



**Global and China Optical Fiber Perform
Industry Report, 2014-2017**

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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, a kind of specialty glass preform used to draw optical fiber, is the core material for the manufacturing of optical fiber. Optical fiber preform, optical fiber and optical cable account for 70%, 20% and 10% of the total profit of the optical fiber industry chain.

Global optical fiber preform capacity amounted to 13,000 tons in 2014, mainly concentrated in the United States, Japan and China (totaling as much as 85.2% of the world's total), of which China ranked first with a share of 39.8%. Besides a big producer of optical fiber preform, China is also a large consumer, demanding 6,639 tons in 2014, 60.9% of global demand. The figure is expected to increase to 7,144 tons in 2015.

Due to technological limitation, over 70% of China's demand for optical fiber preform was imported prior to 2010. In recent years, as key domestic companies enhanced their capability for independent research and development, China's optical fiber preform production capacity continued to expand. Thus, the self-sufficiency rate in optical fiber preform rose from 20.0% in 2007 to 64.4% in 2014, and is expected to reach 72.6% in 2015.

In March 2014, the Ministry of Commerce initiated an anti-dumping investigation on optical fiber preforms originating in Japan and the United States. In May 2015, the preliminary verdict showed that China Customs would levy security deposits on imports of optical fiber preform from Japan and the United States based on dumping margin (7.8%-39.0%) decided in preliminary rulings. Affected by this, China's imports of optical fiber preform recorded negative growth (-9.5%) for the first time in 2014 and are expected to keep falling in 2015 (a year-on-year decline of 8.7% during Jan-May).

Global optical fiber preform industry is highly concentrated, with top5 companies (one in China, two in the United States, and two in Japan) together making up 59.4% of market share in 2014, of which Chinese Yangtze Optical Fibre and Cable Co., Ltd. (YOFC) taking the first place with a share of 13.3%, followed by U.S. Corning Inc. (12.9%).

YOFC: In Jun 2015, the company came to an agreement with Shin-Etsu Chemical Co., Ltd. to establish a joint venture (located in Qianjiang, Hubei Province), which is scheduled to be set up in Aug and specializes in the production of optical fiber preform with designed capacity of 450t/a.

Corning Inc.: In 2014, the company posted net sales of USD1.89 billion in China, making up 19.5% of its total. By 2014, the company had 9 manufacturing facilities in China, including one optical fiber preform manufacturing facility in Shanghai.







Sumitomo Electric Industries, Ltd.: The company cooperates with Futong Group in optical fiber preform field in China, jointly building two optical fiber preform production bases- Hangzhou SEI-Futong Optical Fiber Co., Ltd. and Tianjin SEI-Futong Optical Fiber Co., Ltd. with the latter going into production in Aug 2014 and being the first optical fiber preform project in northern China.

Hengtong Optic-electric Co., Ltd.: In Dec 2014, the company developed optical fiber preform of 200mm in diameter and 6 meters in length that could be drawn 15,000 km of thread, hitting a new world record; in Feb 2015, the company made breakthroughs in “long-distance low-loss submarine optical cable-used optical fiber preform R&D and industrialization” project, and is expected to start mass production at the end of 2015.

Global and China Optical Fiber Preform Industry Report, 2014-2017 highlights the followings:

- Supply & demand, competitive landscape, and price trend of the global optical fiber preform market;
- Policy environment, supply & demand, import & export, and price trend of the Chinese optical fiber preform market;
- Operation, revenue structure, gross margin, optical fiber preform business, and development in China of seven major global companies;
- Operation, revenue structure, gross margin, and optical fiber preform business of six major Chinese companies.

Optical Fiber Perform Output of Global Main Manufacturers, 2014

Manufactures	Output (ton)	Industrial Distribution
 YDFC	1,550	The optical fiber preform production base is located in Wuhan. In 2016, its capacity will rise to 3,500 tons/a; The key raw materials (sleeve) for optical fiber preform are mainly supplied by Heraeus, a German company;
 CORNING	1,500	Its optical fiber preform production base in China is located in Shanghai; In December 2014, the company acquired Samsung Electronics' optical communication business (including optical fiber preform);
 ShirEtsu	1,400	The optical fiber preform is mainly manufactured by Kashima plant. In 2010. The company began to construct a 240 tons/a plant in Jiangsu, China. And in 2015 it will construct a second 450 tons/a plant in Hubei;
 SUMITOMO ELECTRIC	1,000	The company' s optical fiber preform production bases in China are located in Hangzhou and Tianjin. Their products are supplied to the joint ventures established by Futong and Sumitomo;
 Futong Group	810	Four production bases are distributed in Zhejiang (2), Chengdu, and Tianjin; With an investment of RMB1.25 billion, the 500 ton/a optical fiber preform project is to be put into operation in the third quarter of 2016;
 Hengtong Optic-Electric	750	The company' s optical fiber preform production base is located in Jiangsu; The optical fiber preform for long-distance low-loss submarine cable project, which is to go into operation at the end of 2015, would fill the gap of the domestic technologies;

Source: Global and China Optical Fiber Perform Industry Report, 2014-2017 ; ResearchInChina

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