

China Digital STB (Set-top Box) Industry Report, 2010

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Abstracts

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China's digital STB (set-top box) industry has ushered in a boom in market structure adjustment and further development since 2010. The convergence of radio & TV network, telecommunication network, and Internet has entered the pilot stage, which has fueled the upgrading of client-side STB; furthermore, the 'Extending Coverage to Every Village' Project (a nationwide systematic project in China covering road, electricity, drinking water, telephone network, CATV network, Internet, etc. in rural areas) has enhanced the demand for STB in rural market.

From the perspective of market segment, bidirectional STB, high definition STB and IPTV STB are the development orientation of STB; however, more than 52% of the 170 million CATV users in China have not yet been transformed into digital users, as a result, cable digital STB will continue to play a dominating role in the coming years.

Up to the end of September 2010, Chinese cable digital TV users totaled 81.762 million, with a penetration rate of 45%; Chinese cable STB ownership reached 93.618 million; the total domestic shipment of cable STB increased by 4.331 million year on year to 21.438 million in the first three quarters of 2010, and will maintain stable growth in the future.

Regarding the cable digital STB, the brands that each enjoy over 10% market share include Digital Video Networks (DVN), Skyworth, Jiuzhou Electronic, Changhong, and Coship Electronics. Yinhe Electronics and Unionman Technology also hold relatively large market shares.

Regarding terrestrial STB, Shenzhen MTC, Mico Electric and E-TEK collectively take more than 50% of the domestic market.

Regarding satellite STB, the crack-down on illegal market by the State Administration of Radio Film and Television (SARFT) at the end of 2009 has further standardized the satellite STB market and provided those time-honored satellite STB enterprises with new development opportunities. Time-honored satellite STB manufacturers like Jiuzhou Electronic, Changhong, ShenZhou Electronic, and Hisense became the winners of the third public bidding of the “Extending Coverage to Every Village” project in August 2010.

And regarding IPTV STB, there are few professional manufacturers, because the Triple Play is still at the pilot stage. Currently, the market is mainly in the hands of such telecommunication enterprises as ZTE, UTStarcom and Hansun Technologies Inc.

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