

**Global and China Optical Fiber Preform
Industry Report, 2017-2021**

Sep. 2017

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 core raw material of optical fiber products, accounts for around 70% of the profit of optical fiber. Global optical fiber preform output and demand were 14.9kt and 13.8kt in 2016, up 16.0% and 10.2% from a year ago, respectively, and are expected to reach 30.2kt and 25.6kt in 2021 separately, driven by rapid development of the optical fiber and cable market.

China, the world's largest producer of and source of demand for optical fiber preform, produced 6.1kt and demanded 7.668kt in 2016, 41.0% and 55.4% of the world's total, respectively, indicating a supply-demand gap of 1.568kt, still in a state of short supply. However, as Chinese enterprises improve optical fiber preform technology and put production lines into operation, the gap has narrowed gradually, from 68.4% in 2010 to only 20.4% in 2016 and estimated 18% or so in 2021.

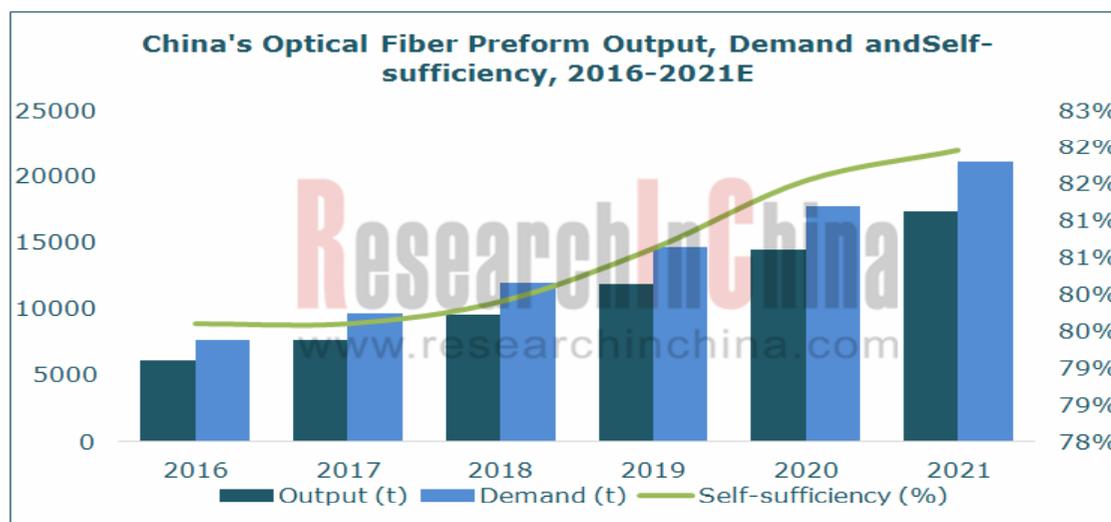
There are about 20 major optical fiber preform producers worldwide in this highly-concentrated market, including Corning, Sumitomo Electric Industries, Shin-Etsu Chemical, Yangtze Optical Fibre and Cable, and Hengtong Optic-electric. Yangtze Optical Fibre and Cable ranks first by global market share (based on output), 13.4% in 2016, followed by Corning (about 12.9%).

The country's efforts to promote "tri-networks integration", "Broadband China", "5G Construction" and "Internet Plus" have brought unprecedented opportunities for the Chinese optical fiber and cable market, driven rapid development of the optical fiber preform market, and stimulated Chinese optical fiber preform producers to expand capacity. Yangtze Optical Fibre and Cable began construction of YOFC Qianjiang Science Park in Mar 2016, put its Phase I into production in Mar 2017, and will build Phase II and Phase III. After reaching designed capacity, the project will deliver capacity of 1.5kt/a optical fiber preform and 20 million core?km /a. Meanwhile, the company also initiated PCVD11 capacity expansion project with the aim of lifting optical fiber preform capacity. Hengtong Optic-electric reorganized its optical fiber preform business and established a wholly-owned subsidiary- Hengtong Photoconductive New Materials in 2017, planning to add 1.5kt/a optical fiber preform.

In addition, the Ministry of Commerce of the People's Republic of China announced in Aug 2017 that it decided to conduct a one-year expiry review investigation into the anti-dumping measures imposed on the imports of optical fiber preform originated in Japan and the United States, and during the expiry review investigation of the anti-dumping measures, the imports of optical fiber preform originated in Japan and the United States will still be subject to anti-dumping duties at the scope and rate released in the Ministry of Commerce Announcement No.25 of 2015. Affected by this, coupled with short supply of the product, optical fiber preform prices have risen since 2015, hitting RMB1,011/kg in 2016 and expected to go up further to an average of RMB1,100/kg in 2017.

Global and China Optical Fiber Preform Industry Report, 2017-2021 highlights the followings:

- ◆ Global optical fiber preform market (supply & demand, regional distribution, price, competitive landscape, development trends, etc.);
- ◆ Chinese optical fiber preform market (policies, supply & demand, competitive landscape, prices, development trends, etc.);
- ◆ Global and Chinese optical fiber and cable market;
- ◆ 13 global and Chinese optical fiber preform enterprises (operation, optical fiber preform business, etc.).



Source: Global and China Optical Fiber Preform Industry Report, 2017-2021

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