

Global STB SoC Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G3BD95C6946FEN.html>

Date: June 2026

Pages: 134

Price: US\$ 4,480.00 (Single User License)

ID: G3BD95C6946FEN

Abstracts

The global STB SoC market size is expected to reach \$ 7043 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

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

This report is a detailed and comprehensive analysis of the world market for STB 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 STB SoC that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global STB 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World STB 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 STB SoC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global STB SoC Market, Segmentation by Type:

FHD SoC

UHD SoC

Global STB SoC Market, Segmentation by Access Architecture:

Broadcast Type

Pure IP Type

Hybrid Type

Global STB SoC Market, Segmentation by Highest Codec Generation:

Legacy Codec Type

HEVC Mainstream Type

Next-Generation Enhanced Type

Global STB SoC Market, Segmentation by Application:

Broadcast Pay TV STB SoC

IPTV STB SoC

OTT Streaming STB SoC

Hybrid STB SoC

Companies Profiled:

Broadcom

Amlogic

MediaTek

Huawei Technologies Co., Ltd.

ALi Corporation

Realtek Semiconductor Corp.

Synaptics Incorporated

STMicroelectronics

Renesas Electronics Corporation

NationalChip

Allwinner Technology

Rockchip

Key Questions Answered:

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

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