

Global Mobile TV SoC Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Mobile TV SoC market size was valued at US\$ 40.13 million in 2025 and is forecast to a readjusted size of US\$ 68.93 million by 2032 with a CAGR of 8.0% during review period.

The core of the Mobile TV SoC industry is not the smart TV application processor, but rather broadcast reception chips and front-end devices that highly integrate RF tuning, signal demodulation, error correction, diversity reception, low-power management, and terminal interfaces into mobile phones, automotive systems, and portable devices. These products are designed to solve unstable free-to-air terrestrial TV reception, tight power budgets, limited board space, and multi-region broadcast standard fragmentation in mobile use cases. Official product pages show that the mainstream technical approaches in this segment include integrated RF plus demodulator SoCs, split tuner and demodulator front ends, multi-standard support across ISDB-T, DVB-T, ATSC, and SBTVD-T, and two- or four-diversity reception architectures for automotive scenarios, while improving practical usability through compact packaging, low standby power, interference resistance, and high-mobility reception capability. Typical customers are not limited to TV brands, but include handset OEMs, automotive electronics suppliers, USB receiver solution providers, navigation device makers, module vendors, and broadcast terminal manufacturers. Common delivery forms include standard chips, tuner or demodulator LSIs, modular front ends, reference designs, and supporting driver software. From a product-line perspective, the core layer consists of Mobile TV SoCs for phones and portable devices, while the broader layer includes tuners, demodulators, and automotive diversity solutions serving the same reception chain, making this, in essence, a specialized front-end semiconductor niche driven by mobile broadcast reception demand.

The true value of the Mobile TV SoC industry does not lie in simply bringing traditional television content onto phones, but in enabling low-cost, wide-coverage, low-latency content reception for mobile terminals through broadcast networks. DiBEG's official One-Seg description shows that a single TV channel can simultaneously carry an HDTV program and a mobile TV program, which means mobile reception was designed as an institutionalized part of digital terrestrial broadcasting rather than an add-on feature. The resulting chip design logic is therefore fundamentally different from that of conventional living-room TV front ends. It must simultaneously deliver high integration, compact packaging, low power consumption, resistance to interference in complex channels, and stable reception under mobility and multipath conditions. Renesas explicitly positions its products for mobile phones and other portable devices, while Sony places automotive and mobility scenarios at the center of its product matrix. This indicates that the real competitive edge in the industry lies in system-level optimization of the broadcast reception chain rather than in isolated component performance. For customers, these chips solve a combined set of problems including device development complexity, regional standard adaptation, reception stability, and terminal power control, which is why the segment still carries clear engineering value and meaningful qualification barriers.

From an industry-structure perspective, this is not a single-product market, but a specialized semiconductor sub-sector centered on mobile broadcast reception and built from SoCs, tuners, demodulators, diversity solutions, and modules. Sony's official site simultaneously presents tuner LSIs, demodulator LSIs, tuner-and-demodulator integrated LSIs, modules, and automotive diversity solutions. Rafael and NXP represent more tuner-centric front-end routes, while Socionext demonstrates the platform value of demodulators across multiple broadcast standards and multi-tuner connectivity. This means the industry is not moving in a one-way direction toward ever-higher integration. Instead, it has evolved into a layered supply structure shaped by different terminal architectures and different regional standards. For phones and portable devices, integrated RF plus demodulator SoCs are more advantageous. For automotive systems, diversity architecture and multipath robustness matter more. For TVs, recorders, set-top boxes, and external receivers, flexible tuner-and-demodulator combinations remain valid. The result is a sector characterized by relatively low volumes, product diversity, high validation thresholds, and strong dependence on regional broadcast standards.

From a regional and forward-looking perspective, the clearest demand base for this industry still comes from Japan and countries within the ISDB-T international ecosystem, especially Brazil and other Latin American adopters. DiBEG's official list of

adopting countries shows that ISDB-T has formed a relatively stable regional network, while the Brazilian government's recent TV 3.0 push has brought mobility, internet integration, spectrum optimization, accessibility, and new interaction models back to the center of digital television upgrading. This creates two layers of opportunity for the industry. The first is the legacy opportunity, namely the continuing long-tail demand for phones, automotive receivers, USB receivers, and portable devices under the current digital terrestrial TV framework. The second is the upgrade opportunity, namely the potential for next-generation digital TV evolution to drive renewed iteration in reception front ends, tuner architectures, and broadcast silicon platforms. Overall, this is not a high-expansion market, but it remains a structurally attractive niche supported by policy drivers, regional standard barriers, and engineering complexity.

This report is a detailed and comprehensive analysis for global Mobile TV SoC market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Mobile TV SoC market size and forecasts, in consumption value (\$ Million), sales quantity (M Untis), and average selling prices (US\$/Unit), 2021-2032

Global Mobile TV SoC market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (M Untis), and average selling prices (US\$/Unit), 2021-2032

Global Mobile TV SoC market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (M Untis), and average selling prices (US\$/Unit), 2021-2032

Global Mobile TV SoC market shares of main players, shipments in revenue (\$ Million), sales quantity (M Untis), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Mobile TV SoC

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Mobile TV SoC market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Renesas Electronics Corporation, Sony Group Corporation, Socionext Inc., Realtek Semiconductor, Rafael Microelectronics, Inc., NXP Semiconductors N.V., Samsung Electronics, Silicon Motion Technology Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Mobile TV SoC market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

FHD SoC

UHD SoC

Market segment by Functional Integration Type

RF + Demod Integrated SoC

Tuner-Demodulator Integrated LSI

Tuner Type

Demodulator Type

Module Type

Market segment by Primary Broadcast Standard Type

ISDB-T Mobile Reception Type

Global Terrestrial & Cable Multi-Standard Type

4K/8K Satellite Extension Type

Market segment by Application

Handheld And Portable Device Type

Automotive Mobile Reception Type

External Reception Device Type

Fixed TV Reception Front-End Type

Major players covered

Renesas Electronics Corporation

Sony Group Corporation

Socionext Inc.

Realtek Semiconductor

Rafael Microelectronics, Inc.

NXP Semiconductors N.V.

Samsung Electronics

Silicon Motion Technology Corporation

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Mobile TV SoC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Mobile TV SoC, with price, sales quantity, revenue, and global market share of Mobile TV SoC from 2021 to 2026.

Chapter 3, the Mobile TV SoC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Mobile TV SoC breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales

market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Mobile TV SoC market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Mobile TV SoC.

Chapter 14 and 15, to describe Mobile TV SoC sales channel, distributors, customers, research findings and conclusion.

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