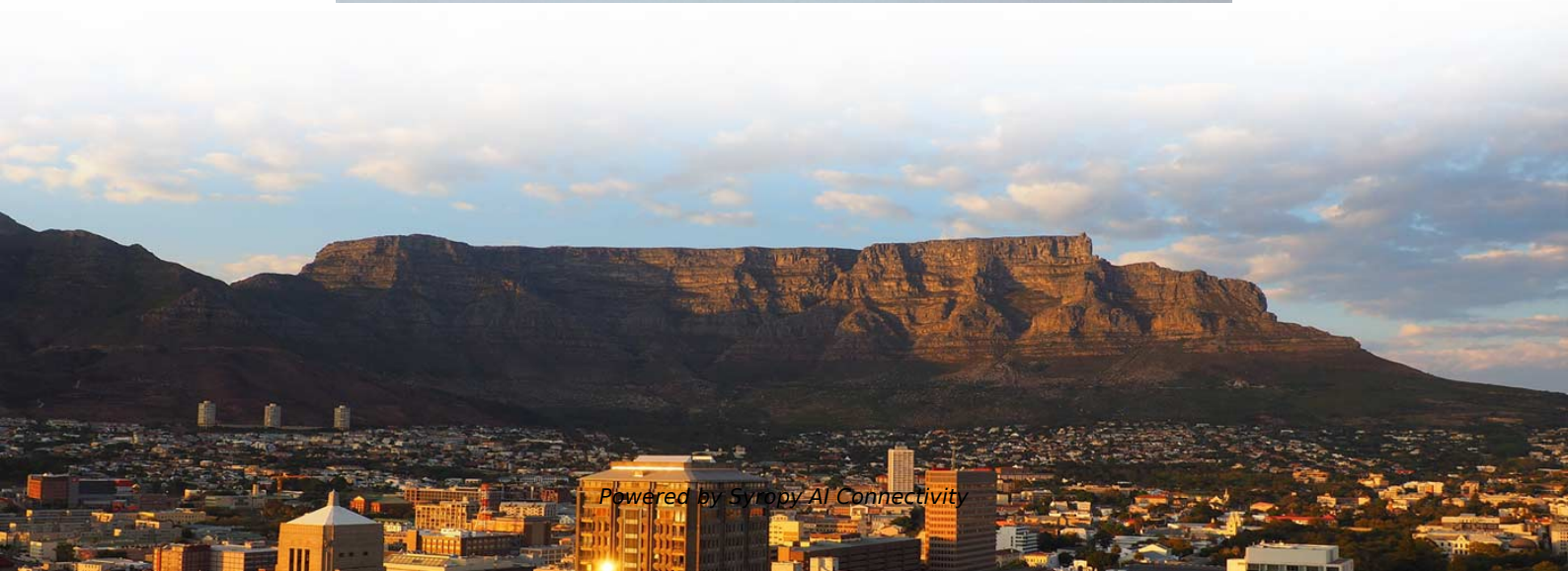


# **Price Increase of Upstream Materials for Optical Modules**





## Overview

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Over the past several months, upstream material costs and supply chain constraints have pushed fiber prices upward, directly impacting cable assemblies, patch cord production, and passive optical components. In early 2026, global commodity markets experienced increased volatility: gold prices broke through \$5,189 per ounce, and prices of non-ferrous metals such as copper and tin rose by more than 20% year-on-year. Prices of epoxy resin and fiberglass, key raw materials for PCB boards, also continued. ①Currently, a few domestic manufacturers such as Focuslight Technologies and Tengjing Technology have achieved mass supply of Faraday rotators and associated magneto-optical crystals, accelerating the localization substitution. For distributors, telecom contractors, ISPs, and data center integrators, understanding the. Factor category Specific factor impact overview Related instructions Supply and demand: Exploding demand for AI computing power is driving data center expansion, and 800G/1.



## Price Increase of Upstream Materials for Optical Modules

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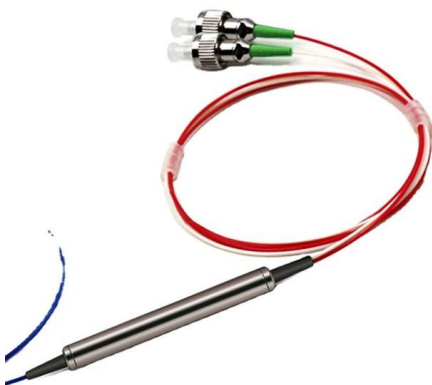


### Optical fibre prices rise as preform availability tightens

The interaction between sustained demand growth and limited upstream flexibility has reshaped the operating environment for optical fibre and cable markets. Price direction is now closely

### Module prices hardly decline as upstream prices stay high

Module prices hardly decline as upstream prices stay high Polysilicon The polysilicon sector posts steady production this month, with production volume gradually increasing. As of the

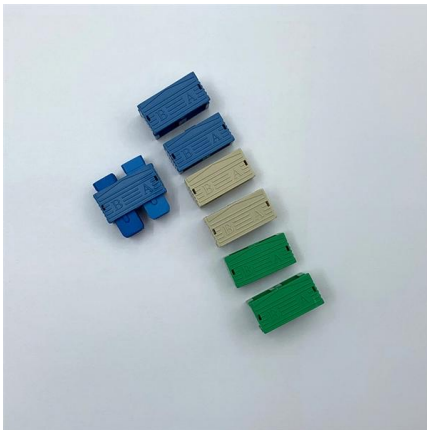
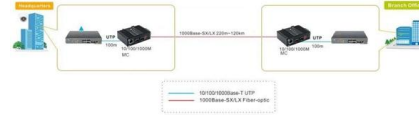


### Understanding Optics Module Trends and Growth Dynamics

The optics module market is booming, projected to reach \$42 billion by 2033, driven by 5G, cloud computing, and data center expansion. Learn about key market trends, leading companies, and

### PV Price Watch: Price-off At Upstream Industrial Chain,

Although the upstream industrial chain price is gradually sliding down it is worth mentioning that, according to many distributors, PV module prices,



### Analysis Of Photovoltaic Module Price Trends And Industry Impact For

However, price fluctuations in the photovoltaic module market remain a critical factor influencing the industry's growth. This article will analyze the price trends of photovoltaic modules for

### Central China: The supply of key materials for upstream optics

The supply of key materials in the upstream of the optical communication industry chain continues to be tight, especially the shortage of optoelectronic chips. Central China released a



### Optical Module Procurement Guide

Shifts in pricing for optical modules will continue to be the result of technology advancements and changing market needs. The shift to higher-speed





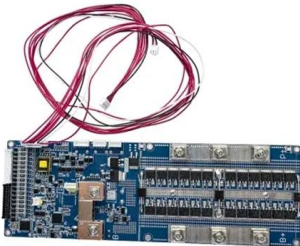
**Cost trends of Ethernet switches and optical modules**

Download scientific diagram , Cost trends of Ethernet switches and optical modules from 2010 to 2023; the values for 2020-2023 are projections. Based on data from



**Tightening of upstream supply in optical module sector! Acceleration**

Price pressures are gradually emerging, prompting the industry to accelerate the diversification and localization of the supply chain.



**Falling Wafer Prices, Pessimistic Q4 Module Demand**

Photovoltaic Modules Module prices remained unchanged this week. For ground-mounted power stations, the price for TOPCon 210 bifacial modules



**Why Fiber Optic Prices Are Rising in 2026**

The global fiber optic industry is entering a new pricing cycle. Over the past several months, upstream material costs and supply chain constraints have pushed fiber prices upward, directly impacting





### The reasons behind the recent sharp price increase of optical modules

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 Module Supply Chain 2025 Annual Report Data Summary ·

Observation Content: Changes in upstream procurement costs for optical chips and passive components, with a focus on whether major suppliers issue price increase notices.

### Inflationary pressures in the world of fibre and how

Let's have a look at how major optical companies manage inflationary pressures and come up with innovative strategies to lessen the impact of price



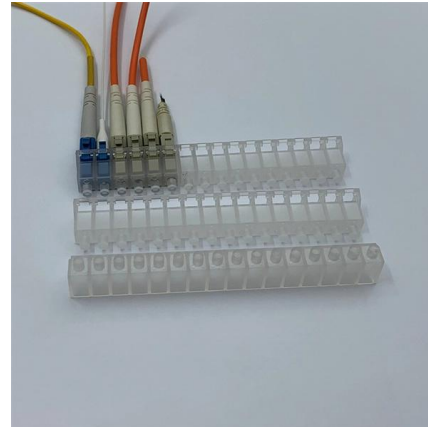
### The Impact of Optical Transceiver Prices on the

Fluctuations in the price of optical transceivers will also have a profound impact on the upstream and downstream of the industrial chain. High-priced optical



### Chinese solar module prices fall despite price hikes in

Despite the price pressure from the upstream polysilicon and wafer segment, the overcapacity would curtail any possible price increase in the cell



### Price Hike for Photocouplers Expected for 2021 Given

Owing to the rapidly growing demand for EV quick charging poles, as well as the recovering market for consumer electronics and industrial control

### The Breakthrough Path for the Optical Communications

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



### Upstream prices continue to fall amid mixed module price trends

Local-made price quotes reach USD 0.27-0.3/W, while non-local-made ones are at USD 0.18-0.22/W. InfoLink will provide prices for locally made modules depending on the market

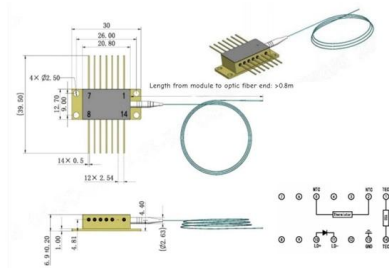


### The reasons behind the recent sharp price increase of optical modules

Costs are driving optical chip shortages and price increases. High-speed optical chips (such as those above 25G) are in short supply, leading to rising costs. The self-sufficiency rate for high-speed



Outline drawings mm



### Sky-High Prices Contribute to Rising Fiber Optic Cable Costs

However, due to global supply constraints and demand increases, fiber optic cable prices have increased significantly since 2021. These price increases threaten the viability of broadband

### Upstream price hikes ripple down; module prices remain stagnant

- o Upstream costs - Continued increases in polysilicon prices would drive wafer costs and quotes further upward.
- o Downstream demand - Should prices rise beyond end-market tolerance, the



### Advanced Optics Material Market , Global Market

Advanced Optics Material Market was worth USD 11.2 billion in 2025, and is predicted to grow to USD 18.9 billion by 2035, with a CAGR of 5.4%.



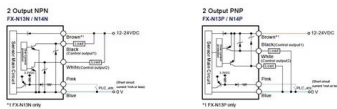
### Why Fiber Optic Prices Are Rising in 2026 - Market Trends, Cost

The global fiber optic industry is entering a new pricing cycle. Over the past several months, upstream material costs and supply chain constraints have pushed fiber prices upward, directly impacting



### The Breakthrough Path for the Optical Communications Industry Amid

For key metal raw materials, sign long-term procurement agreements of 3-6 months with upstream suppliers to lock in some raw material prices and reduce the impact of short-term



### Central China: The supply of key materials for upstream optics modules

The supply of key materials in the upstream of the optical communication industry chain continues to be tight, especially the shortage of optoelectronic chips. Central China released a



PRODUCTION NAME	Frequency conversion control cabinet
POTECTION DEGREE	IP55
VOLTAGE	220/380V
SIZE	customized as required
MOUNTING WAY	Floor-standing
APPLICATION	Indoor and outdoor



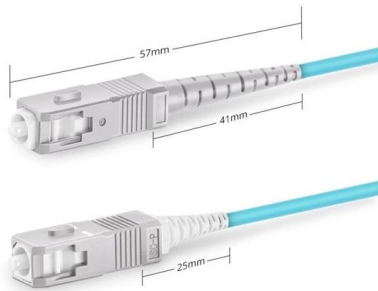
### Tightening of upstream supply in optical module sector! Acceleration

The aforementioned optical module industry insider told reporters from the STAR Market Daily that the reason why leading enterprises are "not panicking" in the face of tight supply and



## Fiber Optic Prices Surge 178%: Global Impact Analysis

This price spike, driven by a surge in overseas submarine cable projects and temporary shortages in preform production capacity, has already impacted the bill of materials (BOM) costs for optical



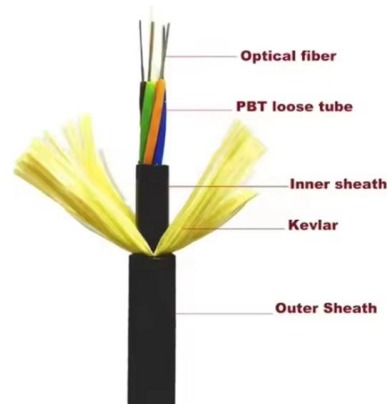
Simplex SC UPC

## Central China: The supply of key materials for upstream optics modules

The supply of key materials in the upstream of the optical communication industry chain continues to be tight, especially the shortage of optoelectronic chips. Central China released a research report

## Why are photovoltaic modules the only ones to fall in price recently

The continued low prices of battery components will lead to large-scale losses in the "whole links" of photovoltaic main materials, and no one will be spared (except that most of the



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