

China Digital STB (Set-Top-Box) Market Report, 2006-2007



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This report presents the development of STB markets at China and abroad, and studies STB application market as well. It gives a detailed description of manufacturers (15 chip producers, 19 CA producers, 11 middleware producers, 8 ODMs and 50 STB producers) in China STB industry chain.

By technical progression, STB can be divided into cable STB, terrestrial STB, satellite STB and IP STB. But they have been increasingly integrated. And now the multi-mode STB integrated with cable, terrestrial, satellite and IP network functions has turned up in the market. Soon, STB will be even integrated with PVR and become home multimedia center.

The global sales of STB reached over 70 million sets in 2005, of which satellite STB still took 60%. Nevertheless, there will be not a remarkable market growth for satellite STB (similar to cable STB and terrestrial STB) in the future. It is noteworthy that IP STB market grows the fastest.

The rapidly whole move of Cable TV digitalization in China conduces to the sales of Cable TV STB. In 2004, the sales volume of cable STB stood only at 81,000 sets in mainland China. Then, the figure soared to 3.681 million sets in 2005 and 6.979 million sets in 2006. With the reconstruction of dual-way networks in cities across China in a couple of years, STB will be towards dual-way, high definition and expansibility. Compared to analog TV, the biggest merit of digital TV rests with the provision of value added functions. For profits, operators have to add more interactive programs, with which enhanced STB needs to be matched. As the whole move of TV digitalization draws to an end in more and more cities around China, there will be out of question a significant rise in the sales volume of enhanced STB. Now, the operation of cable digital TV runs well with the increasing number of payment digital TV subscriber. Forecast by ResearchInChina, the sales volume of cable digital STB will up to 25 million sets in mainland China by 2008.

China is one of main producers of STB and it has complete industry chain. Domestic STB producers are differently specialized in the production of low-end STB, dual-mode (cable & IP) STB and high-end (PVR function) STB.

Seen from the data in 2005, 70% of China-made STB (mainly DVB-S and DVB-T) were distributed abroad, and the sales volume exceeded 10 million sets. In 2006, there was a change in market situation, and the proportion for the domestic sale of China-made STB rose to 40%. Noticeably, cable STB accounted for 90% of Chinese STB market shares. Such trend will be obviously exposed in 2007.

Two trends will happen to STB chip industry in the future. One is 'being more professional'. Enterprises have to foster their own brands in segmented markets like IP STB and PVR STB. And the other is 'being integrated with multiple functions'. That is to say, it is required to integrate functions such as channel modulation, signal source decoding, video processing and CPU control of DTV receiving terminal into a single SoC chip. Based on market demand, SoC chip series with varied portfolio can be released in best season.

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