

Global AIDC Optical Fiber Preforms Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AIDC Optical Fiber Preforms market size is expected to reach \$ 3488 million by 2032, rising at a market growth of 20.5% CAGR during the forecast period (2026-2032).

AIDC optical fiber preforms, i.e., optical fiber preforms for AI data centers, are high-purity silica glass rods used to draw optical fibers for AI data centers. Positioned at the upstream of the optical fiber value chain, they determine the final fiber's attenuation, dispersion, geometric consistency, bend-insensitive performance, and batch stability. The typical structure consists of a high-refractive-index core and a low-refractive-index cladding, produced through vapor deposition processes such as OVD, VAD, PCVD, and MCVD, and then drawn in fiber-drawing towers into data center optical fibers including G.657.A2, G.657.A1, G.652.D, G.654.E, and selected OM4 and OM5 fibers. Compared with standard telecom preforms, AIDC preforms emphasize higher purity, low hydroxyl content, low loss, bend-insensitive design, outer diameter consistency, and drawing stability for small-coating-diameter fibers. With the rapid expansion of AI data center Scale-out cluster interconnects, DCI data center interconnects, high-density cabling, and 800G/1.6T optical interconnects, preforms have become a key bottleneck in expanding AIDC fiber supply.

In 2025, global AIDC optical fiber preform shipments reached approximately 3,300 tons, with a unit price of about USD 185,000 per ton and a gross margin of around 40%.

The demand pull from AI data center construction is not only a linear increase in fiber-kilometers, but also a structural upgrade toward high-density and high-performance fibers. As the upstream core material used to draw data center fibers such as G.657.A2, G.652.D and G.654.E, AIDC optical fiber preforms directly determine attenuation, bend-

insensitive performance, geometric consistency and batch stability. As Scale-out cluster interconnect and DCI demand expands, standard fiber capacity cannot fully replace high-performance AIDC fiber capacity. Companies capable of stable high-end preform supply are gaining stronger bargaining power in the value chain.

On the supply side, preform manufacturing is a high-technology, capital-intensive and yield-sensitive segment. OVD, VAD and PCVD processes require advanced equipment, process recipes, deposition efficiency, refractive-index profile control and impurity control, making capacity expansion cycles much longer than downstream fiber drawing and cable processing. Public reports indicate that Chinese optical fiber and cable manufacturers are seeing full orders, with some production schedules extending into 2027, while preforms are identified as an important bottleneck in capacity expansion. Companies such as YOFC, Hengtong, FiberHome and Futong, which have vertically integrated capabilities from preforms to fibers and cables, are better positioned to capture delivery advantages during the AI data center upcycle.

Looking forward, AIDC optical fiber preforms will evolve toward larger size, lower loss, higher uniformity and stronger application-specific design. Preform technologies for G.657.A2 bend-insensitive fiber, G.654.E low-loss large-effective-area fiber, small-coating-diameter fiber, and future hollow-core or multicore fibers will become key areas of competition. The main opportunities come from rapid AI fiber demand growth and price elasticity caused by preform capacity bottlenecks, while the main challenges include long expansion cycles, strict customer qualification, constraints in key equipment and high-purity raw materials, and the impact of technology route changes on preform structure design.

This report studies the global AIDC Optical Fiber Preforms production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AIDC Optical Fiber Preforms and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AIDC Optical Fiber Preforms that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AIDC Optical Fiber Preforms total production and demand, 2021-2032, (Tons)

Global AIDC Optical Fiber Preforms total production value, 2021-2032, (USD Million)

Global AIDC Optical Fiber Preforms production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global AIDC Optical Fiber Preforms consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: AIDC Optical Fiber Preforms domestic production, consumption, key domestic manufacturers and share

Global AIDC Optical Fiber Preforms production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global AIDC Optical Fiber Preforms production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global AIDC Optical Fiber Preforms production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global AIDC Optical Fiber Preforms market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Corning, Sumitomo Electric, Fujikura, Prysmian, Furukawa Electric, Sterlite Technologies Limited (Jiangsu Sterlite Tongguang Optical Fiber Co., Ltd.), YOFC, Hengtong Group, ZTT Group, Wuhan Fenghuo Ruituo Technology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AIDC Optical Fiber Preforms market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AIDC Optical Fiber Preforms Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AIDC Optical Fiber Preforms Market, Segmentation by Type:

OVD

PCVD

VAD

Others

Global AIDC Optical Fiber Preforms Market, Segmentation by Fiber Optic Technology:

G.657.A1

G.657.A2

G.652.D

Other(G.654.E,hollow-core fiber,etc.)

Global AIDC Optical Fiber Preforms Market, Segmentation by Coating Diameter:

250 ?m

200 ?m

180 ?m

Others

Global AIDC Optical Fiber Preforms Market, Segmentation by Application:

Scale-Up Interconnect

Scale-Out Interconnect

Data Center Interconnect

Others

Companies Profiled:

Corning

Sumitomo Electric

Fujikura

Prysmian

Furukawa Electric

Sterlite Technologies Limited (Jiangsu Sterlite Tongguang Optical Fiber Co., Ltd.)

YOFC

Hengtong Group

ZTT Group

Wuhan Fenghuo Ruituo Technology Co., Ltd.

Zhejiang Fuchunjiang Photoelectric Technology Co., Ltd.

Far East Smart Energy

Tongding Interconnection Information Co., Ltd.

Jiangsu Etern Optical Fiber Technology Co., Ltd

Key Questions Answered:

1. How big is the global AIDC Optical Fiber Preforms market?
2. What is the demand of the global AIDC Optical Fiber Preforms market?
3. What is the year over year growth of the global AIDC Optical Fiber Preforms market?
4. What is the production and production value of the global AIDC Optical Fiber Preforms market?
5. Who are the key producers in the global AIDC Optical Fiber Preforms market?
6. What are the growth factors driving the market demand?

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