Telecommunication Cable Market Assessment, By Type [Coaxial, Twisted Pair, Fiber Optics, LAN, Others], By Installation [Sea Based Telecom Cable, Land Based and Others], By Application [Telecommunication, Data Centers, Community Antenna Television, Computer Networks, Others], By Region, Opportunities and Forecast, 2016-2030F

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Report description:

Global telecommunication cable market is anticipated to grow at a CAGR of 6.05% between 2023 and 2030. The market was estimated to be worth USD 52.4 billion in 2022 and is expected to reach USD 83.83 billion by 2030. Starting in the mid-20th century, the information age swiftly shifted focus from traditional industries to an information technology-driven economy. This era ushered in a global village through digital technology and expanding connectivity, enabling the seamless flow of information and culture. The digital landscape, including the internet and social media, continues to reshape our global interactions and way of life. The transformation is driven by the capabilities of telecommunications cables, specially engineered to facilitate the efficient transmission of vast amounts of data across the globe.

The telecommunications cables market is experiencing significant growth, driven by increasing demand for mobile data and broadband services and the rapid expansion of 5G and future 6G networks. High-speed internet connectivity allows the integration of emerging technologies like blockchain and augmented reality/virtual reality (AR/VR) and the rising adoption of the Internet of Things (IoT) and Machine-to-Machine (M2M) devices. Post pandemic, the global digital economy experienced significant growth due to increased demand for remote work, online learning, and the expanding e-commerce sector. Telecommunication cables are a critical component of cloud computing and data center sectors, facilitating the advancement of smart cities and connected homes. It in turn, fosters the expansion of global telecommunication cable market.

Rapid Internet Growth Fuels Global Telecommunications Cable Market

The worldwide demand for telecommunications cable is surging as global internet connectivity continues to grow. According to

International telecommunication union, in 2022, two third population in the world, i.e., 5.3 billion people were using internet, owing to 66% growth in the world's population. This surge in internet usage is driving the expansion of the telecommunication cable market. To meet the heightened demand for internet connectivity, telecom companies are heavily investing in network infrastructure, including fiber-optic and coaxial cables. The rapid expansion of 5G networks further fuels the market, emphasizing the essential role of telecommunication cable in our increasingly connected world.

The 2Africa subsea cable project, initiated in May 2022 by a consortium including China Mobile International, Meta (Facebook), MTN GlobalConnect, Orange, Saudi Telecom Company, Telecom Egypt, Vodafone, and WIOCC, aims to enhance internet connectivity between Africa and the world. The project will bolster direct international connectivity for data centers, enterprises, and wholesale customers. With a total length of 45,000 kilometers and a design capacity of 180 Tbps, it will connect 19 African countries and 33 countries globally, improving network resilience and regional connectivity. Alcatel Submarine Networks will construct the cable as a fully funded project, set to conclude by 2024.

FTTH Integration Enhances High-Speed Internet Access and Fuels Telecom Cable Market

Fiber-To-The-Home (FTTH) is an advanced internet connectivity solution directly connecting fiber-optic cables to homes and businesses for high-speed data transmission over long distances. Fiber optics provide significant bandwidth, while wireless systems offer mobility, making the integration of both vital for future access solutions. The blend enhances FTTH services, utilizing Wi-Fi to support various services through a unified infrastructure. It's crucial for delivering high-speed internet access to consumers and improving connectivity for residences and businesses. Governments worldwide are extending fiber connectivity to remote areas. The growing reliance of businesses on internet services for operations fuels the demand for telecommunication cables, driving the telecommunications cables market.

Over the past few years, Verizon has expedited its fiber deployment strategy, rolling out approximately 57,000 fiber miles starting in 2020. It has established fiber connections at more than 51% of its cellular sites. Verizon is actively extending its fiber-to-the-premise (FTTP) network footprint, focusing on the Northeastern region. The company recently unveiled plans to broaden its high-speed internet coverage in areas such as Delaware, Virginia, Maryland, Pennsylvania, central New York, and other locations.

Governments Regulations

Government regulations in the telecommunications sector are crucial for a fair, reliable, and sustainable industry. They establish service quality standards, manage radio frequency spectrum, mandate universal accessibility, protect consumer rights, enforce fair pricing, and protect privacy. International organizations like ITU-T formulate ITU-T recommendations, which serve as a global standard for ICT infrastructure. G.654.E is a category for terrestrial optical fibers and cables with cutoff shifted features for digital coherent transmission systems. Regulations promote open markets, prevent monopolies, and set environmental standards to minimize infrastructure impact. Governments worldwide are partnering on major infrastructure projects, such as the SEA-ME-WE 6 subsea cable and the PEACE Cable System, to meet increasing capacity demands between Asia, Africa, and Europe.

In April 2023, the Prysmian Group initiated measures to tackle this challenge by launching ECO CABLE for their telecom offerings. The ECO CABLE certification adheres to established standards, emphasizing factors such as the carbon footprint of cable products, the exclusion of hazardous substances, recyclability, the rate of recycled materials, environmental advantages, and the transmission efficiency of the cables. The objective is to advance the sustainability of optical cables.

In September 2022, the ecological consequences of telecommunications cables, particularly with regards to heavy metals such as lead, attracted significant attention, prompting investigations by the United States Environmental Protection Agency."

5G Revolutionizing Wireless Technology and Expanding the Telecommunication Cable Market

The rise of 5G networks marks a significant leap in wireless technology as it represents the fifth generation of mobile networks, introducing a global wireless standard. This transformative technology promises exceptional benefits, including ultra-fast multi-Gbps peak data speeds, incredibly low latency, heightened reliability, extensive network capacity, widespread availability, and consistent user experience. By enabling faster data transfers and cost-effective connectivity for embedded sensors across a wide range of devices, 5G has spurred the adoption of Machine-to-Machine (M2M) devices and the integration of technologies such as artificial intelligence (AI) and machine learning (ML), augmented reality (AR), and virtual reality (VR), collectively bolstering the telecommunication cable market.

In September 2023, Google Fiber launched its GFiber Labs program, introducing a high-speed 20 Gig service for customers. This

service is powered by Nokia's 25G PON technology, surpassing the previous 10 Gig limit and doing so in an energy-efficient way without requiring alterations to the current fiber infrastructure. The 20 Gig service package also comes with a pre-certified Wi-Fi 7 router for users. Google Fiber's ultimate objective is to offer an ultra-fast 100 Gig internet service.

Telecommunication Cables as the Cornerstone of Digital Infrastructure

Telecommunication cables play a pivotal role in establishing the foundation of a digital infrastructure, serving as the backbone of the digital economy. They are indispensable for establishing data centers, ensuring the seamless transfer of data within critical infrastructure. The expanding cloud computing and data center markets, including applications in healthcare, education, and businesses, rely heavily on these cables. Furthermore, the growth of smart cities and connected homes hinges on the reliable connectivity of telecommunications cables. As the world increasingly embraces digitization, businesses are transitioning their products and services to the online realm, driving the demand for these cables. The surge in digital transformation is further accelerated by the burgeoning e-commerce market, highlighting the indispensable role of telecommunication cable in powering the modern digital landscape.

In July 2023, Sumitomo Electric supplied optical fiber cables that incorporated PureAdvanceTM-110, a large-effective-area fiber with minimal loss, for a data center interconnect initiative. Leveraging innovative pure-silica-core fiber technologies, Sumitomo Electric achieved record-breaking transmission loss rates, decreasing them from 0.17 dB/km to 0.16 dB/km or even lower at a wavelength of 1550 nm, thereby establishing a new benchmark for terrestrial cables.

Impact of COVID-19

The COVID-19 pandemic has accelerated telecom technology trends, resulting in a surge in demand for telecommunication services and cables. The shift to remote work, online learning, and virtual communication has led to a need for faster internet connections and improved cables. The booming e-commerce sector has increased the demand for reliable telecommunication cables. However, global supply chain disruptions and lockdowns have affected cable production and distribution. In response, Europe has initiated projects to expedite network expansion, aligning with European Union's digital single market objectives. European telecom companies are fast-tracking the deployment of fiber optic networks due to increased data demand from remote work and online learning. This highlights the need to expand Europe's telecommunications infrastructure, presenting significant growth opportunities in the telecommunication cables market.

Impact of Russia-Ukraine War

The ongoing conflict between Russia and Ukraine has far-reaching effects on telecommunications cables market as sanctions imposed on Russia have significantly impacted its economy, affecting various sectors, including telecommunications sector. Underwater telecommunications cable projects have been put on hold due to geopolitical uncertainty and risks. Furthermore, undersea telecommunications cables have been damaged and targeted in the region, posing threats to EU critical infrastructure that relies on these cables for connectivity. This has prompted EU countries to explore alternative connectivity options to safeguard their data and ensure network security, reflecting the growing need to diversify and protect critical communication links in times of geopolitical instability and cyber threats.

Following the war, European Union (EU) has been planning to invest in "cable projects of European interest" globally, aiming to reduce its dependence on a limited number of undersea internet connections. The initiative is set to unveil in early 2024 as part of a broader strategy to boost the EU's telecommunications sector and internet infrastructure. It lays the groundwork for a forthcoming "digital networks act" projected in 2025, designed to streamline regulations and attract more capital for telecom companies.

Key Players Landscape and Outlook

The telecommunication cable sector is currently experiencing a substantial surge in innovation, primarily motivated by the necessity to accommodate the transformations introduced by 5G technology. Notable catalysts for this innovation encompass multi-core fibers (MCF), next-generation fiber optic connectors, and the emergence of hybrid cables. Hybrid cables are of particular significance, which serve as essential components within data centers. The rising need for energy-efficient and space-saving solutions is driven by the escalating data traffic within these centers. The transition towards innovative cables aligned with the objectives of enhancing efficiency, optimizing space utilization, and improving overall performance, which cater to the expanding requirements of extensive telecom networks and data centers in the market.

In October 2023, Nexan successfully completed the divestiture of its Telecom Systems business, Aginode, to Syntagma Capital.

This move aligns with Nexans' strategic goal of streamlining its operations and focus on electrification markets.
In May 2022, One Energy and Prysmian Group unveiled a strategic partnership with Telstra to construct a cutting-edge inter-capital fiber network in Australia. This national fiber network initiative is a multi-year project in which Telstra will establish a state-of-the-art inter-city dual fiber path, encompassing approximately 20,000 route kilometers of new terrestrial fiber optic cable. The primary aim of this endeavor is to enhance inter-capital capacity while bolstering connectivity of regional areas in Australia.
In February 2022, the European Investment Bank (EIB) and Prysmian Group, a prominent company in energy and telecom cable systems, revealed the successful conclusion of a financing agreement totaling USD 135 million. This funding is intended to bolster Prysmian Group's research and development initiatives for the period 2021-2024 across Europe. These initiatives encompass advancements in ultra-fast telecom networks, more environmentally sustainable power grids, and the development of various new products. These products include submarine power transmission cable systems, installations for great depths, optical fibers, cables for FTTH and FTTA applications, intelligent cable systems, and sensing solutions for the management of power grids.

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