

IHS: Europe Shows Optical Networking Growth

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According to IHS, Europe is the only world region showing Y-o-Y optical networking hardware revenue growth-- while global revenues remain flat, European growth reaches 8% Y-o-Y.



“With 3 consecutive quarters of good results, Europe is signaling a reversal of the terrible optical spending that we’ve seen in the region over the last 5 years,” the analyst says. “This strength is concentrated in Alcatel-Lucent, Ciena and Infinera.”

Such results are stronger when measured in euros-- adjusted for exchange rate European optical spending is up by 30% Y-o-Y.

On a global basis, global Q2 2015 optical networking hardware (WDM and SONET/SDH) revenues are up by 22% Q-o-Q, with WDM equipment as spending driver. WDM hardware makes 86% of Q2 2015 global optical hardware revenues, with spending growth reaching either 23% Q-o-Q or 6% Y-o-Y.

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