



2023 Market Share Leader Award

XGS-PON Market

Presented by: Dell'Oro Group

About Dell'Oro Market Share Leader Award



Dell'Oro tracks market size and share on a quarterly basis for most product categories within telecom, security, enterprise networks, and data center IT. Using objective data and a proven and respected methodology, Dell'Oro Group identifies the leading supplier by total annual revenue in specific product categories.

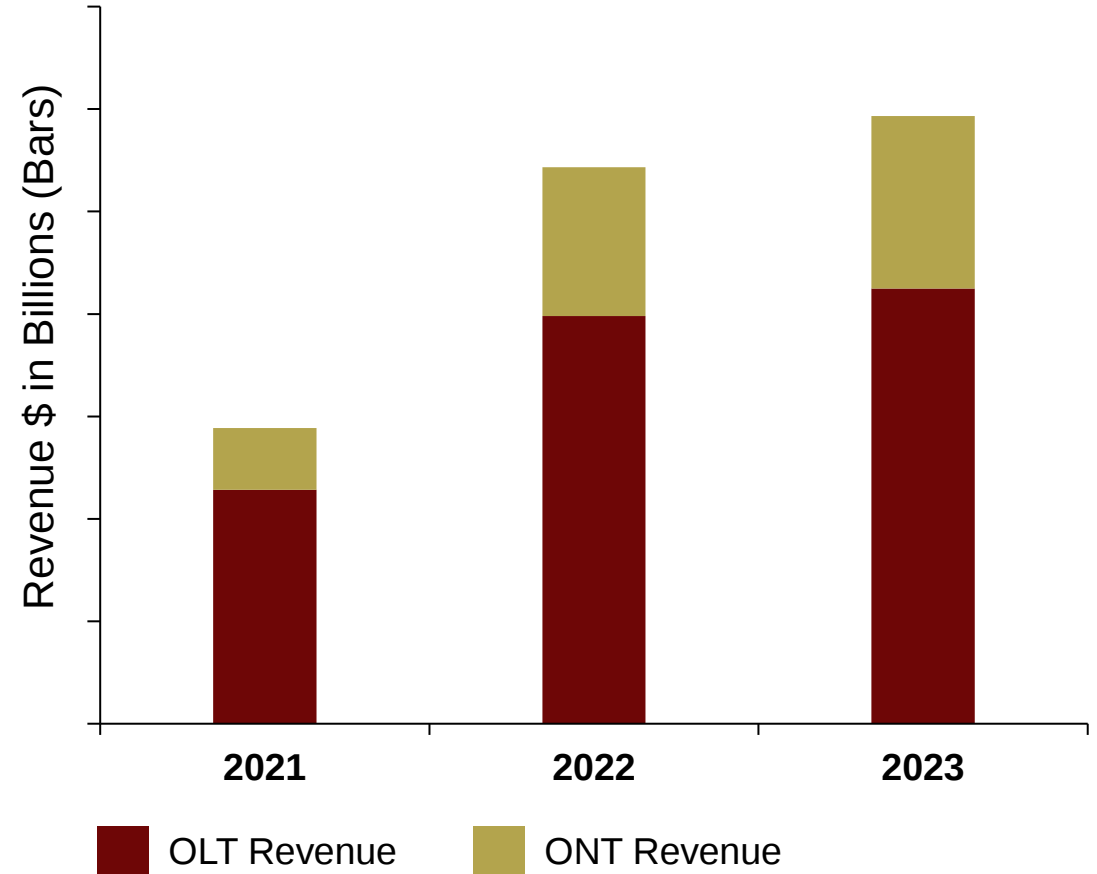
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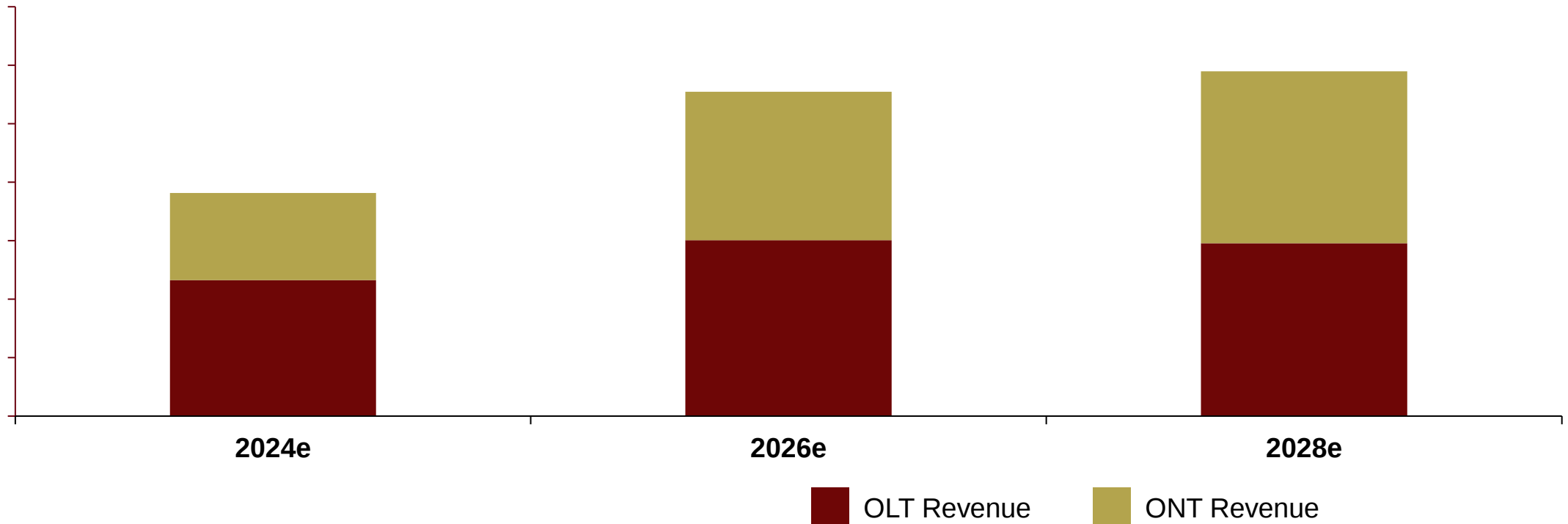
XGS-PON Market 2023



- XGS-PON is being deployed globally to help broadband providers deliver multi-gigabit, symmetric services
- Providers will also use XGS-PON to deliver business services, as well as mobile transport services
- XGS-PON will be the dominant global technology through at least 2028



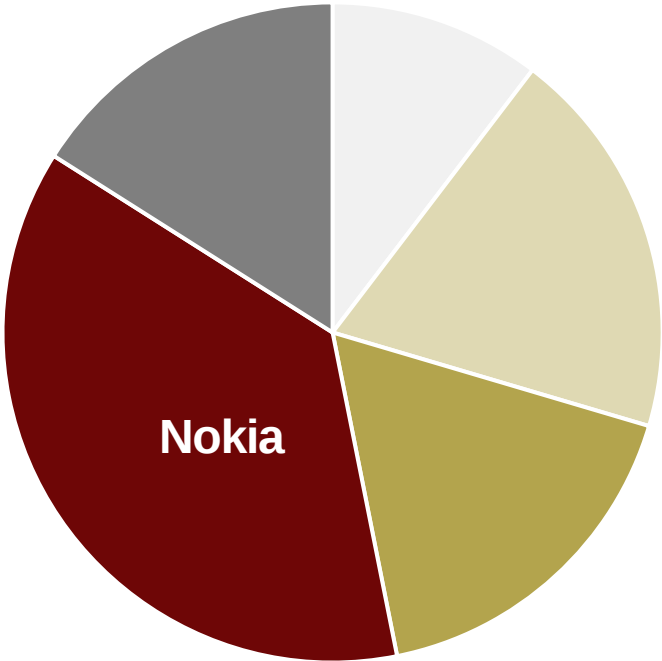
XGS-PON Market Forecast



- Global adoption expected, led by North America and Western Europe
- Operators looking to leapfrog cable's DOCSIS 4.0 deployments
- XGS-PON enables multi-Gigabit, symmetric speeds
- Easily upgradeable to 25GS-PON and other future PON technologies



XGS-PON Market Share Leader 2023



Nokia led the XGS-PON market in 2023 with 37% market share



XGS-PON Market Revenue Ranking 2023

Global



Rank #1 Nokia



Rank #2 Calix



Rank #3 Huawei



Rank #4 ZTE



Rank #5 Adtran

About Dell'Oro Group



- Founded in 1995 and headquartered in Silicon Valley.
- Boutique research firm specializing in telecommunications, security, enterprise networks, data center infrastructure.
- Quarterly Reports on market share, market size, and pricing, by macro region of the world.
- 5-Year Forecast Reports, analyst judgment on technology trends, market size tables with history and forecast.
- Industry executives, investors, and government agencies use our data for critical decision-making.
- Earned the reputation as the “Gold Standard”.



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