

China Optical Communication Industry Report, 2010-2011

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Abstracts

The optical communication network construction in China has transferred to the extensive upgrading of access network since 2010, and the centralized procurement quantity of FTTx by three telecom operators has approximated 20 million lines. In 2011, the FTTx centralized procurement quantity of China Telecom is expected to total 19 million lines, followed by China Unicom. According to the planning of the State Administration of Radio Film and Television (SARFT), the CATV operators will initiate network reform in 2011 and will purchase great numbers of PON devices.

Chinese optical communication equipment industry has maintained the growth rate of over 30% in recent years. Regarding the construction of optical fiber access network, access system device occupies more than 50% of the gross investment. At present, China Telecom and China Unicom give priority to EPON, while China Mobile, the newcomer in broadband market, prefers GPON. Chinese local suppliers of PON devices mainly cover Huawei, ZTE, and FiberHome.

The cost of optoelectronic devices, the core components of optical network, accounts for 25%-30% of that of optical communication equipment. Hereinto, optical splitters are in short supply in Chinese market. The major optoelectronic device manufacturers in China consist of Accelink Technologies Co., Ltd. (Accelink), Wuhan Huagong Genuine Optics Tech Co., Ltd. (HG Genuine), and Wuhan Telecommunication Devices Co., Ltd. (WTD). Nevertheless, they lack core technologies and ingenious brands, and the core optical fiber components rely on import.

In 2010, the capacity utilization of optical fiber & cable in China was around 90%, and the price of centralized purchasing presented a downward trend, a fall of 12% YoY. Yet influenced by Great East Japan Earthquake, the upstream optical fiber pre-forms has

encountered tense supply, and the falling price of optical fiber & cable has slowed down, so the price of optical fiber & cable in 2011 will be equivalent to that in 2010. Optical fiber pre-form contributes 70% to the profit of the entire optical fiber & cable industry chain. Hengtong Optic-electric, Jiangsu Zhongtian Technology Co., Ltd. (ZTT), FiberHome, Futong Group, and Yangtze Optical Fibre and Cable Company Ltd. (YOFC) have already practiced pre-form projects. The optical fiber pre-form output of Chinese local manufacturers approached 1,000 tons in 2010.

Major Local Manufacturers in Chinese Optical Communication Field

In the field of optical communication equipment, the leading ZTE boasts roughly 45% share of the FTTx market. Huawei launched the dual-mode ONT that favors EPON and GPON in 2010, which solved the problem concerning technological compatibility between EPON and GPON. Under the fierce competition, the gross margin of FiberHome optical communication device business dropped nearly 5 percentage points.

In respect of optoelectronic devices, the dominant Accelink will achieve the localization of ROADM modules and the commercialization of AWG chips in 2011. HG Genuine expanded the workshop by 1000 m² in 2010 and raised the monthly capacity from 300K modules to the maximum 500K. WTD has been in possession of more than 1/3 share in global low & medium-end AOD (active optical device) market, and its sales witnessed a 40% YoY rise in 2010.

As for optical fiber & cable industry, the optical fiber pre-form joint project of Hengtong Optic-electric and the U.S. based OFS has been put into operation, with the output of over 100 tons in 2010 and the annual capacity of 200 tons. The optical fiber pre-form capacity of ZTT was close to 50 tons in 2010. FiberHome and Fujikura set up the joint venture in 2009, and it will satisfy 20% domestic demand after the complete production of optical fiber pre-form project. Futong Group and Sumitomo established the joint venture for the production of large-sized optical fiber pre-forms. As the sole supplier of small, medium, and large-sized pre-forms, the pre-form capacity of YOFC advances year by year and the annual capacity approximated 800 tons in 2010.

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