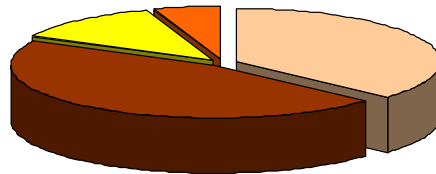


Announcement

Fiber Optic Connector & Mechanical Splice Global Market Forecast & Analysis 2017-2027



Study Release Date: April 25, 2018



www.electronicast.com

Fiber Optic Connector Global Market Forecast & Analysis 2017-2027

Published: April 25, 2018
Text Pages: 577 pages – PDF
Excel File: Market Forecast Database (2017-2027)
PowerPoint File: Summary Data Figures

Fee: USD 4990 Files sent by E-mail

One-Fee Policy: all employees of the client company/organization may use the report, worldwide

Report Description

This is the ElectroniCast forecast of global consumption and technology trends of fiber optic connectors and mechanical splices. We believe clients will find this report useful for planning of product and market development.

Historical estimated data are presented for 2017, plus the year-by-year forecast through 2027.

This analysis and forecast and of America, EMEA and APAC regional consumption is presented for each significant fiber optic connector and mechanical splice used in selected communication applications. The forecast for each connector type, in turn, is segmented into each geographical region.

The information is presented in easy-to-follow illustrations and text. The reasons for the forecast trends are discussed. A global summary also is provided. The report also outlines the market research methodology followed. There are over 100 vendors competing for the global fiber optic connector/ mechanical splice market, which ElectroniCast tracks in a product matrix showing participation in the following: connectors, cable assemblies, optical backplanes, and fiber optic installation apparatus; however, is dominated by a few companies that have a broad base in various interconnect products.

Connectors and Applications Covered in this Study

The ElectroniCast connector market forecast is built up from specific segments. The three major categories: single-mode, multimode and mechanical splices are further broken down as shown in Table 1.

The end applications for the selected fiber optic connectors discussed in this study report are itemized in Table 2.

Table 1
Fiber Optic Connector Product Category List

Single-mode Fiber Optic Connector
ST Simplex
FC Simplex
SC Simplex
Small Form Factor (SFF) Simplex Connector
LC Simplex
MU Simplex
E-2000 and F-3000 and Related
SFF Other Simplex
Adapter
In-series Adapter
Between-series Adapter
Multichannel/Multifiber Connector
MT Based (includes MT, MPO/MTP)
MXC TM
SFF Duplex Connector
SFF Duplex MT-RJ
SFF Other Duplex
Other Multifiber Connector
MIL-SPEC
Other Single-mode Fiber Optic Connectors
Multimode Fiber Optic Connectors
ST Simplex
SC Simplex
Small Form Factor (SFF) Simplex Connector
SFF LC Simplex
SFF MU Simplex
E-2000 TM and F-3000 TM and Related
SFF Other Simplex
Adapter
In-series Adapter
Between-series Adapter
Multichannel/Multifiber Connector
MT (includes MT, MPO/MTP)
MXC TM
SFF Duplex Connector
SFF Duplex MT-RJ
SFF VF-45 (SG) Duplex
SFF Other Duplex
Other Multifiber Connector
MIL-SPEC
Other Multimode Fiber Optic Connectors
Mechanical Splices

Note: All LC connectors are counted as simplex

Table 2
Fiber Optic Connector Application Category List

Telecommunications

Apparatus
Modules/Components

Private Data LAN/WAN

Apparatus
Modules/Components

Cable TV

Apparatus
Modules/Components

Military/Aerospace

Commercial-Off-The-Shelf (COTS) and Value-Added Connectors
Military Specified/Standard (MIL-SPEC)
Aircraft/Spacecraft
Shipboard
Other Military/Aerospace (Base Stations, Tactical Ground,
Vehicles, Missile Systems, Other)

Specialty

The Specialty applications category, which includes automotive/vehicle, medical, sensors, industrial, energy/oil/gas, and harsh-environment, as well as non-specified (miscellaneous uses)

This report presents the ElectroniCast market forecast of the use of fiber optic cleavers and strippers. This report provides the consumption by the following functions:

- Value (US\$, million)
- Quantity (number/units in thousands)
- Average Selling Prices (ASP \$, each)

Information Base for the Market Forecast

Primary Research This study is based on analysis of information obtained continually since 1985, but updated through the middle of April of 2018. During this period, ElectroniCast analysts performed interviews with authoritative and representative individuals in the fiber optics industry plus telecommunications, datacom, military/aerospace and other communication industries, instrumentation/ laboratory – R&D and factory/manufacturing, from the standpoint of both suppliers and users of 40/100GbE MPO (and other) fiber optic connectors. The interviews were conducted principally with:

- Engineers, marketing personnel and management at manufacturers of fiber optic connectors, couplers/splitters, isolators, OADMs, DWDM, photonic/ Ethernet switches, modulators, collimators, mechanical splice, attenuators, transceivers and receivers, as well as laser diodes and photodiodes, application-specific ICs, packages, ferrules and cables, substrate materials, AWGs/optical waveguide and other components used in the fabrication of optoelectronic transceivers, cable assemblies, test/measurement equipment, splice equipment and installation apparatus
- Design group leaders, engineers, marketing personnel and market planners at major users and potential users of cable, cable assemblies, connectors, installation apparatus, passive devices and transceivers, such as telecommunication transmission, switching and distribution equipment producers, data communications equipment producers (switches, hubs, routers), computer and workstation producers, weapon system, aircraft and spacecraft electronic equipment producers, optical instrumentation system producers and others
- Other industry experts, including those focused on standards activities, trade associations, and investments

The interviews covered issues of technology, R&D support, pricing, contract size, reliability, documentation, installation/maintenance crafts, standards, supplier competition and other topics. Customers of Fiber optic connectors & splices also were interviewed, to obtain their estimates of quantities received and average prices paid, as a crosscheck of vendor estimates. Customer estimates of historical and expected near term future growth of their application are obtained. Their views of use of new technology products were obtained.

The analyst then considered customer expectations of near term growth in their application, plus forecasted economic payback of investment, technology trends and changes in government regulations in each geographical region, to derive estimated growth rates of quantity and price of each product subset in each application. These forecasted growth rates are combined with the estimated baseline data to obtain the long-range forecasts at the lowest detailed level of each product and application.

Secondary Research A full review of published information was also performed to supplement information obtained through interviews. The following sources were reviewed:

- Professional technical journals and papers; Trade press articles
- Technical conference proceedings; Product literature
- Company profile and financial information
- Additional information based on previous ElectroniCast market studies
- Personal knowledge of the research team

In analyzing and forecasting the complexities of the North American market for optical interconnect products, it is essential that the market research team have a good and a deep understanding of the technology and of the industry. ElectroniCast members who participated in this report were qualified.

Bottom-up Methodology ElectroniCast forecasts, as illustrated in the forecast data base structure are developed initially at the lowest detail level, then summed to successively higher levels. The background market research focuses on the amount of each type of product used in each application in the base year (last year), and the prices paid at the first transaction from the manufacturer. This forms the base year data.

ElectroniCast analysts then forecast the growth rates in component quantity use in each application, along with price trends, based on competitive, economic and technology forecast trends, and apply these to derive long term forecasts at the lowest application levels. The usage growth rate forecasts depend heavily on analysis of overall end user trends toward communication equipment usage and economic payback.

Cross-Correlation Increases Accuracy The quantities of network switches, optical fiber/cable, connectors, transceivers, transport terminals, optical add/drop MUX, VCSELs, couplers/splitters, isolators, photonic switches and other products used in a particular application are interrelated. Since ElectroniCast conducts annual analysis and forecast updates in each fiber optic related product field, accurate current quantity estimates in each application are part of this corporate database. These quantities are cross-correlated as a “sanity check.”

ElectroniCast, each year since 1985, has conducted extensive research and updated their forecasts of each fiber optic component category. As technology and applications have advanced, the number of component subsets covered by the forecasts has expanded impressively. The calculation and analysis data spreadsheet technique is based upon input/output analysis, leveraging the quantitative consumption quantity, price and value of each item in each application at all levels to achieve reasonable quantitative conclusions; this interactive analysis concept, first applied on a major scale by Leonteff, of the US Department of Commerce, in the mid 1950s, was then adopted successfully by analyst/forecasting firms Quantum Science, Gnostic Concepts and (in 1981) by ElectroniCast.

About ElectroniCast

ElectroniCast, founded in 1981, specializes in forecasting technology and global market trends in fiber optics communication components and devices, as well providing market data on light emitting diodes used in lighting.

As an independent consultancy we offer multi-client and custom market research studies to the world's leading companies based on comprehensive, in- depth analysis of quantitative and qualitative factors. This includes technology forecasting, markets and applications forecasting, strategic planning, competitive analysis, customer-satisfaction surveys and marketing/sales consultation. ElectroniCast, founded as a technology-based independent consulting firm, meets the information needs of the investment community, industry planners and related suppliers.

Proprietary Statement

All data and other information contained in this data base are proprietary to ElectroniCast and may not be distributed or provided in either original or reproduced form to anyone outside the client's internal employee organization, without prior written permission of ElectroniCast.

ElectroniCast, in addition to multiple-client programs, conducts proprietary custom studies for single clients in all areas of management planning and interest. Other independent consultants, therefore, are considered directly competitive. ElectroniCast proprietary information may not be provided to such consultants without written permission from ElectroniCast Consultants.

One-Fee Policy

This market forecast report, which is available immediately, is part of a consultant service from ElectroniCast Consultants to our clients. All employees of the client company/organization may use this report, worldwide at the consultant service subscription fee shown in the front pages of this announcement.

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 - Fischer Connectors SA
 - Furukawa/Fitel/OFS
 - Glenair Inc.
 - Greenlee Textron Inc., a subsidiary of Textron Inc.
 - Hirose Electric Co., Ltd.
 - Hubbell Incorporated
 - ILSINTECH
 - Inno Instrument
 - ITT Cannon and Veam
 - LEMO Connectors
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