



**China Optical Communication Industry
Report, 2012-2014**

Jan. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

The global optical fiber and cable market maintained stable growth in 2011, and the total demand in 2011 rose by 15% year on year to over 200 million core km. In 2012, the demand remained strong, with the growth rate of nearly 6%. In the next five years, the average annual growth rate will be about 3%.

In 2011, the optical network equipment market valued nearly USD16 billion. Network operators increasingly preferred ROADM, coherent optics, packet optical transmission and optical transport network (OTN) equipment; WDM saw the growth of 22% and ROADM 36%. The deployment of 40G/100G accelerated, showing the high-speed development of optical network equipment. Huawei and Alcatel-Lucent still ranked among top two in the market, while ZTE continued to increase its market share.

In 2011, impacted by the de-inventory of downstream manufacturers and the economic downturn, the global optical component market grew by 9% year on year to USD5.8 billion. However, the global optical component price decreased significantly in 2011, partially offset the growth rate of the output value of the industry. The growth rate in 2012 will not exceed 10%.

By region, Latin America and Asia are key growing areas, while

Europe, Japan and South Korea witness a drop in demand. China has been the largest driver for the global fiber demand. In 2011, the demand in China accounted for about 50% of the global demand; the proportion is expected to be close to 60% in 2012.

The overall performance of China's optical network reaches the moderate level in the world, and the broadband access penetration rate is 10.94%, ranking 34th. For China, it will take a long time and require sustainable investment to construct the optical fiber network. In a short term, the 3G construction will slow down, and FTTH will replace 3G to become the most important driving force of the demand for optical fiber. Operators will start 4G construction after 2013; 4G network deployment, the integration of radio & television network, telecommunication network and the Internet, as well as the optical fiber upgrading will act as the new impetus which prompts the demand for optical fiber in China.

In China, the construction of optical communication is at its peak. During "Twelfth Five-Year" (2011-2015), the communication investment hits RMB2 trillion, up 36% year on year from RMB1.44 trillion in "Eleventh Five-Year" (2006-2010); 80% of the investment will be used to mobile broadband and fixed broadband, 150% more than 37.5% in "Eleventh Five-Year".

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The gap between Chinese optical communication system equipment manufacturers and foreign equipment manufacturers is gradually narrowed. Huawei and ZTE can compete with Ericsson and Nokia Siemens. Huawei has become one of the world's top three suppliers of optical transmission equipment. Foreign manufacturers such as Alcatel-Lucent have quitted the Chinese market, whereas Huawei, FiberHome and ZTE occupy more than 80% market share in China.

In the field of optical fiber and cable, the optical fiber perform market involved with the most difficult technical and complicated process is basically monopolized by foreign manufacturers, such as USA Corning, Netherlands Draka, as well as 4 Japanese giants (Shin-Etsu, Sumitomo, Fujikura and Hitachi). Prior to 2010, except Wuhan Yangtze, most of Chinese optical fiber manufacturers were mainly engaged in R & D and production of optical fiber drawing and optical cable. Hengtong Optic-electric, ZTT, FiberHome and Futong Group started independent research and development of optical fiber perform after 2010. In 2012, 5 major optical fiber preform manufacturers are expected to release nearly 500 tons of capacity; meanwhile, the demand for optical fiber preform reaches 4,000 tons, so that the self-sufficiency rate is up to 45%, significantly higher than that in 2011.

The report contains seven chapters and 98 charts. It analyzes background, status quo and competition pattern of Chinese optical communication market, development trends of China optical communication industry, as well as operation and development trends of 18 key enterprises in the industry.

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