



Global and China Optical Fiber Preform Industry Report, 2010-2011

July 2011

This report

- ◆ **Analyzes the development of global and China optical fiber preform industry**

- ◆ **Focuses on global and Chinese optical fiber preform industry**

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Abstract

As a kind of raw material for optical fiber production, optical fiber preform features the comparably high technical content of its manufacturing techniques, and the manufacturers are primarily concentrated in Japan, Europe and America, while other countries rely upon importing optical fiber preform to produce optical fiber and cable. With the soaring demand of optical fiber in developing countries, Japanese, European and American producers also accelerate their pace of setting up joint ventures in corresponding areas. Currently, the demand of optical fiber preform in Asia-Pacific and North America accounts for over 80% of the world's total.

At present, with nearly half of the world's total demand, China is the largest consumer of optical fiber preform in the world. In 2010, the output of optical fiber preform approximated 1,400 tons or more, which was far from satisfying the domestic demand of over 3,000 tons. In this sense, most of Chinese optical fiber and cable manufacturers depend on importing optical fiber preform from Japan, Europe and America.

In 2010, China imported 2,003.6 tons of optical fiber preform from overseas suppliers, including Shin Etsu, Fujikura, Sumitomo Electric, Corning and Holland Drake etc.

Importers and Imported Volume of China-made Fiber Preform , 2010

Importer	Imported Volume (t)	Ratio
Japan	1353.04	67.5%
USA	568.46	28.4%
France	61.83	3.1%
Korea	8.80	0.4%
Germany	11.40	0.6%
China Hong Kong	0.04	0.0%
England	0.003	0.0%
Total	2003.59	100.0%

Source: ResearchInChina

Six Chinese manufacturers of optical fiber preform include Yangtze Optical Fibre and Cable Company Ltd., Jiangsu Hengtong Photoelectric Co., Ltd., Jiangsu Zhongtian Technologies Co., Ltd, FiberHome Telecommunication Technologies Co., Ltd., Futong Group and Fasten Group. Among them, only YOFC has fully released its capacity and others are still in the period of capacity release. In the future, with the full capacities release of Chinese optical fiber preform manufacturers, it is predicted that, compared to 2010, the output will be doubled and achieve roughly 2,895 tons in 2013, which will basically meet the home demand of optical fiber preform and hopefully get rid of dependence on imports.

This report not only analyzes the global and China's supply and demand of optical fiber preform and its prospect, but also highlights key enterprises including 7 international manufacturers and 6 Chinese counterparts.

Regarding Corning, its optical fiber and cable business is

subordinated to the telecom department. In 2010, revenue of telecommunication department occupied 26% of the total revenue of Corning. Currently, Corning owns two production bases in North Carolina and several branches in China. A large portion of Corning's optical fiber products are sold to its subsidiaries, such as Corning Cable Systems (Shanghai) Co., Ltd., Beijing CCS Optical Fiber Cable Co., Ltd., Chengdu CCS Optical Fiber Cable Co., Ltd. and Corning Cable Systems POLSKA SP.

Yangtze Optical Fibre and Cable Company Ltd., a joint venture of China Telecom, Wuhan Yangtze Communications Industry Group Co., Ltd and Draka Holding N.V., is the earliest enterprise that realized self-sufficiency of optical fiber preform in China. In 2010, YOFC's capacity of optical fiber exceeded those of Corning and ranked No.1 in the optical fiber market worldwide. In the meantime, its output of optical fiber preform keeps increasing year by year. Specifically, the YOFC's output of optical fiber preform rose from 300 tons in 2008 to 750 tons in 2009 and 850 tons in 2010.

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