Global Market Share Report
DSL Port Shipments - 2017 & 4Q17
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Table of Contents

- Executive Summary
  - Global Market Share (Rolling 4-Quarter)

- Market Analysis- Annual (2017)
  - Annual DSL Port Shipments by Year (2002-2017)
  - Global DSL port shipments by Region, 2017 vs. 2016
  - Global Cumulative DSL Port Shipments & Utilization Rate
  - Annual DSL Port Distribution by Type
  - Annual Global VDSL Port Shipments by Region
  - Annual DSLAM Revenue by Region

- Market Analysis -4Q17
  - Quarterly DSL Port Shipments by Region (4Q15-4Q17)
  - Quarterly DSL Port Distribution by Type (4Q15-4Q17)
  - Quarterly VDSL Port Shipments by Region – 4Q15-4Q17
  - Quarterly DSLAM Revenue by Region, 4Q15-4Q17

- Vendor Analysis
  - Top 5 by Region, 2017
  - Global DSL Port Shipments by Vendor, 2017 vs. 2016
  - Global VDSL Port Shipments by Vendor, 2017 vs. 2016
  - Global Total DSL Rolling 4-quarter & Current Quarter Market Share
  - Global Total VDSL Rolling 4-quarter & Current Quarter Market Share
    - Asia Pacific
      - Rolling 4-Quarter by Vendor & Current Quarter
      - 2017 vs. 2016
      - Cumulative DSL Port Shipments & Utilization Rate
    - CALA
      - Rolling 4-Quarter by Vendor & Current Quarter
      - 2017 vs. 2016
      - Cumulative DSL Port Shipments & Utilization Rate
    - EMEA
      - Rolling 4-Quarter by Vendor & Current Quarter
      - 2017 vs. 2016
      - Cumulative DSL Port Shipments & Utilization Rate
    - North America
      - Rolling 4-Quarter by Vendor & Current Quarter
      - 2017 vs. 2016
      - Cumulative DSL Port Shipments & Utilization Rate

- Methodology
List of Figures & Tables

List of Figures
Figure 1: Top Global DSL Vendors (Rolling 4-qtr), 1Q17-4Q17
Figure 2: Annual DSL Port Shipments, 2002-2017
Figure 3: Global DSL port shipments by Region, 2017 vs. 2016
Figure 4: Global Cumulative DSL Port Shipments vs. Subscribers, 2002-2017
Figure 5: DSL port Distribution by Type, 2002-2017
Figure 6: Annual VDSL Port Shipments by Region (2004-2017)
Figure 7: DLSAM Revenue by Region (2004-2017)
Figure 8: Global DSL Market Share 2017 vs. 2016
Figure 9: Global VDSL Market Share 2017 vs. 2016
Figure 10: Quarterly DSL Port Shipments, 4Q15-4Q17
Figure 11: Quarterly DSL Port Distribution by Type, 4Q15-4Q17
Figure 12: Quarterly VDSL Port Shipments by Region, 4Q15-4Q17
Figure 13: Quarterly DLSAM Revenue by Region, 4Q15-4Q17
Figure 14: Asia Pacific Rolling 4-quarter & Current Quarter Market Share
Figure 15: Asia Pacific Cumulative DSL Port Shipments vs. Subscribers, 2001-2017
Figure 16: CALA Rolling 4-quarter & Current Quarter Market Share
Figure 17: CALA Cumulative DSL Port Shipments vs. Subscribers, 2001-2017
Figure 18: EMEA Rolling 4-quarter & Current Quarter Market Share
Figure 19: EMEA Cumulative DSL Port Shipments vs. Subscribers, 2001-2017
Figure 20: North America Rolling 4-quarter & Current Quarter Market Share
Figure 21: North America Cumulative DSL Port Shipments vs. Subscribers, 2001-2017

List of Tables:
Table 1: Top Five DSL Vendors by Region, 2017
Table 2: Global DSL Port Shipments by Vendor, (2017 vs. 2016)
Table 3: Global VDSL Port Shipments by Vendor (2017 vs. 2016)
Table 4: Asia Pacific DSL Port Shipments by Vendor, (2017 vs. 2016)
Table 5: CALA DSL Port Shipments by Vendor, (2017 vs. 2016)
Table 6: EMEA DSL Port Shipments by Vendor, (2017 vs. 2016)
Table 7: North America DSL Port Shipments by Vendor, (2017 vs. 2016)
Supplemental Spreadsheet:
This spreadsheet includes quarterly DSL port shipments by type and revenue for each vendor from 1Q02 to 4Q17. It also provides IP-DSLAM market share by vendor (1Q05-4Q09) as well as quarterly MSAP shipment information (1Q03-4Q11). Data is presented by region and global totals.

- List of Vendors Tracked
- Report Summary
- Global Shipment Summary by Region (1Q02-4Q17)
- Rolling 4-Quarter Market Share - by Region (4Q16-4Q17)
- Current Quarter Market Share by Region (4Q17)
- Rolling 4-Quarterly VDSL Market Share by Region (4Q16-4Q17)
- Current Quarter VDSL Market Share by Region (4Q17)
- 2017 versus 2016 Global Market Share, Total DSL and VDSL
- IP-DSLAM Market Share by Vendor (Current and Rolling 4-Quarter)(1Q05-4Q09)
- Global Totals by Vendor (1Q02-4Q17)
- Asia Pacific Totals by Vendor (1Q02-4Q17)
- CALA Totals by Vendor (1Q02-4Q17)
- EMEA Totals by Vendor (1Q02-4Q17)
- North America Totals by Vendor (1Q02-4Q17)
- MSAP By Vendor (1Q03-4Q11)
DSL Port shipments Hit New Lows in 4Q17 and 2017 as Fiber Transition is Fully Underway

Executive Summary

Growing demand for fiber-based broadband technologies continued to impact overall DSL port shipments during 2017. Global DSL port shipments declined 9 percent year-over-year to reach 45.7 million. VDSL port shipments now constitute the majority of ports shipped, reaching 91 percent of the total in 2017 versus 79 percent in 2016. With declining DSL subscribers, virtually all port shipments are to support rehabilitation of the current infrastructure, rather than support for subscriber growth. To date, cumulative DSL port shipments have reached nearly 1.14 billion.

For 2017, Huawei maintained its rolling 4-quarter market leader position with 34 percent share, followed by Nokia at 28 percent. ZTE and ADTRAN were virtually tied for third, followed by ZyXEL. Rolling 4-quarter market share is shown in Figure 1.

During 2017, annual VDSL port shipments increased by more than 5 percent to reach 41.5 million, representing 91 percent of total DSL port shipments, up from 79 percent in 2016. ADSL represented 8 percent of shipments versus 20 percent in 2016. SHDSL shipments remain at approximately 1 percent.

VDSL is now the dominant technology within all regions and contributes, representing 93 percent of total Asia Pacific DSL ports, 88 percent of CALA, 91 percent of EMEA and 98 percent of North America total DSL ports.

Huawei is the VDSL market share leader for rolling 4-quarter with 32 percent market share, followed by Nokia with 30 percent.

Broadbandtrends estimates approximately 50 million VDSL2 Vectoring ports are currently active in the field, with approximately 73 million VDSL2 Vectoring enabled ports shipped to date. During 2017, we also witnessed the first round of Super Vector (35b) port shipments as well.

There was increasing activity related to G.fast deployments during 2017, as commercial product with enhanced features became available. At present, approximately 1 million G.fast ports have been shipped to date.
About this report
This Global DSL Market Share report covers port shipments from DSL Aggregation Equipment to include: IP DSLAMs & MSAN/MSAPs. Global and regional market shares are updated quarterly and cover all regions (Global, Asia Pacific, CALA, EMEA and North America. Market Share is calculated for both the current quarter as well as a rolling 4-quarter period.

DSL Market Share is reported for the following segmentation:

1). By Vendor
2.) By Type of DSL (ADSL/ADSL2+, SHDSL, VDSL/VDSL2+,
3.) By Region: Asia Pacific, CALA, EMEA and North America
4.) By Revenue ($USD)

Companies tracked in this report include ADTRAN, Allied Telesyn, Calix, Corecess, DasonZhone Networks, ECI Telecom, Ericsson, FiberHome, Fujitsu, Huawei, Iskratel, KeyMile, NEC, Nokia, PacketFront, Samsung, Sumitomo, Tellabs, UTStarcom, ZTE, ZyXEL and others.

This report includes both a 24-page written report (including 21 Figures and 7 Tables) as well as a supplemental spreadsheet. This spreadsheet includes quarterly DSL port shipments by type and revenue for each vendor from 1Q02 to 4Q17. It also provides IP-DSLAM market share by vendor (1Q05-4Q09) as well as quarterly MSAP shipment information (1Q03-4Q11). Data is presented by region and global totals.

This report is part of Broadbandtrends Continuous Information Service, or is available for $1495 ($USD).

For more information about our services, or to order this report, please contact us at 540.725.9774 or via email at sales@broadbandtrends.com. Additionally this report may be purchased online at http://www.broadbandtrends.com

Methodology
Each quarter broadbandtrends requests DSL quarterly port shipment from DSL equipment vendors. We request data for all DSL platforms such as ATM-DSLAMs, IP-DSLAMs as well as Multi-Service Access Platforms that offer DSL. We request DSL by type (ADSL/ADSL2+, SHDSL, VDSL/VDSL2) and we request this information to be broken out by region (Asia Pacific, CALA, EMEA, North America). We also track press releases, earnings calls/reports, service provider activity and well as subscriber adoption. In addition, we will have discussions with vendors as necessary to clarify data.

For MSAP we also collect DS0/VoIP lines which are line side 64K DS0 circuits delivered through ports in the equipment shipped for revenue. As of 1Q12, we are no longer tracking MSAP ports.

In order to calculate revenue, we use an Average Selling Price per region unless this information is provided by the vendor.

All vendors identified have provided shipment information, unless otherwise stated in the notes.

Market Share is calculated for both the current quarter as well as a rolling 4-quarter period.
About Broadbandtrends LLC

Broadbandtrends LLC is an independent market analysis and consulting firm specializing in the coverage of service provider transformation activity across the network, business and services segments. In addition, Broadbandtrends offers unparalleled coverage on the growing impact of broadband on the digital economy.

Broadband specific coverage is focused on the ubiquitous connectivity of ultra-broadband (both fixed and mobile) infrastructure, services and regulation; Connected Home, Multiscreen/OTT video, Smart Cities and IoT. Our goal is to provide unbiased, accurate and dependable research that will help drive tangible results for our clients.

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