

Global and China Optical Fiber Preform Industry Report, 2019-2025

Aug. 2019

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

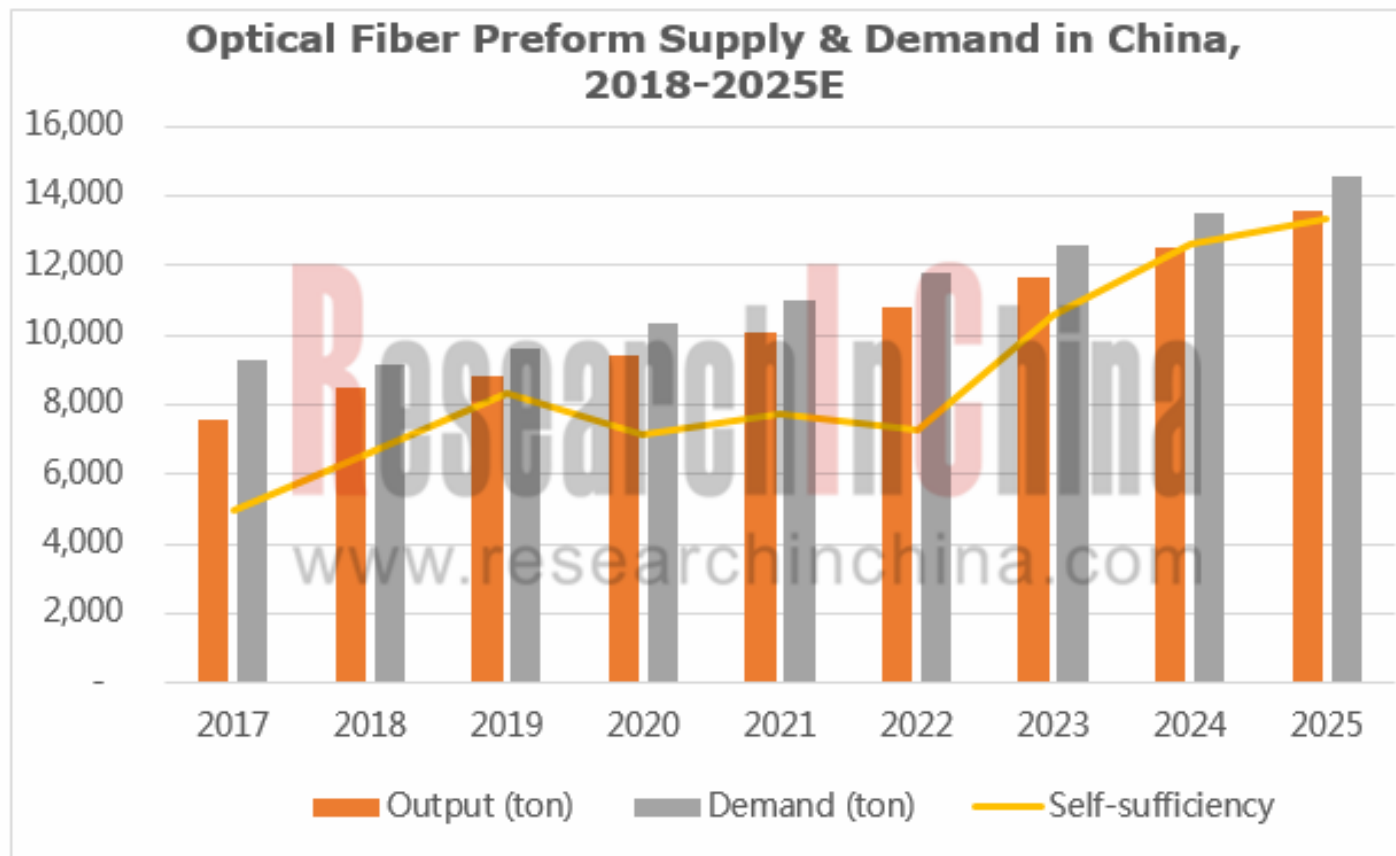
Optical fiber preform, playing an important role in the optical fiber and cable industry chain, seizes about 70% profits of optical fiber. Global demand for optical fiber preform stood at 16.2kt in 2018, a mere 5.5% growth, far lower than in 2017, as optical fiber market slowed down, but is projected to hit 25kt in 2025 with the growing demand from large-scale 5G construction, among others. China, as a key consumer of optical fiber preform, accounted for 56.7% of the global total demand in 2018, a share projected to be 60% in 2025.

Optical fiber preform is still in short supply in China, a large supplier worldwide. Yet, as more optical fiber preform projects become operational, the supply gap in the country will be narrowed, and over 85% will be self-sufficient in 2025, compared with 81.9% in 2018

China's imports of optical fiber preform slumped in 2018, and the gloomy picture continues to 2019. That's because China still carries out the optical fiber preform anti-dumping policy (on July 10, 2018, Chinese government announced to continue imposing anti-dumping duties on optical fiber preform from Japan and the United States for 5 years), and furthermore, trade tensions between China and the US have yet to be eased.

Global optical fiber preform industry features a high concentration. There are just around 20 manufacturers, largely in Japan, the United States and China and typically Corning, Sumitomo Electric Industries, Shin-Etsu Chemical, YOFC and Hengtong Optic-electric. By capacity, YOFC boasts the largest share in the global market, followed by Corning.

Both of the two giants had optical fiber preform capacity expansion projects in recent two years. In YOFC's case, in late 2018, Phase II of YOFC Qianjiang Co., Ltd.'s 500 t/a OVD optical fiber preform capacity expansion project went into production, sending YOFC's total capacity to 3,500t/a; YOFC also has such projects under construction as YOFC Qianjiang Phase III and Shin-Etsu YOFC (Hubei) Optical Preform Co., Ltd.'s Phase II and YOFC SDG (Hubei) Optical Preform Co., Ltd.'s new project.



Source: ResearchInChina

As for Corning, following operation of its optical fiber preform technological upgrading project in Hainan province in 2018, it pushed on with construction of optical fiber preform technological upgrading and capacity expansion project which drew to an end in August 2019, with a capacity of 1,066 t/a.

A combination of factors like anti-dumping policy are at play in rapid growth of Chinese optical fiber preform companies which already have stronger competence in research and development and enlarge their capacity. As with large manufacturers YOFC, Hengtong Optic-electric, Futong Group and Corning (Hainan) Optical Communication, in 2019 other main optical fiber preform suppliers in China, like Jiangsu Etern, Tianjin Futong Xinmao Science & Technology, Hangzhou Cable, STL-Sterlite Technologies and Hebei Far East Communication System Engineering (HBFEC), also have deployed optical fiber preform projects. According to the disclosed projects, it is predicted that China's optical fiber preform capacity will outstrip 25kt/a in 2025, a sign of excess capacity.

In 2019, price of optical fiber preform products has dropped a bit in China due to higher risk of overcapacity, smaller supply gap and fiercer competition in the market.

Global and China Optical Fiber Preform Industry Report, 2019-2025 highlights the following:

- Global optical fiber preform market (supply & demand, regional distribution, price, competitive pattern, and development trend);
- Chinese optical fiber preform market (policy, patents, supply & demand, import & export, competitive pattern, price, and development trend);
- Developments of global and China optical fiber & cable markets;
- 13 global and Chinese optical fiber preform companies (operation, optical fiber preform business, etc.).

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