

1 6T of active optical components in overseas warehouse

Article Overview

1.6T optical modules are beginning to ship to overseas customers, primarily for AI compute centers, but overall volume remains limited due to production constraints.

Market and Commercialization Status

The 1.6T optical module market is entering its commercial takeoff phase, with leading vendors shipping products mainly to overseas AI customers while domestic shipments in China still focus on 400G and 800G modules . These modules are designed for ultra-large data centers, AI compute clusters, and supercomputing centers, offering high-speed interconnects at 1.6 terabits per second . The global market for 1.6T optical modules reached USD 1.14 billion in 2024 and is projected to grow at a CAGR of 32.5%, reaching USD 13.36 billion by 2033 .

Supply and Production Considerations

Despite the commercial rollout, production capacity is constrained due to shortages of key chips and the complexity of advanced technologies like EML and silicon photonics . As a result, shipments remain below one million units in 2025, and overseas warehouses are likely stocked with limited quantities to meet priority AI and hyperscale customer demand . Copper-cable alternatives remain cheaper than fiber-based 1.6T solutions, influencing cost-sensitive deployments .

Leading Vendors and Deployment

Major suppliers include Xinyisheng, Zhongji Xuchuang, Guangxun Technology, and other emerging players, with shipments targeted at hyperscale and AI compute centers abroad . Vendors are investing in advanced technology routes to expand capacity, but the transition from 400G/800G to 1.6T modules is gradual, with 1.6T modules currently focused on high-end applications .

Implications for Overseas Warehouses

Overseas warehouses are likely holding limited stock of 1.6T active optical components, primarily to support AI infrastructure and hyperscale data center deployments. Due to production constraints and high demand, these components are not yet widely available in volume, and procurement may require coordination with vendors or distributors to secure allocations for overseas deployment . In summary, while 1.6T optical modules are commercially available and being shipped overseas, inventory in overseas warehouses is limited, reflecting both the early stage of market adoption and ongoing supply chain constraints.

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Chinese Cloud companies started to upgrade their data centers with 100GbE transceivers in 2018-2020

The rapid development of AIGC has promoted the demand for 800G optical modules, and

Silicon photonics boom continues: Taiwanese manufacturers ship GMT 1.6T optocoupler equipment, boosting

The report also includes a review of the latest mergers and acquisitions and their impact on the market

The global Optical Components Market is estimated at USD 8.57 billion in 2026 and is projected to grow to USD 13.4

The Optical Modules Market encompasses the design, manufacturing, and deployment of compact, high-performance

800G modules drive optical market recovery in Q2 2025, with initial 1.6T shipments. This article highlights key trends

In short, a new optical communication industry map is taking shape in Southeast Asia, becoming an important part of

In overseas markets, the company's 1.6T optical module products are being delivered in bulk to overseas integrators

LightCounting releases a research note on the early financial results for Q4 2024 Demand for optical connectivity remains strong, but

The rapid rise of AI data centers has driven the demand for next-generation optical

The optical hardware cycle is rarely synchronised with a single year. 2026 is unusual because three trends are

Chinese optical module companies are rapidly expanding into Southeast Asia, transforming Thailand, Malaysia, and

ACON OPTICS has more than 20 years of design and manufacturing capabilities, expertise in fiber optics interconnect and optical

They convert electrical signals into optical signals and vice versa, enabling data transmission at high speeds with



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Many booths displayed advanced 1.6T optical-module samples, with tightened on-site

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