



FTTx coverage and capex: worldwide trends and forecasts 2023–2029



Rupert Wood

About this report

This report analyses and forecasts the coverage (premises passed) and capex for FTTx architecture and technologies during 2023–2029. It is based on several sources, including the following.

- Analysys Mason’s internal research, including our core telecoms forecasts, our fixed data traffic forecasts and our detailed modelling of the costs of technologies and deployment. Our modelling and assumptions are informed by professionals in our 17 offices worldwide.
- Ongoing engagement with stakeholders in the FTTx market, including operators and vendors.

KEY QUESTIONS ANSWERED IN THIS REPORT

- How quickly will FTTP coverage increase in different regions and countries worldwide?
- Which countries represent the most-promising opportunities for vendors in terms of FTTP coverage expansion?
- How quickly will FTTP coverage grow in emerging markets?
- What will be the scale of roll-outs from non-incumbent FTTP operators?
- How much overbuild will occur between FTTP plays and between FTTP and cable?
- What are the coverage levels of gigabit-capable broadband?

GEOGRAPHICAL COVERAGE

- Western Europe (WE)
- Central and Eastern Europe (CEE)
- Middle East and North Africa (MENA)
- Sub-Saharan Africa (SSA)
- Emerging Asia–Pacific (EMAP)
- Developed Asia–Pacific (DVAP)
- China
- North America (NA)
- Latin America (LATAM)

KEY METRICS

- Coverage (premises passed)
- Overbuild ratios
- Capex (network and connection)
- Architecture/technology:
 - FTTC/FTTB/VDSL or G.fast
 - FTTB/LAN
 - FTTP (split by incumbent and alternative operator)
 - Cable DOCSIS

WHO SHOULD READ THIS REPORT

- This report provides strategic planners with detailed and comprehensive insights into the development of FTTx in comparable markets, thereby allowing them to understand what level and type of investment is appropriate, and where opportunities lie.
- For equipment vendors, construction businesses and component suppliers, it shows the scale of opportunity in FTTx.
- The model can also serve several other functions beyond the immediate scope of this report. It can be used to provide the costs of alternative scenarios. If you wish to explore these options, please contact the author.



Worldwide trends

Regional trends

Forecast methodology and assumptions

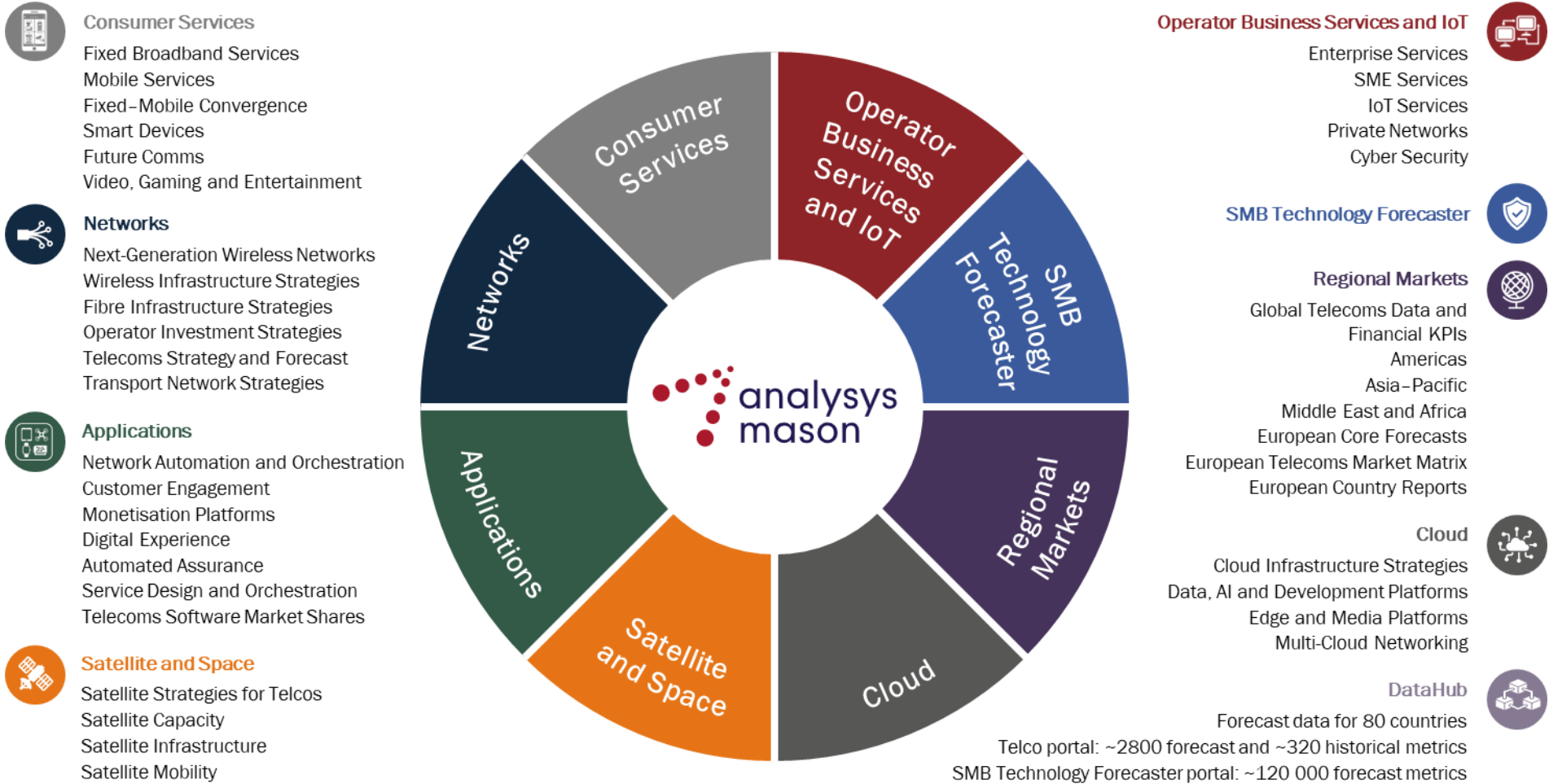
About the author and Analysys Mason

About the author



Rupert Wood (Research Director) is the lead analyst for our *Fibre Infrastructure Strategies* and *Wireless Infrastructure Strategies* research programmes. His research covers the following areas: the evolution of operators' investment priorities; operator business structures; business models for FTTP and convergence; fixed broadband technologies; the economic impact of digital transformation; capex forecasting; and network traffic forecasting. He has extensive experience of advising senior management on strategic issues. Rupert has a PhD from the University of Cambridge, where he was a Lecturer before joining Analysys Mason.

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