Global Market Share Report

GPON & 10GPON Port Shipments – 1Q19

Author: Teresa Mastrangelo

June 20, 2019
BBT-19-1100

Table of Contents

List of Figures

List of Tables:

Supplemental Spreadsheet:

This spreadsheet includes quarterly GPON port shipments by type (OLT and ONT) as well as revenue for each vendor from 1Q08 to 1Q19

- List of Vendors Tracked
- Regional Distribution Summary
- Global Summary by Region (1Q08-1Q19)
- Market Share Summary (Current Quarter & Rolling 4-Quarter)
- Vendor Port Distribution by Type (1Q08-1Q19)
- Global Totals by Vendor (1Q08-1Q19)
- Asia Pacific Totals by Vendor (1Q08-1Q19)
- CALA Totals by Vendor (1Q08-1Q19)
- EMEA Totals by Vendor (1Q08-1Q19)
- North America Totals by Vendor (1Q08-1Q19)

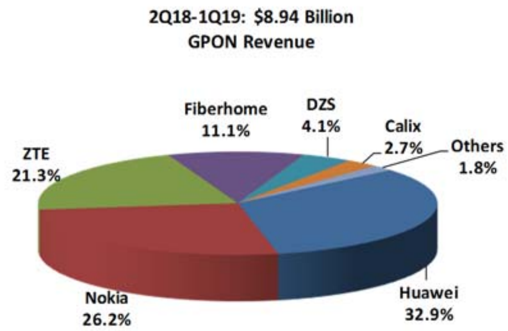
GPON Shipments into EMEA Surged to Highest Levels in 1Q19

Executive Summary

Global demand for GPON equipment declined by 6 percent in 1Q19 to reach $2.22 billion. This decline is associated with a decline in shipments into both Asia Pacific and North America during 1Q19. EMEA experienced its strongest quarter to date – with double digit quarterly growth across all segments. CALA also experienced its 2nd strongest quarter to date as more operators deploy FTTH to compete with a strong cable and mobile broadband market.

Huawei is the market leader for rolling 4-quarter GPON revenue with 33 percent market share, followed by Nokia at 26 percent and ZTE with 21 percent, as shown n Figure 1.

Figure 1: Global GPON Revenue by Vendor, Rolling 4-quarter



Source: broadbandtrends

For the current quarter, Global OLT revenue declined by 11 percent over 4Q18 to reach $718 million, while ONT unit revenue declined 3 percent to reach $1.5 billion.

For the current quarter, OLT ports shipments declined by 13 percent to reach 1.572 million – with 74 percent of those shipments associated with Asia Pacific.

ONT shipments (both Single Family and Multi-Dwelling) declined by 5 to reach 24.6 million – with 80 percent associated with Asia Pacific. MxU ONTs represent approximately 3 percent of total ONT shipments in 1Q19.

10G-PON (XGS-PON, NG-PON2) shipments are occurring in all regions, albeit at low volumes compared to GPON. In Asia Pacific, XG1-PON is the primary 10G PON flavor being deployed; XGS-PON in EMEA and a mix of both NG-PON2 and XGS-PON within North America. In most markets, operators are using 10G-PON to feed MDUs, while in North America the primary target is business services.

For 1Q19, 350,000 10G PON OLT ports were shipped, with 10G EPON accounting for the largest portion at 77 percent. Next-generation 10G PON (XGS-PON & NG-PON2), accounted for 15K port shipments during the quarter. Calix is the market share leader in this segment with 39 percent share, followed by ZTE, Nokia and Huawei.

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, DZS, 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 15-page written report (including 8 Figures and 7 Tables) as well as a supplemental spreadsheet. This spreadsheet includes quarterly GPON port shipments by type and revenue for each vendor from 1Q08 to 1Q19.

This report is part of broadbandtrends.com continuous information service, or is available for $1295.

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 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, 10G EPON, XGS-PON & NG-PON2) 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 ONUs (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.

For more information about our services and experience, please visit www.broadbandtrends.com.