

Market Alert: 3Q10 FTTx, DSL, and CMTS

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Abstracts

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Introduction

This brief provides an initial analysis of the broadband access equipment (FTTx, DSL and CMTS) market for 3Q10. It includes a section on each technology detailing shipments, revenues, and market shares for the top vendors.

Features and benefits

Published every quarter, this report offers a look at trends in the optical and broadband access market.

Clients use market share data for planning, competitive intelligence, and marketing.

Highlights

Our preliminary estimates for 3Q10 indicate mixed results with a combination of sequential gains and losses, but a clearer upward growth trend year-over-year in each of the global DSL, CMTS, and FTTx (OLT and ONT/ONU) equipment markets. Chinese dominance in telco spending drove ZTE to a higher ranking globally, displacing Alcatel-Lucent from second place. Huawei topped the EMEA and Asia-Pacific markets; ZTE ranked second in Asia-Pacific; Alcatel-Lucent led in South & Central America and was second in North America and EMEA. The VDSL market is showing renewed vigor. Globally VDSL ports grew 38% sequentially and doubled from the year-earlier quarter. In North America and Asia-Pacific shipments approached the 1 million mark, and in

EMEA shipments crossed the 2-million-port mark for the first time.

Your key questions answered

What was the total spending for fixed broadband access equipment including DSL, CMTS, and FTTx in 3Q10?

How did 3Q10 fixed broadband access spending differ from the previous quarter and from the year-ago quarter?

Which vendors gained the most market share in fixed broadband access volumes and revenues in 3Q10?

Which vendors lost the most market share in fixed broadband access volumes and revenues in 3Q10?

Which were the top-ranked vendors in each segment (DSL, CMTS, and FTTx) in 3Q10?

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Shipments to China dominating FTTx

Initial GPON buildouts contribute again to stronger OLT sales in 3Q10; EPON OLT sales are flat sequentially but up considerably from last year

FTTB rollouts moving towards FTTH in GPON and EPON

ZTE and Zhone gaining GPON market share quietly to rise up the ranks

FTTx rollouts far ahead of subscriber acquisition; low take rates in some markets leading to excess capacity

3Q10 DSL results

Alcatel-Lucent and Huawei trade places in 3Q10

In rare event, Huawei loses market share as Alcatel-Lucent gains

The DSL market continues to grow, defying end-of-lifecycle expectations

Asia-Pacific underperformed other regions

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CMTS shipment growth pauses in 3Q10 but is expected to resume through 2011

Cisco widening its lead again over Arris

Motorola only vendor to see higher revenues in 3Q10

Downstream volumes see larger declines in 3Q10

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Methodology

Based on multiple vendor quarterly calls

Author

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