

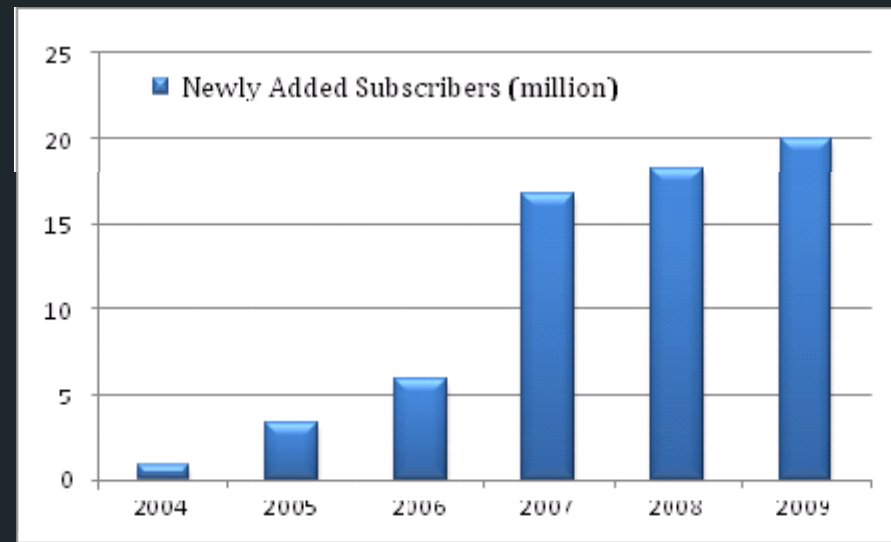
Global and China Digital STB (Set-top Box) Market Report, 2009



In 2009, the overall conversion to digital TV was completed in 177 cities across China, and the newly developed cable TV subscribers registered 19.9 million. Besides, the number of subscribers in satellite TV, terrestrial DTV and IPTV also witnessed rapid growth.

Due to good performance of digital STB market and optimistic estimation of manufacturers, the shipment of big manufacturers grew considerably in 2009 and the shipment of cable digital STB reached 23.4 million units in China, up 14% yr-on-yr. In addition, terrestrial digital STB and satellite digital STB rose 42.9% and 7.3% in shipment.

Newly Added Cable Digital TV Subscribers in China, 2004-2009



The State Administration of Radio Film And Television (SARFT) conducted the invitation of intenders for Satellite TV 'Village-to-Village' Project for two times respectively in 2008 and 2009, of which the first bid sum reached RMB1.295 billion and second bid sum RMB3 billion. Judging from successful bidding, Chinese digital STB market is still seized by Changhong, Hisense, Haier, Co-Ship and HASEE, and those manufacturers are successively in the R&D and promotion of two-way STB, PVR STB, dual-mode STB and 3D high-definition STB etc since low-end digital STB can not meet the customers' needs any longer.

In 2009, cable STB chip and satellite STB chip are the mainstream in the STB chip market. The market is well-developed relatively, and chip manufacturers are the ones from Taiwan and abroad. In the international terrestrial STB market, HDIC and LegendSilicon have some advantages. Such manufacturers in live satellite broadcast STB market are authorized to produce ABS-S based demodulation chips, as NationalChip and Availink etc.

In cable STB chip market, ST enjoys the biggest market share, but its market shares are increasingly seized by other chip suppliers such as Fujitsu, NEC, Zoran, NXP etc.

In satellite STB field in 2009, the key players in the chip market are ST, Conexant and Novatek etc from Taiwan and abroad as well as Haier from Mainland China. The code-lock STB chip targets mainly at American and European markets, and the code-unlock STB chip at Mainland China, Europe and the Middle East etc.

In terrestrial STB market, the entrants in DTMB demodulation chip are composed of LegendSilicon, HDIC, Maxscend, Trident and some IC manufacturers from Taiwan.

The report not only expounds the segmented markets of digital STB industry and the developments of STB markets at home and abroad, but elaborately analyzes the links of Chinese STB industry chain, including chip manufacturers, CA vendors, middleware, ODM and STB manufacturers.

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