

Why are optical module prices still rising

The optics module market is experiencing significant growth, driven primarily by the explosive growth of data traffic and the burgeoning deployment of 5G and cloud computing.

The key growth driver is the rising demand for 800G Ethernet optical modules, alongside the initial commercial shipments of 1.6T modules, which are beginning to contribute modest revenue.

Policies support domestic subsidies for key materials (such as indium phosphide) to promote industrial investment and provide a 15% subsidy based on the terminal sales price. How to deal with the rising ...

The demand chain runs from AI data centers to high-speed optical modules and then to indium phosphide substrates. The report argues that traditional display-panel demand is now only ...

In 2022, the average selling price (ASP) of 400G optical modules decreased by 15% compared to 2021, due to increased competition and technological advancements.

The optical module market has become increasingly competitive, with average selling prices declining at approximately 15-20% annually for mainstream products. Chinese manufacturers have significantly ...

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 ...

Higher raw material costs contributed to the rise of semiconductor import prices in 2022. Those input costs fell in 2023, causing price decreases for import semiconductors. In 2024, the ...

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...

Understand why electronic component prices can rise suddenly, including supply chain, inventory, lifecycle, and market factors, and learn strategies to reduce cost volatility.

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