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		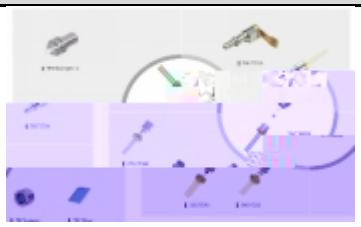	
		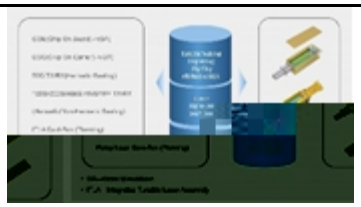	

		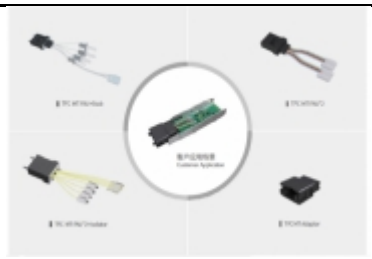	
		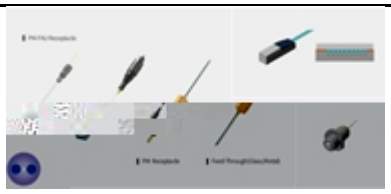	

		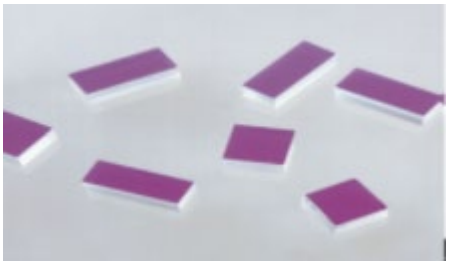	

		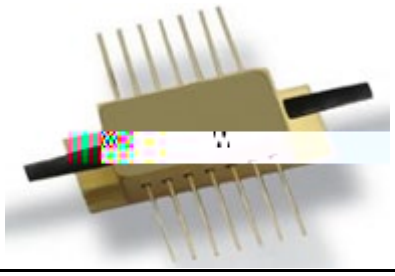	

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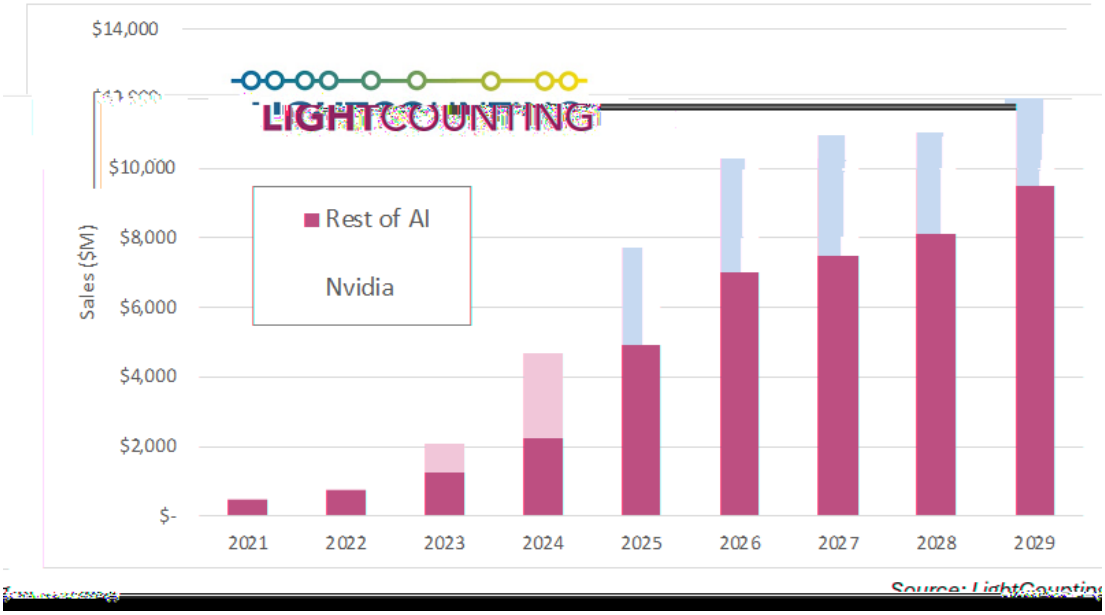
Figure: Sales of Ethernet Optical Transceivers for AI Clusters



Source: LightCounting

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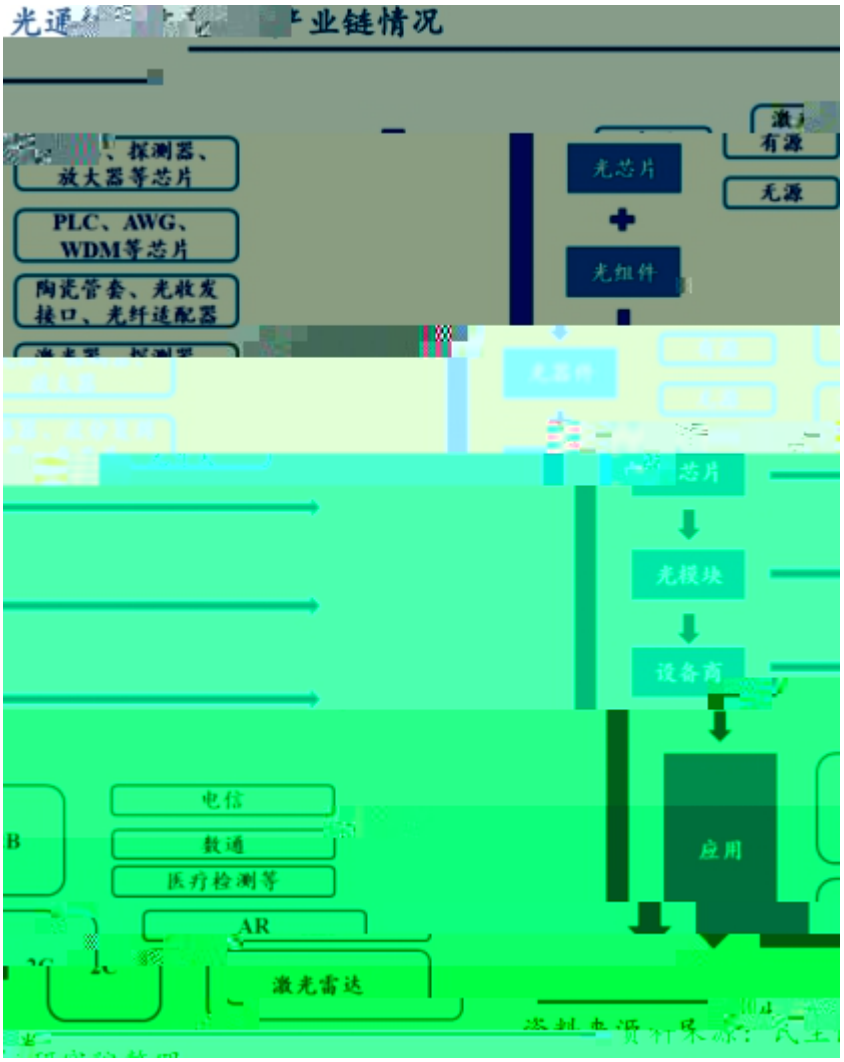
业链情况
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WDM等芯片
陶瓷管套、光收发
接口、光纤适配器
光芯片
有源
无源
光组件
芯片
光模块
设备商
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电信
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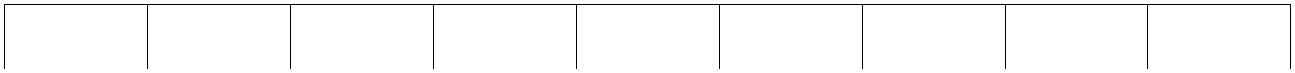

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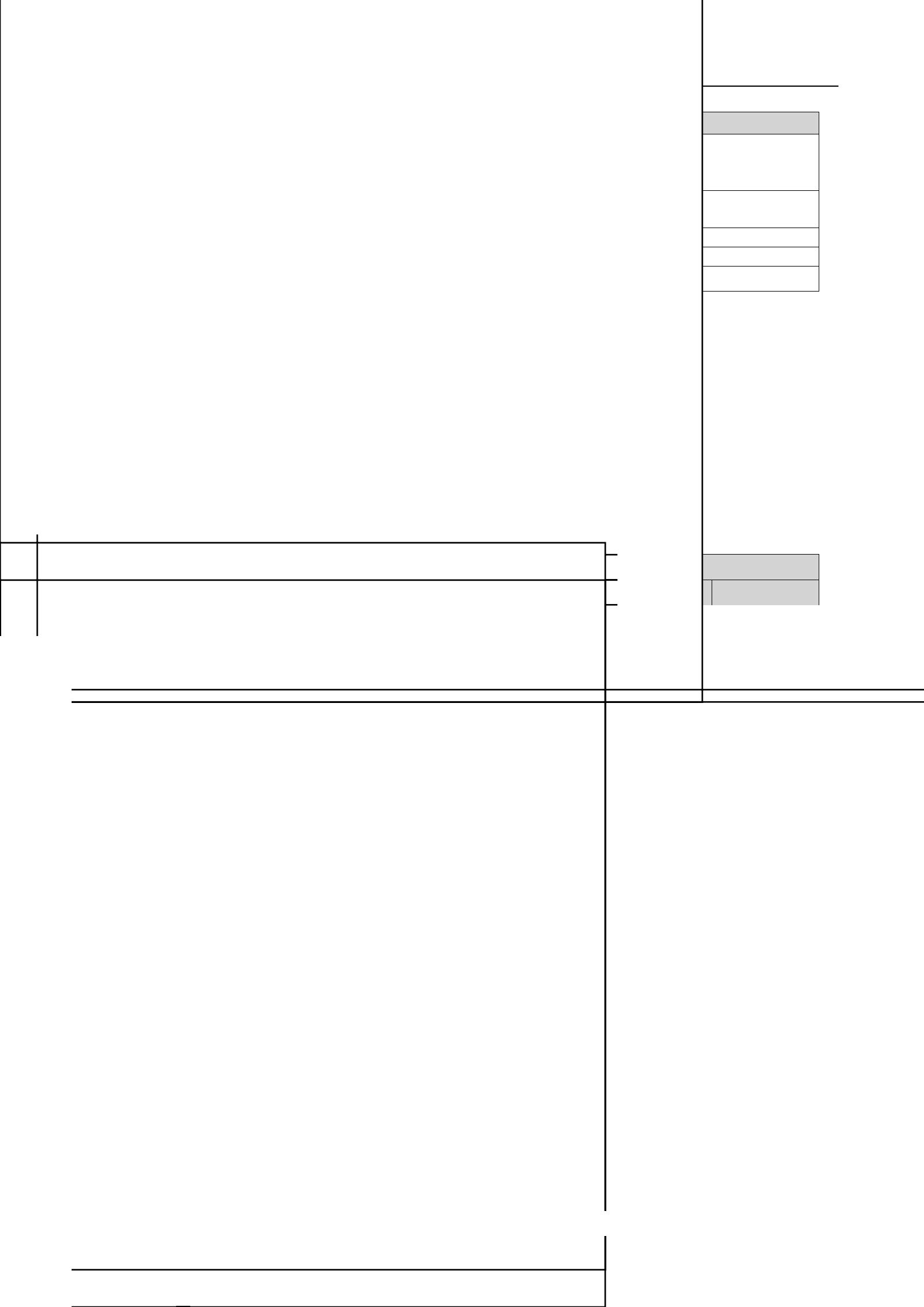

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