Computing power and optical module prices surge



Overview

The surge in fiber prices is directly linked to the explosive growth in demand for downstream optical modules. As the global AI race intensifies, major tech companies are deploying 800G and even 1. 6T high-speed optical modules for intra-data-center connectivity on a large scale. Supply bottleneck: High-end production capacity (such as 800G) is difficult to. Since the start of 2026, a global surge in raw material prices has swept the optical communication industry. 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. On April 3, China's optical communications sector defied a broader market slump, with shares of Guangku Technology surging over 11% to a record high, while leading stocks like Zhongji Innolight and TFC Optical Communication also rose.

Article Content

Global fiber optic prices have surged over 400%, with AI computing ...

Global fiber optic prices have surged over 400%, with AI computing power and production capacity bottlenecks jointly driving a new industry cycle. by Fusion Splicer April 13, 2026

The reasons behind the recent sharp price increase of optical modules

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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

Optical Communication Raw Material Prices Surge 144% in 2026 | HCH

Since early 2026, optical communication prices have soared, with G.652D fiber up 144% — a seven-year high. Driven by AI data center fiber demand and indium phosphide shortage, the

Rising Fiber Optic Prices and Supply Challenges: Cost Trends

Taking high-speed optical transceiver modules as an example, prices have been rising steadily since their initial market launch.

Optical Communications Sector Bucks Market Downtrend, Fiber

The surge in fiber prices is directly linked to the explosive growth in demand for downstream optical modules. As the global AI race intensifies, major tech companies are deploying

Nvidia Orders Surge: InnoLight and Eoptolink Dominate

The rapid growth rate far exceeds the industry average, and the company stated that this was mainly driven by the high-speed optical modules''

Dual-Line Beneficiary in the AI Computing Power Race,

This U.S.-based leader in optical module technology saw its stock price surge by 340% over the full year, making it a standout performer in the global AI

AI Fuels High-Speed Interconnects, NVIDIA,

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

A 3-fold surge! The big winner behind optical modules

As the "heart" of optical modules, optical chips are becoming one of the components in computing infrastructure that have pricing power. In the first three quarters of 2025, the company''s performance

Optical Fiber Price Surge (H2 2025–2026):... | AIMIFIBER

See why G.657A2 and G.652D optical fiber prices are rising in 2025–2026, how FTTH cable budgets are affected, and what procurement teams

The cost of compute power: A $7 trillion race | McKinsey

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The winners of the AI-driven computing era will be the companies that anticipate compute power demand and invest accordingly. Companies

DRAM Prices Surge 172% YoY with No Signs of

Toward the end of last month, we reported a notable disruption in the memory supply chain. Manufacturers retroactively increased RDIMM prices by

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Solar Module Prices 2025: Complete Guide To Current Costs & Trends

Comprehensive guide to solar module prices in 2025. Current costs, market trends, buying strategies, and price forecasts. Updated with latest data.

PwC_Semiconductor and Beyond_2026

The rise of SDVs may move vehicles toward a zonal architecture with centralized computing power, raising the performance requirements of automotive systems-on-chip (SoCs). The car of the future

A major RAM price rise will impact laptops, PCs and

With RAM and SSD chip prices set to skyrocket in 2026, Black Friday could be your last chance to get a laptop or PC for a reasonable price. Let

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800G Optical Module: The Super Driveshaft for the AI Computing Power Surge

The global 800G optical module market is projected to experience a significant supply-demand gap by 2025,with demand surging by 120% year-on-year.

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