Global and China Optical Fiber Preform Industry Report, 2012-2015

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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.

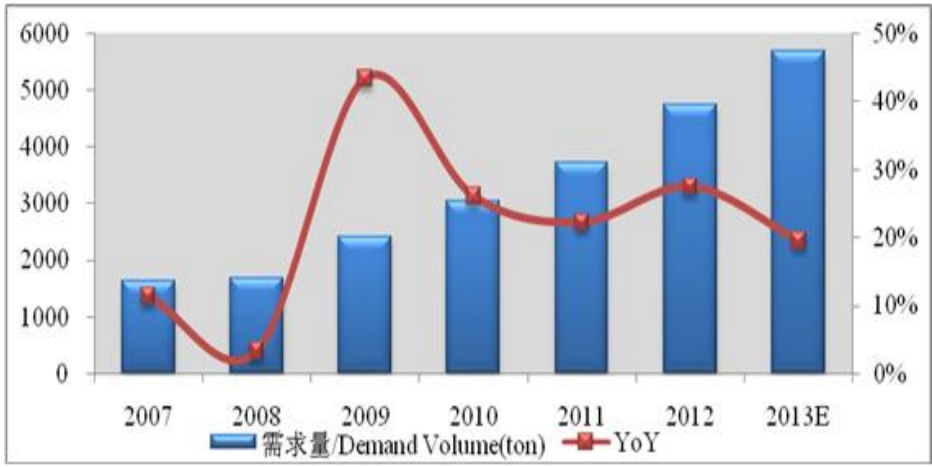
Abstract

Optical fiber preform is the core materials to make quartz optical fiber. Restricted by production technology, most manufacturers are concentrated in Japan, the United States and Europe, while other countries mainly produce optical fiber and cable through imports of optical fiber preform.

In 2012 China's self-sufficiency rate of optical fiber preform was approximately 53.96%. Promoted by "Broadband China" strategy and other favorable policies, domestic optical fiber preform industry has been in a rapid development period; major manufacturers such as Yangtze Optical Fibre and Cable Company Ltd. (YOFC), Jiangsu Hengtong Photoelectric Stock Co., Ltd. and Futong Group have actively increased capacity via acquisitions, joint ventures or new construction so as to enhance competitiveness. The capacity is expected to reach 4,200 tons or so in 2013.

In 2012 the global demand for optical fiber and cable was approximately 279 million core kilometers, with corresponding demand for optical fiber preform up to 9,200 tons, mainly distributed in the Asia-Pacific region, of which, China contributed about 4,753 tons, accounting for 51.66% of the world's total demand.

China's Demand for Optical Fiber Preform, 2007-2013E



Source: ResearchInChina *Global and China Optical Fiber Preform Industry Report, 2012-2015*

On the basis of analyzing market size, competition pattern, etc. of global and China optical fiber preform industry, this report also focuses on operation and optical fiber preform-related business development of key companies.

As the No.1 optical fiber preform company in China, YOFC has achieved optical fiber preform capacity of 1,500 t/a and optical fiber capacity of about 32 million core kilometers by the end of 2012. The same year, it established joint venture plants with Yunnan Lincang Xinyuan Germanium Industry (Share-holding) Co., Ltd, Shandong Pacific Fiber Optics Co., Ltd. and Kaile Science and Technology Co., Ltd. to improve optical fiber capacity. Besides, the company plans to expand capacity through cooperation with Heraeus in 2013, to build the world's second largest optical wand manufactory.

Jiangsu Hengtong Photoelectric Stock Co., Ltd. enjoys a relatively complete optic-fiber industrial chain layout. In May 2012, the company established a 700,000 core kilometers/a optical cable joint venture in Brazil. The same year, its 600 t/a Optical Fiber Preform (G.652) Project with a construction period of two years started construction; once completed, the company will be provided with 950 t/a optical fiber preform. In May 2013, Jiangsu Hengtong Photoelectric Stock Co., Ltd. and Jiangsu Nanfang Communication Technology Co., Ltd. set up a joint venture with annual optical fiber capacity of 6 million core kilometers.

After establishing an optical wand joint venture with Japan's Sumitomo Electric in 2011, Futong Group raised funds for the construction of the 500 t/a Large-size Optical Fiber Preform Project in February 2013, with a construction period of four years, once completed, the company's optical fiber preform capacity will reach 1,100 t/a.

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