FEBRUARY 2026

Fiber Broadband
LATAM CHAPTER

FTTH Panorama for Latin America 2025

EXECUTIVE SUMMARY

Produced by:

SMC+ DIGITAL PUBLIC AFFAIRS

The Fiber Broadband Association provides advocacy, education and resources to companies, organizations and communities who want to deploy the best networks through fiber to the home, fiber to the business and fiber everywhere. Our member-led association collaborates with industry allies to propel fiber deployment forward for a better broadband future here and around the world.

Fiber Broadband Association members represent the entire broadband ecosystem: providers, suppliers, consultants, consumers, policymakers, device makers and application providers.

The Latam Chapter is the representation of the Fiber Broadband Association in the Latin America region.

For more information, visit
www.fiberbroadband.org/about-latam/

SmC+ is a leading firm in digital policy strategy, with a focus on Latin America.

We help global tech companies and international organizations surf the waves of Latam Policy Issues, adapting to the challenges and opportunities in each market.

Our unique service, Regulatory Assistance as a Service (RaaaS), enables our clients to overcome their regulatory hurdles in Latin America, by providing deep knowledge on local dynamics to support strategic actions.

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EXECUTIVE SUMMARY

FTTH PANORAMA FOR LATIN AMERICA 2025

Fiber Broadband LATAM CHAPTER

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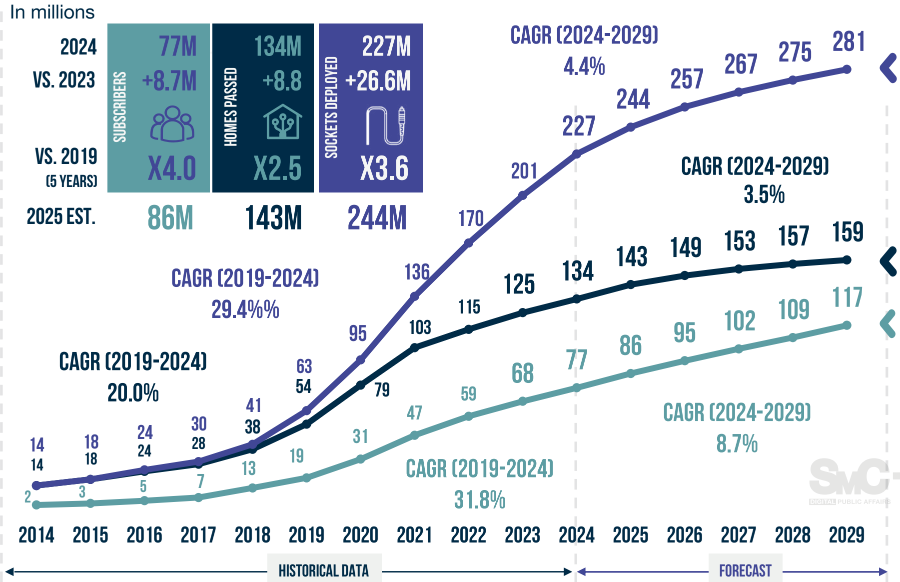
FROM MASSIVE ROLLOUT TO OPERATIONAL EXCELLENCE; SCALE REACHED, COMPETITION INTENSIFIES

The FTTH/B coverage growth trajectory in Latin America is deepening into the slow-down phase it started two or three years ago. The coverage plateau must not be understood as a hindrance to deployments. Sockets are expected to grow x1.2 to 2029 (going from 227 to 281 million in the next five years). The service densification will need to be accompanied by marketing differentiation by operators, who will seek to leverage service quality, user experience and price to reduce churn rates and increase conversion rates.

In millions

	SUBSCRIBERS	HOMES PASSED	SOCKETS DEPLOYED
2024	77M	134M	227M
VS. 2023	+8.7M	+8.8	+26.6M
VS. 2019 (5 YEARS)	X4.0	X2.5	X3.6
2025 EST.	86M	143M	244M



	2024	2029
SOCKETS PENETRATION	119%	147%
COVERAGE	70%	83%
PENETRATION	40%	61%
TAKE UP RATE	34%	42%

More than US$ 5 billion were invested during 2025 in Latin America and the Caribbean when considering fiber projects and intense M&A activity.

LAC'S ADDRESSABLE MARKET

+110M HH

The FTTH addressable market in LAC remains substantial, with more than 110 million households still lacking service. The market potential for fiber in LAC is bifurcated into two distinct categories: the unserved and the legacy users. Out of the approximately 191 million households in the region, a staggering 78 million still lack any form of fixed broadband connection and 36 million households are using non-fiber technologies (such as HFC or xDSL).

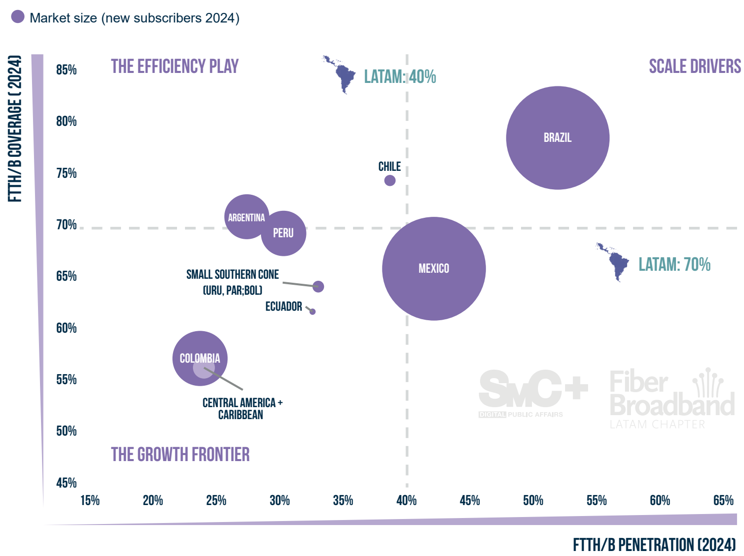
LAC FTTH EXPECTED TO REACH 40M NEW HH IN THE NEXT 5 YEARS

Source: SmC+

THE LATIN AMERICAN FIBER MARKET HAS REACHED A CRITICAL TIPPING POINT IN 2024. THE GAP BETWEEN "HOMES PASSED" AND "ACTIVE SUBSCRIBERS" IS BEGINNING TO CLOSE AS THE INFRASTRUCTURE MATURES

Accelerated coverage expansion has materially increased the addressable base for FTTH services, but its impact on subscriber growth varies significantly by market. In high-coverage markets, further expansion mainly strengthens the conditions for take-up acceleration, intensifying competition and shifting the focus toward migration from legacy technologies and churn capture. In contrast, markets with lower coverage and penetration still offer room for structural subscriber additions, as new networks directly unlocks first-time fiber adoption.

FTTH/B COVERAGE VS PENETRATION



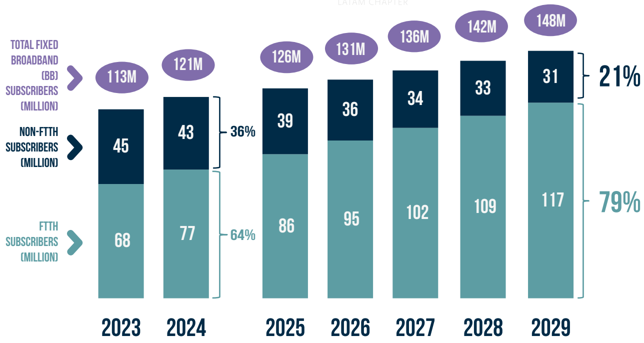
Source: SmC+

FIBER IS NO LONGER AN UPGRADE; IT IS THE STANDARD FOR THE DIGITAL ECONOMY

The displacement of older technologies is no longer a slow erosion; it is an accelerated replacement. FTTH is projected to absorb the majority of net fixed broadband growth, while non-fiber technologies continue to contract.

FTTH SUBSCRIBERS

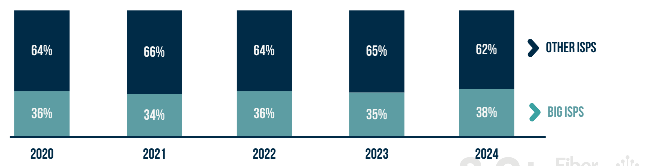
CAGR: 9% (2024-2029)
GROWTH: 52% (2024 VS 2029)



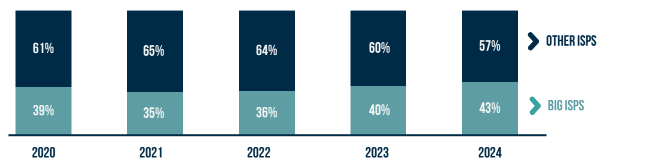
Source: SmC+

The Latin American FTTH market remains a unique ecosystem where massive multi-market incumbents coexist with a highly fragmented "long tail" of thousands of smaller providers. While Big ISPs focus mainly on migrating to their own massive legacy bases (HFC/xDSL), smaller players are effectively winning the "greenfield" battle for new digital users. This highlights the success of local players in entering underserved neighborhoods and secondary cities.

NET ADDITIONS OF FTTH SUBSCRIBERS – BIG ISPS VS. OTHER ISPS



NET ADDITIONS OF FTTH HOMES PASSED – BIG ISPS VS. OTHER ISPS



Source: SmC+

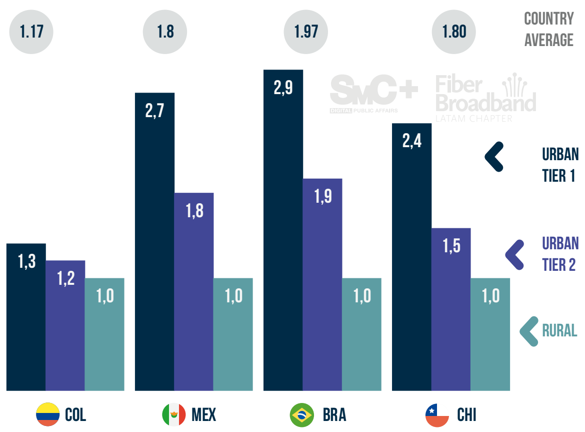
THE LONG TAIL CONSISTENTLY HAS CAPTURED OVER 60% OF NET ADDITIONS IN HOMES PASSED AND SUBSCRIBERS

INCREASING OVERLAP IN URBAN ZONES PUSHES PLAYERS TO INCREASE COMPETITION

As fiber deployment reaches maturity in major metropolitan hubs, the regional landscape has shifted from a race for coverage to a fight for subscriber conversion and retention. In most Tier-1 cities, the era of "sole provider" status is over, replaced by a reality where infrastructure redundancy is now the standard.

OVERLAP INDEX ACCORDING TO HOUSING TIPIFICATION

Deployed sockets/ports per homes passed



Source: SmC+

CHILE CONTINUES TO LEAD LATIN AMERICA IN FIXED BROADBAND SPEED, NOW 2ND WORLDWIDE, UP FROM 7TH LAST YEAR

COUNTRY AVERAGE | FIXED BROADBAND (AUG 2025)

	GLOBAL RANKING	↓ DL MBPS	↑ UL MBPS
Chile	2ND	347.4	269.7
Peru	20TH	220.9	187.8
Brazil	25TH	206.4	108.5
Colombia	30TH	191.5	88.8
Uruguay	32TH	186.8	34.9
Panama	34TH	185.9	16.9
Costa Rica	43TH	147.1	91.9

Source: Speedtest Global Index, August 2025. Download (DL) and Upload (UL) speeds in Mbps

KEY DIFFERENTIATORS IN THE GROWING COMPETITIVE LANDSCAPE: QOS

SERVICE OFFER
- High Speed
- Symmetry
- Low latency
- Stability

IN-HOME FRONTIER
- Wi-Fi 6
- Proper installation
- FTTR

FIBER DEPLOYMENT MOMENTUM IN LATAM IS EXPECTED TO CONTINUE OVER THE NEXT YEARS

The trends observed throughout 2024 and 2025 confirm that fiber is no longer a transitional technology, but the core platform on which fixed connectivity growth, service quality and digital transformation will depend in the coming years.

TRENDS AND KEY TAKEAWAYS FOR INDUSTRY STAKEHOLDERS

INFRASTRUCTURE MATURITY

With an 83% coverage estimation for 2029, the region is nearing its physical deployment ceiling, making marketing and customer retention the new primary drivers. Overlap is expected to keep increasing in major cities, with 54 million new sockets by 2029, take-up rate will just go from 34% in 2024 to 42% in 2029.

DATA AS CATALYST

The projected triple of fixed data traffic between 2024 and 2029 ensures that fiber will remain the only future-proof technology capable of supporting the regional digital economy.

BUSINESS MODEL EVOLUTION

The rise of neutral hosts and a fresh wave of M&A activity are no longer emerging trends; they are the dominant strategies for maintaining capital efficiency in a market defined by network overlap and higher competition.

FWA AND SATELLITE REMAIN NICHE

Alternative platforms such as FWA and satellite remain complementary solutions rather than substitutes for fiber in dense and economically attractive areas.

ARTIFICIAL INTELLIGENCE

AI is less about carrying more traffic and more about operating networks better, monetizing them smarter, and competing on experience. For ISPs, the most immediate value of AI lies in network planning and optimization, fault detection and predictive maintenance, customer experience management and commercial optimization.

Source: SmC+

SmC+

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