

Telecommunications Ukraine Market to reach \$7.2billion with 3.7% CAGR Key Player, Regions and Forecast to 2022

Telecommunications Ukraine Market to Grow at a 3.7% CAGR Key Player, Regions and Forecast to 2022

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Summary

The telecommunications market in Ukraine will generate revenue of \$1.6bn (UAH 40.7bn) in 2016. CAGR in local currency will be -0.7%. Market revenue in USD is expected to decline through 2021. Mobile data revenue will grow at a CAGR of 3.7% in local currency to reach UAH 7.2bn (\$256m) in 2021, with contribution to overall ARPS increasing from 21.0% in 2016 to 26.1% in 2021. Fixed VoIP will witness strong growth over 2016-2021 (CAGR of 8.2% in UAH), while fixed broadband will register a CAGR of 3.9%, in LCU. Going forward, operators should seize opportunities in mobile data and fixed broadband segments as the demand for data continues to grow, while vendors should position themselves to support operators' network expansion plans to address the demand of high data traffic.

Key Findings

- The overall telecom service revenue in Ukraine is estimated to decline by 2.1% over 2016-2021 to reach \$1.6bn (UAH40.7bn) in 2016.
- The telecommunications market in Ukraine will see service revenue growth in mobile data, fixed VoIP and fixed broadband segments.
- Mobile revenue will account for 70.4% of the total telecom market in 2016. Mobile data will be an important driver of this trend, as it will expand at a 3.7% CAGR in LCU from 2016 to 2021 driven by growth in the adoption of 3G services and smartphones and data intensive plans.
- We expect the contribution of Internet access to fixed services revenue will increase from 46.8% in 2016 to 57.0% in 2021.
- Ukraine's telecom market will be controlled by two operators – Kyivstar and Vodafone Ukraine (MTS). Operators are focusing on 3G expansion, bundled packages and data based services to strengthen their position in the telecom market.

Synopsis

"Ukraine: Telecom Service Revenue to Decline through 2021, Due to Pressure on the Voice Segment and Slow Data Growth,"

A new Country Intelligence Report by Pyramid Research, provides an executive-level overview of the telecommunications market in Ukraine today, with detailed forecasts of key indicators up to



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2021. Published annually, the report provides detailed analysis of the near-term opportunities, competitive dynamics and evolution of demand by service type and technology/platform across the fixed telephony, broadband, mobile and pay-TV sectors, as well as a review of key regulatory trends.

The Country Intelligence Report provides in-depth analysis of the following:

- Regional context: telecom market size and trends in Ukraine compared with other countries in the region.
 - Economic, demographic and political context in Ukraine.
 - The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, number portability and more.
 - A demand profile: analysis as well as historical figures and forecasts of service revenue from the fixed telephony (including VoIP), broadband, mobile voice, mobile data and pay-TV markets.
 - Service evolution: a look at changes in the breakdown of overall revenue between the fixed/pay-TV and mobile sectors and between voice, data and video from 2016 to 2021.
 - The competitive landscape: an examination of key trends in competition and in the performance, revenue market shares and expected moves of service providers over the next 18-24 months.
 - In-depth sector analysis of fixed telephony, broadband, mobile voice, mobile data and pay-TV services: a quantitative analysis of service adoption trends by network technology and by operator, as well as of average revenue per line/subscription and service revenue through the end of the forecast period.
 - Main opportunities: this section details the near-term opportunities for operators, vendors and investors in Ukraine's telecommunications and pay-TV markets.
- Reasons to Buy
- This Country Intelligence Report offers a thorough, forward-looking analysis of Ukraine's telecommunications and pay-TV markets, service providers and key opportunities in a concise format to help executives build proactive and profitable growth strategies.
 - Accompanying Pyramid Research's Forecast products, the report examines the assumptions and drivers behind ongoing and upcoming trends in Ukraine's mobile communications, fixed telephony/VoIP, broadband and pay-TV markets, including the evolution of service provider market shares.
 - With more than 20 charts and tables, the report is designed for an executive-level audience, boasting presentation quality.
 - The report provides an easily digestible market assessment for decision-makers built around in-depth information gathered from local market players, which enables executives to quickly get up to speed with the current and emerging trends in Ukraine's telecommunications and pay-TV markets.
 - The broad perspective of the report coupled with comprehensive, actionable detail will help operators, equipment vendors and other telecom industry players succeed in the challenging telecommunications market in Ukraine.

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