

Global Mobile TV SoC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mobile TV SoC market size is expected to reach \$ 68.93 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

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 studies the global Mobile TV SoC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mobile TV SoC and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Mobile TV SoC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mobile TV SoC total production and demand, 2021-2032, (M Untis)

Global Mobile TV SoC total production value, 2021-2032, (USD Million)

Global Mobile TV SoC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Untis), (based on production site)

Global Mobile TV SoC consumption by region & country, CAGR, 2021-2032 & (M Untis)

U.S. VS China: Mobile TV SoC domestic production, consumption, key domestic manufacturers and share

Global Mobile TV SoC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Untis)

Global Mobile TV SoC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Untis)

Global Mobile TV SoC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Untis)

This report profiles key players in the global Mobile TV SoC market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Mobile TV SoC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Mobile TV SoC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mobile TV SoC Market, Segmentation by Type:

FHD SoC

UHD SoC

Global Mobile TV SoC Market, Segmentation by Functional Integration Type:

RF + Demod Integrated SoC

Tuner-Demodulator Integrated LSI

Tuner Type

Demodulator Type

Module Type

Global Mobile TV SoC Market, Segmentation by Primary Broadcast Standard Type:

ISDB-T Mobile Reception Type

Global Terrestrial & Cable Multi-Standard Type

4K/8K Satellite Extension Type

Global Mobile TV SoC Market, Segmentation by Application:

Handheld And Portable Device Type

Automotive Mobile Reception Type

External Reception Device Type

Fixed TV Reception Front-End Type

Companies Profiled:

Renesas Electronics Corporation

Sony Group Corporation

Socionext Inc.

Realtek Semiconductor

Rafael Microelectronics, Inc.

NXP Semiconductors N.V.

Samsung Electronics

Silicon Motion Technology Corporation

Key Questions Answered:

1. How big is the global Mobile TV SoC market?
2. What is the demand of the global Mobile TV SoC market?
3. What is the year over year growth of the global Mobile TV SoC market?
4. What is the production and production value of the global Mobile TV SoC market?
5. Who are the key producers in the global Mobile TV SoC market?
6. What are the growth factors driving the market demand?

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