

## Huawei Stays on Top in 2Q08 as DSL port Shipments Surge

### Report Highlights

- ▶ DSL Port shipments increased by 20 percent quarter-over-quarter to reach 27.2 million in 2Q08
- ▶ Huawei retains the top-spot for current quarter with 33 percent, followed by Alcatel-Lucent with 28 percent.
- ▶ Alcatel-Lucent maintains market lead in rolling-4 quarter market share at 30 percent
- ▶ Huawei is the market share leader in IP-DSLAM for both current and rolling 4-quarter
- ▶ Asia Pacific accounted for 51 percent of total DSL ports in 2Q08
- ▶ IP-DSL Ports represent 78 percent of total DSL ports in 2Q08
- ▶ Alcatel-Lucent leads VDSL market, followed by ZyXEL and Huawei in 2Q08
- ▶ MSAP platforms contributed 20 percent of total DSL ports in 2Q08

### Executive Summary

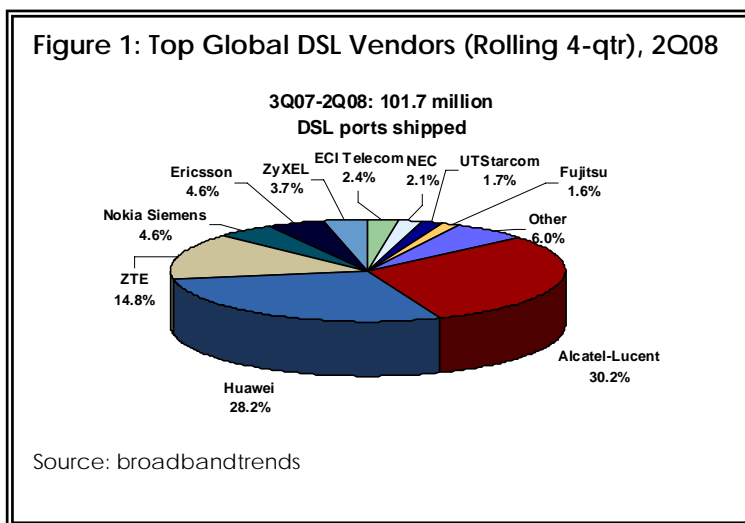
Shipments of DSL ports surged during 2Q08, increasing 20 percent over 1Q08 to reach 27.2 million ports. Every region experienced strong growth, except North America, which was flat during the quarter. For the last four quarters, DSL port shipments reached 101.7 million.

Rolling 4-quarter market share positions for the top three vendors, Alcatel-Lucent, Huawei and ZTE remain unchanged. They are followed by Ericsson and Nokia-Siemens to round out the top five. Alcatel-Lucent's rolling 4-quarter market share was 30 percent, followed by Huawei at 28 percent. Rolling 4-quarter market share is shown in Figure 1.

ADSL and its variants represented 89 percent of total DSL shipments, followed by VDSL with 10 percent and SHDSL with less than one percent. VDSL port shipments were up nearly 15 percent over 1Q08.

During 2Q08, DSL ports shipped on IP/Ethernet-based platforms represented 78 percent of total port shipments – up from 75 percent in 1Q08.

Shipments of DSL ports from Multi-Service Access Platforms represented 20 percent of total DSL ports, down from 25 percent in 1Q08.



## IP-DSLAM Port Shipments

Table 1: IP-DSL Port Shipments by Region, Rolling 4-Quarter (3Q07-2Q08) & Current Quarter (2Q08)

Rolling 4-Quarter (3Q07-2Q08)	Current Quarter (2Q08)
Huawei	Huawei
Alcatel-Lucent	Alcatel-Lucent
ZTE	ZTE
Ericsson	ZyXEL
ZyXEL	Ericsson

Source: broadbandtrends.com

## Vendor Results by Region – Summary Only

Table 2: Top Five DSL Vendors by Region, Rolling 4-Quarter (3Q07-2Q08)

Global	Asia Pacific	CALA	EMEA	North America
Alcatel-Lucent	Huawei	Alcatel-Lucent	Alcatel-Lucent	Alcatel-Lucent
Huawei	ZTE	Huawei	Huawei	Adtran
ZTE	Alcatel-Lucent	Ericsson	Nokia Siemens	Calix
Nokia Siemens	ZyXEL	ZTE	Ericsson	Tellabs
Ericsson	NEC	Zhone	ECI Telecom	Zhone

Source: broadbandtrends.com

Table 3: Top Five DSL Vendors by Region – Current Quarter (2Q08)

Global	Asia Pacific	CALA	EMEA	North America
Huawei	Huawei	Alcatel-Lucent	Alcatel-Lucent	Alcatel-Lucent
Alcatel-Lucent	ZTE	Huawei	Huawei	Adtran
ZTE	Alcatel-Lucent	ZTE	Nokia Siemens	Calix
ZyXEL	ZyXEL	Nokia Siemens	Ericsson	Tellabs
Nokia Siemens	NEC	UTStarcom	ECI Telecom	Occam

Source: broadbandtrends.com

## Global MSAP/DLC Segment

Table 4: Global MSAP – Current Quarter 2Q08

Global MSAP/DLC (DS0&DSL)	Global MSAP/DLC (DSL Only)
Huawei	Huawei
Alcatel-Lucent	Alcatel-Lucent
ZTE	Ericsson
Ericsson	Nokia Siemens
Nokia Siemens	Fujitsu

Source: broadbandtrends.com

## About this report

The Market Share Report tracks ATM DSLAMs, IP DSLAMs, Multi-Service Access Platforms, Next-Generation DLCs and Broadband Loop Carriers. Global and regional market shares are updated quarterly and cover all regions (Global, Asia Pacific, CALA, EMEA and North America).

Companies tracked in this report include Adtran, Alcatel-Lucent, Calix, Ciena, ECI, Ericsson, Fujitsu, Huawei, Motorola, NEC, Nokia-Siemens, Occam, Samsung, Sumitomo, Tellabs, Teledata, UTStarcom, Zhone, ZTE, ZyXEL and others.

This 9-page report (including an extensive spreadsheet with historical data (1Q02-2Q08), which includes 6 figures and 10 tables 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 [sales@broadbandtrends.com](mailto:sales@broadbandtrends.com)

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**Supplemental Spreadsheet:**

This spreadsheet includes quarterly DSL port shipments by type and revenue for each vendor from 1Q02 to 2Q08. It also provides IP-DSLAM market share by vendor (1Q05-2Q08) as well as quarterly MSAP shipment information (1Q03-2Q08). Data is presented by region and global totals.