

Global Holey Fiber (Photonic Crystal Fiber) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Holey Fiber (Photonic Crystal Fiber) market size is expected to reach \$ 67.06 million by 2032, rising at a market growth of 9.4% CAGR during the forecast period (2026-2032).

In 2025, global production of porous fiber (photonic crystal fiber) reached 84,341 meters, with an average selling price of \$419 per meter. Porous fiber (photonic crystal fiber) is a type of fiber in which regular micropores/microstructures (often honeycomb-shaped air hole arrays) are introduced into the fiber cladding to control light guiding properties 'by structure rather than chemical doping.' By changing the aperture, spacing, number of loops, and geometry, key indicators such as dispersion, mode field, nonlinearity, birefringence, and loss can be made into 'designable parameters.' Its main characteristic is the regular arrangement of two-dimensional through-holes or doped regions along the fiber length on a pure silica substrate. It features single-mode transmission, nonlinear effects, dispersion characteristics, air-core transmission, low loss, and high power carrying capacity, making it widely used in optical communication, fiber optic sensing, laser processing, and nonlinear optics. The upstream raw materials include glass substrates/preform components, doping and material modification, coating and protective materials, process gases and consumables, etc. The mainstream manufacturing process is 'preform-drawing,' most typically stack-and-draw, which requires a large number of quartz capillaries and glass rods/support tubes to be stacked into preforms before drawing. The midstream involves the design and production of various photonic crystal fibers, which is the core technology, including structural design > preform assembly > fiber drawing > coating > testing and grading > secondary processing/cabbing/module assembly. Downstream applications include laser transmission, fiber optic sensing, and optical communication. The gross profit margin for manufacturing companies is approximately 25%–55%.

Regionally, the Chinese market has seen rapid growth in recent years. In 2025, the market size was US\$13.16 million, accounting for approximately 37.24% of the global market, and is projected to reach US\$24.8228 million by 2032, at which point its share of the global market will reach 37.62%. From a competitive landscape perspective, major international players include NKT Photonics, Yangtze Optical Fibre and Cable (YOFC), GLOphotonics, Changyingtong, fiberware GmbH, and Anyang Laser. NKT's products cover multiple product lines, including nonlinear PCF, ytterbium-doped gain PCF, and hollow-core fiber, demonstrating its deep strategic layout in high-performance optical fibers at both the device and system levels. YOFC explicitly defines PCF as 'microstructure/porous fiber' and offers various product series based on light guiding mechanisms and applications, supporting its adoption in laser, sensing, and specialized communication scenarios in China. On the production side, Europe and China are two important production regions, accounting for 27.46% and 37.24% of the market share respectively in 2025. This is due to Europe's long-term accumulation in specialty optical fibers and precision manufacturing, as well as China's complete supply chain from preform to drawing to cabling/engineering delivery, and the influence of local customers. Especially in novel microstructure optical fibers such as hollow-core/anti-resonant fibers, leading global cloud and telecom operators are placing 'manufacturability and scalable delivery' on an equal footing with performance. In terms of product type, solid-core photonic crystal fiber (microstructure fiber) holds a significant position, with a market size of US\$28.9631 million in 2025, accounting for approximately 81.96% of the global market. This share is projected to reach 71.36% by 2032. Looking ahead, the demand for porous fiber (photonic crystal fiber) will extend from 'research and small-batch devices' to 'engineering and large-scale deployment (especially hollow-core communication/data center interconnects).' Competition on the supply side will expand from single-point performance to 'manufacturability, yield, batch consistency, delivery, and change management.' Leading manufacturers will further strengthen their barriers through platform-based products and system-level collaborations. In terms of product structure, solid-core PCF will continue to support high-value-added applications such as lasers and sensing, while hollow-core/new microstructures will accelerate their penetration in low-latency networks and next-generation optical transmission. Both will jointly drive the industry into a new round of rebalancing in terms of scale, concentration, and application structure.

This report studies the global Holey Fiber (Photonic Crystal Fiber) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Holey Fiber

(Photonic Crystal Fiber) 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 Holey Fiber (Photonic Crystal Fiber) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Holey Fiber (Photonic Crystal Fiber) total production and demand, 2021-2032, (Meter)

Global Holey Fiber (Photonic Crystal Fiber) total production value, 2021-2032, (USD Million)

Global Holey Fiber (Photonic Crystal Fiber) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Meter), (based on production site)

Global Holey Fiber (Photonic Crystal Fiber) consumption by region & country, CAGR, 2021-2032 & (Meter)

U.S. VS China: Holey Fiber (Photonic Crystal Fiber) domestic production, consumption, key domestic manufacturers and share

Global Holey Fiber (Photonic Crystal Fiber) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Meter)

Global Holey Fiber (Photonic Crystal Fiber) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Meter)

Global Holey Fiber (Photonic Crystal Fiber) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Meter)

This report profiles key players in the global Holey Fiber (Photonic Crystal Fiber) 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 NKT Photonics, YOFC, GLOphotonics, Yangtze Optical Electronic, fiberware GmbH, YSL Photonics, FORC-Photonics, 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 Holey Fiber (Photonic Crystal Fiber) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Meter) and average price (US\$/Meter) 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 Holey Fiber (Photonic Crystal Fiber) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Holey Fiber (Photonic Crystal Fiber) Market, Segmentation by Type:

Solid Core

Hollow Core

Global Holey Fiber (Photonic Crystal Fiber) Market, Segmentation by Principle:

Total Internal Reflection Type

Photonic Bandgap Type

Global Holey Fiber (Photonic Crystal Fiber) Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Holey Fiber (Photonic Crystal Fiber) Market, Segmentation by Application:

Laser Transmission

Fiber Optic Sensing

Optical Communication

Others

Companies Profiled:

NKT Photonics

YOFC

GLOphotonics

Yangtze Optical Electronic

fiberware GmbH

YSL Photonics

FORC-Photonics

Key Questions Answered:

1. How big is the global Holey Fiber (Photonic Crystal Fiber) market?
2. What is the demand of the global Holey Fiber (Photonic Crystal Fiber) market?
3. What is the year over year growth of the global Holey Fiber (Photonic Crystal Fiber) market?
4. What is the production and production value of the global Holey Fiber (Photonic

Crystal Fiber) market?

5. Who are the key producers in the global Holey Fiber (Photonic Crystal Fiber) market?

6. What are the growth factors driving the market demand?

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