



THE OPTICAL VENDOR LANDSCAPE

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Abstract

This report provides a holistic analysis of the global communications industry, during a period of unprecedented growth in demand for broadband connectivity and the rise of Cloud companies. It examines business strategies of traditional telecom service providers and Cloud/Web2.0 companies, as well as their suppliers of networking equipment and optical/electronic components.

A detailed analysis of revenue growth and profitability across different levels of the industry supply chain in 2010-2022 is used to identify challenges and opportunities for the future. The report also includes a review of the latest mergers and acquisitions and their impact on the market landscape.

This report takes a deeper look at suppliers of optical components and modules, providing market shares of leading vendors sorted into the several categories (top 3, top 4–6, top 7–10, and other vendors). It includes data on diversification of the top 12 leading suppliers of optical transceivers in the Ethernet, Fibre Channel, WDM, FTTx, Wireless, and Optical Interconnect market segments. Many of the leading component vendors shared confidential sales data with LightCounting to support this study.

The success of Chinese equipment and component suppliers is discussed and many Chinese optical component and IC vendors are profiled.

Companies mentioned in this report include Acacia, Accelink, Adtran, Alibaba, Alphabet, Altera, Aluksen, Amazon, AMCC, AMD, AmpliPHY, Analog Devices, AOI, Apple, Arista, Aroptics Tech, AT&T, ATOP, Avago, Baidu, BANYAN, British Telecom, Broadcom, China Mobile, China Telecom, China Unicom, Ciena, CIG, Cisco Systems, CLOUDLIGHT, Coherent, COLORCHIP, Comcast, CREALIGHTS, Credo, Dell, Deutsche Telekom, Ebay, Elite Optotronics, EMC, Emcore, Emulex, EOChip, Eoptolink, Equinix, Ericsson, Freescale, Fujian Z.K. Litecore, Gigalight, Guangte Technology, GX Photonics, H3C, Hengxin Semitech, HG Genuine, Hi-Optel, HiSense, Huawei, Infinera, Innolight, Inphi, InSiGa, Inspur, Intel, JD.com, JEZETEK, Juniper, KDDI, Leaptex Photonics, LENGXIN, Lightip Technology, Linear Technology, LINKTEL, Lumentum, Luxshare, Macom, Marvell Technology, Maxim IC, Maxlinear, Meta, Microchip, Microsemi, Microsoft, Mindsemi, MiniSilicon, Netease, Nokia, NTT, Nvidia, OE Solutions, O-Net, Oracle, Orange, PayPal, Phograin, Photonic Tech, PMC Sierra, POTRON, Qlogic, Qualcomm, Semtech, Shijia Photons, SIFOTONICS, Softbank, SUNSTAR, Telecom Italia, Telefonica, Tencent, Transmode, UXFastic, Verizon, VERTILITE, VIPshop, Vitesse, Vodafone, Wingcomm, XGIGA (NOW AMPHENOL), Xiamen San-U, YOFC, YouOpto Technology, Yuanjie Semiconductor, ZKTel, and ZTE.