications subject to change without notice.

