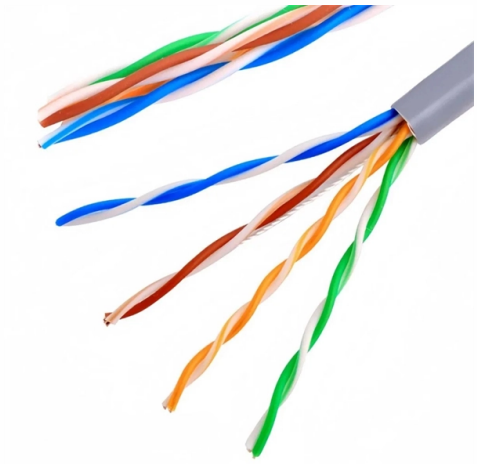
Proportion of the Optical Module Industry Chain



Overview

Google's TPU supply chain overview: Uncovering the "hidden. The following are key listed companies in each core area, with the newly added Tianfu Commun.

Key Takeaways

The optical module industry chain is dominated by data center and telecom applications, with chips forming the core component, while emerging sectors like automotive and LiDAR are growing rapidly. Industry Chain Segmentation1.

End-

Use Applications

Data Centers: Accounted for 45% of global optical module revenue in 2022, driven by cloud computing and AI workloads. Hyperscale operators like AWS, Microsoft Azure, and Google Cloud are major buyers, investing heavily in 400G and 800G modules. Telecommunication Networks: Contributed 28% of market revenue in 2022, including both wired and wireless backhaul, metropolitan, and long-haul transport.

Automotive & LiDAR: Growing at 30% in 2023, fueled by ADAS and V2X communication systems. Enterprise & Other Applications: Include campus networks, HPC, and secure optical modules, with increasing demand for encryption and energy-efficient solutions. 2.



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Component Segments

Optical Module Chips: Core of the industry, enabling signal conversion and amplification. The market was valued at $823 million in 2024 and projected to reach $1. 52 billion by 2032, with laser & detector chips being the largest sub-segment.

Transceivers & Cables: Form the backbone of high-speed interconnects, including QSFP28, QSFP+, SFP+, and emerging 400G/800G/1. 6T modules. Amplifiers, Splitters, and MUX/DEMUX Components: Support long-haul and coherent optical transmission, critical for telecom and hyperscale networks.

3.

Technology Proportions

Silicon Photonics: Expected to capture 70-80% of the 1. 6T market, offering higher integration and lower costs. Indium Phosphide (InP) Modules: Remain important for high-performance coherent and long-reach applications.

Co-

Packaged Optics (CPO) vs Near-Packaged Optics (NPO): CPO adoption is limited by maintenance costs, while NPO is emerging as a practical solution for high-density deployments. 4.

Regional Distribution

North America: Dominates with 36% market share, led by hyperscale and telecom deployments. Asia Pacific: Fastest-growing region at 18% CAGR, driven by 400G modules and state-owned enterprises. Europe: Focused on coherent optical modules for metro and long-haul networks.

5.

Market Size and Growth

Global optical module market was valued at $13. 2–14. 8 billion in 2022–2025 and is projected to reach $35.

8–39. 6 billion by 2030–2034, growing at a CAGR of 11–14%. Chips, transceivers, and cables collectively form the majority of the value chain, with end-use applications in data centers and telecom driving the largest revenue share.

In summary, the optical module industry chain is structured with chips at the core, followed by transceivers, cables, and supporting components, while data centers and telecom networks dominate demand, and emerging sectors like automotive and LiDAR are rapidly expanding. Technological shifts toward silicon photonics and high-speed 400G–1. 6T modules are reshaping the value distribution across the chain.

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The following are key listed companies in each core area, with the newly added Tianfu Communication becoming a core player in the optical module segment. Relevant data primarily

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