

# Global and China Digital STB (Set-top Box) Market Report, 2008

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## Abstracts

This report outlined the global and China set-top box (STB) industry focus on technologies and application markets, as well as the chip manufacturers, CA manufacturers, middleware manufacturers, ODM and STB manufacturers.

Along with the fast deployment of Digital TV (DTV), the sales of STB also achieved a rapid growth. Standard-definition STBs with single receiving function cannot meet the demand as the constant development of various digital broadcasting technologies, such as IPTV, bi-directional wired DTV, ground DTV, and satellite TV. The sales of STB with multiple receiving modes and high-definition STB are growing rapidly.

In 2007, totally 140 million STBs were sold worldwide, the overall sales percentage of satellite STBs was 46%, and IP STB gained the highest sales growth with a figure of 4.53 million, increased by 77% comparing 2006.

In China, during the period of digital conversion of cable TV, most operators chose low-end STBs with basic functions in the virtue of cost efficiency due to the free given of STB to terminal users. In addition, some operators cut down the bidding price and delayed payment due to capital pressure, applying rather pressure on STB manufacturers.

However, along with the operation of HDTV, the requirements from terminal users begin upgrading and the market share of high-end STBs is gradually increasing. In 2007, The sales of HDTV STBs in china increased much compared with 2006. The demand on HDTV STBs in large cities like Beijing and Shanghai are both gradually growing. Not only HDTV STBs, but also PVR STBs is gradually accepted by the market.

By the end of December, 2007, China Ministry of Information Industry issued the standard for card separation of UTI, giving new incentives to STB market. In addition, the reformation of bi-directional networks for cable TV further stimulates the market demand on high-end STBs. In 2007, 19.73 million cable DTV STBs was sold in china, the overall sales percentage for free low-end STB, Single-direction enhanced STB, interactive STB and HDTV was 68%, 17%, 15% and 0.03% respectively.

China has become one of the major STB manufacturing bases in the world, with an integrated industrial chain. There are more than 300 STB manufactures in China. So far, low-end STBs still dominate China market and domestic manufacturers are having the largest cake in the market. Foreign manufacturers are restrained from China's DTV related policies and the scattered distribution of Chinese DTV operators. Several foreign manufacturers have withdrawn from China market.

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