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Subject: Fiber Cabling to Surpass Copper Cabling in the Structured Cabling Systems Market By 2008
Date: Wednesday, February 07, 2007 11:10:10 AM
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| | <p>For Immediate Release</p> <p>February 7, 2007</p> |
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Fiber Cabling to Surpass Copper Cabling in the Structured Cabling Systems Market By 2008

After a decade of significant growth in the 1990s, the structured cabling systems market has struggled in recent times and the market has stalled. Frank Murawski, President of FTM Consulting Inc., stated, "As we first reported, the onset of market saturation occurred in 1999 because most large firms had already installed their initial LANs. This resulted in the first drop in market growth. The market went from consecutive years of double-digit growth in the 1990s to a small, single-digit growth in 1999." Compounding the market decline in 2000 was the U.S. economic slowdown, which caused the market to experience its first negative growth. For the next three years, market growths through 2003 were soft with minimal or no growth in the primary markets. In addition, the aftermarket for structured cabling systems hardly matched the cabling shipments in the previous years for the initial LAN installations. Further, the lack of new office building construction during this period considerably reduced the need for new structured cabling systems.

By 2004, the market recovered slightly with a small single-digit positive growth primarily due to new Web applications, add-ons, and to a lesser extent, PC replacement upgrades. In many cases the PC upgrades could use the existing cabling infrastructure if the network transmissions did not increase.

With this as a backdrop, it appears as if the market could continue to stagnate in the future. However, our study, "[Structured Cabling Systems Market](#)," indicates a resumption of double digit growth in 2006. This renewed growth will be driven by the need for network congestion relief in those networks experiencing bottlenecks, such as the data centers. The need for higher speeds will primarily include Gigabit Ethernet speeds in excess of 1 Gbps. This will require fiber cabling, as copper cabling will not provide the performance required. Our analysis indicates that copper UTP cabling will under perform for speeds in excess of 1 Gbps over longer distances.

We project a major shift in the market by 2008, when, for the first time, fiber cabling shipments exceed copper UTP cabling shipments. Copper has always dominated the market. Fiber cabling is expected to become the dominant cabling media for structured cabling system applications, such as data centers, campus and Fiber-to-the-Zone (FTTZ). In addition, fiber cabling will continue to be the dominant cabling used in riser cabling subsystems.

We project that copper UTP cabling will continue to dominate the horizontal cabling subsystem market in the future. Fiber-to-the-Desk (FTTD) will remain illusive, being a small percentage of the total horizontal cabling subsystem market in the future. FTTD will be found mainly in niche applications, in which speeds of 10 Gbps or higher are required at the workstations. For example, CAD or CAM terminals or any workstation handling a great deal of video feeds will be the typical application implementing FTTD in the future.

According to this study, fiber cabling shipments are forecast to grow from \$1.2 billion in 2005, at a growth rate of 26.3%, to \$4.0 billion by 2010. The highest growth application is expected to be data centers.

[This study from FTM Consulting, Inc.](#) is part of the [IGI Certified Report Series](#) and provides all of the detailed product forecasts segmented by applications, by Gigabit Ethernet and by type of cable (SM, MM, Cat 5, Cat 5e, Cat 6, etc.).

Notes to the media:

Charts and graphs from the reports can be made available to media outlets as needed.

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