



Global Market Share Report

GPON Port Shipments – 2020 & 4Q20

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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 4Q20

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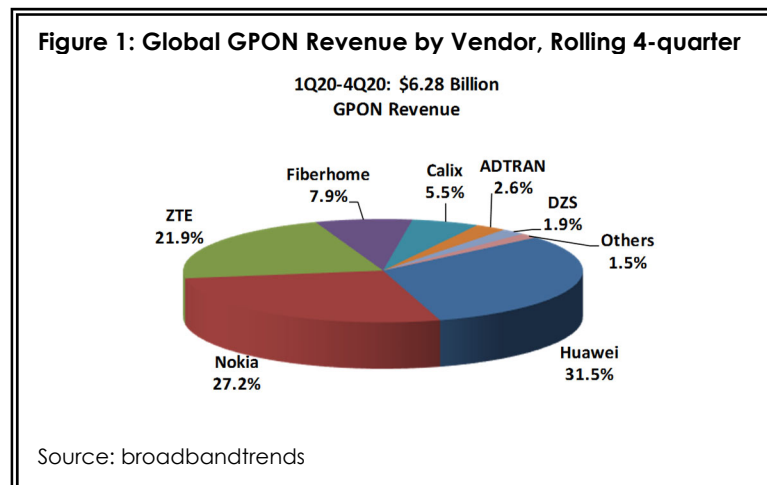
GPON Declines as Operators Transition Towards 10G PON

Executive Summary

Global demand for GPON equipment declined by 11 percent in 2020 to reach \$6.3 billion. The bulk of this decline was associated with Asia Pacific – specifically the China market – as operators within this region shifted their investment to 10G PON. CALA was the bright spot in 2020, as GPON revenues increased by 45 percent over the previous year. EMEA remained robust with a 7 percent increase, while North America was flat with a very small (1 percent) decline, year-over-year. Despite the decline in Asia Pacific, this region still contributed nearly 50 percent of total GPON revenue; 58 percent of OLT shipments and 64 percent of ONT unit shipments.

Global OLT revenue declined by 20 percent year-over-year to reach \$1.52 billion, while ONT unit revenue increased by 6 percent year-over-year to reach \$4.8 billion.

Huawei is the market leader for rolling 4-quarter GPON revenue with 32 percent market share, followed by Nokia with 27 percent and ZTE with 22 percent, as shown in Figure 1.



For current quarter (4Q20) revenue, Huawei lead with 29 percent, followed by ZTE and Nokia.

For the current quarter, OLT ports shipments declined 1 percent from 3Q20 to reach 955k. This was the lowest quarterly OLT port shipments since 2014. Total OLT port shipments since we began tracking GPON in 2008 are more than 50.3 million.

ONT shipments (both Single Family and Multi-Dwelling) increased by 48 percent from 3Q20 to reach 27.8 million. Total ONT unit shipments since we began tracking GPON in 2008 are nearly 700 million units. MxU ONTs represent approximately 3 percent of total ONT shipments in 2020 & 4Q20.

For the current quarter, GPON revenue increased by 28 percent from 3Q20 to reach \$1.9 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, Alphon, Calix, Cisco, DasanZhone Networks, ECI, FiberHome, 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 10 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 4Q20.

This report is part of Broadbandtrends 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) 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.