



Global and China Optical Fiber Preform Industry Report, 2013-2016

Jun. 2014

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

As the core material of the optical fiber and cable industrial chain upstream, optical fiber preform contributes about 70% of the whole industrial chain profits.

In 2013, the global optical fiber preform production reached 10,449 tons, up 18.2% year on year, meeting demand of 10,128 tons, up 16.6% year on year.

As the top three optical fiber preform producers and demanders in the world, China, Japan and the United States combined for 84.1% and 83.3% of the global production and demand, of which, China topped the list, boasting separate proportions of 32.9% and 59.8%.

Pulled by the broadband demand from 4G, FTTx and LTE, the Chinese optical fiber preform market demand is growing rapidly, which then brings ever-increasing import volume. In 2013, the Chinese optical fiber preform imports rose 20.2% year on year to 2,748.1 tons, making up 45.4% of the country's demand.

The United States and Japan are major importers of Chinese optical

fiber preform, altogether taking 91.3% of China's total imports in 2013. To avoid import price dumping and improve profit margins of domestic products, the Ministry of Commerce of the People's Republic of China has conducted an anti-dumping investigation on imported optical fiber preform native to Japan and the United States since March 2014.

Moreover, China's growing market demand for optical fiber preform has also attracted a large number of domestic and foreign enterprises. So far, foreign companies e.g. Shin-Etsu Chemical, Sumitomo Electric Industries and Fujikura have entered the Chinese optical fiber preform market; on the other hand, domestic counterparts such as Hengtong Optic-electric Co., Ltd. and Jiangsu Zhongtian Technology Co., Ltd. are also increasing their capacity of optical fiber preform via upgrading and reconstruction or new projects, for the purpose of sharpening the competitive edge.

As the second largest optical fiber preform manufacturing enterprise in China, Hengtong Optic-electric Co., Ltd. has been provided with the 650 tons/a optical fiber preform production capacity. Its 610 tons/a Optical Fiber Preform Project newly constructed in August 2013 is expected to be completed and put into production in 2015.

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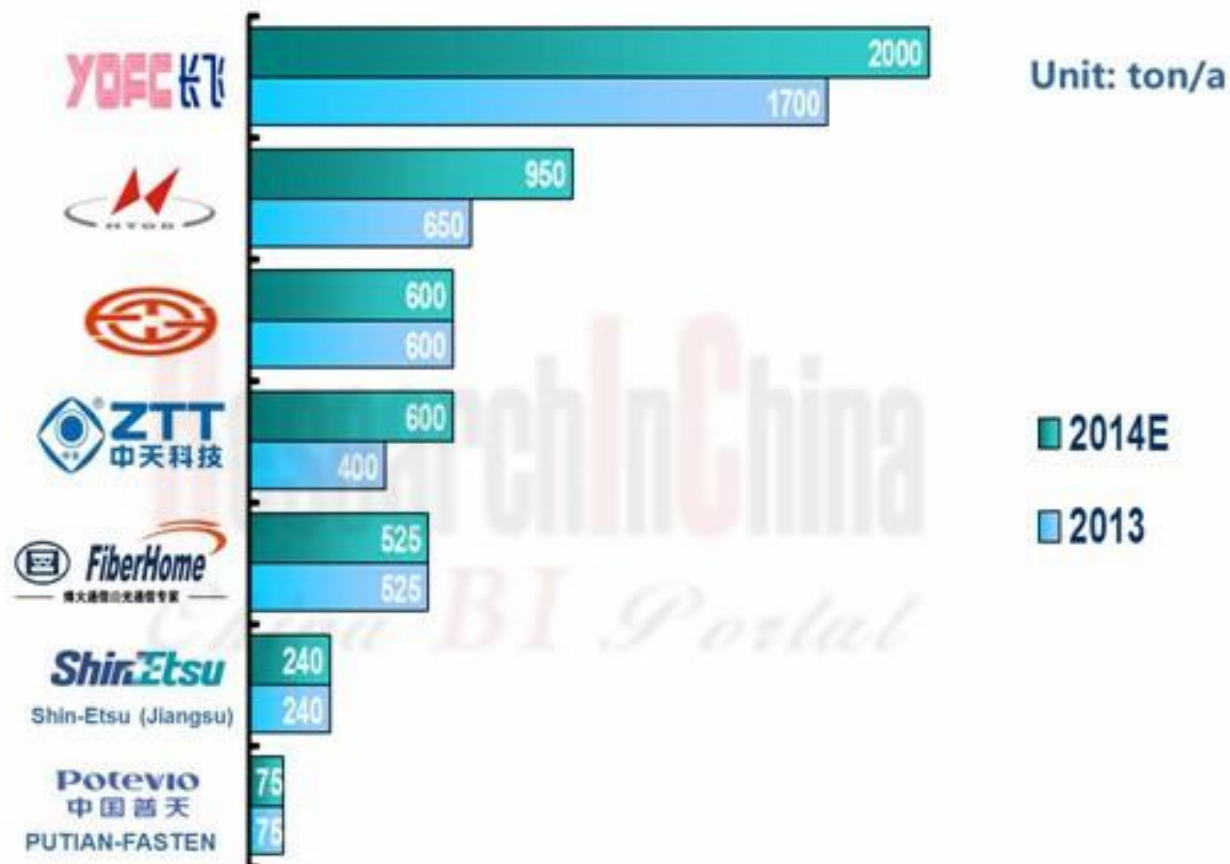
Jiangsu Zhongtian Technology Co., Ltd is one of the domestic manufacturers that have a complete industrial chain e.g. optical wand – optical fiber – optical cable. In recent years, it has continuously extended the capacity of optical fiber preform, with 400 tons/a formed upon the completion of the Optical Fiber Preform Project Phase I, II and III in 2011-2013. In 2014, the company initiated the Optical Fiber Preform Technology Upgrade Project, and will see total capacity up to 600 tons/a upon the year-end commissioning.

In addition, Jiangsu Tongding Optic-Electronic Stock Co., Ltd, Zhongli Sci-Tech Group Co., Ltd, Tianjin Xinmao Science &Technology Co., Ltd and other mainstream optical fiber manufacturers have also successively marched the optical fiber preform industry. Among them, the first two companies will put their optical fiber preform projects into production by the end of 2014; the 300 tons/a Single-mode Preform Project planned by Tianjin Xinmao Science &Technology has been approved by the EIA General Counsel and is now being built.

Global and China Optical Fiber Preform Industry Report, 2013-2016 by ResearchInChina mainly focuses on the followings:

- ✘ Supply and demand, regional distribution, price trend, etc. of the global optical fiber preform market;
- ✘ Policy environment, market supply and demand, import and export, competition pattern, price trend, etc. of the Chinese optical fiber preform industry;
- ✘ Operation, optical fiber preform business, development strategy, etc. of seven global companies and six Chinese companies;
- ✘ Market share, market size, etc. of Chinese optical fiber preform enterprises in 2013-2016E.

Capacity of Major Optical Fiber Preform Manufacturers in China, 2013-2014



Source: Global and China Optical Fiber Preform Industry Report , 2013-2016

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