

Global STB 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 STB SoC market size was valued at US\$ 4398 million in 2025 and is forecast to a readjusted size of US\$ 7043 million by 2032 with a CAGR of 6.9% during review period.

STB SoCs, or set-top box system-on-chips, are the core control platforms for cable, satellite, terrestrial digital TV, IPTV, OTT, and hybrid set-top boxes. They integrate broadcast reception, network connectivity, video encoding and decoding, graphics display, security control, and application processing onto a single chip, helping operators and device makers balance cost, power consumption, form factor, performance, and content protection. Based on official product pages, these chips typically integrate multi-core CPUs and GPUs, while some also add NPUs, Wi-Fi, channel demodulators, security engines, or rich peripheral interfaces. They are built around video standards such as H.264, H.265, AV1, AVS2, AVS3, and even VVC, and provide decoding and display capability from HD to 4K and 8K. They also support software ecosystems such as Android, Linux, RTOS, or RDK to enable live TV, video on demand, cloud applications, voice interaction, home gateway functions, and hybrid broadcast-plus-internet services. Typical customers include Pay TV operators, IPTV platforms, OTT brands, set-top box OEMs and ODMs, as well as local solution providers serving digital upgrade demand in emerging markets. Common delivery forms include standard SoCs, platform solutions with reference designs, secure solutions with CAS or DRM support, and customized products tailored to regional broadcast standards and customer requirements. From a business model perspective, vendors generally monetize through chip sales, reference designs, SDKs, middleware adaptation, and long-term project support, while building barriers through standard compatibility, operator certification, content security, and system integration depth.

The STB SoC industry has not been marginalized by the rise of smart TVs and mobile video. Instead, it is evolving from a traditional set-top box controller into a comprehensive platform chip that connects broadcast networks, broadband networks, and home digital services. Broadcom still defines cable, satellite, IPTV, OTT, and terrestrial STBs as a complete platform market in its annual report and product pages. ST explicitly targets cable, satellite, DTT, x DSL, and IP scenarios within the same SoC roadmap. Renesas positions hybrid set-top boxes as high-end products that support both digital broadcasting and Internet content distribution. This shows that the industry logic of STB SoCs has shifted from single-purpose decoding chips to long lifecycle platforms built for multi-network compatibility and multi-service delivery. For operators and device brands, STBs remain a controllable home gateway, because they are better suited than pure TV SoCs for unified content distribution, account operations, advertising, voice interaction, and value-added services. As long as video services continue to require management across networks, standards, and terminals, STB SoCs will remain relevant and will continue moving toward higher integration, lower power consumption, and stronger platform capabilities.

From a technology competition perspective, the moat of STB SoCs is not limited to video decoding capability. It is built on a combination of security, software ecosystem, regional standard compatibility, and system integration. Vendors such as Amlogic, Broadcom, Realtek, Allwinner, and Rockchip continue upgrading beyond 4K, and support for next-generation codecs such as AV1, AVS2, AVS3, and VVC has become a key selling point for reducing bandwidth costs and extending platform life. At the same time, ALi, NationalChip, Realtek, and Broadcom continue to emphasize CAS, DRM, advanced security, and operator-grade protection, showing that in Pay TV and hybrid video environments, content security still directly determines whether a chip can enter core projects. On the software side, MediaTek explicitly supports Android-based set-top boxes, Rockchip supports both Android and Linux, and Realtek has entered operator ecosystems through a Hybrid RDK solution. This means that the most competitive vendors in the future will need to deliver not just a capable chip, but also reference designs, SDKs, middleware adaptation, certification capabilities, and regional market know-how. As Synaptics brings NPUs into STBs and ALi introduces AI Agent concepts into smart set-top boxes, the industry's value focus is moving from video playback alone toward home interaction and edge intelligence.

From the perspective of regional demand and growth drivers, the most optimistic opportunities for STB SoCs in the coming years will come not only from replacement cycles in mature markets, but also from continuing procurement driven by digital TV infrastructure upgrades and regional standard fragmentation in emerging markets. ALi

has explicitly targeted India, the Middle East, Africa, and Latin America with its F6P, while NationalChip has disclosed deployments of its DVB T2 and satellite solutions in Southeast Asia, Central Asia, Africa, and Eastern Europe. This indicates that in regions where broadband coverage is still uneven and broadcast television remains highly efficient in reach, STB SoCs with strong cost performance and security capabilities still enjoy stable demand. At the same time, the Chinese market is not merely a low-cost battleground. Under the push of IPTV, OTT, direct-to-home satellite broadcasting, domestic codec standards, and secure and controllable technology requirements, companies such as HiSilicon, NationalChip, Allwinner, and Rockchip each have structural opportunities. Europe and Japan, by contrast, reflect a more premium route centered on hybrid broadcast plus Internet services. Overall, the most encouraging aspect of this industry is that it benefits from both replacement demand and incremental expansion, with the first driven by platform upgrades from 4K to 8K, AV1 to VVC, and Android to RDK, and the second driven by emerging market digitalization, operator tenders, content legitimization, and the restructuring of the home intelligent gateway.

This report is a detailed and comprehensive analysis for global STB 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 STB SoC market size and forecasts, in consumption value (\$ Million), sales quantity (M Untis), and average selling prices (US\$/Unit), 2021-2032

Global STB 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 STB 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 STB 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 STB 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 STB 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 Broadcom, Amlogic, MediaTek, Huawei Technologies Co., Ltd., ALi Corporation, Realtek Semiconductor Corp., Synaptics Incorporated, STMicroelectronics, Renesas Electronics Corporation, NationalChip, etc.

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

Market Segmentation

STB 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 Access Architecture

Broadcast Type

Pure IP Type

Hybrid Type

Market segment by Highest Codec Generation

Legacy Codec Type

HEVC Mainstream Type

Next-Generation Enhanced Type

Market segment by Application

Broadcast Pay TV STB SoC

IPTV STB SoC

OTT Streaming STB SoC

Hybrid STB SoC

Major players covered

Broadcom

Amlogic

MediaTek

Huawei Technologies Co., Ltd.

ALi Corporation

Realtek Semiconductor Corp.

Synaptics Incorporated

STMicroelectronics

Renesas Electronics Corporation

NationalChip

Allwinner Technology

Rockchip

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 STB SoC product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the STB 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 STB 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 STB SoC.

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

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