

Optical Modulators: Market Shares, Strategies, and Forecasts, Worldwide, 2018-2024

Table of Contents

Optical Modulators: Executive Summary

The study is designed to give a comprehensive overview of the Optical Modulator market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategies likely to succeed.

Table of Contents

Table of Contents

Abstract: Modulators Bring Lower Cost and Scalability for Optical Fiber and Laser Systems. Modulator (EOM) Allows Control of Amplitude, Phase, Polarization Of Optical Beam.	1
Optical Modulator Executive Summary	23
Optical Modulators and Photonic Integrated Circuits	23
Supply Chain For The Pic Industry	25
High-Speed Optical Modulators	25
1. Optical Modulator: Market Description and Market Dynamics	31
1.1 Laser Micro Processing	31

1.2 Business Strategies of the Optical Modulator Companies	36
1.2.1 Photonic Laser Devices	38
1.3 Carbon Dioxide ("CO ₂ ") Gas Lasers And Crystal Laser Technologies	40
1.4 Fiber Lasers	40
1.4.1 Choice of Wavelengths and Precise Control of Beam	43
1.4.2 Applications and Processes with Nonfiber Laser Technologies	44
1.5 Polymers –	44
1.6 Photonic Device Product Development Capabilities	44
1.6.1 Increasing Bandwidth: Google, Apple, Facebook, Amazon and Microsoft (GAFAM) in the US, Baidu, Alibaba. and Tencent (BAT) in China.	46
1.6.2 Data Communication Taking Place Within The Data Center	46
1.6.3 Intel, Acacia, and Luxtera	47
1.7 Molecular Level Engineering “Nanotechnology.”	49
1.7.1 Polymers	49
2. Optical Modulators Market Shares and Forecasts	51
2.1 Optical Modulators Market Driving Forces	51
2.1.1 Simple Crystal Modulator, Refractive Index Is Function Of Strength Of Local Electric Field	53
2.1.2 Optical Modulator Silicon and Polymer Photonics Markets	54
2.2 Optical Modulators Market Shares	59
2.3 Optical Modulators Market Forecasts	67
2.3.1 Optical Modulators Market Segment Applications	78
2.4 Optical Modulators Market Segment Forecasts	81
2.4.1 Optical Phase Modulator, Fiber Bragg Gratings, Polarization Modulators; Amplitude Modulators, Segments	83

2.4.2	Optical Modulator Mobile, Data Center, Touch Screens, Flexible Screens, Automotive, AR/VR, Energy and IoT Market Segments	85
2.4.3	Phase Modulators	87
2.4.4	Optical Acousto Modulators	91
2.4.5	Acousto-optic Modulator / Bragg Cell	91
2.4.6	Traffic Management	98
2.4.7	3D Printing Optical Modulators	98
2.4.8	Lasers In The Semiconductor Industry	99
2.4.9	Photonics	100
2.4.10	High Growth Industrial Technology Segments	105
2.4.11	Optical Modulator Imaging and Data Recorders	106
2.4.12	Polymer Role in PICs	107
2.4.13	Photonic Integrated Circuit Market Shares	108
2.5	Optical Modulator Prices	109
2.6	Optical Modulator Regional Analysis	111
2.6.1	US	112
2.6.2	Europe	113
2.6.3	Asia Pacific	113
3	Optical Modulators Product Description	115
3.1	Optical Modulator Controls A Beam Of Light	115
3.2	Lightwave Logic Electro-Optic Modulator Prototype Device Design and Development	115
3.2.1	Lightwave Logic Polymer Photonic Integrated Circuits (P2ICTM)	116
3.3	Gooch & Housego PLC	117
3.4	APE - Angewandte Physik & Elektronik GmbH	117
3.5	Thorlabs	118

4	Optical Modulators Research and Technology	119
4.1	All Polymer Flexible Electronic Circuit	119
4.2	Zinc Germanium Phosphide (ZGP)	121
4.3	Electro-Optic Modulators	121
4.4	Graphene Modulator Providing Compact, Energy Efficient Telecommunication	123
5.	Optical Modulators Company Profiles	124
5.1	AA Opto-Electronic Company	124
5.1.1	AA World Leader In Acousto-Optic And Radio Frequency Devices	125
5.1.2	AA / QuantaTech	127
5.2	APE Angewandte Physik & Elektronik GmbH	128
5.2.1	APE Angewandte Physik & Elektronik GmbH Supports Ultrashortpulse (USP) Lasers	128
5.3	Axsun Technologies	130
5.3.1	Axsun Optical Coherence Tomography	132
5.3.2	Axsun Optical Coatings	132
5.3.3	Axsun MEMS Tunable Filter	132
5.3.4	Axsun Micro-Alignment Structures	133
5.3.5	Axsun Integrated Optical Engines	133
5.3.6	Axsun Frequency Swept Laser Source	133
5.4	Brimrose	135
5.5	Conoptics	140
5.6	Felles Photonic Instruments	144
5.6.1	Felles Photonic Instruments Spatially Variable Waveplates Embedded in Fused Silica Glass	145
5.7	Fujitsu	148

5.8	Gleam Optics	150
5.9	Gooch & Housego	152
5.9.1	Gooch & Housego Fiber-Coupled Acousto-Optic Modulators (FCAOM)	153
5.9.2	Gooch & Housego Applications Of Fiber-Coupled Acousto-Optic Modulators	157
5.9.3	Gooch & Housego Fiber-Q® Fiber Coupled Modulators (FCAOM)	158
5.9.4	Gooch & Housego June 2018 Revenue	158
5.10	Inrad Optics	159
5.10.1	Inrad Optics Revenues	159
5.10.2	Materials Expertise	159
5.8	Intel	159
5.8.1	Intel® Optical Transceiver Products	162
5.9	IPG Photonics	162
4.4.1	IPG Photonics Revenue	163
5.10	iXblue	167
5.10.1	Photline Mxer Modulators	171
5.10.2	iXfiber PM Gyro Fiber	172
5.10.3	Photline NIR Modulators	172
5.10.4	iXfiber Active Fibers	173
5.10.5	Photline NIR800 Modulators	173
5.10.6	Photline Modboxes	174
5.10.7	iXblue Solutions For Navigation, Positioning And Imaging	174
5.10.8	iXblue Partners	175
5.11	Jenoptik	177
5.11.1	Jenoptik Positioning and Revenue	181

5.12 Lightwave Logic	185
5.12.1 Lightwave Logic Molecular Level Design	186
5.12.2 Lightwave Logic Electro-optic Modulator Prototype Device Design and Development	187
5.12.3 Lightwave Logic Polymer Photonic Integrated Circuits (P2ICTM)	187
5.12.4 Lightwave Logic Business Opportunity	188
5.12.5 Lightwave Logic Ridge Waveguide Modulator 100 Gbps (using 4 channels of 25 Gbps)	190
5.12.6 Lightwave Logic Electro-Optic Modulators	193
5.12.7 Lightwave Logic Polymer Photonic Integrated Circuits (P2ICTM)	193
5.12.8 Lightwave Logic Business Strategy	194
5.12.9 Lightwave Logic Organic Polymer-Enabled Electro-Optic Modulators	195
5.13 Lumentum	196
5.13.1 Lumentum High-Performance, OIF-compliant Modulators Supporting Metro, Regional, And Long-Haul Networks	196
5.13.2 Lumentum White Boxes	197
5.13.3 Lumentum Pluggable Transceivers And Optical Components	198
5.13.4 Lumentum Broad Portfolio of 100G Optical Transceivers	199
5.13.5 Lumentum Purchased Oclaro	201
5.13.6 Lumentum High-Speed Optical Modulators	201
5.13.7 Lumentum Photonic Products Enabling Optical Networking And Commercial Laser	202
5.13.8 Lumentum / Successor to JDSU	203
5.13.9 Lumentum Continuous Wave Single Frequency IR Laser	206

5.13.10 Lumentum NPRO 125/126 Diode-Pumped Laser Lidar Oscillator	209
5.13.11 Lumentum NPRO 125/126 Diode-Pumped Laser	210
5.14 MKS Instruments/ Newport	211
5.15 Qubig GmbH	216
5.16 Schäfter + Kirchhoff GmbH	226
5.12 Sumitomo	229
5.12.2 Optical Transceiver Modules That Support Large-Capacity/High-Speed	
Optical Communication	231
5.12.3 Sumitomo Optical devices	231
5.12.4 Wireless devices	232
5.12.5 Sumitomo RF Devices That Deliver Comprehensive Solutions For	
Wireless Systems	232
5.12.6 Sumitomo LN Modulators	233
5.13 ThorLabs	235
5.13.2 ThorLabs 20,000 Products	239
5.14 Viavi	240
5.14.2 Viavi Network Testing Solutions	240
6. Optical Modulator Regional Analysis	242
6.1 Optical Modulator Regional Analysis: Total Market	242
6.2 Optical Modulator Regional Analysis: Americas	243
6.3 Optical Modulator Regional Analysis: Europe	245
6.4 Optical Modulator Regional Analysis: China	247
6.5 Optical Modulator Regional Analysis: India	249
6.6 Optical Modulator Regional Analysis: Japan	251
6.7 Optical Modulator Regional Analysis: Southeast Asia	253
6.8 Optical Modulator Companies	255

6 Where to Buy Electro-optic Modulators	257
Related Product Categories	257
Scientific and Technical Information	258
Check List for Electro-optic Modulators	258
WinterGreen Research,	271
WinterGreen Research Methodology	271
WinterGreen Research Process	273
Market Research Study	273
WinterGreen Research Global Market Intelligence Company	274

List of Figures

Abstract: Modulators Bring Lower Cost and Scalability for Optical Fiber and Laser Systems. Modulator (EOM) Allows Control of Amplitude, Phase, Polarization Of Optical Beam.	1
Figure 1. Optical Modulator Market Driving Forces	33
Figure 2. Optical Modulator Market Shares, Dollars, Worldwide, 2017	38
Figure 3. Optical Modulator Mobile, Data Center, Touch Screens, Flexible Screens, Automotive, AR/VR, Energy and IoT Market Segment Forecasts, Dollars, Worldwide, 2012, 2017, 2024	40
Figure 4. Optical Modulator Technologies: Inp, Polymer, and GaAs, Segments, Units and Dollars, Worldwide, 2018-2024	41
Figure 5. Laser Micro processing Paradigm Shift Mobile and Touch Screens	42
Figure 6. Laser Micro processing Paradigm Shift: Mobile, Touch Screens, and IoT	43
Figure 7. Laser Micro Processing Paradigm Shift: Mobile, IoT, Flexible Touch Displays, VR/AR, Energy, Automotive	44

Figure 8. PIC Major Companies Involved In The Photonic Integrated Circuit Industry	48
Figure 9. Advantages of Fiber Lasers	53
Figure 10. Photonic Device Product Development Functions: Response to Market Changes	56
Figure 11. Integrated Photonics in the Datacenter	59
Figure 12. Optical Modulator Market Driving Forces	63
Figure 13. Optical Modulator Network Applications	63
Figure 14. Crystals Change Modulation Of Light with Respect to:	64
Figure 15. Advantages LWLG Material Polymer Modulator Material Features	65
Figure 16. Principal Competitive Factors in Silicon and Polymer Photonics Target Markets:	66
Figure 17. Optical Modulator Key Advantages	68
Figure 18. Optical Modulators Key Applications	69
Figure 19. Optical Modulator Market Shares, Dollars, Worldwide, 2017	71
Figure 20. Optical Modulator Market Shares, Dollars, Worldwide, 2017	72
Figure 21. Optical Modulators Key Applications	73
Figure 22. Optical Modulator Competitor Market Description, Worldwide, 2017	76
Figure 23. Optical Module Market Forecasts, Worldwide, Dollars, 2018-2024	78
Figure 24. Optical Module Market Forecasts, Worldwide, Dollars and Percent Growth, 2018-2024	80
Figure 25. Optical Modulator, Market and Market Forecast, Dollars and % Growth, 2012-2025	81
Figure 26. Optical Modulator, Market and Market Forecast, Units and % Growth, 2012-2025	82
Figure 27. Optical Modulator, Market and Market Forecast, Units and % Growth, Worldwide, 2012-2025	83
Figure 28. Optical Modulator Technologies: Inp, Polymer, and GaAs, Segments, Units and Dollars, Worldwide, 2018-2024	84

Figure 29. Optical Modulator Mobile, Data Center, Touch Screens, Flexible Screens, Automotive, AR/VR, Energy and IoT Market Segments, Dollars, Worldwide, 2012, 2017, 2024	85
Figure 30. Data Center Uses for Optical Modulators	86
Figure 31. Silicon Photonics Market Structure	87
Figure 32. Optical Modulators Market Segment Applications	88
Figure 33. Optical Modulators Market Segment Applications	89
Figure 34. Main SiPh Data / Telecom Applications	90
Figure 35. Silicon Photonics Landscape	91
Figure 36. Optical Modulator Types	92
Figure 37. Optical Modulator Market Segments, Dollars, Worldwide, 2024	93
Figure 38. Optical Phase Modulator, Fiber Bragg Gratings, Polarization Modulators; Amplitude Modulators, Segments, Dollars, Worldwide, 2017	94
Figure 39. Optical Phase Modulators, Fiber Bragg Gratings, Polarization Modulators; Amplitude Modulators, Segments, Percent, Worldwide, 2017	95
Figure 40. Optical Modulator Mobile, Data Center, Touch Screens, Flexible Screens, Automotive, AR/VR, Energy and IoT Market Segments, Dollars, Worldwide, 2018-2024	96
Figure 41. Optical Modulator Mobile, Data Center, Touch Screens, Flexible Screens, Automotive, AR/VR, Energy and IoT Market Segments, Percent, Worldwide, 2018-2024	97
Figure 42. Optical Phase Modulator, Market and Market Forecast, Dollars and % Growth, 2012-2017	99
Figure 43. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Phase Modulators, 2017-2025	100
Figure 44. Optical Modulators By Type	101
Figure 45. Optical Modulators By Application	101
Figure 46. Acousto Optical Modulators for General manufacturing	103
Figure 47. Optical Modulator Acousto-optic Automotive Applications	103
Figure 48. Optical Modulator Acousto-optic Consumer Applications	104

Figure 49. Optical Modulator Acousto-optic Heavy industry Applications	104
Figure 50. Optical Modulator Acousto-optic Aerospace Applications	104
Figure 51. Optical Modulator Acousto-optic Semiconductor and Electronics Applications	105
Figure 52. Optical Modulator Acousto-optic Advanced Applications	105
Figure 53. Optical Modulator Acousto-optic Communications Applications	105
Figure 54. Optical Modulator Acousto-optic Medical Applications	106
Figure 55. Optical Modulator Raw Materials (Indium Phosphide (InP), Silica-on-Silicon, Silicon, Gallium Arsenide Technologies (GaAs) Units and Percent, Worldwide, 2017 - 2024	107
Figure 56. Acousto Optical Modulator Market Shares, Dollars, Worldwide, 2017	108
Figure 57. Photonics the Mastery of Light	111
Figure 58. Market Segment Growth, Semiconductor, Industrial Technologies, Life and Health Sciences, Research and Defense	112
Figure 59. Accelerating Volume and Velocity of Data	113
Figure 60. Applications for Data Storage and Sharing, Quantity of Data Managed	114
Figure 61. Optical Modulator Capital Investment Drivers	115
Figure 62. High Growth Industrial Technology Segments	116
Figure 63. Technologies Needed to Achieve Scaling Performance of Polymer Modulators	118
Figure 64. Photonic Integrated Circuit Markets	119
Figure 65. Optical Modulators Regional Market Segments, 2017	122
Figure 66. Optical Modulators Regional Market Segments, 2017	123
Figure 67. All Polymer Electronic Circuit	130
Figure 68. All Polymer Flexible Electronic Circuit	131
Figure 69. An Applied Voltage Is Increased By A Factor Of 100 Across The Electro-Optic Crystal	133

Figure 70. AA Opto-Electronic Company Acousto-optic devices covering wavelengths from 180 nm up to 11 μ m	135
Figure 71. AA Opto-Electronic In-House Design Capabilities:	136
Figure 72. AA Opto-Electronic In-House Manufacturing Capabilities:	137
Figure 73. APE Areas of Application for Ultrafast Lasers	140
Figure 74. Brimrose Acousto-Optic Modulator (AOM)	146
Figure 75. Brimrose Free Space Acousto-Optic Modulator (AOM) Functions	147
Figure 76. Brimrose Acousto-Optic Modulator	148
Figure 77. Brimrose Acousto-Optic Modulator Applications	148
Figure 78. Brimrose Acousto-Optic Modulator (AOM) Key Features	149
Figure 79. Brimrose Digital Applications	149
Figure 80. Brimrose Fiber-Coupled A-O Modulator	150
Figure 81. Conoptics Electro-Optic Modulators	151
Figure 82. Conoptics Crystal Types:	152
Figure 83. Conoptics ADP Crystal Series Wavelength Limits (240 to 800 nm)*	153
Figure 84. KD*P Crystal Series Wavelength Limits (240 to 1100nm)*	153
Figure 85. LTA Crystal Series Wavelength Limits (700 to 2000nm)	154
Figure 86. Conoptics Applications	154
Figure 87. Felles Photonic Instruments Workshop Photonics Key Competencies: 155	
Figure 88. Felles Photonic Instruments Color Calibration Pattern Fabricated In Bulk Of Fused Silica Glass Using Femtosecond Laser	157
Figure 89. Spatially Variable Waveplate Examples (From Left To Right) S-Waveplate, "Soft" Aperture, Fresnel Lens And Sinusoidal Phase Grating Shown In Cross Polarized Light	158
Figure 90. Fujitsu Optical Components Dual-Carrier Integrated Coherent Receiver (ICR)159	
Figure 91. Fujitsu Optical Components Modulators for 400-Gbps Applications.160	

Figure 92. Fujitsu 100G DP-QPSK Modulator	160
Figure 93. Gleam and Lightwave Logic, Inc (LWLG) Partnership Objectives	161
Figure 94. Gleam All Polymer Flexible Photonic Circuit	162
Figure 95. Gooch & Housego Fiber-Q® Fiber Coupled Modulators (FCAOM)	164
Figure 96. Gooch & Housego Fiber-Coupled Acousto-Optic Modulator (FCAOM) Features	165
Figure 97. Gooch & Housego Fiber-Q® Modulator Features	165
Figure 98. Gooch & Housego Applications Of Fiber-Coupled Acousto-Optic Modulators	168
Figure 99. Intel Optical Modulator Functions	171
Figure 100. Intel® Optical Modulators Integration Functions	172
Figure 101. IPG Photonics Revenue First Quarter 2018	174
Figure 102. IPG Photonics Sales Among Principal Markets:	175
Figure 103. IPG Photonics Regional Sales	176
Figure 104. iXblue Intensity Modulators	179
Figure 105. iXblue Modulators	180
Figure 106. iXblue Photonics Lab	182
Figure 107. Photline MXER Modulators Used In Pipeline Monitoring	183
Figure 108. iXfiber PM Gyro Fiber	183
Figure 109. Photline NIR Modulators	184
Figure 110. iXfiber Active Fibers	184
Figure 111. iXblue Partners	186
Figure 112. Jenoptik Applications and Revenue	189
Figure 113. Jenoptik Applications	189
Figure 114. Jenoptik Positioning	192
Figure 115. Jenoptik Photonics Components	196
Figure 116. Lightwave Logic Business Strategy	206

Figure 117. Lumentum High-Performance, OIF-compliant Modulators Supporting Metro, Regional, And Long-Haul Networks	208
Figure 118. Lumentum Optical Communications Component Types	210
Figure 119. Lumentum Broad Portfolio	211
Figure 120. JDSU APE Phase Modulators	214
Figure 121. Lumentum / JDSU Phase Modulators Applications	215
Figure 122. JDSU APE Phase Modulators Key Features	216
Figure 123. JDSU APE Phase Modulators Applications	216
Figure 124. Lumentum Continuous Wave Single Frequency IR Laser	217
Figure 125. Lumentum NPRO 125/126 diode-pumped lasers Features	219
Figure 126. Lumentum NPRO 125/126 Diode-Pumped Laser Applications	219
Figure 127. Lumentum NPRO 125/126 Diode-Pumped Laser Lidar Oscillator Applications	220
Figure 128. Lumentum NPRO 125/126 Diode-Pumped Laser	221
Figure 129. Newport New Focus™ Electro-Optic Amplitude Modulators	222
Figure 130. Electro-Optic Phase Modulator	223
Figure 131. Newport High Damage Threshold Electro-Optic Phase Modulators	224
Figure 132. Qubig GmbH Electro-Optic Modulators	228
Figure 133. Qubig GmbH Electro-optic Modulators Key Features	229
Figure 134. Qubig GmbH Electro-optic Modulators	230
Figure 135. Qubig GmbH Electro-optic Modulators Applications	230
Figure 136. Qubig GmbH Product Matrix	231
Figure 137. Qubig GmbH Customer References	231
Figure 138. Qubig Selected Modulators Offered	232
Figure 139. Qubig Alkali Repumper Frequencies for Spectroscopy and Laser Cooling of neutral Atoms	235
Figure 140. Qubig GmbH Distribution Partner for China	236
Figure 141. Qubig GmbH Distribution Partner for Israel	237

Figure 142. Schäfter+Kirchhoff Products	238
Figure 143. Fiber Optics	238
Figure 144. Schäfter+Kirchhoff' EOM Electro-Optical Modulators	239
Figure 145. AOTF acousto-optical tunable filters	239
Figure 146. Sumitomo Business Segments	241
Figure 147. Sumitomo SOC LN Modulators Optoelectronics	244
Figure 148. Sumitomo SOC LN Modulators For Optical Communication Systems 245	
Figure 149. Sumitomo LN Modulators	246
Figure 150. Thorlabs Electro-Optic Modulators	247
Figure 151. Thorlabs Electro-Optic Modulator Models	247
Figure 152. ThorLabs Liquid Crystal EO Modulators/Noise Eaters	248
Figure 153. ThorLabs Electro-Optic Modulators 20 GHz Analog Intensity Modulator 249	
Figure 154. ThorLabs 40 GB/s Lithium Niobate Modulators	250
Figure 155. Viavi Network Testing Solutions	251
Figure 156. Optical Modulator, Market and Market Forecast, Dollars and % Growth, 2012-2025	253
Figure 157. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Americas, 2012-2017	254
Figure 158. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Americas, 2017-2025	255
Figure 159. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Europe, 2012-2017	256
Figure 160. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Europe, 2017-2025	257
Figure 161. Optical Modulator, Market and Market Forecast, Dollars and % Growth, China, 2012-2017	258

Figure 162. Optical Modulator, Market and Market Forecast, Dollars and % Growth, China, 2017-2025	259
Figure 163. Optical Modulator, Market and Market Forecast, Dollars and % Growth, India, 2012-2017	260
Figure 164. Optical Modulator, Market and Market Forecast, Dollars and % Growth, India, 2017-2025	261
Figure 165. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Japan, 2012-2017	262
Figure 166. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Japan, 2017-2025	263
Figure 167. Optical Modulator, Market and Market Forecast, Dollars and % Growth, SouthEast Asia, 2012-2017	Error! Bookmark not defined.
Figure 168. Optical Modulator, Market and Market Forecast, Dollars and % Growth, Southeast Asia, 2017-2025	Error! Bookmark not defined.