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Global Thin-Film Lithium Niobate Photonic Integrated Circuit Market Growth 2026-2032

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Abstracts

The global Thin-Film Lithium Niobate Photonic Integrated Circuit market size is predicted to grow from US$ 29.35 million in 2025 to US$ 313 million in 2032; it is expected to grow at a CAGR of 40.5% from 2026 to 2032.

In 2025, global sales of Thin-Film Lithium Niobate Photonic Integrated Circuits were approximately 50,000 units, with an average selling price of about US$600 per unit at the manufacturer level. The gross margin of major manufacturers was approximately 45%–55%.

Thin-Film Lithium Niobate Photonic Integrated Circuit (TFLN PIC) is a class of integrated photonic chip based on thin-film lithium niobate (TFLN/LNOI) as the core optical material platform. Through micro- and nanofabrication processes, optical waveguides, electrodes, splitters, couplers, modulation units, resonant structures, and other photonic functional elements are integrated onto a single chip. By leveraging the strong linear electro-optic effect, broad optical transparency window, and favorable nonlinear optical properties of lithium niobate, TFLN PICs can enable high-speed electro-optic modulation, phase control, optical switching, wavelength conversion, and quantum photonic processing. Compared with conventional bulk lithium niobate devices, the thin-film lithium niobate platform offers smaller device dimensions, lower driving voltage, higher modulation bandwidth, and greater suitability for multi-channel and high-density photonic integration.

The upstream supply chain of Thin-Film Lithium Niobate Photonic Integrated Circuits mainly includes LNOI wafers, metal electrode materials, photoresists, dielectric materials, as well as equipment for lithography, etching, thin-film deposition, bonding, and wafer testing. Thin-film thickness uniformity, wafer defect density, waveguide

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etching accuracy, and electrode fabrication processes directly affect insertion loss, modulation efficiency, bandwidth, and manufacturing yield. Downstream applications mainly include data communications, telecommunications, coherent optical communications, microwave photonics, quantum photonics, LiDAR, and precision optical sensing. TFLN PICs can be further integrated into high-speed optical transceivers, coherent optical modules, optical engines, and other optoelectronic systems.

United States market for Thin-Film Lithium Niobate Photonic Integrated Circuit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Thin-Film Lithium Niobate Photonic Integrated Circuit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Thin-Film Lithium Niobate Photonic Integrated Circuit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Thin-Film Lithium Niobate Photonic Integrated Circuit players cover HyperLight, Furukawa FITEL Optical Components, CCRAFT, Quantum Computing, Luxtelligence, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Thin-Film Lithium Niobate Photonic Integrated Circuit Industry Forecast” looks at past sales and reviews total world Thin-Film Lithium Niobate Photonic Integrated Circuit sales in 2025, providing a comprehensive analysis by region and market sector of projected Thin-Film Lithium Niobate Photonic Integrated Circuit sales for 2026 through 2032. With Thin-Film Lithium Niobate Photonic Integrated Circuit sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Thin-Film Lithium Niobate Photonic Integrated Circuit industry.

This Insight Report provides a comprehensive analysis of the global Thin-Film Lithium Niobate Photonic Integrated Circuit landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest

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development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Thin-Film Lithium Niobate Photonic Integrated Circuit portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thin-Film Lithium Niobate Photonic Integrated Circuit market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thin-Film Lithium Niobate Photonic Integrated Circuit 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 Thin-Film Lithium Niobate Photonic Integrated Circuit.

This report presents a comprehensive overview, market shares, and growth opportunities of Thin-Film Lithium Niobate Photonic Integrated Circuit market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Electro-Optic Modulation

Optical Switching

Nonlinear Photonics

Quantum Photonics

Segmentation by Wavelength Band:

O-band

C-band

L-band

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Segmentation by Channel Count:

Single-channel

2–4 Channels

?8 Channels

Segmentation by Application:

Data Communication

Telecommunication

Quantum Photonics

Microwave Photonics

LiDAR and Optical Sensing

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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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.

HyperLight

Furukawa FITEL Optical Components

CCRAFT

Quantum Computing

Luxtelligence

Lightium

Liobate Technologies

Advanced Fiber Resources (Zhuhai)

Ningbo Ori-Chip Optoelectronics Technology

TuringQ

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thin-Film Lithium Niobate Photonic Integrated Circuit market?

What factors are driving Thin-Film Lithium Niobate Photonic Integrated Circuit market growth, globally and by region?

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

How do Thin-Film Lithium Niobate Photonic Integrated Circuit market opportunities vary by end market size?

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How does Thin-Film Lithium Niobate Photonic Integrated Circuit break out by Type, by Application?

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