

Dark Fiber Market Forecasts to 2030 – Global Analysis By Type (Single-mode Fiber and Multimode Fiber), Network Type, Material, Application and By Geography

<https://marketpublishers.com/r/D82E9B0C305DEN.html>

Date: February 2025

Pages: 150

Price: US\$ 4,150.00 (Single User License)

ID: D82E9B0C305DEN

Abstracts

According to Statistics MRC, the Global Dark Fiber Market is accounted for \$7.5 billion in 2024 and is expected to reach \$17.0 billion by 2030 growing at a CAGR of 14.5% during the forecast period. Dark fiber refers to unused optical fiber cables that were installed as part of a network infrastructure build-out to accommodate future data capacity demand. These cables remain unlit, allowing businesses, telecom companies, and data centers to lease or own fiber-optic infrastructure for their exclusive use. This approach allows organizations to control their network operations, security, and bandwidth, bypassing dependency on shared telecom services.

Market Dynamics:

Driver:

Enhanced durability and corrosion resistance

Dark fiber infrastructure offers extended lifespan and reduced maintenance costs due to its enhanced durability, which can withstand physical stresses and extreme weather conditions. This reduces the frequency of repairs and replacements, resulting in lower maintenance costs. Its corrosion resistance is crucial in coastal regions, industrial zones, and high humidity areas, ensuring fibers remain operational over decades. Dark fiber can be deployed in diverse terrains, including underground, underwater, and aerial settings, enabling networks to extend to remote or challenging locations, particularly for submarine cables.

Restraint:

Complex manufacturing processes

The production of optical fiber involves complex processes, advanced technologies, and strict quality controls. The need for specialized raw materials, like high-purity silica, drives up costs, making it less affordable for smaller businesses. The complexity of manufacturing also restricts qualified suppliers, leading to high barriers to entry and supply chain bottlenecks. A concentrated supplier base can result in monopolistic behavior, leading to higher prices and limited access to fiber infrastructure in certain regions.

Opportunity:

Growing global air travel industry and rise in both commercial and military aircraft production

Dark fiber networks are increasingly being used in commercial aviation, military aviation, and airport modernization to provide high-bandwidth, low-latency, and secure data transmission capabilities. These networks are ideal for real-time data transmission, surveillance, remote control of UAVs, and secure communication with ground stations. As air traffic increases, airports are deploying advanced IT systems, smart sensors, and IoT devices, requiring high-speed and reliable connectivity. Dark fiber networks enable seamless communication and data sharing within airport campuses.

Threat:

High manufacturing and material costs

The manufacturing of optical fibers involves advanced technologies and high-quality materials, which can be costly to implement and maintain. This makes dark fiber infrastructure deployment more expensive, limiting its adoption in cost-sensitive sectors. High material and production costs also create barriers to market entry, stifling innovation and maintaining high pricing structures. Established manufacturers benefit from economies of scale, while smaller companies struggle to compete, reducing market diversity.

Covid-19 Impact

The COVID-19 pandemic significantly impacted the dark fiber market. The surge in remote work, online education, and telehealth drove increased demand for high-speed and reliable connectivity, accelerating dark fiber adoption. However, supply chain disruptions, labor shortages, and delayed infrastructure projects hindered deployment timelines. Enterprises prioritized digital transformation, boosting dark fiber investments, particularly for data centers and cloud services. While short-term economic uncertainties caused some project delays, the long-term outlook remains positive as the pandemic highlighted the critical need for robust and scalable fiber-optic networks.

The single-mode fiber segment is expected to be the largest during the forecast period

Over the estimation period, the single-mode fiber segment is expected to capture the largest market share owing to superior performance over long distances, making it ideal for intercity, international, and transoceanic communication. It meets the growing demand for applications like cloud computing, 5G, and IoT, driving adoption in urban and remote areas. SMF's ability to handle high bandwidth with low latency supports data centers, streaming platforms, and enterprise networks. It also supports emerging technologies like AI, machine learning, and real-time analytics, further solidifying its role in the dark fiber market.

The plastic segment is expected to have the highest CAGR during the forecast period

The plastic segment is expected to register the highest CAGR growth during the estimation period due to its accessibility to businesses and regions, including developing markets. Cost-effective plastics like polyethylene and PVC enable mass production and large-scale deployments, driving market growth. Plastic sheaths and claddings protect optical fibers against moisture, UV radiation, and physical damage, ensuring long-term reliability. Advanced plastics with added properties, like flame retardancy and abrasion resistance, are increasingly used for critical applications like underground or submarine cables.

Region with largest share:

Over the forecasted timeframe, the North America region is anticipated to dominate the market share due to widespread deployment of dark fiber networks. The mature market allows telecom providers to expand capacity through leasing to enterprises, ISPs, and cloud operators. Leading technology companies and telecom giants drive investments in dark fiber, ensuring cutting-edge data transmission. The US, home to world-largest

data center hubs, is also attracting demand for dark fiber for seamless communication. Canada's cooler climate and renewable energy resources make it a preferred location for data centers.

Region with highest CAGR:

Asia Pacific is expected to register the highest CAGR over the forecast period. This growth in urban population demands high-speed internet and reliable communications infrastructure, driving the need for dark fiber networks. Governments and private entities are investing in upgrading existing telecommunications infrastructure, particularly in major metropolitan areas, to support the region's growing digital economy. The rollout of 5G networks, particularly in China, Japan, and South Korea, is also driving demand for dark fiber networks, as they support dense data traffic and ensure stable connectivity.

Key players in the market

Some of the key players in Dark Fiber market include AT&T Inc., Century Link, Inc., Cologix, Colt Group SA, Comcast Corporation, Consolidated Communications, Crown Castle, DEPL, FairPoint Communications, Inc., FirstLight, GTT Communications Inc., Interoute Communications Ltd., Level 3 Communications Inc., Lumen Technologies, Inc., NTT Communications, Verizon Communications Inc., Windstream Services LLC and Zayo Group.

Key Developments:

In December 2024, Lumen partners with Prometheus hyperscale to enhance connectivity for sustainable AI-driven data centers. With the rapid growth in AI, big data, and cloud computing as they address the critical environmental challenges faced by the AI industry.

In November 2024, Lumen Technologies, Inc. announced the expiration and results of the cash tender offers of Lumen and its indirect, wholly-owned subsidiary Level 3 Financing, Inc. to purchase any and all of their respective outstanding senior.

In February 2024, Smart label tracking improves real-time visibility for global supply chains. It uses AT&T's highly secure cellular connectivity to connect around the globe in over 210 countries. Unlike many asset trackers that require reverse logistics, AT&T Smart Label is built so it can be disposed of after use and arrival at its destination.

Types Covered:

Single-mode Fiber

Multimode Fiber

Network Types Covered:

Metro Networks

Long-Haul Networks

Regional Networks

Other Network Types

Materials Covered:

Glass

Plastic

Other Materials

Applications Covered:

Telecom

Internet Service Providers (ISPs)

BFSI (Banking, Financial Services, and Insurance)

Healthcare

Education & Industrial

Military & Government

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments

- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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