

Global Gigabit Passive Optical Network (GPON) Chipset Market Growth 2025-2031

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Abstracts

The global Gigabit Passive Optical Network (GPON) Chipset market size is predicted to grow from US\$ 1153 million in 2025 to US\$ 842 million in 2031; it is expected to grow at a CAGR of -5.1% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

GPON is a fiber optic network which provides connection from one point to multiple points. It is a fiber-to-the-premises type of network, which offers several connections through unpowered splitters and a distinct optical fiber. GPON (Gigabit Passive Optical Network) chipset is a core component of a passive optical network that complies with the ITU-T G.984.x standard.

Analysis of GPON chipset market driving factors

1. Fiber-to-the-home (FTTH) demand explosion

Global broadband access market expansion:

Home and enterprise scenario upgrade: 4K/8K video, cloud gaming, remote office and other high-bandwidth applications are becoming popular, driving GPON to evolve to 10G-PON and XGS-PON.

Policy promotion: Various countries' 'Broadband China' and 'Digital India' plans accelerate the deployment of fiber networks. For example, China's FTTH penetration

rate has exceeded 90%.

2. Technology iteration and emerging application scenarios

5G and IoT integration:

5G fronthaul network: GPON, as a low-cost backhaul solution, supports dense deployment of small base stations.

Smart city: Carrying IoT device data such as security monitoring and intelligent transportation, requires low latency and high reliability.

Enterprise dedicated line and industrial Internet:

SD-WAN: GPON provides low-cost, high-security enterprise branch interconnection.

Industrial Internet of Things (IIoT): Meet the stringent requirements of industrial control for latency through TDM/IP integration.

3. Maturity of the industry chain and cost optimization

Competition among chipset suppliers: Broadcom and other leading manufacturers reduce power consumption and cost and improve integration through technological innovation (such as 7nm process).

Scaled production effect: The increase in splitting ratio (such as 1:128) shares costs and promotes the penetration of GPON in rural and emerging markets.

Modular design: Miniaturized packaging such as SFP+ reduces deployment difficulty and adapts to diverse scenarios.

4. Policy and standardization drive

Improvement of international standards: ITU-T G.984.x supports the coexistence of GPON, 10G-PON, and NG-PON2, promoting smooth network upgrades.

Government subsidies and tax incentives: For example, the EU 'Connecting Europe Fund' (CEF) funds fiber projects to reduce investment pressure on operators.

5. Competition landscape and market concentration

Monopoly of leading manufacturers: The top five manufacturers occupy the main market share and consolidate their advantages through supply chain integration and technical cooperation.

Differentiated competition among emerging manufacturers: Some companies focus on low-power ONU chips or specific industry solutions (such as medical and education) to enter the market segment.

Future trends and challenges

Technology integration: GPON is combined with Wi-Fi 6/7 and 5G-FWA to create an all-optical home network.

Energy efficiency upgrade: Low-power design (such as sleep mode) responds to carbon neutrality goals and reduces operating costs.

Security threats: The potential risks of quantum computing to AES encryption promote the research of post-quantum cryptography (PQC).

The GPON chipset market is driven by FTTH demand, technology upgrades, policy promotion, cost optimization and industry chain collaboration. In the future, with the expansion of scenarios such as 5G-FWA and enterprise dedicated lines, GPON technology will continue to evolve to meet diversified access needs and play a key role in smart cities, industrial Internet and other fields.

LP Information, Inc. (LPI) ' newest research report, the "Gigabit Passive Optical Network (GPON) Chipset Industry Forecast" looks at past sales and reviews total world Gigabit Passive Optical Network (GPON) Chipset sales in 2024, providing a comprehensive analysis by region and market sector of projected Gigabit Passive Optical Network (GPON) Chipset sales for 2025 through 2031. With Gigabit Passive Optical Network (GPON) Chipset sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Gigabit Passive Optical Network (GPON) Chipset industry.

This Insight Report provides a comprehensive analysis of the global Gigabit Passive Optical Network (GPON) Chipset landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and

M&A activity. This report also analyzes the strategies of leading global companies with a focus on Gigabit Passive Optical Network (GPON) Chipset portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Gigabit Passive Optical Network (GPON) Chipset market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Gigabit Passive Optical Network (GPON) Chipset and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Gigabit Passive Optical Network (GPON) Chipset.

This report presents a comprehensive overview, market shares, and growth opportunities of Gigabit Passive Optical Network (GPON) Chipset market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

10G PON

50G PON

Other

Segmentation by Application:

FTTx

CATV

Corporate Network

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Broadcom

Cortina Access (Realtek)

Microchip

Sanechips (ZTE)

Airoha Technology

(MTK)

Fisilink (FiberHome Communications)

Semtech

MaxLinear

Key Questions Addressed in this Report

What is the 10-year outlook for the global Gigabit Passive Optical Network (GPON) Chipset market?

What factors are driving Gigabit Passive Optical Network (GPON) Chipset market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Gigabit Passive Optical Network (GPON) Chipset market opportunities vary by end market size?

How does Gigabit Passive Optical Network (GPON) Chipset break out by Type, by Application?

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