

Passive Optical Network Equipment Market– Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Component (Wavelength Division Multiplexer/De-Multiplexer, Optical filters, Optical Power splitters, Optical cables, Optical Line Terminal (OLT), Optical Network Terminals (ONT), Others), By Type (Gigabit Passive Optical Network (GPON), Ethernet Passive Optical Network (EPON), Next Generation Passive Optical Network (NG PON), Others), By Application (FTTH (Fiber to the Home), FTTx (Fiber to the X), Mobile Backhaul), By End User (Residential, Commercial, Industrial), By Region, Competition

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Abstracts

The Passive Optical Network Equipment Market is projected to reach USD 14.63 billion by the end of 2028, exhibiting a compound annual growth rate (CAGR) of 14.3% during the forecast period. The rising adoption of telecom and internet services, coupled with the growing demand for bandwidth, has resulted in an increased requirement for Gigabyte Passive Optical Network (GPON) equipment in the foreseeable future. Moreover, the demand for Ethernet Passive Optical Network (EPON) equipment is expected to surge, driven by data-intensive services like video on demand, videoconferencing, and Voice over Internet Protocol (VoIP).

Passive optical networks (PONs) are telecommunications networks designed to

leverage traffic diversity in network communications. PONs are utilized for data communications, specific backhaul applications, and residential and commercial access. Customers can access broadband networks through PONs, which leverage fiber optic technology. The term 'passive' signifies that only the transmit and receive points require electrical power, while the fiber and other components remain unpowered. PON networks employ optical splitters and point-to-multipoint architecture to simultaneously transmit signals upstream and downstream from a single transmission point to multiple user terminals. An optical line terminal (OLT) is located at the central office of the communications business, while multiple optical network units (ONUs) are placed near end consumers. PONs are extensively used in residential, commercial, and enterprise settings due to their high bandwidth, stability, and cost-effective deployment through bandwidth sharing. Deploying PONs is a cost-effective solution, especially for large-scale installations, as it connects numerous subscribers through a single fiber-optic cable, distributing fiber closer to users through passive splitters. Furthermore, PONs are gaining popularity due to their advantages of faster speed, cost-effectiveness, scalability, utilization of existing fiber-optic infrastructure, multiple upgrade paths, and low latency to accommodate the growing number of applications.

Key Market Drivers

The increasing need for Green Network Solutions is a significant factor contributing to the market's growth.

The telecommunications industry is continuously striving to adopt green energy alternatives to meet the growing demand for energy consumption. The era of digitalization and the adoption of smart technologies have significantly increased the need for high-speed internet services with large bandwidth in various regions. For instance, telecom towers have successfully started deploying diesel-free sites and are actively seeking solutions for more reliable grid power supply to maintain quality standards. Base stations account for most of the energy usage, which is why network operators place a strong emphasis on improving network infrastructure energy efficiency. This presents a unique challenge in delivering dependable and clean energy to Telcos and Tower cos, especially considering the significant increase in data traffic following the introduction of 5G in 2022. By eliminating the need for rack-mount switches, the reliance on non-renewable electrical equipment and power consumption can be reduced. Additionally, environmentally-friendly passive optical local area network options outperform traditional copper-based Ethernet local area networks. These solutions replace the use of workgroup switches with optical splitters, ensuring compliance with heating, ventilation, and air-conditioning (HVAC) standards. This not

only eliminates the need for thousands of KW energy but also provides a more cost-effective option. As a result, there is a growing demand for green network solutions to establish low-carbon optical networks. Passive optical network (PON) utilizes a single fiber, single type optic to connect to the workgroup terminal (WGT). Moreover, PON utilizes small passive optical splitters, which are housed in enclosures in a building, typically on every floor. Therefore, PON requires no power, generates no heat, and can even be installed in electrical closets.

Increase in Demand for High-Speed Broadband Augmenting Market Expansion

Currently, there is a significant surge in the demand for high-speed broadband connectivity, driven by the exponential growth of data-intensive applications, video streaming, cloud computing, and the Internet of Things (IoT). To meet these ever-increasing bandwidth requirements, telecommunication providers and network operators are turning to passive optical network (PON) technology. PON equipment enables the delivery of high-speed data, voice, and video services. Furthermore, the global increase in broadband connections is a key factor projected to drive market progress in the forecast period. For instance, according to the Organization for Economic Co-operation and Development, fixed broadband subscriptions in OECD countries reached 476.0 million in June 2022, up from 463.0 million in 2021, with an average of 34.7 subscriptions per 100 inhabitants. Mobile broadband subscriptions reached 1.8 billion in June 2022, up from 1.7 billion in 2021, with an average of 128 subscriptions per 100 inhabitants. However, it is important to note that PON technology involves complex optical transmission and multiplexing techniques, which may require specialized skills and expertise for deployment and maintenance. The technical challenges associated with implementing and managing PON networks can act as a restraint for market growth, particularly for smaller service providers with limited technical resources.

The Global Passive Optical Network (PON) market is currently experiencing robust expansion, driven by the compelling combination of low ownership costs and high return on investment (ROI). PON technology offers a cost-effective solution for high-speed broadband deployment, leveraging its inherent ability to deliver data, voice, and video services over a single optical fiber infrastructure. The reduced maintenance and operational expenses associated with PON systems contribute to their favorable cost of ownership, appealing to service providers and enterprises alike. Simultaneously, the scalability and efficiency of PON networks result in a remarkable ROI as they cater to a growing subscriber base. This blend of affordability and profitability has positioned PON technology as the preferred choice for network operators seeking to optimize their

resources while meeting the increasing demand for bandwidth-intensive applications and seamless connectivity, thereby driving the ongoing expansion of the global PON market.

The global passive optical network equipment market is witnessing significant growth, primarily due to the rapid rise in popularity of Gigabit Passive Optical Network (GPON) equipment. As internet connectivity becomes increasingly vital in residential and commercial sectors, GPON technology offers unparalleled data transmission speeds and enhanced bandwidth capabilities. This advancement has spurred substantial demand for GPON equipment, fostering innovation and competitiveness within the market as providers strive to meet the growing connectivity needs of modern consumers and businesses.

However, the growth of the global Passive Optical Network (PON) market faces challenges due to limited reach and coverage. While PON technology offers impressive data transmission capabilities, its effectiveness diminishes over long distances. This limitation hinders its widespread adoption, particularly in geographically expansive or remote areas where extending the PON infrastructure proves economically and technically challenging. As a result, network operators are compelled to seek alternative solutions or combine PON with other technologies to achieve comprehensive coverage. Efforts to address this challenge involve research into innovative signal amplification techniques and the optimization of optical components. Successfully overcoming the limited reach and coverage obstacle will be pivotal in unlocking the full potential of PON networks, enabling them to provide high-speed connectivity to a broader spectrum of users and ultimately accelerating the expansion of the global PON market.

Competition from Wireless Technologies

The global Passive Optical Network (PON) market is facing a significant challenge in the form of intensifying competition from wireless technologies. The rapid evolution of 4G and 5G wireless networks has greatly expanded the reach of high-speed internet connectivity, eroding some of the traditional advantages of PON systems. As wireless infrastructure becomes more robust and widespread, particularly in densely populated urban areas, consumers and businesses are increasingly drawn to the convenience and mobility offered by wireless connections. This shift has prompted network operators and PON providers to reassess their strategies, with a focus on differentiation through higher bandwidth, enhanced reliability, and seamless integration with wireless networks. To maintain competitiveness, the PON market must harness these attributes while also addressing the unique challenges posed by wireless alternatives, reaffirming its

relevance and value proposition in an ever-evolving telecommunications landscape.

Key Market Trends

The ongoing research and development efforts are driving technological innovations

The Global Passive Optical Network (PON) market is experiencing a surge of technological advancements driven by ongoing research and development endeavors. Innovations in PON technology continually enhance its performance, scalability, and capabilities. From the emergence of higher-speed variants like 10G-PON and NG-PON2 to improvements in wavelength division multiplexing (WDM) techniques, these developments expand PON's potential to deliver even greater bandwidth, lower latency, and improved quality of service. Moreover, research efforts focus on addressing challenges such as extending reach and coverage, enhancing network security, and optimizing energy efficiency. This ongoing innovation underscores PON's adaptability and relevance in meeting the ever-growing demand for high-speed, reliable, and future-proofed broadband solutions across diverse industries and global markets.

The Advancement in Fiber Optic

The dynamic growth of the Global Passive Optical Network (PON) market is significantly propelled by remarkable advancements in fiber optic technologies. PON systems, reliant on optical fiber infrastructure, benefit immensely from the ongoing evolution of fiber optics, enabling higher data transmission rates, increased signal reliability, and enhanced cost-efficiency. As fiber optic cables become more compact, durable, and affordable, PON deployments become increasingly accessible and attractive to network operators and service providers. These fiber optic innovations amplify the capabilities of PON networks, facilitating the seamless delivery of high-speed internet, robust connectivity, and versatile services. The synergistic relationship between PON and fiber optic advancements underscores their integral role in shaping the modern telecommunications landscape and meeting the surging demand for efficient, future-ready broadband solutions on a global scale.

Segmental Insights

Type Insights

The gigabit passive optical network (GPON) segment is poised to dominate the global market for passive optical network equipment, driven by the growing demand for high-

speed connectivity from broadband users. The adoption of GPON is necessitated by this increasing demand, as it offers superior technology compared to ethernet passive optical network (EPON), with higher bandwidth allocation and lower power consumption. The rapid deployment of FTTH/GPON globally, fueled by the rising demand for high-quality video streaming, further reinforces the superiority of GPON technology. The forecast period predicts a significant market share growth for GPON, driven by its increasing adoption in fiber-to-the-home (FTTH) services. Consequently, cloud-based solutions for passive optical network equipment are witnessing widespread adoption in the global market.

End-User Type Insights:

In terms of end-users, the commercial sector is expected to be the dominant player in the global market for passive optical network equipment. This is attributed to the telecommunications providers' increasing development of fiber optic networks for various commercial applications, including offices, educational institutions, hospitality, banking, and more. Enterprises across industries are prioritizing technological advancements to enhance network speed and efficiency. The information technology and defense sectors, in particular, require secure and reliable internet services, which can be achieved through optical fiber technology. Furthermore, enterprises are transitioning from existing gigabit ethernet passive optical networks (GPON) with data rates of 2.5Gbit/s and 1.25Gbit/s to next-generation NG-PONs, offering maximum speeds of 10Gbit/s symmetrically. As a result, the growing demand in the commercial segment is driving the expansion of the global passive optical network equipment market.

Regional Insights

North America is expected to assert its dominance in the Global passive optical network (PON) market during the forecast period, driven by a confluence of factors that position the region as a frontrunner in PON adoption. The region boasts prominent businesses across various industries and extensively implements software solutions. The continent's technologically advanced infrastructure, high demand for high-speed internet and data services, and robust investments in fiber optic networks provide a solid foundation for PON's expansion. Additionally, government initiatives focused on enhancing broadband connectivity, coupled with the increasing need for reliable and efficient network solutions in sectors like healthcare, finance, and education, are propelling PON's growth. North America's competitive telecommunications landscape and the presence of key industry players further catalyze its leadership in adopting and

deploying PON technology. As PON continues to evolve and cater to the escalating connectivity demands of modern society, North America is positioned to not only dominate the market but also set benchmarks for innovation and network excellence on a global scale.

Key Market Players

Huawei Technologies Co. Ltd.

Mitsubishi Electric Corporation

ADTRAN, Inc.

Nokia Corporation

Verizon Communication, Inc.

Tellabs, Inc.

Telefonaktiebolaget LM Ericsson

ZTE Corporation

SAP SE

Motorola Solutions, Inc.

Report Scope:

In this report, the Global Passive Optical Network Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Passive Optical Network Equipment Market, By Component:

Wavelength Division Multiplexer/De-Multiplexer

Optical Filters

Optical Power Splitters

Optical Cables

Optical Line Terminal (OLT)

Optical Network Terminals (ONT)

Others

Global Passive Optical Network Equipment Market, By Type:

Gigabit Passive Optical Network (GPON)

Ethernet Passive Optical Network (EPON)

Next Generation Passive Optical Network (NG PON)

Others

Global Passive Optical Network Equipment Market, By Application:

FTTH (Fiber to the Home)

FTTx (Fiber to the X)

Mobile Backhaul

Global Passive Optical Network Equipment Market, By End User:

Residential

Commercial

Industrial

Global Passive Optical Network Equipment Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Passive Optical Network Equipment Market.

Available Customizations:

Global Passive Optical Network Equipment market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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