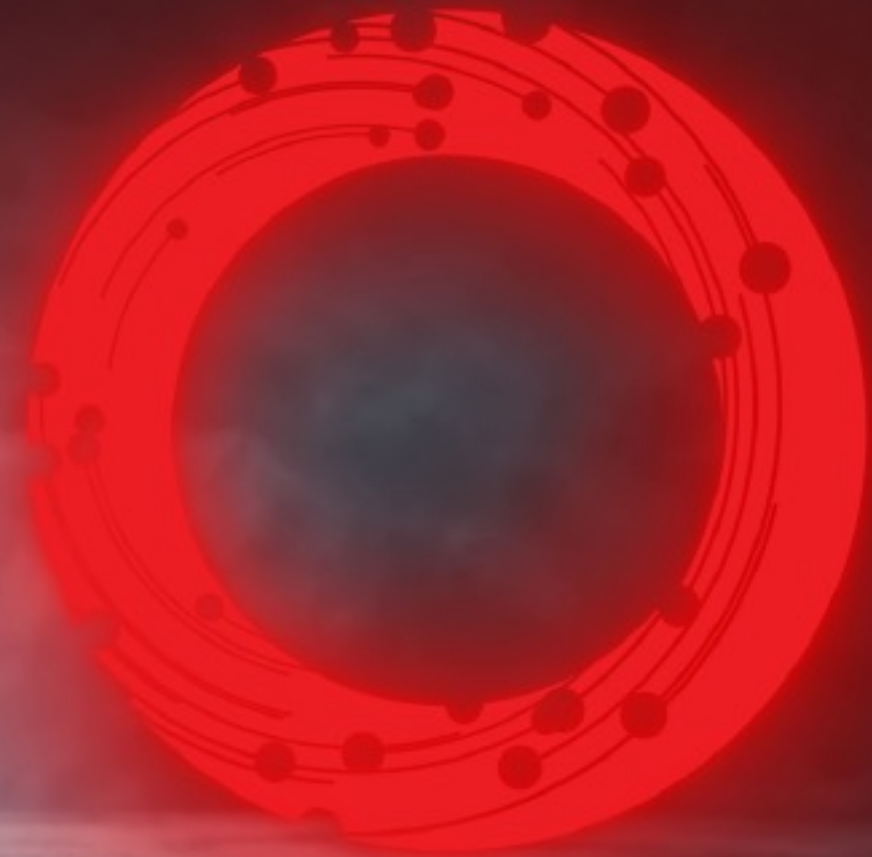




# Der Glasfasermarkt

Marktanalysen und Trends

29 Juni 2022





# Über NBG

## Unabhängig & familiengeführt

Gegründet in 1996 – 220 Mitarbeiter

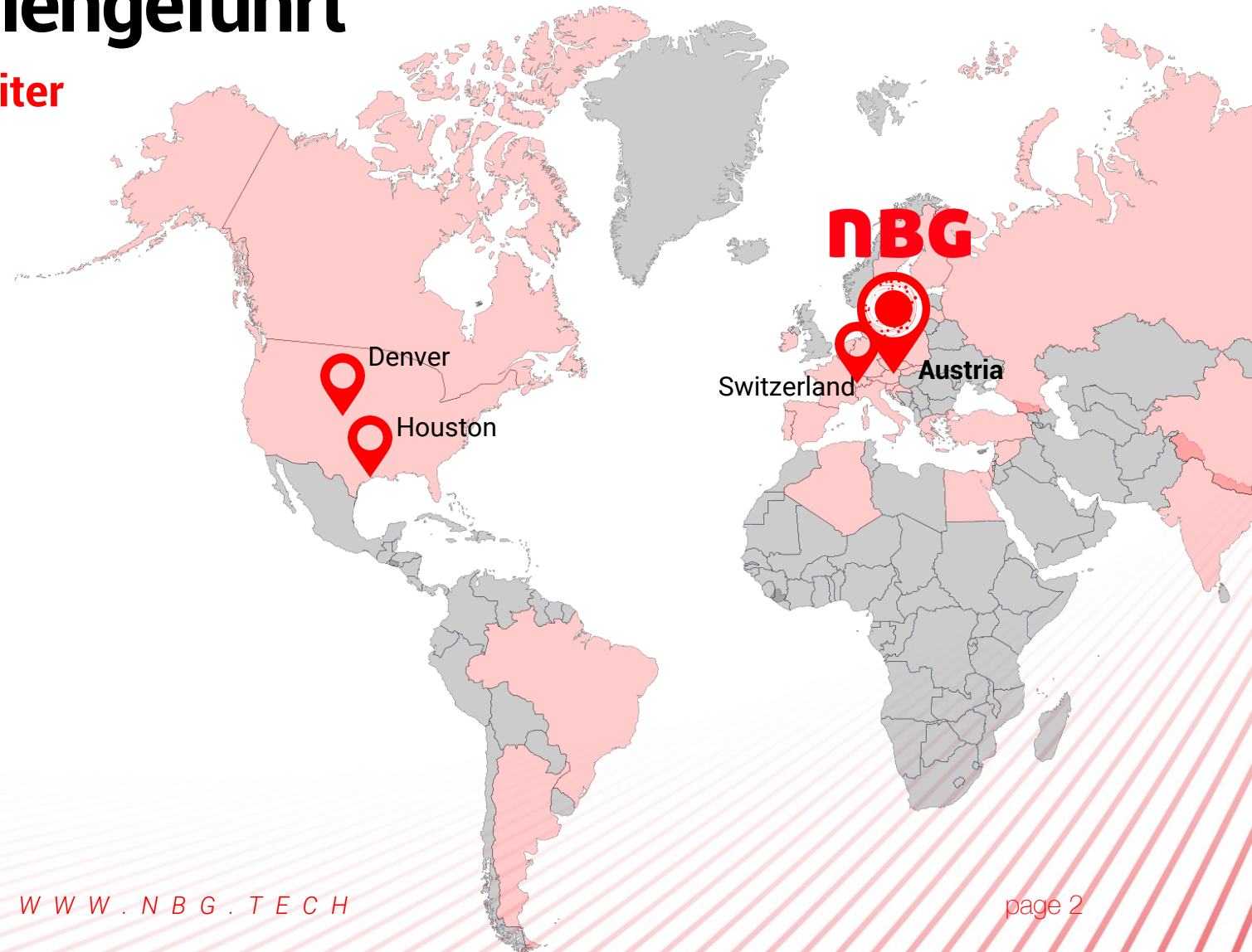


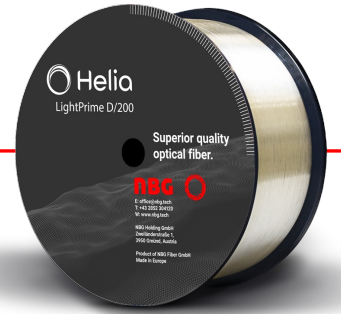
KommR

**Karl Bauer**

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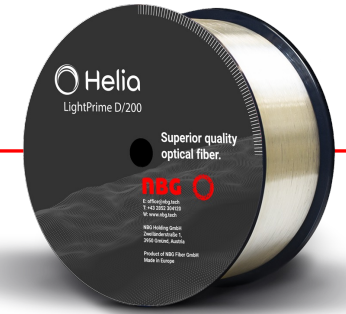




## ***Daten von: CRU Marktanalysen***

1. Analysen und Trends über den internationalen Glasfasermarkt
2. Einer der wichtigsten Reports am Markt
3. Eigenen Fiber Optic Cable Index (FOCI)

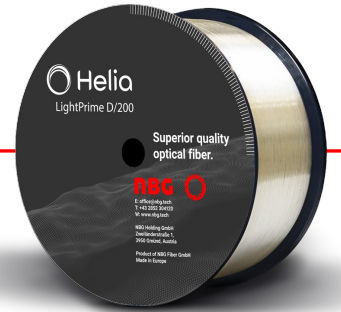




## Trends

- Die weltweite Nachfrage nimmt zu, erfordert aber lokale Beschaffung, Verfügbarkeit, Unterstützung und Dienstleistungen
- Die EU- und MEA-Märkte wachsen und verlangen lokalen Service und Support





## ***Glasfasermarkt Global***

1. Die Nachfrage in China, den USA, EMEA und Asien ist hoch. In anderen Ländern/Regionen wie Indien, Südamerika und Afrika muss der Ausbau erst noch starten
2. Der OF Markt in Frankreich entspricht zur Zeit +17 MFKM (80% davon wird G657 A2 eingesetzt). Deutschland und das Vereinigte Königreich holen auf, haben aber Probleme mit der Verfügbarkeit von Arbeitskräften
3. Die USA beginnen mit enormen 5G- und FTTH-Roll-outs. Zwei riesige Fördertöpfe von 20,4 und 65 Milliarden \$ stehen zur Verfügung.
4. Japan, China und Südkorea haben hier gegenüber der USA einen Riesen-Vorsprung.



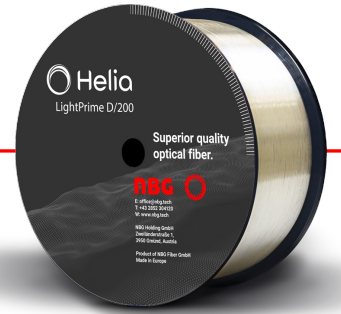
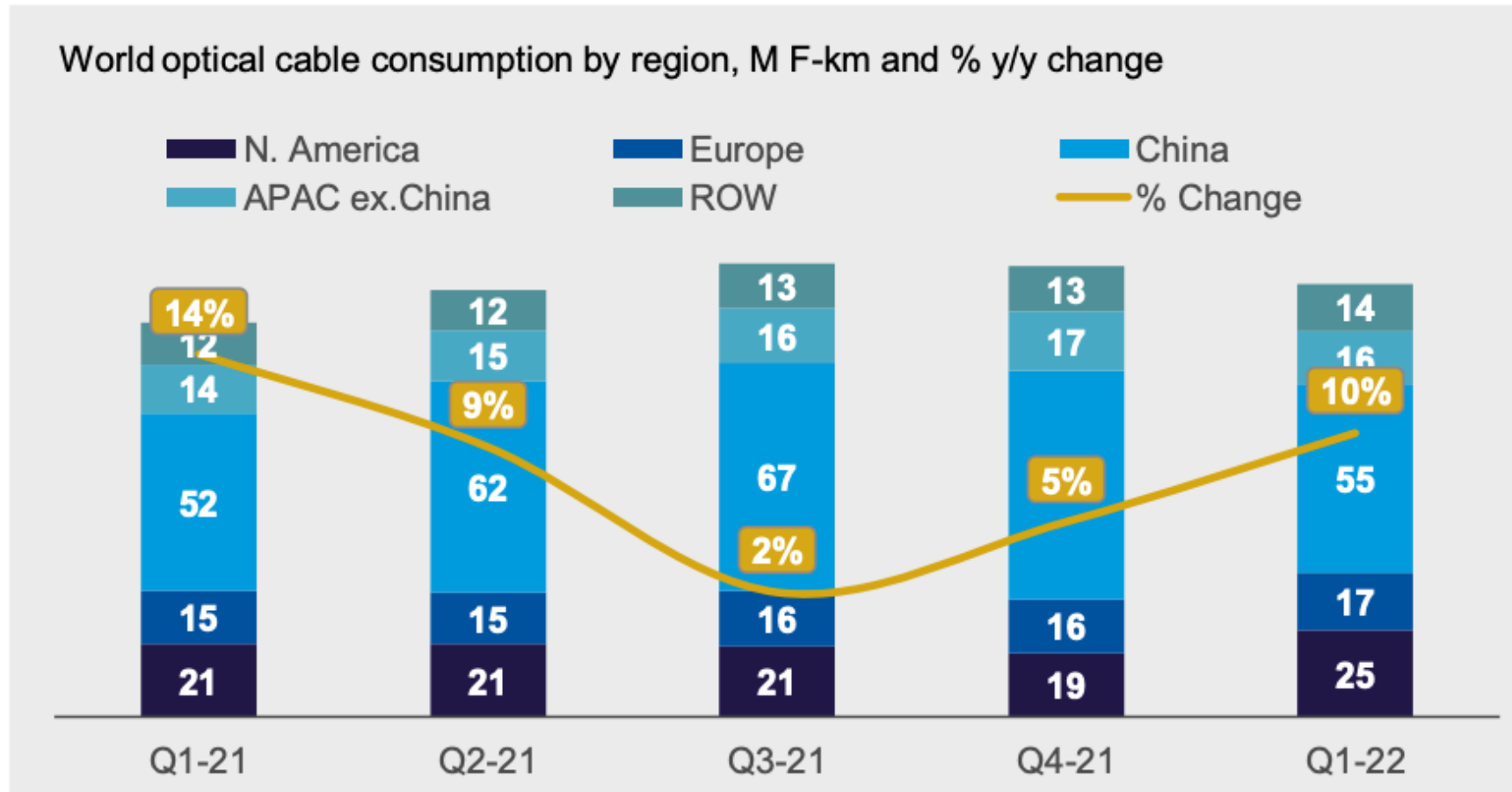


Figure 2: Global optical cable demand grew by 10% y/y in 2022 Q1

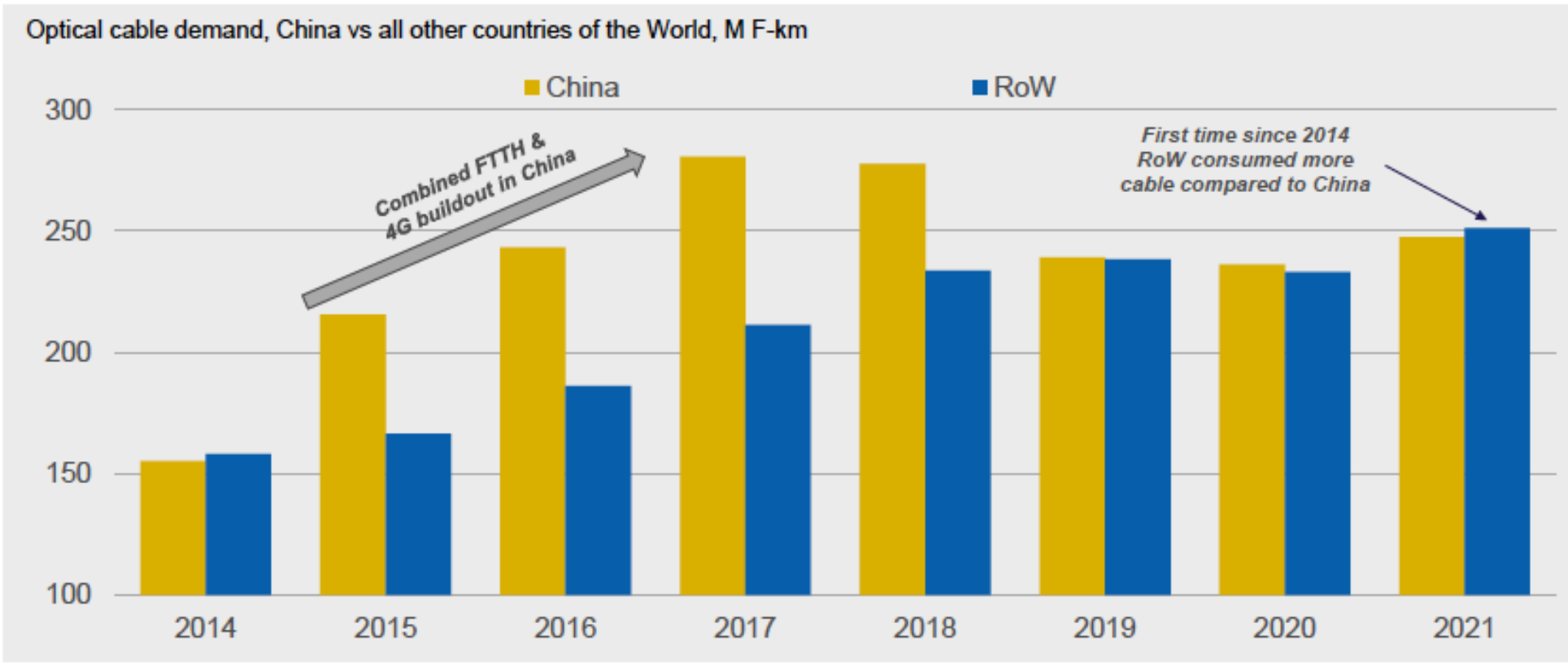


DATA: CRU



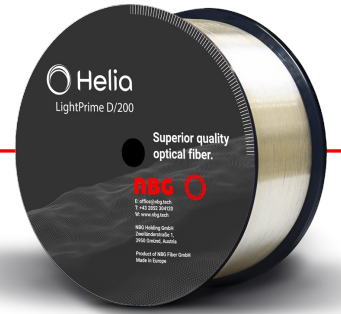
**CRU** Just how big & important is the Chinese market?

## China accounts for ≈ +50% of global optical cable demand...



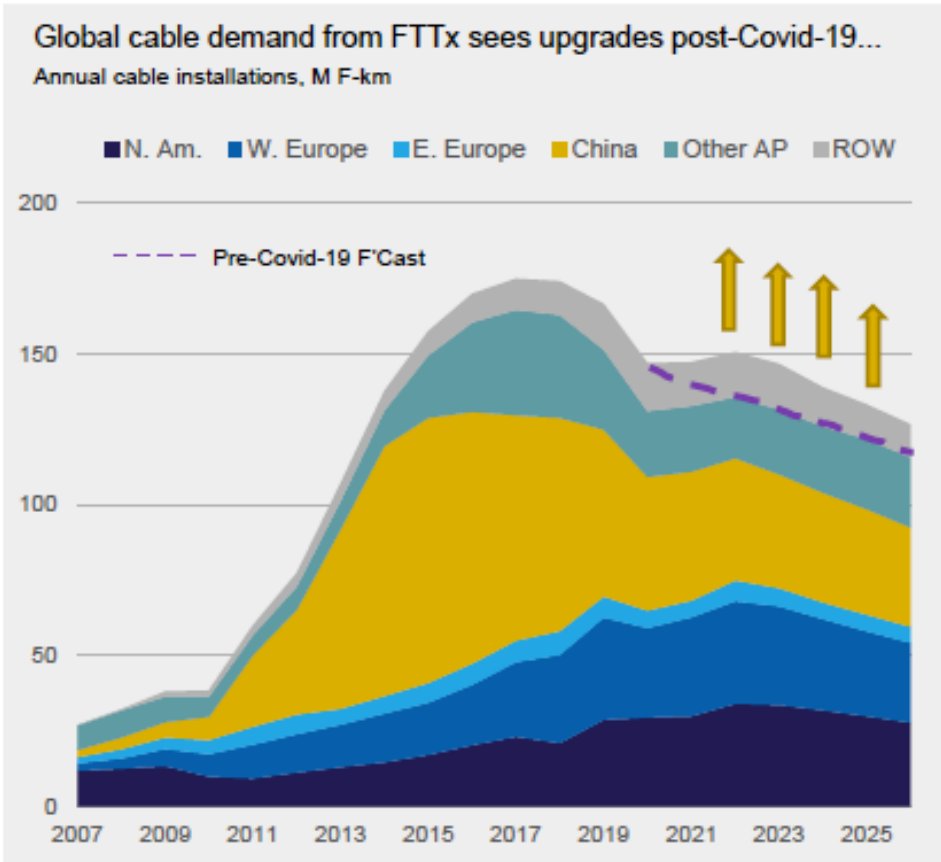
...but closer to 60% for both cable and fibre supply

DATA: CRU



**CRU** What about demand?

## Demand drivers: Outlook for FTTx demand upgraded near-term

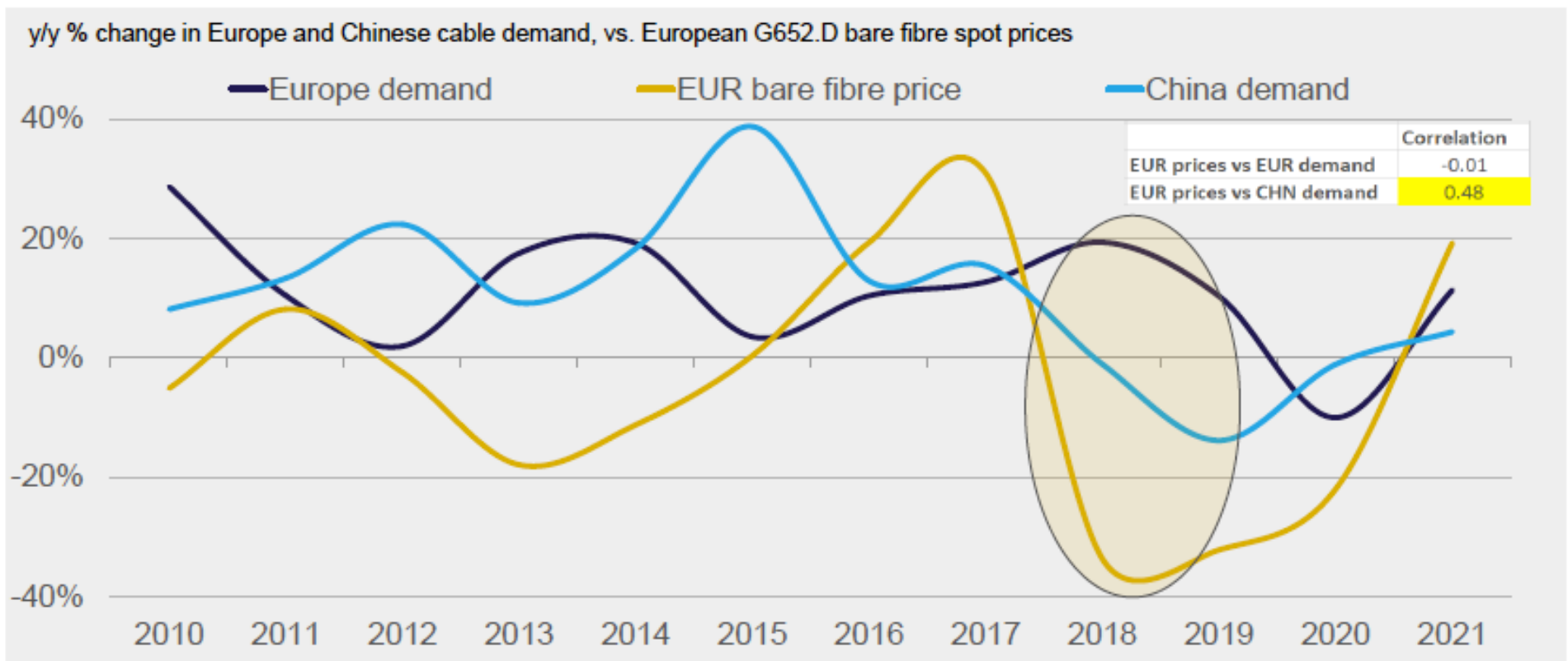


- ▶ **FTTx related demand** globally has been upgraded in following Covid-19, driven by the US and Europe...
- ▶ ...however, it still remains well below the peak in 2017/18 as both homes passed in China and RoW are in decline
- ▶ 5G infrastructure still necessary to maintain global cable demand growth!

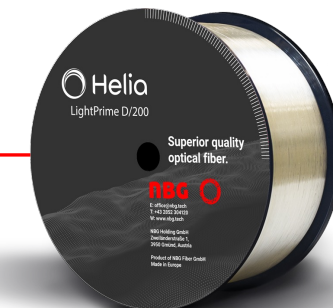


**CRU** What does this mean for international markets?

## European prices have become intrinsically linked to China...

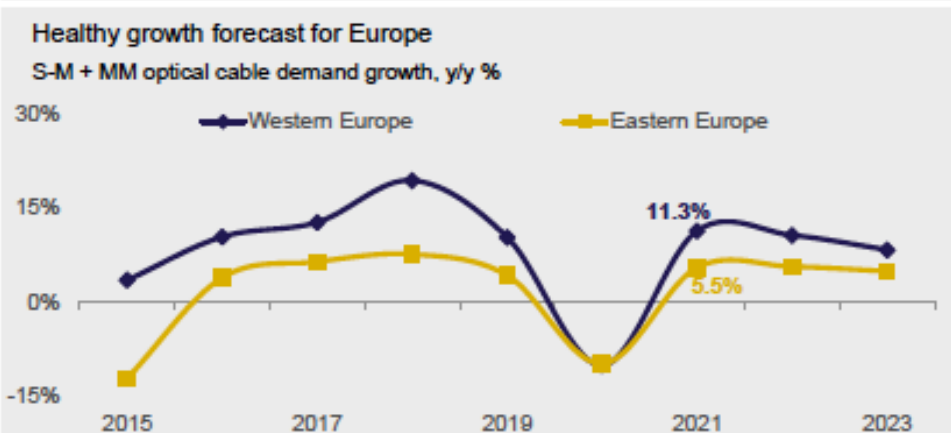
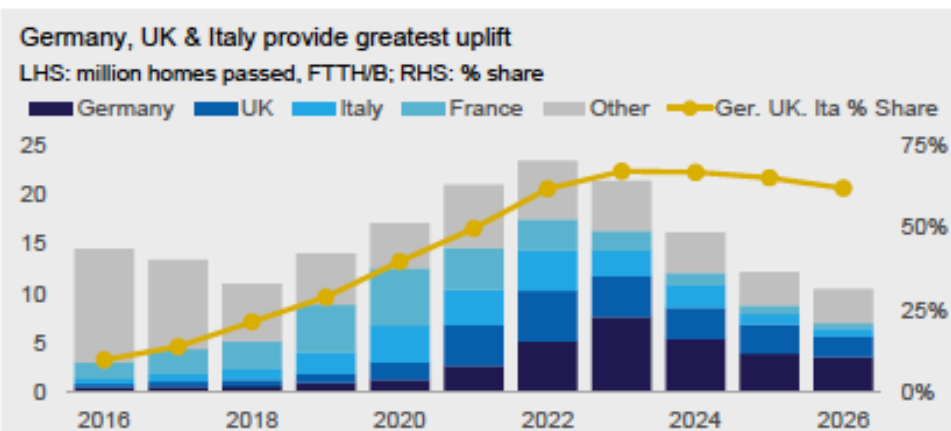


...which has become increasingly important in determining global fibre (+ cable) prices

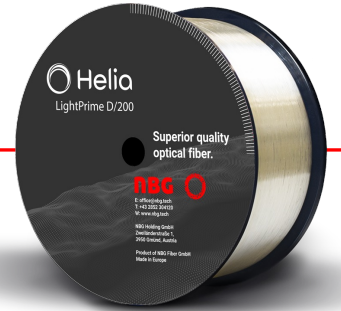


**CRU** What about demand?

## Europe: bright outlook supported by rising FTTH targets

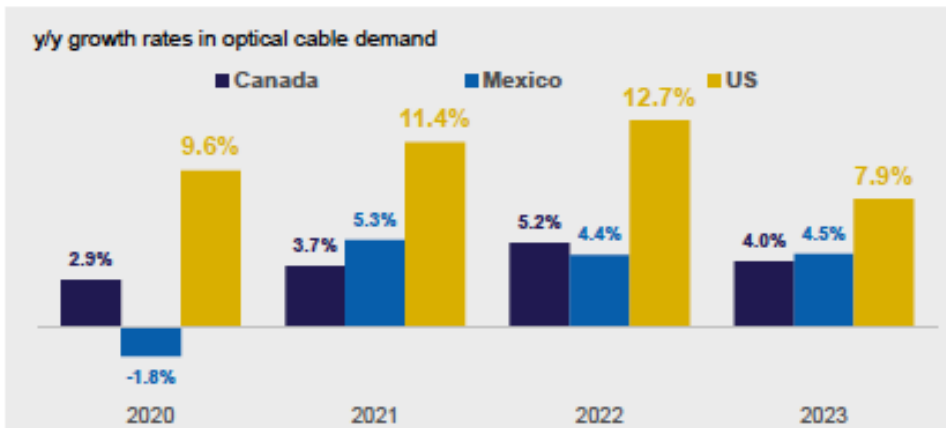
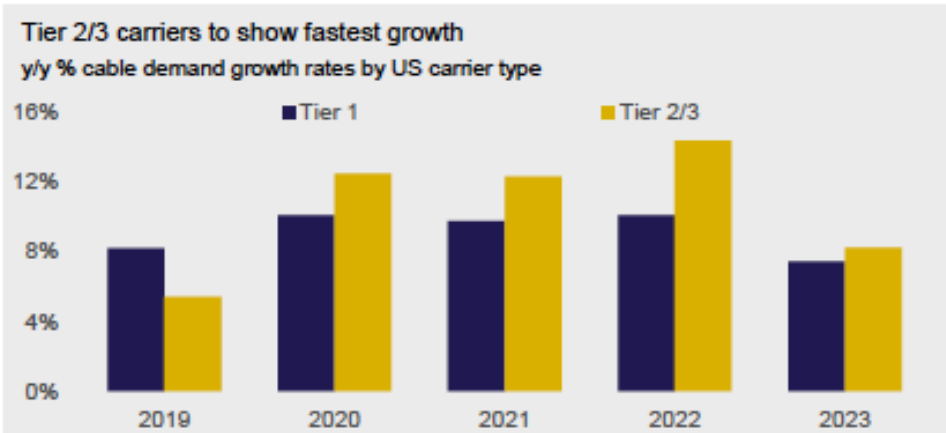


- Across **Europe**, a renewed drive for full fibre connectivity has spurred on significant investment and more ambitious FTTH targets as set by governments, regulators, and carriers alike.
- CRU estimate **Europe** will pass an additional **25M homes with FTTH/B** this year alone. The bulk of additional passings mid-term are located in the **UK, Germany & Italy**.
  - ❑ Between them, the three countries represent a sink of more than 50M homes which are yet to be passed with FTTH/B. This equates to a +65% share of the total number of homes left to pass with FTTH/B in **W. Europe**.
- CRU expects Western European demand growth to bounce-back and reach **11.3% y/y in 2021**. Beyond this, average annual growth rates in the region of **6% y/y** are expected.
- The outlook for **Eastern Europe** is subdued but stable
- EU AD investigation ongoing but further upside to price view



**CRU** What about demand?

## N. Am: rural connectivity driving surge in cable demand



- Whilst there have been previous broadband-based infrastructure stimulus measures injected into the US economy, none match the size and impact that **RDOF** (\$20.4 bn over two phases) and the impending Infrastructure Bill (\$65 bn) will have on US cable demand over coming years.
  - ❑ Combined, this equates to over **\$85 bn in funding**.
- Once again, higher growth rates are being supported by the Tier 2 and Tier 3 carriers, which won big at last year's RDOF reverse auction. Initial estimates suggest the targeted 5.2M homes could generate well over **20M F-km** of additional demand over the six-year time frame.
- Subsequently, CRU is expecting total annual cable demand growth of over **11% y/y in 2021**, with plenty of upside.
- Elsewhere, a bounce back in **Mexican** cable demand starting in 2021 will support higher levels of regional growth mid-term. We now expect demand to breach the **6m F-km** level once again in Mexico in 2023.



**CRU** What about demand?

## Industry challenges culminating in an inflationary environment



Elevated raw material prices / associated input costs



Rising energy tariffs and supply limitations



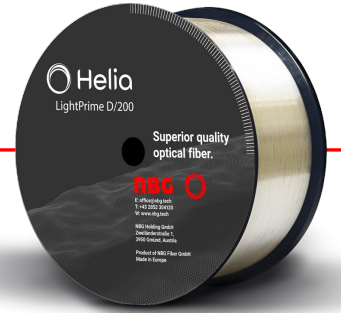
Elevated freights costs



Logistical challenges (haulage issues, delayed clearance at ports, reduced workforce)

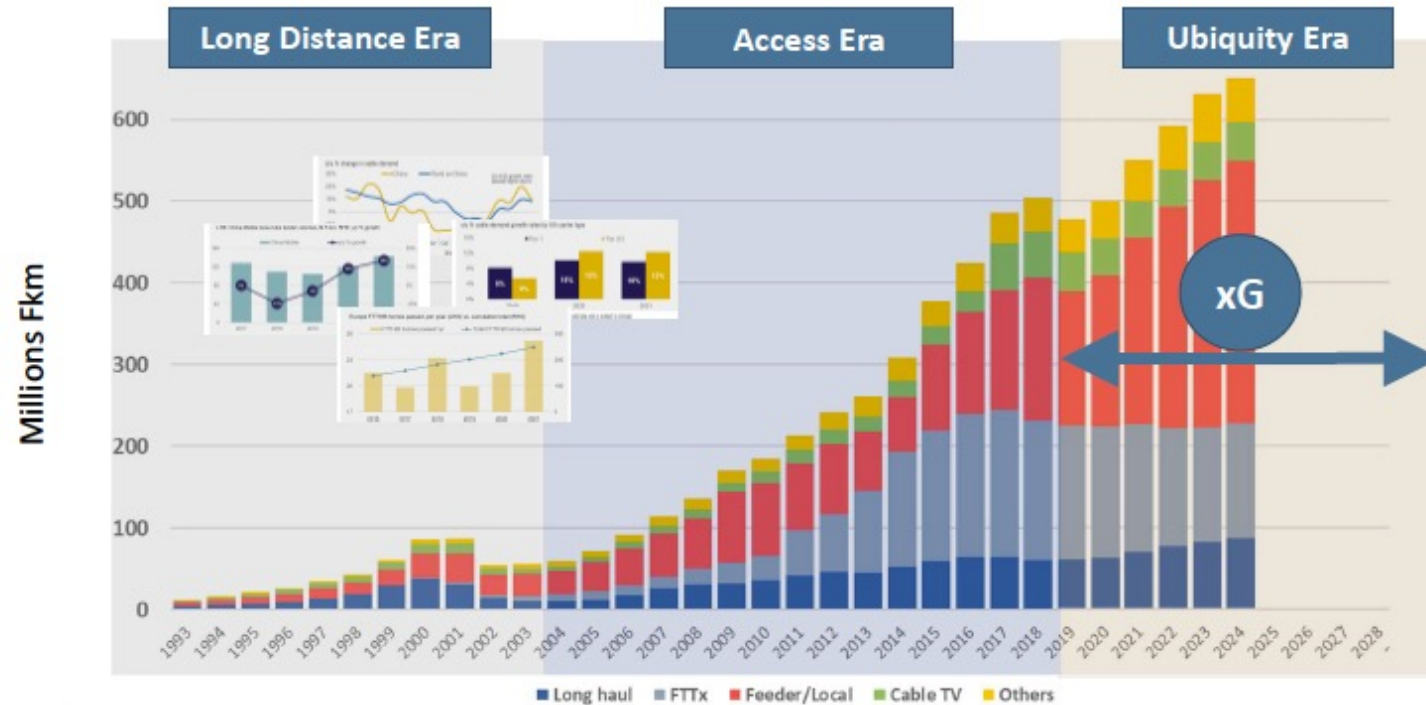


Cable prices have seen dramatic increases in certain markets, although fibre can lag (disconnect?)



# Der Single Mode Glasfasermarkt wächst

## World SM Fiber Demand: Back to Growth

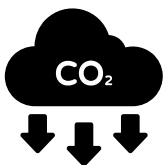




# Trend: Fiber Optic Sensing für Smart Cities



# Was Fiber Optic Sensing bewirkt?



Einsparung von bis zu 50% der CO<sub>2</sub>-Emissionen im städtischen Autoverkehr bis 2030 \*



80% der Stadtbewohner wünschen sich eine integrierte Verkehrslösung \*\*

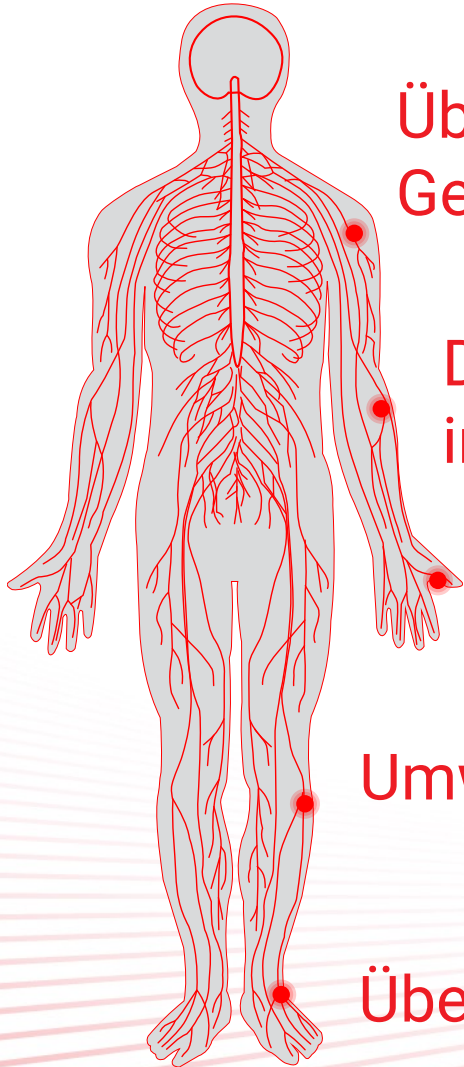


Verlängerung der Lebensdauer von öffentlichen und privaten Vermögenswerten um bis zu 30% \*\*\*



Energieeinsparungen von durchschnittlich bis zu 30% und bis zu 85% bei der Beleuchtungsenergie \*\*\*\*

# Was Fiber Optic Sensing kann?



Überwachung des Zustands von Gebäuden und Infrastruktur

Daten über Parkplatzauslastungen in Echtzeit

Sicherheitsüberwachung

Umwelt- und Temperaturüberwachung

Überwachung des Verkehrsflusses



## Innovationspartnerschaften:



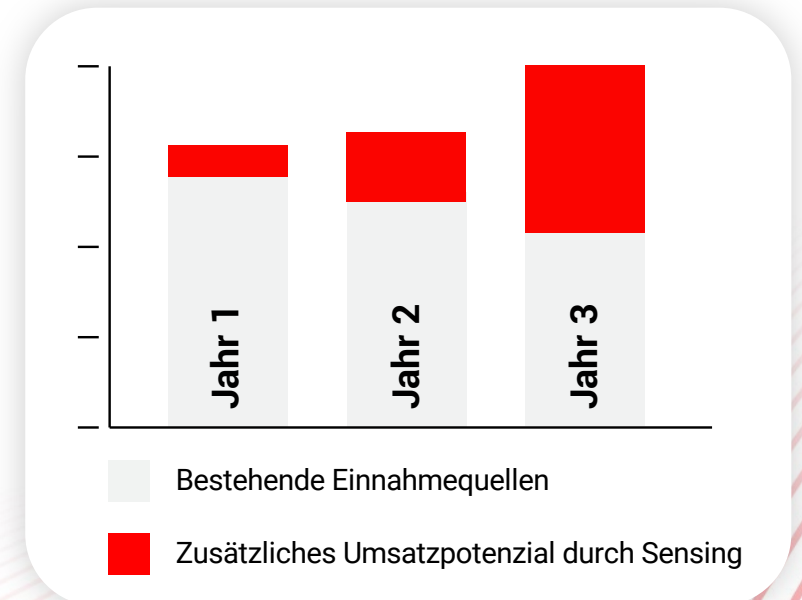
## Erfassung von Daten aus bestehenden Netzen als neue Einnahmequellen



**Show  
me the  
money!**

# +50% Einnahmen

Auf der Grundlage von Prognosen aus Partnerumfragen



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