

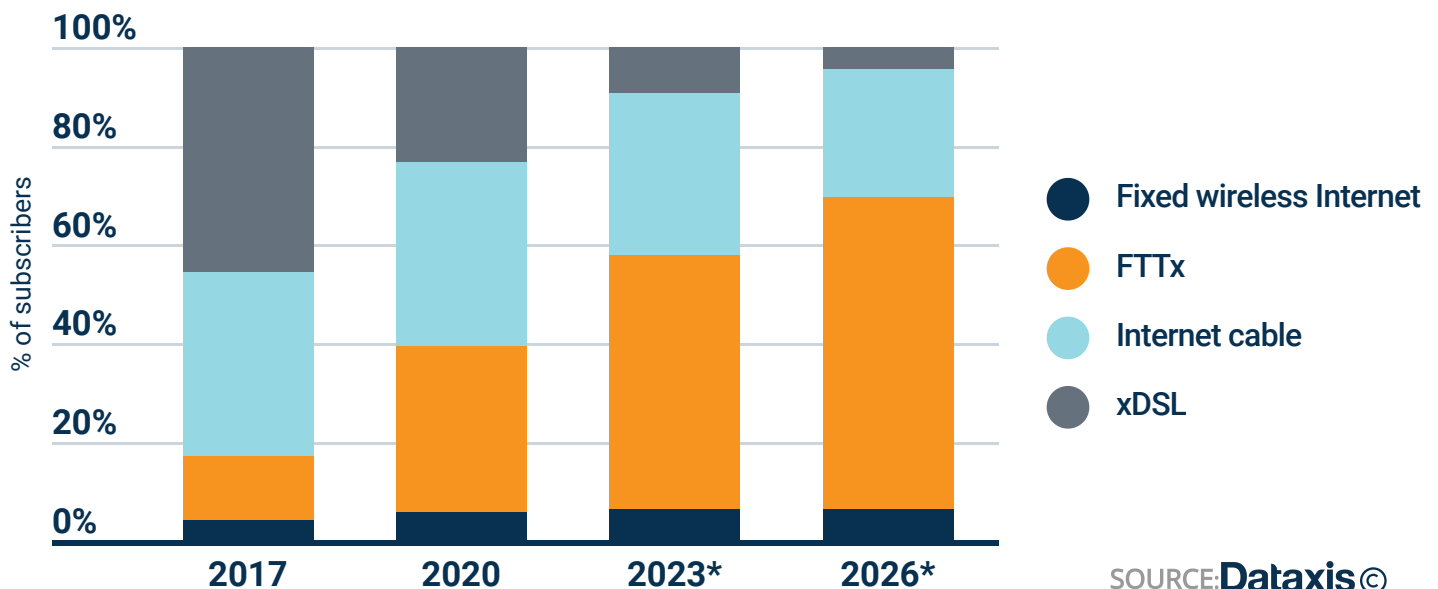
Since Q2 2021, Fiber Optics leads the broadband market in Latin America

PRESS RELEASE | 23 September, 2021

At Q2 2021, the Latin American broadband market exceeded the 100 million accesses mark. Fiber reached a 39% market share and, for the first time, became the option with the greatest diffusion rate in the region.

The biggest group behind this technology deployment was Telefónica with a market share of 16.4%, followed by América Móvil with 15.2%. These figures show a relatively low dominance of traditional, large telco operators. The universe of competitors in fiber is still very fragmented: in Latin America, dozens of small and mid-range players compete with each other, encouraged by the low cost of deployment and the lack of competitors with ultrabroadband options in suburban areas.

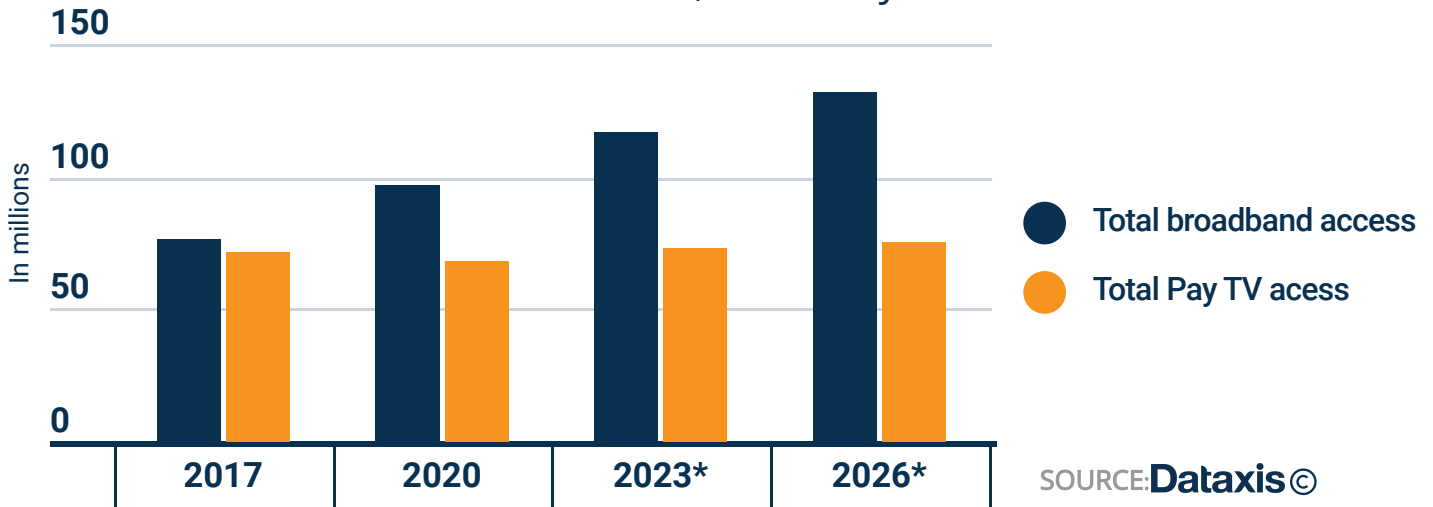
Broadband access by technology Latin America, selected years



Fiber also grows as a substitute for other technological options, initially to replace DSL. As of 2020, Dataxis also notes that a strong migration movement revolving around major cable systems started to emerge, even though these actors have traditionally been very reluctant to leave cable modems. By 2026, Dataxis predicts that fiber will concentrate 83.2 million accesses in Latin America; 63% of the total forecasted broadband connections. While the total broadband market will jump by 31.9%, fiber's growth will be 3.5 times faster, reaching 113.2%.

Broadband and pay TV access evolution

Latin America, selected years



It is becoming clear that broadband is rising as a standalone product that, eventually, will be paired with third parties OTT services. Although fiber is not directly competing with pay TV, it has a non-negligible impact on its consumption, as internet providers offer fiber bundled with IPTV, OTT and often Android TV. TV bundled with fiber already started to replace traditional bundles like DSL-DTH and Cable-Cable Modem and encourages the rise of a new competition, threatening existing market leaders.

Carlos Blanco | Analyst

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