Ovum Reveals a Strong Finish to 2011 for Fixed Broadband Access Market

The market for fixed broadband access equipment saw exceptional growth for the second consecutive year, according to Ovum. Preliminary results for 2011 show PON equipment shipments doubled from 2010, annual DSL port shipments surpassed 100 million and CMTS port shipments crossed the 1 million mark for the first time ever.

In a new market share analysis*, the independent telecoms analyst also reveals changes of rank among top vendors. ZTE surpassed Huawei to take the lead in PON OLT port shipments. Alcatel-Lucent entered the top three and FiberHome the top six in PON ONT/ONUs. Nokia Siemens Networks and Adtran improved their DSL rankings to fourth and fifth respectively. Huawei, ZTE and Alcatel-Lucent were the top three in DSL in that order.

“One of the key factors of growth in the year 2010 was a recovery from the downturn in 2009. However, as there was no such catching up needed in 2011, this year’s growth is all the more remarkable and exceeded our expectations,” explained Kamalini Ganguly, network infrastructure analyst at Ovum.

PON shipment volumes (OLT ports and ONT/ONU units) reached record numbers, driven, for the second year running, by China. While China Telecom bought the majority of PON equipment until recently, a China Unicom contract drove the market share dynamics in the second half of 2011. Similarly, Mexico and, to a lesser extent, Brazil are driving the dramatic growth of PON in South and Central America.

“For many vendors, market share gains still depend on winning customers in key countries. However, it is also true that the customer base for FTTx deployments continues to broaden with an increasing number of participants from incumbents, competitive carriers, governments, utilities and even MSOs,” comments Ganguly.

Elsewhere, the DSL market grew by 10% in 2011, driven by the promise of advanced DSL technologies increasing the capacity and reach of DSL ports, as well as FTTN, FTTC and FTTB upgrades. EMEA was the only regional market to post lower shipments in 2011 compared to 2010. The prospects of the DSL market in 2012 will depend significantly upon a European recovery.

Finally, the CMTS market rose by 54% over 2010 and, in a change from the 2010 trend, the share gains were accrued by Arris. However, Cisco still remains the leader in this segment as it has been for years now. Arris's gains for the most part were due to growth in its large US installed base, but all three major CMTS vendors posted growth in international markets.

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