

Forecast Update: Optical Components

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Abstracts

Introduction

OC posted strong growth in 2010, but it is ahead of ON. We argue this difference is due to the different levels of the food chain and further argue that the difference will be corrected in 2011 by expansion of ON. Our outlook is for continued strong growth through 2015. Demand is for higher transmission rates in all segments of the market and for ROADMs in DWDM networks.

Features and benefits

Overall revenue outlook of OC is analyzed. The fastest growing market segments and the fast growing product segments are reviewed.

WAN, datacom, and access (FTTx and CATV optics) OC are forecasted through 2015. Price and volumes are included.

A new methodology is used where OC market share and forecast are aligned.

Highlights

Demand for higher-data-rate components continues to drive growth. 40Gbps is going mainstream in DWDM networks. Strong desire for 100Gbps today presents good revenues in 2015. 16Gbps Fibre Channel pushes up SAN while 10Gbps drives Ethernet to a new level. GPON is taking off in FTTx. ROADMs are in demand worldwide in metro and long haul.

Your key questions answered

Why is OC growing faster than ON? Will OC crash due to inventory in 2011?

What is the outlook for OC growth past 2011?

Does WAN continue to be the strongest OC segment?

Contents

SUMMARY

In a nutshell

Ovum view

Simply inventory replenishment or new round of network buildouts? The answer will come in 2011

Key messages

FORECAST SUMMARY

OC to reach \$10.5bn by 2015

Forecast revenue boost and its alignment to market share

Market segment impact due to market share alignment

RESULTS FOR 3Q10

3Q10 UP 25% FROM RECESSION BOTTOM

Market led by medium transmission products

ROADMs and short-distance transmission gain share

LONG-RANGE MARKET FORECAST DRIVERS AND BARRIERS

Ever-higher bandwidth needs will outweigh barriers to growth in the long run

The economic recovery is proceeding but downside risks remain elevated

Enterprise demand

Consumer demand

Carrier revenues are projected to improve but carriers will spend cautiously

Perchance to dream of a higher position in the telecom food chain

The optical networks system market is poised for a turn-around

The service provider switching and routing system market update

The CATV and FTTx access system market update

MARKET SEGMENT FORECAST

WAN continues to lead and is projected to increase its share

DWDM modules, led by ROADMs, have the highest WAN revenues and will out-

perform other segments

DWDM interface modules also driving WAN market

Modulation format to be shared at 40Gbps

Ethernet and Fibre Channel transitions driving datacom market

Fibre Channel transition

Ethernet transition

Surprisingly strong growth of GPON in access market

PRODUCT SEGMENT FORECAST

Transmission growing faster than transport

Long transmission and discrete transmission driving market

MARKET SCENARIOS AND WARNING SIGNS

Watch ON growth as bellwether for OC throughout the year

APPENDIX

Methodology

Further reading

Definitions

Product segment mapped to market segment

Produce segment definitions

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