

Photonic Integrated Circuit Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Photonic Integrated Circuit Market Summary

Introduction and Market Overview

Photonic Integrated Circuits (PICs), enabling high-speed data transfer using light, are critical in telecommunications, data centers, and biomedical applications. With global 5G investments reaching USD 400 billion in 2023, PICs support high-bandwidth needs. The rise of cloud computing and precision medicine further drives demand. The global PIC market is estimated at USD 10.0-15.0 billion in 2025, with a CAGR of 7%-12% through 2030, fueled by connectivity demands and technological advancements.

Regional Market Trends

North America: The U.S. and Canada lead with data center and biomedical applications.

Europe: Germany and Netherlands focus on telecommunications and photonics innovation.

Asia Pacific: China, Japan, and South Korea see growth in 5G and data centers.

Rest of the World: Brazil and India expand with rising connectivity needs.

Application Analysis

Telecommunications: Expected growth of 8%-13%, driven by 5G and fiber optics. Trends focus on high-speed connectivity.

Biomedical: Projected growth of 7%-12%, valued for diagnostics. Trends emphasize precision medicine.

Data Centers: Anticipated growth of 8%-14%, used for high-bandwidth processing. Trends highlight energy efficiency.

Others: Growth of 6%-10%, including sensing, with a focus on innovation.

Type Analysis

III-V Material: Expected growth of 8%-13%, preferred for high-performance PICs. Trends focus on scalability.

Lithium Niobate: Projected growth of 7%-11%, valued for optical modulation. Trends emphasize precision.

Silica-on-silicon: Anticipated growth of 6%-10%, used for cost-effective solutions. Trends highlight integration.

Others: Growth of 5%-9%, including hybrid materials, with a focus on emerging technologies.

Key Market Players

Lumentum Operations: Markets PICs for telecommunications.

POET Technologies, Coherent, Infinera Corporation, Intel Corporation, Cisco Systems, Source Photonics, Huawei Technologies, EFFECT PHOTONICS, ANSYS: Focus on high-speed and energy-efficient PIC solutions.

Porter's Five Forces Analysis

Threat of New Entrants: Low, due to high R&D and fabrication barriers.

Threat of Substitutes: Moderate, with electronic circuits as alternatives.

Bargaining Power of Buyers: Moderate, due to specialized applications.

Bargaining Power of Suppliers: High, due to limited high-purity material sources.

Competitive Rivalry: High, driven by innovation in speed and efficiency.

Market Opportunities and Challenges

Opportunities:

Leveraging USD 400 billion 5G market for PICs in telecommunications.

Targeting data center and biomedical growth.

Innovating with scalable and energy-efficient PICs.

Expanding into emerging markets like China and India.

Challenges:

High costs of R&D and fabrication for PICs.

Competing with traditional electronic circuits Dotting circuits.

Addressing scalability issues in photonics.

Navigating strict telecommunications regulations.

Managing supply chain disruptions for materials.

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