

Global and China Optical Fiber Preform Industry Report, 2020-2026

Sept.2020

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 as a hi-tech product and a crucial link in the optical fiber industry chain contributes to 70% or so of profit margin. Global 4G and FTTH construction at dusk leads to the shrinking demand for optical fibers and cables, so does for optical fiber preform. But the 5G construction produces a growing demand for not only optical fibers but optical fiber preform.

In 2019, the global optical fiber preform capacities were estimated to hit 26,676 tons and output approximately 18,902 tons, with the capacity utilization at 70.9% and showing a severe supply glut arising from the successive production of the construction projects invested by Chinese enterprises over the recent years. It is expected that the world's optical fiber preform capacity will rise to 30,436 t/a in 2020.

China has been the largest producer of optical fiber preform in the world alongside production expansion of Chinese competitors, with its capacity registering 16,426 t/a (basically meeting the domestic market demand) with a 61.6% share of the global total in 2019, while China's output of optical fiber preform edge down 1.1% on a like-for-like basis to roughly 8,800 tons largely due to the sluggish demand in optical fibers and cables market amid completion of 4G construction and FTTH as well as the infancy of 5G construction.

With high technical barriers, the optical fiber preform industry harbors about 20 companies worldwide encompassing US-based Corning, Italy-based Prysmian, Japanese players Sumitomo Electric Industries, Shin-Etsu Chemical and Fujikura as well as Chinese peers like Yangtze Optical Fibre and Cable Joint Stock Co., Ltd. (YOFC), Hengtong Optic-electric, Futong Group, and Jiangsu Zhongtian Technology (ZTT). In 2019, the top five giants swept a combined 58.2% share by capacity, of which Corning ranked first with 15.5% share, closely followed by YOFC 15.2%.

Still, some Chinese enterprises are expanding optical fiber preform capacities. FiberHome Technologies, for instance, publicized on November 28, 2019 the prospectus about raising funds by issuance of convertible corporate bonds, with a plan to raise RMB3,088.35 million of which RMB500 million is to be earmarked for FiberHome Ruituo Technology's optical fiber preform project (phase-I). Far East Smarter Energy Co., Ltd. rolled out its plan for private issuing of A-shares 2020, projecting to raise a total capital of no more than RMB2.552 billion including RMB1.502 billion for the optical fiber preform, optical fibers and cables industry chain construction project. In future, the Chinese optical fiber preform industry will be further out of sync, where competition will prick up with an ever higher concentration.

5G construction is in full swing around the globe, triggering the robust demand for optical fiber preform. What's more, overseas FTTX development and submarine cable systems call for more optical fiber preform. As estimated, the global demand for optical fiber preform will grow to 25,880 tons and China's 12,600 tons in 2026.

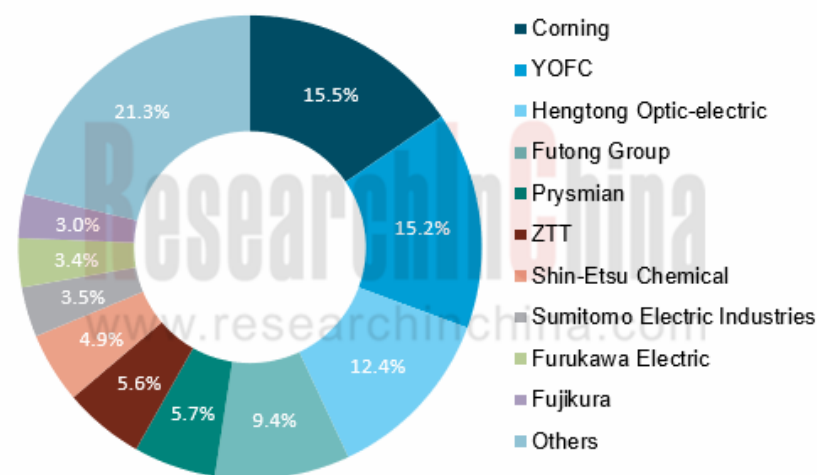
The report highlights:

Global optical fiber preform market (status quo, demand and supply, regional distribution, prices and competitive landscape);
Chinese optical fiber preform market (development environment, history, demand and supply, import and export, prices and competition pattern);

Development of optical fibers and cables market in China and the world;

13 global and Chinese optical fiber preform companies (operation, optical fiber preform business, etc.)

Market Shares of Optical Fiber Preform Companies Worldwide,



Source: ResearchInChina

1. Overview of Optical Fiber Preform

- 1.1 Definition
- 1.2 Production Technology
- 1.3 Industry Chain
 - 1.3.1 Upstream
 - 1.3.2 Downstream

2. Global Optical Fiber Preform Industry

- 2.1 Status Quo
- 2.2 Supply & Demand
 - 2.2.1 Supply
 - 2.2.2 Demand
- 2.3 Regional Structure
 - 2.3.1 USA
 - 2.3.2 Japan
 - 2.3.3 Europe
- 2.4 Price
- 2.5 Competitive Landscape

3. Optical Fiber Preform Industry in China

- 3.1 Policy Environment
 - 3.1.1 Major Policies
 - 3.1.2 Anti-Dumping Investigation
 - 3.1.3 New Infrastructure Construction
- 3.2 Development History

- 3.2.1 Development
- 3.2.2 Patents
- 3.3 Supply & Demand
 - 3.3.1 Supply
 - 3.3.2 Demand
- 3.4 Import & Export
 - 3.4.1 Import
 - 3.4.2 Export
- 3.5 Price Trend
 - 3.5.1 Raw Materials
 - 3.5.2 Optical Fiber Preform
- 3.6 Competitive Landscape

4. Global and Chinese Optical Fiber & Cable Market

- 4.1 Global
 - 4.1.1 Market Development
 - 4.1.2 Regional Structure
 - 4.1.3 Price
 - 4.1.4 Company
- 4.2 China
 - 4.2.1 Market Development
 - 4.2.2 Price
 - 4.2.3 Competitive Landscape
 - 4.2.4 Industry Drivers

5. Major Global Optical Fiber Preform Companies

5.1 Corning

5.1.1 Profile

5.1.2 Operation

5.1.3 Optical Fiber Preform Business

5.1.4 Development in China

5.1.5 Corning Optical Fiber Cable Chengdu Co. Ltd.

5.1.6 Corning Hainan Optical Communications Co., Ltd.

5.2 Sumitomo Electric Industries

5.2.1 Profile

5.2.2 Operation

5.2.3 Optical Fiber Preform Business

5.2.4 Development in China

5.2.5 Chengdu SEI Optical Fiber

5.3 Shin-Etsu Chemical

5.3.1 Profile

5.3.2 Operation

5.3.3 Optical Fiber Preform Business

5.3.4 Development in China

5.4 Fujikura

5.4.1 Profile

5.4.2 Operation

5.4.3 Optical Fiber Preform Business

5.4.4 Development in China

5.4.5 Fujikura FiberHome Opto-Electronic Material Technology

5.5 Prysmian

5.5.1 Profile

5.5.2 Operation

5.5.3 Optical Fiber Preform Business

5.5.4 Development in China

5.6 Furukawa Electric

5.6.1 Profile

5.6.2 Operation

5.6.3 Optical Fiber Preform Business

5.6.4 Development in China

5.7 TwentscheKabel Holding (TKH)

5.7.1 Profile

5.7.2 Operation

5.7.3 Optical Fiber Preform Business

5.7.4 Development in China

5.7.5 Twentsche (Nanjing) Fibre Optics

6. Major Chinese Optical Fiber Preform Companies

6.1 YOFC


6.1.1 Profile

6.1.2 Operation

6.1.3 Optical Fiber Preform Business

6.2 Hengtong Optic-electric

6.2.1 Profile



- 6.2.2 Operation
- 6.2.3 Optical Fiber Preform Business
- 6.3 Jiangsu Zhongtian Technology (ZTT)
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Optical Fiber Preform Business
- 6.4 FiberHome Technologies
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Optical Fiber Preform Business
- 6.5 Futong Group
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Projects under Construction
 - 6.5.4 Optical Fiber Preform Business
 - 6.5.5 Tianjin Futong Xinmao Science & Technology Co., Ltd.
- 6.6 Potevio Fasten Optical Communication
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Optical Fiber Preform Business

7. Summary and Forecast

- 7.1 Enterprise
- 7.2 Market



Optical Fiber Preform Mandrel and Cladding Diagram
Optical Fiber Preform Mandrel Process Distribution Proportion, 2018
A Panorama of Optical Fiber Preform Industry
Optical Fiber Preform Industry Chain
Cost Structure of Optical Fiber Preform in China
Downstream Industrial Chain of Optical Fiber Preform
5G Commercial Network Deployments Worldwide as of Q2 2020
5G Commercial Network Use Worldwide as of Q2 2020
Coverage of New Infrastructure
Advances in New Infrastructure Construction in China, 2020
Optical Fiber Preform Patent Filings in China, 2012-2020
Optical Fiber Preform Patent Structure in China, H1 2020
Optical Fiber Preform Output and YoY Growth in China, 2009-2020
Optical Fiber Preform Demand and YoY Growth in China, 2010-2020
Optical Fiber Preform Self-sufficiency in China, 2010-2020
Optical Fiber Preform Import Volume and YoY Growth in China, 2010-2020
Structure of China's Optical Fiber Preform Import Volume (by Country), 2013-2020
Optical Fiber Preform Import Value and YoY Growth in China, 2010-2020
Optical Fiber Preform Export Volume and YoY Growth in China, 2010-2020
Structure of China's Optical Fiber Preform Export Volume (by Country), 2013-2020
Optical Fiber Preform Export Value and YoY Growth in China, 2010-2020
Price Trend of Germanium Ingot (50Ω/cm) in China, April-August, 2020 (Unit: RMB/kg)
Average Price of Optical Fiber Preform in China, 2010-2020
The Selling Price of Optical Fiber Preform on the Japanese Market, 2018-2019
Import and Export Prices of Optical Fiber Preform in China, 2010-2020



Structure and Production Processes of Optical Fiber and Cable

Optical Fiber Output Worldwide, 2010-2020

Optical Cable Output Worldwide, 2010-2020

Global Demand for Optical Fiber and Cable, 2011-2026E

Global Optical Cable Demand, 2017-2020(mln fkm)

Growth Rates of Optical Cable Demand (by Quarter) in China, 2017-2020

Price Trend of Optical Fiber Worldwide, 2004-2019

Length of Optical Cable Lines in China, 2011-2019

China's Optical Fiber Output and Growth Rate, 2011-2026E

Optical Fiber and Cable Demand and YoY Growth in China, 2011-2026E

Centralized Procurement Price for Optical Fiber in China, 2004-2019

Shares of Major Suppliers of Optical Fibers and Cables for Three Telecom Carriers in China, 2019

Shares of Candidates for Procurement of General Optical Cables from China Mobile, 2020

Shares of Candidates for Procurement of General Optical Cables from China Mobile, 2019

Bid Winners for Centralized Procurement of Outdoor Optical Cables from China Telecom, 2019

Bid Winners for Centralized Procurement of Optical Fiber Drop Cables from China Telecom, 2019

Capital Expenditure of Three Chinese Telecom Carriers, 2013-2020

Three Chinese Telecom Carriers' Investments in 5G Construction, 2019-2020

Three Chinese Telecom Carriers' Procurement of Optical Fibers and Cables, 2015-2020

FTTH/O Connection and Market Penetration in China, 2014-2019

Per Capita Number of Submarine Optical Cables in Major Countries

Revenue and Net Income of Corning, 2009-2020

Revenue Breakdown and Structure of Corning (by Product), 2015-2020

Revenue Breakdown and Structure of Corning (by Country/Region), 2014-2019

R&D Costs and % of Total Revenue of Corning, 2009-2020



Revenue Breakdown (by Product) of Corning's Telecom Business Segment, 2011-2019
Corning's Revenue in China and As a Percentage of Total, 2009-2019
Revenue and Net Income of Sumitomo Electric, FY2008-FY2020
Revenue Breakdown (by Business) of Sumitomo Electric, FY2008-FY2020
Revenue Breakdown (by Region) of Sumitomo Electric, FY2008-FY2019
R&D Expenses of Sumitomo Electric (by Business), FY2014-FY2019
Development Visions of Sumitomo Electric, FY2022
Operating Income Structure of Sumitomo Electric (by Segment), FY2022
R&D Strategies of Sumitomo Electric (by Segment), FY2022
Sumitomo Electric's Revenue from Information and Communications Business, FY2013-FY2020
Development Strategy of Sumitomo Electric's Information and Communications Business, FY2020
Sumitomo Electric's Revenue in China, FY2011-FY2019
Revenue of Chengdu SEI Optical Fiber Co., Ltd., 2009-2020
Products of Shin-Etsu Chemical (by Division), 2020
Shin-Etsu Chemical's Plants by Business Division/by Region, 2019
Revenue and Net Income of Shin-Etsu Chemical, FY2010-FY2020
Revenue Structure of Shin-Etsu Chemical by Business, FY2013-FY2020
Revenue Structure of Shin-Etsu Chemical by Region, FY2015-FY2020
Revenue and Operating Income of Shin-Etsu Chemical's Electronic and Functional Materials Division, FY2009-FY2020
Investment of Shin-Etsu Chemical's Electronic and Functional Materials Division, FY2016-FY2018
Shin-Etsu Chemical's Revenue in China and Percentage, FY2012-FY2020
Overview of New Optical Fiber Preform Joint Ventures in China
Revenue and Net Income of Fujikura, FY2009-FY2020
Revenue Structure of Fujikura by Business, FY2015-FY2020
Revenue of Fujikura by Business, FY2020Q1



New Products Rolled by Fujikura, FY2018
Fujikura's Business Performance, FY2018
Revenue Structure of Fujikura by Region, FY2014-FY2018
Global Network of Fujikura
Main Consolidated Subsidiaries of Fujikura
Fujikura's R&D Costs by Business, FY2012-FY2019
Fujikura's Power & Telecommunications Revenue by Business, FY2017-FY2020
Telecommunication Systems Business of Fujikura, FY2018
Fujikura's Revenue in China, FY2011-FY2019
Revenue and Net Income of Fujikura FiberHome Opto-Electronic Material Technology, 2011-2020
Equity Structure of Prysmian, 2020
Global Presence of Prysmian, as of end of 2019
Business Operations of Prysmian
Development & Acquisition Course of Prysmian
Revenue and Net Income of Prysmian, 2008-2020
Business Performance of Prysmian, 2020H1
Global R&D Centers of Prysmian, 2019
Revenue Structure of Prysmian by Business, 2019
Revenue Structure of Prysmian by Business, 2020H1
Revenue Structure of Prysmian by Region, 2020H1
Performance of Prysmian's Telecommunications Business, 2020H1
Telecommunications Business Revenue of Prysmian by Business, 2019
Telecommunications Business Structure and Key Clients of Prysmian
Performance of Prysmian's General Cable Business, 2017-2018
Prysmian's Subsidiaries in China by the End of 2019



Sales and Net Profit of Related Subsidiaries of Prysmian, 2017-2018

Prysmian's Presence in China

Global Presence of Furukawa Electric, FY2018

Segment of Furukawa Electric

Business Planning of Furukawa Electric, 2020E

Furukawa Electric's Planning for Global Presence, 2020E

Net Revenue and Operating Income of Furukawa Electric, FY2010-FY2020

Revenue of Furukawa Electric by Business, FY2015-FY2020

Revenue of Furukawa Electric by Business, FY2020Q1

Revenue Forecast of Furukawa Electric, FY2018-FY2025E

R&D Expenses of Furukawa Electric by Business, FY2015-FY2019

R&D Expenses of Furukawa Electric, FY2020Q1

Revenue of Furukawa Electric by Region (Overseas), FY2015-FY2019

Revenue and Operating Income of Furukawa Electric's Communications Solutions, FY2009-FY2020

Net Sales and Operating Income of Furukawa Electric's Communications Solutions, FY2018-FY2020

Sales and Operating Income of Furukawa Electric's Communications Solutions, FY2017-2025E

Furukawa Electric's Communications Growth, FY2018 & FY2021E

Furukawa Electric's Communications Solutions and Related Subsidiaries

Global Activities of Furukawa Electric's Communications Solutions, 2019

Growth Opportunities of Furukawa Electric's Communications Solutions, 2020E

Application of Optical Fiber and Optical Cable Products of Furukawa Electric

Optical Fiber and Cable Business of Furukawa Electric, 2019

Optical Cable Development Trends of Furukawa Electric

Optical Fiber and Cable Business Expansion of Furukawa Electric, FY2018-FY2020E

Main Optical Fiber Production Bases and Projects under Construction of Furukawa Electric, 2019



Global Presence of TKH
Business Model of TKH
Revenue and Net Income of TKH, 2009-2020
Revenue Structure of TKH by Business, 2014-2020
Revenue Structure of TKH by Business, 2018-2020
Revenue of TKH by Product, 2012-2020
Revenue Structure of TKH by Region, 2012-2020
Revenue Breakdown of TKH by Region, 2019
R&D Expenditure of TKH, 2010-2019
Revenue and Business Model of TKH's Telecom Division by Business, 2017-2020
Prospects for Fiber Optics Networks
TKH's Subsidiaries in China by the End of 2019
Business Structure of YOFC
Revenue and Net Income of YOFC, 2007-2020
Revenue Breakdown of YOFC by Product, 2015-2017
Revenue Structure of YOFC by Product, 2011-2020
Operating Revenue of YOFC by Region, 2011-2020
Gross Margin of YOFC by Product, 2011-2019
YOFC's R&D Costs and % of Total Revenue, 2013-2020
Optical Fiber Preform Output and Growth Rate of YOFC, 2006-2018
Optical Fiber Preform and Optical Fiber Projects of YOFC in Qianjiang Science Park
Key Suppliers of Raw Materials for YOFC
Self-produced and Outsourced Output and Sales Volume of YOFC (by Product), 2015-2017
Self-produced and Outsourced Sales Volume of YOFC (by Product), 2015-2017
Global Marketing Network of Hengtong Optic-Electric



Revenue and Net Income of Hengtong Optic-Electric, 2008-2020
Operating Revenue, Operating Cost and Gross Margin of Hengtong Optic-Electric by Product, 2019
Gross Margin of Hengtong Optic-Electric's Optical Communications Products, 2011-2019
Revenue of Hengtong Optic-Electric by Region, 2009-2019
Overseas Operations of Hengtong Optic-Electric, 2018
R&D Costs and % of Total Revenue of Hengtong Optic-Electric, 2009-2020
Optical Fiber Preform Capacity of Hengtong Optic-Electric, 2010-2019
Purpose of the Raised Funds through Exchangeable Corporate Bonds Issued by Hengtong Optic-Electric in 2019
Optical Fiber Preform Capacity Expansion History of Hengtong Optic-Electric, 2010-2019
Evolution of ZTT's Primary Business
Revenue and Net Income of ZTT, 2009-2020
Operating Revenue and Gross Margin of ZTT by Business, 2017-2019
Revenue of ZTT by Region, 2008-2019
R&D Costs and % of Total Revenue of ZTT, 2009-2020
Progress in the Large-sized Optical Fiber Preform Intelligent Transformation Project of ZTT, H12020
Optical Fiber Preform Capacity of ZTT, 2012-2020E
Optical Fiber Preform Output of ZTT, 2010-2018
Capacity, Output and Sales Volume of Optical Fiber and Cable Products of ZTT, 2015-2019
Milestones of FiberHome
Business and Subsidiaries of FiberHome
Revenue and Net Income of FiberHome Technologies, 2008-2020
Revenue of FiberHome Technologies by Product, 2008-2019
Revenue Structure of FiberHome Technologies by Business, 2019
Revenue of FiberHome Technologies by Region, 2008-2019
Gross Margin of FiberHome Technologies by Product, 2008-2019



R&D Costs and % of Total Revenue of FiberHome Technologies, 2011-2020
Net Income of Major Optical Fiber Preform Manufacturing Companies of FiberHome Technologies, 2015-2020
Progress in FiberHome Ruituo Technology's Optical Fiber Preform Project (Phase-I), H1 2020
Optical Fiber Preform Output of FiberHome Technologies, 2010-2018
Purpose of the Raised Funds by Issuing Convertible Corporate Bonds of FiberHome Technologies, 2019
Equity Structure of Futong Group, 2019
Distribution of Futong Group's Production Bases
Revenue and Net Income of Futong Group, 2009-2020
Global Marketing Network of Futong Group
Revenue of Futong Group by Business, 2010-2019
Gross Margin of Futong Group by Business, 2009-2019
Revenue, Gross Profit and Gross Margin of Futong Group, 2014-2019
Capacity and Output of Futong Group's Optical Communications Business by Product, 2014-2020
Sales and Selling Prices of Futong Group's Optical Communications Business by Product, 2014-2020
Key Projects under Construction of Futong Group, 2019
Optical Fiber Preform Production Bases of Futong Group
Optical Fiber Preform Capacity and Output of Futong Group, 2009-2020
Optical Fiber Preform Procurement and Average Purchase Price of Futong Group, 2016-2019
Optical Fiber Preform Sales and Average Selling Price of Futong Group, 2016-2020
Futong Group's Procurement of Raw Materials for Optical Fiber Preform from Top 5 Suppliers and % of Total Procurement, 2014-2019
Revenue and Net Income of Tianjin Futong Xinmao Science & Technology, 2017-2020
Revenue Breakdown (by Product) of Tianjin Futong Xinmao Science & Technology, 2017-2020
Equity Structure of Potevio Fasten Optical Communication, 2019
Revenue and Net Income of Potevio Fasten Optical Communication, 2013-2020
Optical Fiber Preform Capacity and Output of Potevio Fasten Optical Communication, 2006-2018



Competitive Landscape of Global Optical Fiber Preform Market, 2019
Competitive Landscape of China Optical Fiber Preform Market, 2019-2020
Optical Fiber Preform Capacity Utilization of Futong Group, 2009-2019
Global Optical Fiber Preform Capacity Structure, 2019&2026E
Global and China Optical Fiber Preform Demand, 2015-2026E
Optical Fiber Preform Output in China, 2018-2026E
Manufacturing Process Comparison of Optical Fiber Preform Mandrel
Manufacturing Process Comparison of Optical Fiber Preform Mandrel in China
Policies on Optical Fiber Preform Industry in China, 2010-2020
Anti-dumping Policies on Optical Fiber Preform
Anti-dumping Results of Optical Fiber Preform in China, 2018
Development History of Optical Fiber Preform in China
Key Optical Fiber Preform Projects Planned and under Construction in China, 2020
Shareholding Structure and Technologies Applied of Main Optical Fiber Preform Manufacturers in China
Optical Fiber Preform Capacity of Key Optical Fiber Preform Producers in China, 2018-2020
Global Top10 Most Competitive Optical Fiber and Cable Enterprises, 2019
5G as an Accelerator for Related Industries
Operation of Key Optical Fiber Preform Producers in China, 2019

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 2-626, 6th Floor, No.1, Shanyuan Street, Haidian District, Beijing, 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license)3,200 USD
 Hard copy 3,400 USD
 PDF (Enterprisewide license)..... 4,800 USD

✂ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.