

Global and China Optical Fiber Perform Industry Report, 2014-2017

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Abstracts

Optical fiber preform, a kind of specialty glass preform used to draw optical fiber, is the core material for the manufacturing of optical fiber. Optical fiber preform, optical fiber and optical cable account for 70%, 20% and 10% of the total profit of the optical fiber industry chain.

Global optical fiber preform capacity amounted to 13,000 tons in 2014, mainly concentrated in the United States, Japan and China (totaling as much as 85.2% of the world's total), of which China ranked first with a share of 39.8%. Besides a big producer of optical fiber preform, China is also a large consumer, demanding 6,639 tons in 2014, 60.9% of global demand. The figure is expected to increase to 7,144 tons in 2015.

Due to technological limitation, over 70% of China's demand for optical fiber preform was imported prior to 2010. In recent years, as key domestic companies enhanced their capability for independent research and development, China's optical fiber preform production capacity continued to expand. Thus, the self-sufficiency rate in optical fiber preform rose from 20.0% in 2007 to 64.4% in 2014, and is expected to reach 72.6% in 2015.

In March 2014, the Ministry of Commerce initiated an anti-dumping investigation on optical fiber preforms originating in Japan and the United States. In May 2015, the preliminary verdict showed that China Customs would levy security deposits on imports of optical fiber preform from Japan and the United States based on dumping margin (7.8%-39.0%) decided in preliminary rulings. Affected by this, China's imports of optical fiber preform recorded negative growth (-9.5%) for the first time in 2014 and are expected to keep falling in 2015 (a year-on-year decline of 8.7% during Jan-May).

Global optical fiber preform industry is highly concentrated, with top5 companies (one in China, two in the United States, and two in Japan) together making up 59.4% of market share in 2014, of which Chinese Yangtze Optical Fibre and Cable Co., Ltd. (YOFC) taking the first place with a share of 13.3%, followed by U.S. Corning Inc. (12.9%).

YOFC: In Jun 2015, the company came to an agreement with Shin-Etsu Chemical Co., Ltd. to establish a joint venture (located in Qianjiang, Hubei Province), which is scheduled to be set up in Aug and specializes in the production of optical fiber preform with designed capacity of 450t/a.

Corning Inc.: In 2014, the company posted net sales of USD1.89 billion in China, making up 19.5% of its total. By 2014, the company had 9 manufacturing facilities in China, including one optical fiber preform manufacturing facility in Shanghai.

Sumitomo Electric Industries, Ltd.: The company cooperates with Futong Group in optical fiber preform field in China, jointly building two optical fiber preform production bases- Hangzhou SEI-Futong Optical Fiber Co., Ltd. and Tianjin SEI-Futong Optical Fiber Co., Ltd. with the latter going into production in Aug 2014 and being the first optical fiber preform project in northern China.

Hengtong Optic-electric Co., Ltd.: In Dec 2014, the company developed optical fiber preform of 200mm in diameter and 6 meters in length that could be drawn 15,000 km of thread, hitting a new world record; in Feb 2015, the company made breakthroughs in “long-distance low-loss submarine optical cable-used optical fiber preform R&D and industrialization” project, and is expected to start mass production at the end of 2015.

Global and China Optical Fiber Preform Industry Report, 2014-2017 highlights the followings:

Supply & demand, competitive landscape, and price trend of the global optical fiber preform market;

Policy environment, supply & demand, import & export, and price trend of the Chinese optical fiber preform market;

Operation, revenue structure, gross margin, optical fiber preform business, and development in China of seven major global companies;

Operation, revenue structure, gross margin, and optical fiber preform business of six major Chinese companies.

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