

Submarine Cable Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Submarine Cable Systems Market size is estimated at USD 14.88 billion in 2025, and is expected to reach USD 24.18 billion by 2030, at a CAGR of 10.2% during the forecast period (2025-2030).

Key Highlights

- Submarine cable systems typically utilize optical fiber cables for transmitting both data and power. These systems are laid on the seabed, connecting cable landing stations (CLS) at different locations to carry telecommunication and power signals across vast expanses of the ocean. Submarine cabling systems offer highly reliable, secure, and high-capacity telecommunication links between countries worldwide.
- One primary factor driving the growth of the submarine cabling system market is the increased investment in high-speed internet infrastructure. Additionally, the continuous expansion in data generation and transmission globally is anticipated to significantly boost market growth. Consequently, numerous internet backbone operators are expected to invest in the submarine cabling system market throughout the forecast period.
- As Internet access expands in developing countries, the next phase of network improvement may focus on emerging markets worldwide. Consequently, many businesses, including government entities, perceive the submarine cabling system market as a lucrative prospect. Moreover, the rapid increase in mobile broadband adoption significantly contributes to industry growth.
- Furthermore, the global demand for smartphones has been on the rise due to various factors, including increasing disposable income, the introduction of 5G, and telecom infrastructure advancements. Ericsson reports that the global number of smartphone subscribers was 6.26 billion in 2021, predicted to reach 7.69 billion in 2027. These trends are expected to remain key drivers of the studied market's growth.
- Submarine cables, crucial to the global economy and telecommunications, operate in an environment increasingly exposed to geopolitical, physical, and cyber threats, including nation-state sabotage and spying. According to official sources, submarine

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communication cables are a growing target for cyber-threat actors, with incidents capable of causing substantial global internet disruption, further impacting the studied market's growth.

Submarine Cable Systems Market Trends

Dry Plant Products to Drive the Market's Growth

- The dry plant comprises the subsea cable network segment on land, extending from the beach manhole to the cable landing station. This encompasses power feeding equipment (PFE), submarine line terminal equipment, network management systems, and land cable segments.
- Global telecommunications traffic is rapidly expanding in response to customer demands for broadband services and enhanced network performance. For instance, according to ITU, the By 2023, there were approximately 848 million fixed broadband subscriptions in the Asia-Pacific area, showing a growth of almost 50 million compared to 2022. Consequently, the demand for submarine telecommunication systems is steadily increasing, not only for constructing new cable systems but also for augmenting the capacity of existing ones. Several companies are developing Submarine Line Terminal Equipment (SLTE) utilizing optical technologies to meet this rising demand.
- For instance, in October 2023, the Saint Helena branch of the Google Equiano cable was activated, representing the island's inaugural connection to the internet through high-speed subsea fiber optic cables. By June 2023, the installation and integration of the cable's Submarine Line Terminal Equipment had concluded, prompting the commencement of work on the local terrestrial fiber optic network.
- The land cable segments link the submarine line terminals to the power-feeding equipment and other systems at the cable landing station. The Network Management System serves as the unified platform managing all equipment in the submarine cable system, overseeing the wet plant, Power Feeding Equipment (PFE), Open Cable Access Equipment (OCAE), and network operations during routine maintenance and operation.
- Dry plant products are typically engineered to withstand harsh coastal environmental conditions, including high winds, salt spray, and extreme temperatures. Their design prioritizes high reliability, as any disruption to the dry plant can result in a service outage for the entire submarine cable system.

Trans-Pacific to Hold a Significant Market Share

- In the transpacific region, the first Trans-Pacific submarine cable system (TPC-1 (Trans-Pacific Cable 1)) operated during the 1960s. It was a submarine coaxial cable that began with a modest 128-phone line capacity, linking Japan, Guam, Hawaii, and the mainland United States via Hawaii. Since then, numerous transpacific submarine cable systems have continuously been constructed, significantly expanding the region's capacity.
- Submarine cables handle over 97% of global Internet traffic, reflecting the widespread reliance on the Internet for daily tasks. The Internet's capability to connect people globally has led to a continuous rise in international traffic. The Asia Pacific region contributes approximately half of the world's internet traffic, driving the demand for submarine communication cables. The lack of these systems in certain countries within this region has spurred the need for faster internet services in the Transpacific region, prompting funding from organizations like the World Bank and the Asia Development Bank for new cable systems.
- In July 2022, NTT Ltd Japan Corporation, Mitsui & Co. Ltd, PC Landing Corp., and JA Mitsui Leasing, Ltd. announced the formation of a new company, Seren Juno Network Co., Ltd. ("Seren"), established to construct and operate "JUNO," the most extensive trans-Pacific submarine cable system linking Japan and the United States.
- Moreover, in August 2022, NEC Corporation revealed that Seren Juno Network had selected them to build the trans-Pacific

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subsea fiber-optic cable, the "JUNO Cable System," connecting California in the United States with Chiba and Mie prefectures in Japan. This cable, spanning over 10,000 km, is projected to be completed by 2024.

- Key countries in the region, including Japan and Australia, among others, consider submarine cabling systems vital for their economic growth and are intensifying their investments in submarine cable networks, creating opportunities in the studied market. For instance, in July 2023, the Japanese government unveiled plans to augment the Digital Infrastructure Development Fund to expand the submarine cable networks linking Japan with the rest of the world.

Submarine Cable Systems Market Overview

The submarine cable systems market features various key players, including NTT Communications Corporation, Nexans SA, Fujitsu Ltd, NEC Corporation, and Alcatel Submarine Networks. These companies engage in collaborative ventures, long-term partnerships, and strategic initiatives like mergers and acquisitions to bolster revenue growth and expand their global presence.

In October 2023, NEC Corporation marked the completion and activation of the Patara-2 submarine cable network in Indonesia. This network, owned by PT Telkom Indonesia, the country's largest digital telecommunications provider, stands as a pivotal step in advancing digitization efforts across Indonesia's diverse islands.

Similarly, Google LLC revealed plans for the South Pacific Connect initiative during the same month. This initiative entails the implementation of two new transpacific subsea cables-Honomoana and Tabua. These cables aim to significantly enhance the reliability and resilience of digital connectivity across the Pacific region.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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