

Huawei and ZTE Take the Lead in MSAP Shipments in 1H08

Report Highlights

- 1H08 Global MSAP/MSAN revenue declined by 18% over 2H07 to reach \$1.58 billion
- Global MSAP/MSAN port shipments were up 15% over 2H07 reaching 28.5 million
- Alcatel-Lucent leads in total revenue, ZTE leads in total Port (DS0 + DSL) port shipments in 1H08
- DSL ports shipped from MSAP/MSAN declined 9% over 2H07 to reach 11.4 million in 1H08
- DS0 ports shipped from MSAP/MSAN increased 40% over 2H07 to reach 17.1 million in 1H08
- ZTE is the market leader for DS0-only port shipments in 1H08, while Huawei leads in the DSL port shipment category

Executive Summary

Asia Pacific was the driving force in global MSAP/MSAN activity during 1H2008 with record level shipments of both DSL and DS0 ports driven largely by new infrastructure builds and network transformation projects.

Global MSAP/MSAN revenue reached \$1.58 billion, a 15 percent decline over 2H07.

Alcatel-Lucent remains the market leader with 32 percent of total revenue, followed by Huawei and Nokia Siemens Networks, as shown in Figure 1.

DSL port shipments declined 9 percent from 2H07 to reach 11.4 million, while DS0 port shipments increased 40 percent to reach 17.1 million. Overall port shipments (DSL + DS0) reached nearly 28.5 million, a 15 percent increase over 2H07. DSL port shipments represented 40 percent of total MSAP/MSAN ports during 1H08 versus 51 percent in 2H07.

For 1H08, the EMEA region led in the MSAP/DLC revenue with 47 percent of total revenue, while Asia Pacific led in total port shipments with 46 percent of total.

Vendors shipped 48 percent of all MSAP-based DSL ports into the EMEA region, and 55 percent of all DS0 port shipments into the Asia Pacific Region.

In all regions except EMEA, DS0 shipments exceeded DSL shipments during 1H08.

Figure 1: Global MSAP/MSAN by Vendor, 1H08

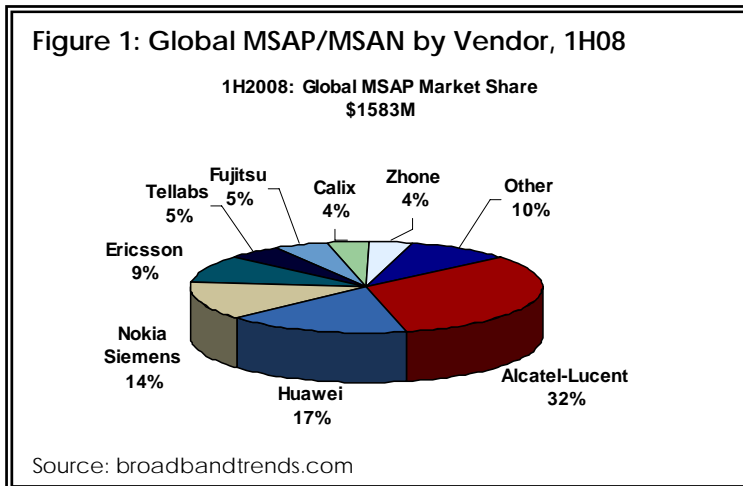


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About this report

The Annual Market Share Report tracks Multi-Service Access Platforms, Next-Generation DLCs and Broadband Loop Carriers. Data is provided for both Global and regional market share for revenue, total port shipments, DS0 port shipment and DSL port shipments and covers all regions (Global, Asia Pacific, CALA, EMEA and North America).

Companies tracked in this report include Adtran, Alcatel-Lucent, Allied Telesyn, Calix, Corecess, ECI Telecom, Ericsson, Fujitsu, Hitron, Huawei, Iskratel, KeyMile, Motorola, NEC, Nokia-Siemens, Occam, Opnet Technologies, Pannaway, Sagem, Samsung, Tailyne, Teledata, Tellabs, UTStarcom, Zhone, ZTE, ZyXEL and others.

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