Global Market Share Report

DSL Port Shipments – 2018 & 4Q18

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This spreadsheet includes quarterly DSL port shipments by type and revenue for each vendor from 1Q02 to 4Q18. It also provides IP-DSLAM market share by vendor (1Q05-4Q09) as well as quarterly MSAP shipment information (1Q03-4Q11). Data is presented by region and global totals.

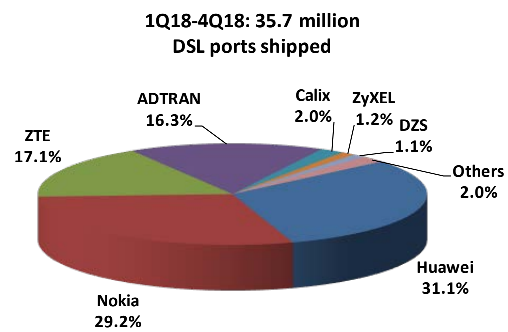
DSL Port shipments Hit New Lows in 2018 as Operators Shift their Focus to FTTH

Executive Summary

Growing demand for fiber-based broadband technologies continued to impact overall DSL port shipments during 2018. Global DSL port shipments declined 22 percent year-over-year to reach 35.7 million. VDSL port shipments now constitute the majority of ports shipped, reaching nearly 94 percent of the total in 2018. With declining DSL subscribers, virtually all port shipments are to support rehabilitation of the current infrastructure, rather than support for subscriber growth. To date, cumulative DSL port shipments have reached nearly 1.15 billion.

For 2018, Huawei maintained its rolling 4-quarter market leader position with 31 percent share, followed by Nokia at 29 percent, followed by ZTE, ADTRAN and Calix. Rolling 4-quarter market share is shown in Figure 1.

Figure 1: Top Global DSL Vendors (Rolling 4-qtr)



Source: broadbandtrends

During 2018, VDSL port shipments represented 94 percent of total DSL port shipments; ADSL represented 6 percent of shipments versus 20 percent in 2016. SHDSL shipments are less than 1 percent.

VDSL is now the dominant technology within all regions and contributes, representing 82 percent of total Asia Pacific DSL ports, 94 percent of CALA, 96 percent of EMEA and 97 percent of North America total DSL ports.

Huawei is the VDSL market share leader for rolling 4-quarter with 31 percent market share, followed by Nokia with 30 percent.

Gfast deployments accelerated during 4Q18, growing by 51 percent quarter-over-quarter to reach 797,000. For 2018, Gfast shipments reached 1.94 million ports, growing 121 percent over 2017. To date, Gfast shipments have reached nearly 3 million. Nearly 75 percent of all Gfast ports have been shipped into EMEA, followed by Asia Pacific then North America.

For 4Q18, Huawei is the market share leader for Gfast port shipments with 43 percent market share, followed by Nokia at 27 percent and ADTRAN at 22 percent.

For 2018, Huawei was the market share leader with 59 percent of total Gfast ports shipped, followed by Nokia at 21 percent and ADTRAN at 13 percent.

About this report

This Global DSL Market Share report covers port shipments from DSL Aggregation Equipment to include: IP DSLAMs & MSAN/MSAPs. Global and regional market shares are updated quarterly and cover all regions (Global, Asia Pacific, CALA, EMEA and North America. Market Share is calculated for both the current quarter as well as a rolling 4-quarter period.

DSL Market Share is reported for the following segmentation:

1). By Vendor

2.) By Type of DSL (ADSL/ADSL2+, SHDSL, VDSL/VDSL2+,

3.) By Region: Asia Pacific, CALA, EMEA and North America

4.) By Revenue ($USD)

Companies tracked in this report include ADTRAN, Calix, DZS, ECI Telecom, Ericsson, FiberHome, Fujitsu, Huawei, Iskratel, KeyMile, NEC, Nokia, PacketFront, Samsung, Sumitomo, Tellabs, UTStarcom, ZTE, ZyXEL and others.

This report includes both a 25-page written report (including 22 Figures and 8 Tables) as well as a supplemental spreadsheet. This spreadsheet includes quarterly DSL port shipments by type and revenue for each vendor from 1Q02 to 4Q18. It also provides IP-DSLAM market share by vendor (1Q05-4Q09) as well as quarterly MSAP shipment information (1Q03-4Q11). Data is presented by region and global totals.

This report is part of Broadbandtrends Continuous Information Service, or is available for $1495 ($USD).

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 DSL quarterly port shipment from DSL equipment vendors. We request data for all DSL platforms such as ATM-DSLAMs, IP-DSLAMs as well as Multi-Service Access Platforms that offer DSL. We request DSL by type (ADSL/ADSL2+, SHDSL, VDSL/VDSL2) and we request this information to be broken out by region (Asia Pacific, CALA, EMEA, North America). We also track 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.

For MSAP we also collect DS0/VoIP lines which are line side 64K DS0 circuits delivered through ports in the equipment shipped for revenue. As of 1Q12, we are no longer tracking MSAP ports.

In order to calculate revenue, we use an Average Selling Price per region 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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