



# Global and China Optical Fiber Preform Industry Report, 2018-2023

July 2018

## **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, playing an important role in the optical fiber and cable industry chain, seizes about 70% profits of optical fiber. In 2017, the global demand for optical fiber preform rose 11.1% year on year and reached 15.3kt, and is expected to hit 31.5kt in 2023 with the CAGR of 12.2% between 2018 and 2023 because of the growing demand for broadband like FTTx (Fiber To The X). China is the largest consumer of optical fiber preform around the globe, as a percentage of 60.5% in global demand and the expected 61.6% in 2023.

China, the world's largest producer of optical fiber preform as well, produced 7.55 kt in 2017, leaving a supply-demand gap of 1.75kt or so and still being in short supply. The short supply will continue as the demand for optical fiber and cable is growing. It is estimated after 2022, optical fiber preform in China will be self-sufficient, and the output and demand will amount to 20.2kt and 19.4kt in 2023, respectively.

Due to technical constraints, global optical fiber perform market is characterized by high concentration, only about 20 players distribute in Japan, USA and China, including Corning, Sumitomo Electric Industries, Shin-Etsu Chemical, Yangtze Optical Fiber and Cable (YOFC), and Hengtong Optic-electric, etc. Among them, YOFC topped with share of 14.7% in terms of capacity in 2017, followed by Corning with 14.4%.

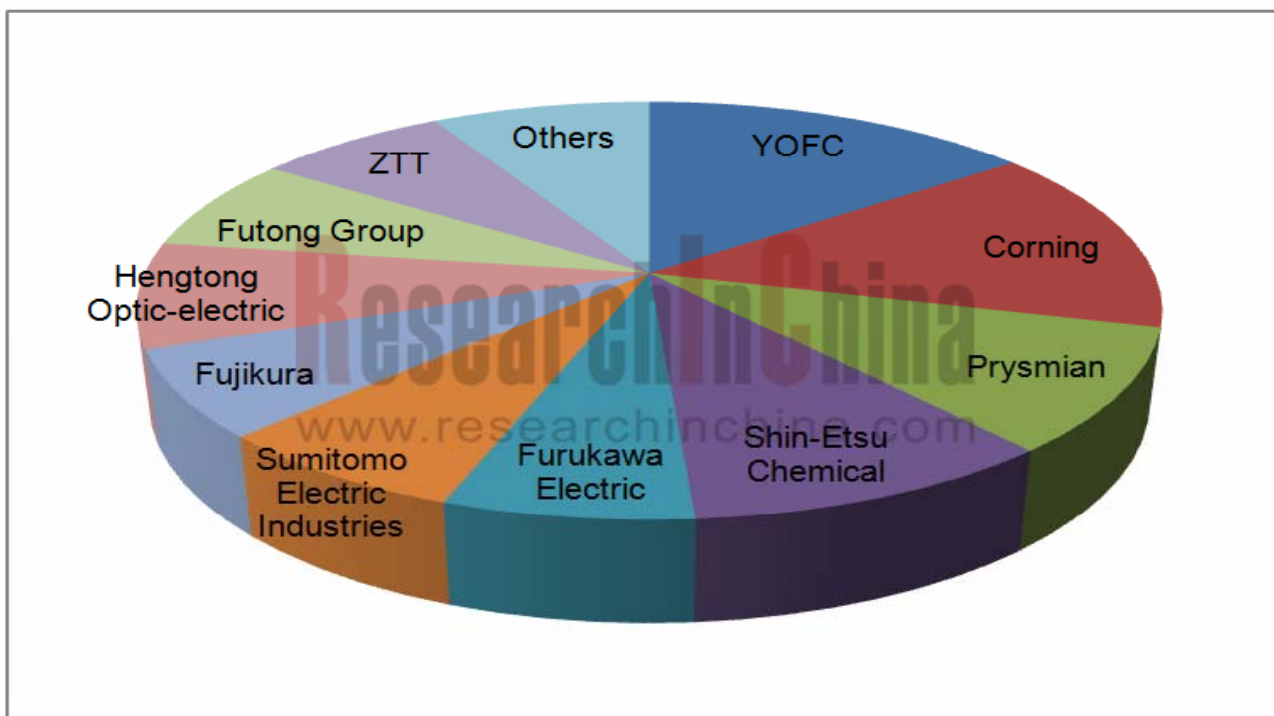
Allured by high prosperity of optical communication industry, there has been a remarkable increase of optical fiber preform industrialization projects across China over the recent two years. Apart from such giants' capacity expansion as YOFC, Hengtong Optic-electric and Futong Group, the key optical fiber and cable companies like Tongding Interconnection Information, Zhongli Sci-Tech, Tianjin Xinmao Science & Technology, and Hangzhou Cable also foray into optical fiber preform field. As estimated, the production capacity of optical fiber preform in China will be at least 25kt till 2023, showing a clear sign of overcapacity.

On July 10, 2018, Chinese government announced to continue imposing anti-dumping duties on optical fiber preform originated from Japan and the United States with 5-year implementation period. This move not only protects Chinese optical fiber preform companies but encourages local peers to make more investments into R&D and rev up production of optical fiber preform, practically conducting to independent innovation of optical fiber and cable industry and making for the development of optical communication in China. Additionally, the price of optical fiber preform is driven upwards and is expected to stand at RMB1,225/kg in 2018.

Global and China Optical Fiber Preform Industry Report, 2018-2023 highlights the following:

- ◆ Global optical fiber preform market (supply & demand, regional distribution, price, competitive landscape and development trend);
- ◆ Chinese optical fiber preform market (Policy climate, supply & demand, import & export, price, competition pattern and development trend);
- ◆ Development of global and China optical fiber & cable market;
- ◆ 13 global and Chinese optical fiber preform companies (operation, optical fiber preform business, etc.).

## Competitive Landscape of Global Optical Fiber Preform Market, 2017



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