

China Digital TV Transmitter Market Report, 2012

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Abstracts

The analog-to-digital TV signal conversion in different countries around the world reached its peak after 2009, so did the digital television network construction. The United States plans to complete the conversion by 2012, and switch off all analog TV signals by 2015; Canada has roundly adopted digital signals since 2011; Japan also basically completed the conversion in 2011; South Korea plans to achieve total digitization of TV signals before the end of 2012. The year 2012 is also the deadline for EU's compulsory completion of digital TV signals.

China plans to shut down analog TV signals by 2015. However, many problems exist in the process of implementation. In China, the major force stimulating digital television market growth stems from the cable digital television market, with earlier commencement of digitization, mostly adopting European Standard DVB-C. Subject to the controversy on standard, the wireless television standard wasn't unified as DMB-T/H (GB 20600-2006) until August 2006. With respect to mobile devices, T-MMB was adopted as the national standard on April 3, 2008, but denied by the State Administration of Radio, Film and Television (SARFT) which has been actively promoting CMMB (China Mobile Multimedia Broadcasting) network construction. With investment in digital TV transmitter reaching approximately RMB600 million in 2010 and not less than RMB800 million in 2011, CMMB has become the major player with respect to signal coverage and user group.

In China, digital terrestrial television network has become a supplement to cable TV network. In 2008, the SARFT allocated free frequency point resources, and applied for RMB2.5 billion to purchase and set up digital TV transmitters, planning to realize national coverage of terrestrial digital television within 3-5 years. But the actual progress has been slow, merely RMB500 million was spent as of early 2011. At the beginning of 2012, SARFT once again issued a development plan, to specify the year 2020 as the deadline for terrestrial television signal digital conversion, and plan to complete the

construction of 2,474 major launching sites before February 2013.

In China, there are many digital TV transmitter enterprises, but the production is still concentrated in a few magnates. Tsinghua Tongfang, since absorbing the capacity of Beijing GigaMega Electronics Co., Ltd. and Anshan Broadcast & TV Equipment Group Corporation in early 21st century, has already become the country's largest radio and television transmitting equipment manufacturer, accounting for about 30% of the domestic digital TV transmitter market in 2011. Besides, Dalian Toshiba Broadcasting Systems Co., Ltd. (a joint venture between Dalian Daxian and Toshiba), Beijing BBEF Science & Technology Co., Ltd. and Chengdu Chengguang TV Equipment Co., Ltd. are all key suppliers of digital TV transmitters in China. In addition, through CMMB network construction, many network equipment providers such as Fujian Sunnada Communication Co., Ltd. and Sunwave Communications Co., Ltd. with close relationship with mobile operators have successively entered the field of digital TV transmitter, aiming to compete with traditional equipment providers in low-power digital TV transmitters.

China Digital TV Transmitter Market Report, 2012 of ResearchInChina primarily covers the followings:

Overall demand (and forecast) for digital TV transmitters in China;

Digital TV network development in China;

Major digital TV transmitter products of Chinese digital TV network;

Development of major digital TV transmitter suppliers in China.

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