VENDORS AND MARKETS FOR OPTICS IN CHINA

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Abstract

Demand for optics from Chinese service providers surprised the industry in 2010-2016. It started with massive deployments of FTTx systems and continued with optical fronthaul in the access markets. First volume deployments of 400G DWDM ports in core networks in China began in late 2023 and a lot more is expected this year.

Chinese Cloud companies started to upgrade their datacenters with 25G AOCs and 100GbE transceivers in 2018-2020 and moved to deploy 200GbE and 400GbE optics in 2022-2023. Demand for optical connectivity in AI Clusters will give another boost to these projects in 2024-2029.

This report discusses current and future infrastructure projects of Telecom service providers and Cloud companies in China. It analyses the impact of these projects on the demand for optical networking equipment, optical modules and components. It includes profiles of the leading Chinese Cloud companies and suppliers of optical components and modules.

The report discusses the history of optical component and module manufacturing in China and the analyses challenges ahead. It includes a companion spreadsheet containing a detailed 5-year history and 5-year forecast for shipments, pricing and sales of optical components deployed in China and compares those with the global market for these products.