

Global Fiber-optic Fire Detection System Market Growth 2026-2032

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Abstracts

The global Fiber-optic Fire Detection System market size is predicted to grow from US\$ 286 million in 2025 to US\$ 482 million in 2032; it is expected to grow at a CAGR of 7.8% from 2026 to 2032.

Fiber-optic Fire Detection System refers to a fire and abnormal-heat detection system that uses optical fiber as the temperature-sensing medium and determines the location and development of thermal events through optical signal interrogation. In this report, the market primarily covers distributed Raman temperature sensing systems based on DTS/Raman-OTDR technology and quasi-distributed Fiber Bragg Grating (FBG) systems designed for fire detection. A typical system consists of an optical interrogator or detection controller, sensing fiber or fiber-optic sensing cable, optical connection components, alarm-processing software, communication interfaces and links to fire alarm or supervisory control systems. Distributed systems continuously measure temperatures along the sensing fiber, while FBG systems monitor a dense series of defined sensing points. Commercial systems may employ single-ended or double-ended measurement configurations, with maximum detection distance ranging from several kilometers to more than 10 km per channel. The systems are primarily deployed in transportation tunnels, power facilities, petrochemical installations, battery energy storage facilities and other environments requiring long-distance, continuous, electrically passive and precisely localized heat detection.

Key Findings

Global shipments of Fiber-optic Fire Detection Systems were approximately 4,500 systems in 2025

The blended manufacturer-level average selling price was approximately US\$65,000 per system in 2025

Typical gross margins for major manufacturers were approximately 35%–45%

Distributed Raman DTS remains the dominant commercial sensing architecture in long-distance fire detection

Transportation tunnels and power facilities remain core applications, while battery energy storage is an emerging demand area

Market Trends

The Fiber-optic Fire Detection System market is shifting from basic temperature alarming toward continuous thermal intelligence, faster localization, multi-zone control and deeper integration with fire alarm, SCADA and asset-management platforms. Raman-OTDR-based DTS remains the mainstream architecture because a single sensing fiber can provide continuous temperature information over several kilometers without powered electronic devices in the monitored area. Product development is moving toward longer certified ranges, higher channel density, shorter measurement cycles and improved spatial resolution; AP Sensing's current N45 platform, for example, supports certified ranges of up to 16 km per channel and four channels, while Chinese systems such as Wuhan Ligong Guangke's DTS-4004 reach 10 km per channel. FBG-based quasi-distributed systems remain relevant where dense, defined sensing positions and flexible optical grating layouts are preferred. Another important direction is system-level intelligence: alarm logic increasingly combines absolute temperature, rate-of-rise, zone-specific thresholds, fault diagnostics and graphical localization rather than relying on a single temperature trigger. Double-ended configurations are also gaining relevance in high-criticality projects because they can improve redundancy and measurement resilience when fiber damage or attenuation occurs.

Market Dynamics

Drivers

Demand is supported by the expansion and modernization of long linear infrastructure where conventional point detectors provide incomplete coverage or require large numbers of devices. Road and rail tunnels, underground power cables, substations,

petrochemical facilities and other hazardous environments benefit from the electrically passive sensing cable, resistance to electromagnetic interference and precise event localization of optical-fiber systems. Fire-safety requirements are also becoming more structured: EN 54-22 explicitly covers resettable line-type heat detectors using optical-fiber sensing elements, while China's current and planned line-type heat detector standards recognize distributed optical fiber and FBG technologies. Rapid deployment of stationary battery storage is creating an additional growth driver because high-energy-density installations require increasingly sophisticated thermal and fire monitoring; the IEA identifies battery storage as one of the fastest-growing power technologies, while NFPA 855 establishes dedicated installation and fire-safety requirements for stationary energy storage systems.

Restraints

The principal restraint is total installed cost relative to conventional heat-sensitive cable, point heat detectors and simpler alarm architectures. A Fiber-optic Fire Detection System requires an optical interrogator, suitable sensing cable, optical termination and splicing, configuration software, commissioning and integration with the fire alarm or industrial control platform. The economic advantage therefore becomes clearer in long-distance or high-value assets than in small, uncomplicated spaces. Project acceptance can also depend on certification, fire-zone design, cable routing and response testing, which increases engineering effort and extends qualification cycles. Performance is affected by the thermal coupling between the monitored asset and sensing cable, fiber installation quality, attenuation, connector and splice losses, measurement range and acquisition speed, creating trade-offs that must be engineered for each application.

Opportunities

The strongest incremental opportunities are emerging in battery energy storage, power-system modernization and retrofit protection of critical infrastructure. Battery storage capacity continues to expand rapidly across China, the United States, Europe and other markets, increasing demand for early thermal-abnormality detection around containers, cable routes and electrical equipment. Power applications also provide opportunities beyond basic fire alarm functions because DTS can simultaneously support hotspot monitoring and asset-condition assessment, improving the economic case for system deployment. Transportation tunnels remain an attractive replacement and upgrade market as operators move from conventional threshold-only detection toward systems providing continuous temperature profiles and precise incident location. Further opportunity lies in integrated platforms combining fire detection with visualization,

remote diagnostics, digital maintenance records and broader optical sensing functions.

Challenges

The industry must balance longer sensing range, faster response, finer spatial resolution and competitive system cost, because improving one performance variable can affect the others. Long-distance networks also require careful optical-loss management, redundancy strategy and field maintenance procedures. In major infrastructure and petrochemical projects, suppliers face lengthy certification, engineering approval and project-delivery cycles, while customers expect reliable interfaces with existing fire alarm, SCADA and emergency-control systems. Another challenge is maintaining consistent fire-detection performance across highly different environments such as tunnels, cable trenches, storage facilities and petrochemical installations, where airflow, ambient temperature gradients and sensing-cable installation conditions vary significantly. Manufacturers therefore compete increasingly on complete application engineering and alarm algorithms rather than interrogator hardware alone.

Industry Chain Analysis

The upstream industry comprises optical fibers and specialty sensing cables, laser sources, photodetectors, optical filters and couplers, fiber connectors, FPGA/DSP and embedded processing hardware, power supplies, industrial communication modules and fire-rated cable materials. Midstream manufacturers integrate these components into interrogators, sensing cables, alarm-processing software and certified fire-detection systems, with the greatest value added concentrated in optical interrogation, signal processing, temperature-calibration algorithms, spatial localization, alarm logic, reliability engineering and fire certification. Downstream channels include fire-protection contractors, infrastructure engineering companies, industrial automation providers and direct project supply to tunnel operators, utilities, petrochemical companies and energy-storage owners. The industry therefore combines precision optical instrumentation with fire-protection engineering: hardware performance determines measurement capability, while certification, application design, installation quality and control-system integration determine whether that capability can be converted into reliable field fire detection.

Segment Insights

Distributed Raman temperature sensing is the principal commercial technology segment. It uses Raman backscatter and optical time-domain measurement to treat the

entire sensing fiber as a continuous temperature sensor, making it particularly suited to long tunnels, cable corridors and industrial installations. Quasi-distributed FBG systems form a smaller but technically differentiated segment, using multiple grating sensing elements along the fiber to establish a dense sequence of temperature-monitoring points. Both architectures are recognized in the Chinese line-type fire-detector framework, confirming that they represent distinct commercial product routes rather than merely different product names.

In measurement configuration, single-ended systems provide simpler installation and competitive economics, while double-ended configurations are favored where redundancy and compensation for fiber attenuation are more important. By maximum detection distance, systems of ≤ 5 km address compact industrial and facility applications, the >5 – 10 km range covers a large share of tunnel and power-infrastructure projects, and >10 km products increasingly represent the high-performance tier. Commercial platforms already extend beyond this threshold, with certified products reaching 16 km per channel.

Downstream Market Opportunities

Transportation tunnels and power facilities represent the most established application base because both involve long linear assets where continuous temperature monitoring and exact event location offer clear advantages. Petrochemical facilities value electrically passive optical sensing in areas affected by electromagnetic interference, hazardous atmospheres and extensive cable or process networks. Battery energy storage is emerging as an increasingly important application as larger stationary storage projects place greater emphasis on early heat detection, fire-safety zoning and integration with emergency control systems. These characteristics support a gradual expansion of fiber-optic detection from specialized tunnel and cable applications into a broader critical-infrastructure fire-safety platform.

Regional Insights

This report assesses Asia-Pacific as the largest market by unit demand, supported by extensive tunnel construction, underground power infrastructure, industrial facilities and a particularly broad manufacturing base in China. Chinese suppliers have developed both distributed DTS and FBG fire-detection architectures, with several products carrying domestic fire-product certification and supporting multi-kilometer monitoring. Europe remains a technologically mature market with a long history of optical linear heat detection in tunnels and industrial installations, reinforced by EN 54-22 certification

requirements and established suppliers such as AP Sensing, Luna Innovations Germany and Sensornet. North America is characterized by demand from power generation, warehousing, transportation, oil and gas and special-hazard applications, with certified fiber-optic systems supplied through established fire-protection channels.

Competitive Landscape Analysis

The market combines global optical-sensing specialists with a sizable group of Chinese industrial fire-detection manufacturers. AP Sensing, Yokogawa Electric, Luna Innovations Germany, Sensornet and The Protectowire Company represent established international suppliers with commercial DTS or fiber-optic linear heat detection platforms, while Shanghai Bohui Technology, Wuhan Ligong Guangke, Suzhou Agioe Technologies, Hebei Weitan Technology, Zhejiang Jericore Technologies, Shenyang Putaian Technology, Hebei Xiaodun Technology, Qingdao Zhongyang Fire Technology, Nanjing Ruishi Intelligent Security Technology, Tianjin Huigan Optoelectronic Technology and Shenyang Shen'an Detection form the principal verified Chinese manufacturing group in this study. Competition is increasingly determined by certified detection distance, spatial and temperature resolution, measurement speed, multi-channel capability, redundancy, fire certification, alarm software and integration with industrial control systems. International suppliers retain strengths in long-duration installed references, high-end optical interrogation and global certifications, while Chinese manufacturers compete strongly in localized fire certification, application engineering, project delivery and cost-performance, particularly in power, transportation and petrochemical projects.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Fiber-optic Fire Detection System Industry Forecast" looks at past sales and reviews total world Fiber-optic Fire Detection System sales in 2025, providing a comprehensive analysis by region and market sector of projected Fiber-optic Fire Detection System sales for 2026 through 2032. With Fiber-optic Fire Detection System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Fiber-optic Fire Detection System industry.

This Insight Report provides a comprehensive analysis of the global Fiber-optic Fire Detection System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on

Fiber-optic Fire Detection System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fiber-optic Fire Detection System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fiber-optic Fire Detection System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fiber-optic Fire Detection System.

This report presents a comprehensive overview, market shares, and growth opportunities of Fiber-optic Fire Detection System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Distributed Raman DTS Type

Quasi-distributed Fiber Bragg Grating (FBG) Type

Segmentation by Measurement Configuration:

Single-ended Type

Double-ended Type

Segmentation by Maximum Detection Distance per Channel:

?5 km

?5–10 km

?10 km

Segmentation by Application:

Transportation Tunnel

Power Facility

Petrochemical

Battery Energy Storage

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

AP Sensing

Yokogawa Electric

Luna Innovations Germany

Sensornet

The Protectowire Company

Shanghai Bohui Technology

Wuhan Ligong Guangke

Suzhou Agioe Technologies

Hebei Weitan Technology

Zhejiang Jericore Technologies

Shenyang Putaian Technology

Hebei Xiaodun Technology

Qingdao Zhongyang Fire Technology

Nanjing Ruishi Intelligent Security Technology

Tianjin Huigan Optoelectronic Technology

Shenyang Shen'an Detection Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fiber-optic Fire Detection System market?

What factors are driving Fiber-optic Fire Detection System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Fiber-optic Fire Detection System market opportunities vary by end

market size?

How does Fiber-optic Fire Detection System break out by Type, by Application?

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