**broadbandtrends**

# Global Market Share Report
## 10G PON Port Shipments – 1Q21
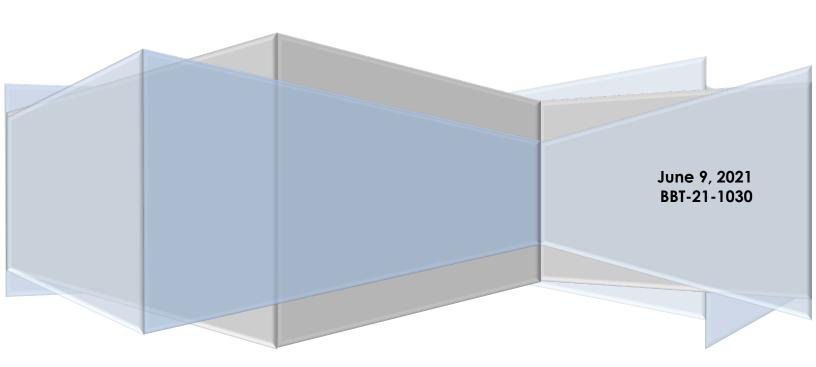**Author: Teresa Mastrangelo**

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**BBT-21-1030**

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## Supplemental Spreadsheet:

This spreadsheet includes detailed vendor shipment information on 10G PON OLT port shipments by type and region.  No revenue information is provided at this time.
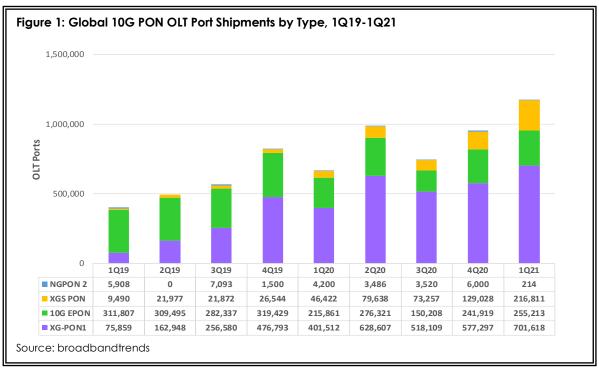
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# Momentum Behind XGS-PON Continues in 1Q21

## Executive Summary

Momentum behind XGS-PON continued during 1Q21, as OLT port shipments grew by 68 percent quarter-over-quarter and nearly 400 percent year-over-year. XG-PON1 continues to make up the largest portion of 10G PON port with strong shipments continuing into China as operators upgrade their networks. Overall, 10G PON shipments (across all types of 10G PON) grew by 23 percent quarter-over-quarter and nearly 76 percent year-over-year. As shown in Figure 1, global 10G PON OLT port shipments reached 1.173 million in 1Q21.



Figure 1: Global 10G PON OLT Port Shipments by Type, 1Q19-1Q21

| | 1Q19 | 2Q19 | 3Q19 | 4Q19 | 1Q20 | 2Q20 | 3Q20 | 4Q20 | 1Q21 |
|---|---|---|---|---|---|---|---|---|---|
| NGPON 2 | 5,908 | 0 | 7,093 | 1,500 | 4,200 | 3,486 | 3,520 | 6,000 | 214 |
| XGS PON | 9,490 | 21,977 | 21,872 | 26,544 | 46,422 | 79,638 | 73,257 | 129,028 | 216,811 |
| 10G EPON | 311,807 | 309,495 | 282,337 | 319,429 | 215,861 | 276,321 | 150,208 | 241,919 | 255,213 |
| XG-PON1 | 75,859 | 162,948 | 256,580 | 476,793 | 401,512 | 628,607 | 518,109 | 577,297 | 701,618 |

Source: broadbandtrends

As shown, demand for 10G EPON rebounded the past two quarters, while XG-PON1 experienced its strongest quarter as operators within China (as well as a handful of operators in CALA and EMEA) utilize XG-PON1 to expand their FTTH services, while continuing to leverage their GPON ONTs. The price point for XG-PON1 continues to offer an attractive alternative for operators to upgrade GPON towards 10G PON, as operators leverage their existing GPON infrastructure, without the need to necessarily support multi-gigabit services.

Cumulative 10G (across all 10G PON types) OLT ports have reached, 9.8 million since shipments began in 2011. This compares to more than 51 million GPON OLT ports that have shipped.

10G PON ports represented 55 percent of all PON OLT ports in 1Q21, up from 43 percent in 4Q20 and 36 percent in 1Q20.

Huawei is the 10G PON market share leader across all total 10G PON ports in 1Q21, driven largely by its shipments related to XG-PON1 and 10G EPON. Nokia is the market share leader in XGS-PON OLT shipments and Calix is the market share leader in NG-PON2 OLT port shipments.

In 1Q21, 263,000 XGS PON ONT units shipped, a 27 percent increase over 4Q20 and more than 500 percent greater than 1Q20. North America was the largest market for XGS-PON ONT unit shipments, accounting for 81 percent of all shipments.

## About this report

The Market Share Report tracks 10G PON port shipments across all variants (XG-PON1, 10G EPON, XGS-PON & NG-PON2). Data includes OLT port shipments and ONT unit shipments (XGS-PON only in current report) for both Global and Regional markets where applicable. This is a new report and provides historical data from the initial 10G PON deployments back to 2011. Data is updated quarterly and Market share is provided for both current quarter, as well as rolling 4-quarter.

10G PON companies tracked include ADTRAN, Calix, Casa Systems, Ciena, DZSi, FiberHome, Huawei, Iskratel, Nokia, Tellabs, ZTE and ZyXEL.

This report includes both a 17-page written report (including 12 Figures and 3 Tables) as well as a supplemental spreadsheet. This spreadsheet includes XGS PON OLT Ports by Vendor (1Q16-1Q21), XGS-PON ONT Shipments by Vendor (1Q16-1Q21), 10G EPON OLT Port Shipments by Vendor (1Q11-1Q21), XG-PON1 OLT Port Shipments by Vendor & Region (1Q15-1Q21).

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

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## Methodology

Each quarter broadbandtrends requests 10G 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 10G PON by type (XG-PON1, 10G EPON, XGS-PON & NG-PON2). 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 all information to be broken out by region (Asia Pacific, CALA, EMEA, and North America).

To 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. ** *Vendor revenue for 10G PON is currently not provided.*

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.

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