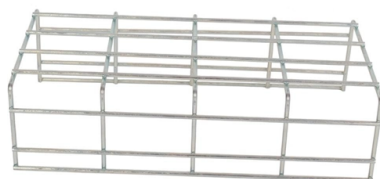


Price Analysis of the Optical Cable Industry



Overview

Discover how AI growth, supply and demand shifts, and more are influencing the optical fibre and cable industry with CRU Group.

Key Takeaways

Optical cable prices are rising due to raw material costs, technological innovation, and surging demand from AI, 5G, and data center expansion. Current Price Trends

The optical cable industry has experienced significant price volatility, particularly in bare fiber, which forms the core of all optical cables. Since late 2024, average contract prices for standard single-mode bare fiber (G.652.D) have increased by 40-60%, with spot market prices doubling in some regions. Lead times have extended from 4-6 weeks to 12-20 weeks, and inventory levels at major manufacturers are at historic lows, below 30 days of cover. Global fiber drawing tower utilization exceeds 95%, reflecting tight supply conditions .

Key Drivers of Price Changes

- **Raw Material Costs:** Optical fiber, cable sheaths, and strengthening cores are the primary raw materials. Fluctuations in these inputs directly affect production costs. Rising raw material prices push optical cable prices higher, while declines can reduce costs .
- **Technological Innovation:** Advances in fiber technology, such as higher transmission speeds, lower losses, and longer service life, increase production costs due to R&D and specialized manufacturing. However, improved efficiency can offset some cost increases over time .

- **Demand Surge:** The explosive growth of AI, hyperscale data centers, 5G-Advanced networks, and Fiber-to-the-Home/Business deployments is driving unprecedented demand. Hyperscalers like AWS, Google, Microsoft, and Meta are expanding inter-data-center networks, consuming massive volumes of optical fiber .
- **Supply Constraints:** Limited production capacity, extended lead times, and geopolitical factors contribute to price pressures. Civil-works costs, helium price swings, and permitting delays can temper short-term supply but are unlikely to derail long-term growth .

Market Size and Forecast

- The global fiber optic cable market was valued at approximately USD 12.82 billion in 2025 and is projected to grow to USD 14.22 billion in 2026, reaching USD 22.74 billion by 2031, at a CAGR of 9.84% .
- Another estimate places the optical fiber cable market at USD 11.79 billion in 2026, with a CAGR of 3.8% through 2034, driven by 5G infrastructure, cloud computing, and data center expansion .
- A broader forecast anticipates growth from USD 5.54 billion in 2026 to USD 11.11 billion by 2035, representing a CAGR of 7.21%, reflecting increasing broadband adoption, IoT, AI, and government digital infrastructure investments .

Segment Insights

- **Cable Type:** Armored cables led with a 34.11% revenue share in 2025, while ribbon designs are growing at a 10.58% CAGR .
- **Fiber Mode:** Single-mode fiber dominates with 72.38% of the market, while multi-core and few-mode fibers are expanding at a 10.21% CAGR .
- **Applications:** Optical cables are widely used in telecommunications, data centers, smart grids, and 5G backhaul networks .

Conclusion

Optical cable prices are influenced by a combination of raw material costs, technological advancements, and surging demand from AI, 5G, and cloud infrastructure. Supply constraints and geopolitical factors exacerbate price volatility. Despite short-term fluctuations, the market is projected to grow steadily over the next decade, with single-mode and armored cables remaining dominant segments. Strategic planning for procurement and investment should account for long lead times, rising costs, and evolving technology requirements.

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