



**Global and China Optical Fiber Preform  
Industry Report, 2011-2012**

**May 2012**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

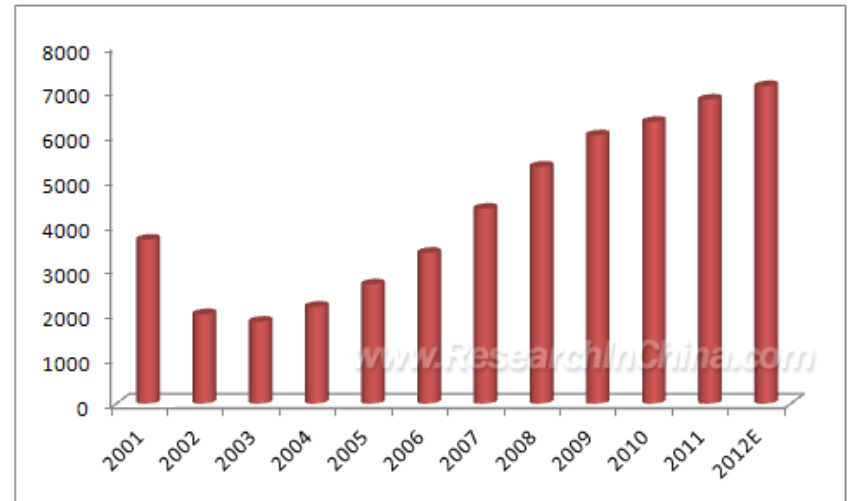
The primary information sources include China Customs and Cnii.com.cn etc.

## Abstract

Optical fiber preform is the upstream product of the optical fiber industry, contributing to 70% total profit of the entire industry chain. Optical fiber perform require high manufacturing technology, and manufacturers are mainly converged in Japan, Europe and America, while other countries mainly import optical fiber preform to produce optical fiber and cable. The global optical fiber preform market sees the equilibrium of supply and demand, while China is experiencing the process from short supply to balanced supply and demand. With the capacity release of Chinese companies, it is expected that the basic balance between supply and demand will be realized in Chinese optical fiber preform market in 2013.

In 2011, the global demand for optical fiber and cable reached 203 million core km, rising 10.92% from 2010; the corresponding demand for optical fiber performs got to 6,800 tons. In 2012, the global demand for optical fiber and cable will be 215 million core km, and the corresponding demand for optical fiber performs will amount to 7,100 tons, growing slightly.

**Global Demand for Optical Fiber Preforms, 2001-2012 (Unit: ton)**



Source: ResearchInChina 'Global and China Optical Fiber Preform Industry Report, 2011-2012'

Based on analysis on the supply and demand of the global optical fiber preform market, this report studies the operation of China optical fiber preform industry.

**At present, the optical fiber preform industry of China is characterized as follows:**

◎ The capacity release increases, the demand grows slowly, and the price hovers at the low level: At present, nearly half of the global demand for optical fiber preforms comes from China, so the supply and demand in China will be the main factor that influences the price in the future. In recent years, as the new capacity of Chinese optical fiber preforms rises and the growth of the downstream demand slows down, the optical fiber preform price hovers at the low level.

◎ YOFC's share falls, but the overall competition pattern remains unchanged: in China, YOFC, Hengtong, Zhongtian, FiberHome, Futong and Fasten can mass-produce optical fiber preforms, especially YOFC ranks first by output. Before 2010, YOFC's market share maintained above 80%, yet as the optical fiber preform projects of several other peers were put into operation, the proportion of YOFC's output dropped to 48.9% in 2011.

◎ The capacity is released quickly; the reliance on imports plays down: With the capacity release of enterprises, China's demand for imported optical fiber preforms sees a decreasing proportion of total demand from 70% in 2010 to 49.7% in 2011. By 2013, China's output of optical fiber preform is expected to reach about 2,930 tons, which can meet the basic needs of domestic enterprises and get rid of the dependence on imports.

◎ The growth in downstream application slows down, oversupply will arise: Seen from the downstream, China's output of optical fiber and cable has exceeded the domestic demand, and the cable export volume is still quite limited. If Chinese optical fiber preform manufacturers continue to expand capacity, they will face oversupply in the future.

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