

# Latest Research Report on Optical Modules from CITIC Securities



## Overview

GMT EIGHT - CITIC SEC: Explosive growth in the market space for optical module equipment, focusing on the trends of efficiency and localization in the chip, coupling, and testing processes. NVIDIA unveiled its new generation product, GB200, with its network architecture. The Zhitong Finance App learned that CITIC Securities released a research report saying that GPT and Gemini have been upgraded, AI applications have accelerated commercialization, and the latest financial reports from overseas cloud vendors Microsoft, Google, and Meta show that AI has played a. Data centers will keep dominating optical module demand as AI and cloud drive revenue growth through 2030. Optical module demand is being pulled in two directions at once, faster bandwidth for dense networks and tighter constraints on power, security, and lead times. In AI. Mars Finance News: On April 20, CITIC Securities research report stated that AI computing clusters have shifted from “stacking computing power” to “competing network efficiency.”

## Article Content

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ed to last year. Other income grew by 24.5% year-on-year, mainly driven by increased income from other non-interest income by CITIC Bank and CITIC Securities" prop

CITIC Construction Investment Securities released a research report ...

CITIC Construction Investment Securities released a research report saying that with the rapid upgrading and iteration of GPUs and ASICs, computing power performance continues to improve,

CITIC SEC Securities 2024 Annual Report Summary and First Quarter ...

CITIC SEC released a research report stating that guided by the spirit of the National Nine Articles and the Central Financial Work Conference, securities companies are expected to continue to return to

CITIC SEC: Explosive growth in the market space for optical module ...

CITIC SEC published a research report stating that the demand for optical communication is experiencing nonlinear growth, and the market space for optical module equipment

Optical Modules Market Research Report 2034

The optical modules market was valued at \$14.8 billion in 2025 and is projected to reach \$39.6 billion by 2034, growing at a CAGR of 11.5%.

CITIC Securities: Positive Capex expectations for North American

CITIC SEC has released a research report stating that the capital expenditure expectations of North American cloud providers are positive, and future capital expenditure will

longbridge

According to the Zhixin Securities APP, Zhixin Securities released a research report stating that NVIDIA recently launched its latest product, the GB200, at GTC2024. The network architecture of the GB200

CITIC Securities: AI Drives Increase in Both Volume and Value

Laser chips are the core component of optical modules, determining their electro-optical conversion efficiency and product generation.

CITIC Securities: Three Trends in the Optical Module Industry in 2024 ...

CITIC Securities released a research report stating that three trends in the optical module industry were showcased at OFC 2024 recently: the rapid development of solutions such as single

CITIC Securities: AI Drives Simultaneous Growth in Price and Volume

High performance, high bandwidth, and low latency networks have become key to improving data center performance. Laser chip is the core component of optical modules,

CITIC SEC: Bullish on the sustained demand for high-end optical modules ...

CITIC SEC released a research report stating that with the support of new customer and new product demand, it is expected that the demand for high-speed optical modules will be well

CITIC Construction Investment: Demand for high-speed optical

The Zhitong Finance App learned that CITIC Construction Investment Securities released a research report saying that with the rapid upgrading and iteration of GPUs and ASICs, computing power

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CITIC Securities: GPT and Gemini upgrade new optical modules

Overseas leading optical module products are in strong demand for 800G and 1.6T products, and DCI is expected to usher in new growth. It is recommended to focus on manufacturers

CITIC Securities: Time for Nvidia to release new products and

The Zhitong Finance App learned that CITIC Securities released a research report saying that at the COMPUTEX 2024 conference, we once again saw the important position of network devices in AI

CITIC Securities: Renewed Surge in AI Network Construction

According to a research report by CITIC Securities, the escalating demand for AI inference and training, coupled with the maturation of ASIC chips, is reigniting the wave of AI network construction. Looking

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