

# Digital TV Industry Report (China)

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## Abstracts

Global digital TV industry develops rapidly, and digitalization becomes a trend. The number of digital TV users worldwide will grow at an annual rate of 30 percent from 2005 to 2009, rising from 11,720 in 2004 to 51,600 in 2009. Further, the world's digital TV market value will be up from USD 57 billion in 2004 to USD 104 billion in 2009.

Chinese market size of digital TV related equipment will hit at least RMB one trillion. The National Development and Reform Commission takes digital TV as one of the industries with production value of over RMB 100 billion. Significant progress has been made in the digitalization of television in China. Besides, Chinese Government has drafted the timetable for the conversion of digital TV, which is a key project during the 11th Five-Year Plan period.

The digitalization of cable TV in China has been in the stage of great promotion. According to the data released by the State Administration of Radio, Film and Television of the People's Republic of China on June 20th 2007, the number of cable digital TV users across China amounted to 12.6625 million at the end of 2006, up 218 percent compared to 2005 and up 1,200 percent compared to 2004. The revenue from digital pay TV hit RMB 523 million in 2006, a rise of 60 percent from the previous year. With the compulsory enforcement of the national digital TV terrestrial broadcasting standards on August 1st 2007, China's digital TV industry with its own intellectual property rights has been in the stage of widespread application.

The digital TV industry chain gets increasingly consummated. Network operator, equipment provider, content provider and digital TV user are the key role-players in digital TV industry chain. Of them, network operators are relatively well developed, and others have also made much progress. Now, the number of digital TV users is growing rapidly.

According to the forecast, the digital TV industry will develop from being in a vertical sense to being in a transverse way. With the official enforcement of digital TV terrestrial broadcasting standards of China, digital TV related companies will improve their competitiveness and influence in the fierce market competition, and the industry structure will be optimized then. Trans-regional trans-industry acquisitions and mergers will lay a sound foundation for the continuous development of the enterprises in digital TV industry where the expansion of digital TV users is focused. Network operators will keep a fast growth in the next few years since they are in the monopoly in some regions of China and have the closest relationship with digital TV users. Considering China's digital TV industry is in the primary stage of development, the report expounds investment prospect of the companies in four aspects including the influences of national policies, digital TV business progression of companies, profitability and growing momentum of companies, and development strategies of companies. Similarly, the report gives an analysis on investment risks in four aspects -- digital TV industry under the affect of national policies, sharp fluctuations, rapid growth of Telecom IPTV services, and the trend of digital TV competition in the future. The growth rate for the perfection of digital TV industry is likely behind that of the market demand.

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