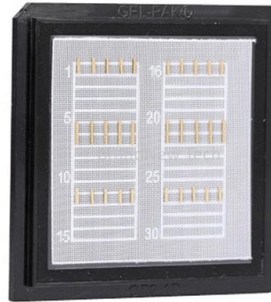


Why are communication optical module prices rising



Overview

Costs are driving optical chip shortages and price increases. Recent price increases in products like memory have pressured AI data center CAPEX, prompting questions about whether such hikes are truly beneficial. While scarcity-driven price rises in single components—be they storage, fiber, or discrete parts—may seem like direct buying signals, within the. Supply and demand: Exploding demand for AI computing power is driving data center expansion, and 800G/1. Supply bottleneck: High-end production capacity (such as 800G) is difficult to. In early 2026, global commodity markets experienced increased volatility: gold prices broke through \$5,189 per ounce, and prices of non-ferrous metals such as copper and tin rose by more than 20% year-on-year. Prices of epoxy resin and fiberglass, key raw materials for PCB boards, also continued. Although optical modules are high-tech products, raw material costs account for as much as 60%-70% of the total cost, with metal materials being one of the major cost items. This trend is no longer limited to the communications industry but is spreading to more fields that rely on high-performance optical fiber transmission, such as FPV, drone remote control, and vision link.

Article Content

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Why Fiber Optic Prices Exploded from Early 2026

Conclusion: Navigating the 2025–2026 Fiber Price Crisis The dramatic surge in fiber optic cable prices from late 2025 into early 2026 is primarily driven by the explosive and sustained

The reasons behind the recent sharp price increase of optical modules

In general, the price increase of optical modules is the inevitable result of strong demand (the AI computing power race) meeting limited supply (bottlenecks in high-end chips, materials, and

Rising Fiber Optic Prices and Supply Challenges: Cost Trends

This structural change is also reflected in optical communication modules. Taking high-speed optical transceiver modules as an example, prices have been rising steadily since their initial

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Optical Module Industry Statistics (2026): Expert Analysis

Optical Module Industry Statistics Optical module demand is reshaping faster than most forecasts, with 2026 growth pointing to a clear

2026 Price Trends of Key Materials in the Networking Industry

Price pressure is mainly concentrated in several key categories, including memory, PCB/CCL, copper, passive components, and optical communication materials.

Fiber Optic Market Outlook 2026: Why Prices Are

Procurement Strategy: When Will Prices Drop? Given the current "tight supply, price surge" phase, here are answers to the most pressing

Rising raw material prices: a way for the optical communication ...

Rising raw material prices are a microcosm of the cyclical fluctuations in the optical module industry. For the industry, short-term cost pressures are both a challenge and an opportunity to optimize the

Optical Module MCUs Become Critical as AI Data Centers Drive

MCU chips powering optical modules have emerged as a critical semiconductor segment driven by the AI data center construction boom, with prices rising approximately 40% year-to-date

Optical Module Industry Statistics 2026

The optical module industry is facing increasing pressure to reduce its carbon footprint, with 40% of manufacturers targeting net-zero emissions by 2030. Competition in the 400G optical

China Optical Module Stocks Surged on AI Demand

Optical component stocks in China surged on June 3 after strong AI demand drove gains in US tech firm Marvell. Major Chinese optical module companies including Zhongji Innolight,

Deep Dive: Optical Module Market

Today, I'm excited to share an in-depth analysis of the global optical module market, an industry I find particularly compelling due to its critical role in data center networks for the

Cost of optical module electronic chips | Weyland

Optical modules are critical components of modern optical communication systems and are widely used in data centers, 5G communications, cloud computing, artificial intelligence (AI), and

NVIDIA Doubles Down on Photonics: CPO Emerges as the Next

Optical modules: the "interpreters" inside data centers 1) Why data centers need light Chips communicate in electrical signals, but high-speed electrical signaling breaks down quickly over

Shortage of chips for optical modules | Weyland

The "chip shortage" has multiple impacts across the industry: 1. Longer Delivery Cycles Optical module manufacturers face extended lead times due to limited availability of core chips. 2.

Deep Dive: Optical Module Market

What are Optical Modules? Optical modules are devices used in fiber optic communications to transmit and receive data through optical fibers. They convert electrical signals

Proportion of costs accounted for by optical chips and optical modules ...

With the rapid evolution toward 400G, 800G, and 1.6T optical modules, the cost structure is continuously changing. The overall trend shows rising electrical chip share, evolving optical device

AI Boom Strains Supply of Lasers, Fiber Optics and Photonics

Companies that provide optical components—such as laser diode makers, fiber cable producers, and photonics module suppliers—may gain pricing power in the short term, which could

2025 Optical Module Market Share and Demand Report

The 2025 optical communication industry is driven by AI data centers (AIDCs) and 5G rollouts, with high-speed optical modules (400G/800G/1.6T) emerging as core growth engines.

Why Fiber Optic Prices Are Rising in 2026

1. Core Drivers Behind Fiber Optic Price Increases 1.1 Rising Raw Material Costs The primary cost component in fiber optic cable manufacturing is preform material. Increased demand for ultra-low

Datacom Optical Module Market: \$42M by 2025, 12.3% CAGR Analysis

Datacom Optical Module market forecast reveals 12.3% CAGR. Analyze drivers: cloud data centers, 400G adoption. Gain insights into market shifts.

Why the Logic Behind Optical Module Price Hikes Is More "Healthy"

Guosheng Securities notes that the pricing logic for optical modules is more sustainable: as specs advance from 400G to 1.6T, unit prices rise while cost per bit continues to fall. This "tech-driven

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Behind them, Hisense Broadband holds a full chain from optical chips to terminal devices, HG Genuine has secured cost advantages through in-house EML chips and SiPh solutions, and TFC

Why Are Optical Fiber Prices Rising in 2026

Optical Fiber prices rose in 2026 on strong demand from AI data centers and 5G. Tight preform capacity, higher raw material costs and supply

Rising Fiber Optic Prices and Supply Challenges: Cost Trends

Global demand for optical fiber is driven not only by upgrades to traditional telecommunications infrastructure but also by the robust expansion of artificial intelligence, big data

The Breakthrough Path for the Optical Communications Industry Amid ...

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

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