Global Market Share Report

GPON Port Shipments - 2017 & 4Q17

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This spreadsheet includes quarterly GPON port shipments by type (OLT and ONT) as well as revenue for each vendor from 1Q08 to 4Q17

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EMEA and North America Bright Spots for GPON in 2017

Executive Summary

Despite growth across most regions, global demand for GPON equipment declined by 5 percent in 2017 to reach $9.8 billion. The bulk of this decline was associated with Asia Pacific – specifically the China market – as both OLT and ONT shipments declined, resulting in a 9 percent decline in overall revenues in this region. Despite this, both EMEA and North America experienced double digit growth over 2016, while CALA remains a market with uneven demand. Despite the decline in Asia Pacific, this region still contributed nearly 78 percent of total GPON revenue; 83 percent of OLT shipments and 85 percent of ONT unit shipments.

Global OLT declined by 11 percent year-over-year to reach $3.141 billion, while ONT unit revenue declined by 2 percent year-over-year to reach $6.67 billion.

Huawei is the market leader for rolling 4-quarter GPON revenue with 30 percent market share, followed by ZTE with 27.5 percent and Nokia with 18.6 percent, as shown in Figure 1.

For current quarter (4Q17) revenue, ZTE leads with 31 percent, followed by Huawei at 29 percent and Fiberhome with 18 percent.

For the current quarter, OLT ports shipments declined by 5 percent from 3Q17 to reach 1.84 million – with 84 percent of those shipments associated with Asia Pacific. Total OLT port shipments since we began tracking GPON in 2008 are more than 32.74 million.

ONT shipments (both Single Family and Multi-Dwelling) increased by 18 percent from 3Q17 to reach 29.95 million – with 86 percent associated with Asia Pacific. Total ONT unit shipments since we began tracking GPON in 2008 are nearly 416 million units. MxU ONTs represent approximately 4 percent of total ONT shipments in 2017 & 4Q17.

For the current quarter, GPON revenue increased by 7 percent from 3Q17 to reach $2.67 billion.
**About this report**

The Market Share Report tracks GPON port shipments from both pure-play GPON platforms as well as Multi-Service Access Platforms. Data includes OLT port and ONT unit shipments as well as revenue for both Global and Regional markets. Data is updated quarterly and Market share is provided for both current quarter, as well as rolling 4-quarter.

FTTx companies tracked include ADTRAN, Allied Telesyn, Alphion, Calix, Cisco, DasanZhone Networks, ECI, FiberHome, Fujitsu – UK, Hitachi, Huawei, Iskratel, KeyMile, Mitsubishi, Motorola, NEC, Nokia, PacketFront, ZTE, and ZyXEL. Data for Ericsson has been combined with Calix.

This report includes both a 16-page written report (including 11 Figures and 13 Tables) as well as a supplemental spreadsheet. This spreadsheet includes quarterly GPON port shipments by type and revenue for each vendor from 1Q08 to 4Q17.

This report is part of broadbandtrends.com continuous information service, or is available for $1495.

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](http://www.broadbandtrends.com)

**Methodology**

Each quarter broadbandtrends requests PON quarterly port shipment from FTTH equipment vendors. We request data for PON delivered from all platform types, including stand-alone PON platforms as well as through Multi-Service Access Platforms.

We request PON by type (GPON, EPON) as well as Active Ethernet port shipments. In addition, we request information on OLT versus ONT shipments. For ONT shipments, we request single family units as well as ONU's (multi-dwelling units). We also request this information to be broken out by region (Asia Pacific, CALA, EMEA, and North America).

We help validate data; broadbandtrends also tracks 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.

In order to calculate revenue, we use an Average Selling Price per region for both the ONT and OLT 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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