China’s digital STB (set-top box) industry has ushered in a boom in market structure adjustment and further development since 2010. The convergence of radio & TV network, telecommunication network, and Internet has entered the pilot stage, which has fueled the upgrading of client-side STB; furthermore, the ‘Extending Coverage to Every Village’ Project (a nationwide systematic project in China covering road, electricity, drinking water, telephone network, CATV network, Internet, etc. in rural areas) has enhanced the demand for STB in rural market.
From the perspective of market segment, bidirectional STB, high definition STB and IPTV STB are the development orientation of STB; however, more than 52% of the 170 million CATV users in China have not yet been transformed into digital users, as a result, cable digital STB will continue to play a dominating role in the coming years.

Up to the end of September 2010, Chinese cable digital TV users totaled 81.762 million, with a penetration rate of 45%; Chinese cable STB ownership reached 93.618 million; the total domestic shipment of cable STB increased by 4.331 million year on year to 21.438 million in the first three quarters of 2010, and will maintain stable growth in the future.

Regarding the cable digital STB, the brands that each enjoy over 10% market share include Digital Video Networks (DVN), Skyworth, Jiuzhou Electronic, Changhong, and Coship Electronics. Yinhe Electronics and Unionman Technology also hold relatively large market shares.
Regarding terrestrial STB, Shenzhen MTC, Mico Electric and E-TEK collectively take more than 50% of the domestic market.

Regarding satellite STB, the crack-down on illegal market by the State Administration of Radio Film and Television (SARFT) at the end of 2009 has further standardized the satellite STB market and provided those time-honored satellite STB enterprises with new development opportunities. Time-honored satellite STB manufacturers like Jiuzhou Electronic, Changhong, ShenZhou Electronic, and Hisense became the winners of the third public bidding of the “Extending Coverage to Every Village” project in August 2010.

And regarding IPTV STB, there are few professional manufacturers, because the Triple Play is still at the pilot stage. Currently, the market is mainly in the hands of such telecommunication enterprises as ZTE, UTStarcom and Hansun Technologies Inc.
# Table of Contents

1. Digital STB Technology and Development
   - 1.1 Definition and Classification
   - 1.2 Key Technology
     - 1.2.1 Composition
     - 1.2.2 Technologies
     - 1.2.3 Technical Development Orientation
   - 1.3 Function
     - 1.3.1 Basic Function
     - 1.3.2 Development Trend

2. Overview of Digital STB Industry
   - 2.1 Overview of Chinese Digital TV
     - 2.1.1 Cable Digital TV
     - 2.1.2 Terrestrial Digital TV
     - 2.1.3 Satellite TV
     - 2.1.4 IPTV
   - 2.2 Industrial Chain
     - 2.2.1 Overview
     - 2.2.2 Profit Model

2.3 Market
   - 2.3.1 Cable STB
   - 2.3.2 Terrestrial STB
   - 2.3.3 Satellite STB
   - 2.3.4 IPTV STB
   - 2.3.5 High Definition STB

3. Major Manufacturers
   - 3.1 Shenzhen Coship Electronics Co., Ltd.
     - 3.1.1 Profile
     - 3.1.2 Operation
     - 3.1.3 Development Strategy and Outlook
   - 3.2 Shenzhen Skyworth Digital Technology Co., Ltd.
     - 3.2.1 Profile
     - 3.2.2 Operation
     - 3.2.3 Development Outlook and Strategy
   - 3.3 Sichuan Changhong Network Technologies Co., Ltd.
   - 3.4 Sichuan Jiuzhou Electronic Technology Co., Ltd.
3.5 Jiangsu Yinhe Electronics Co., Ltd.
• 3.5.1 Profile
• 3.5.2 Products
3.6 DVN Group
3.7 Unionman Technology Co., Ltd.
3.8 Hangzhou Motorola Technology Co., Ltd.
3.9 Tianjin Communication and Broadcasting Group Co., Ltd (TCB)
3.10 Guangdong Cosmic Digital Technology Co., Ltd.
3.11 Fujian Newland Communication Science & Technology Co., Ltd.
3.12 Fujian Shenzhou Electronic Co., Ltd.
3.13 Chongqing Konka
3.14 Shanghai DigiVision
3.15 TCL Technology Electronics Co., Ltd. (TCL AV Centre)
3.16 Hisense Broadband Multimedia Technology (HBMT)
3.17 Blossoms Digital Technology Co., Ltd.
3.18 Beijing Haier Information Technology Co., Ltd.
3.19 Panda Electronics Group Company Ltd.
3.20 Guangxi Daesang Information Technology Co., Ltd. (DSIT)
3.21 Shenzhen MTC Co., Ltd.
3.22 Mico Electric Technology Co., Ltd.
3.23 UTStarcom Co., Ltd.
3.24 ZTE Corporation
3.25 Hansun Technologies Inc.
3.26 Panasonic
3.27 Skyworth-Hightong
3.28 Chengdu Geeya Technology Co., Ltd.
3.29 Gospell Digital Technology Co., Ltd.
3.30 Fuzhou ZhuoYi Electronics Co., Ltd.
3.31 Dalian Daxian Network System Co. Ltd.
3.32 Shanghai DareGlobal Technologies Co., Ltd.
3.33 Fujian Tiancheng Electronics Sci&Tech Co., Ltd.
3.34 Beijing Tongfang Gigamega Technology Co., Ltd.
3.35 Chengdu Doyen Information Technology Co., Ltd.
3.36 Zhejiang BOXSAM Electronics Co., Ltd.
4. STB Chip and Solution Suppliers
• 4.1 STB Chip Market
  • 4.1.1 Cable STB Chip
  • 4.1.2 Terrestrial STB Chip
  • 4.1.3 Satellite STB Chip
• 4.2 STB Chip Manufacturers
  • 4.2.1 STMicroelectronics
  • 4.2.2 Fujitsu
  • 4.2.3 NEC Electronics
  • 4.2.4 Zoran Corporation
  • 4.2.5 Broadcom Corporation
  • 4.2.6 NXP Semiconductors
  • 4.2.7 Sunplus Technology Co., Ltd.
  • 4.2.8 Ali Corporation
  • 4.2.9 Novatek Microelectronics Corp., Ltd.
  • 4.2.10 Haier (Beijing) IC Design Co., Ltd.
  • 4.2.11 Shanghai High Definition Digital Technology Industrial Corporation (HDIC)
  • 4.2.12 Availink Inc.
  • 4.2.13 Hangzhou Nationalchip Science & Technology Co., Ltd.
  • 4.2.14 HiSilicon Technologies Co., Ltd.
  • 4.2.15 Montage Technology

5. CA Manufacturers
• 5.1 Overview of STB CA Market
• 5.2 Key Domestic Manufacturers
  • 5.2.1 Novel-SuperTV Digital TV Technology Co., Ltd.
  • 5.2.2 Beijing Sumavision Technologies Co., Ltd.
  • 5.2.3 Beijing Comunicate Technologies Inc.
  • 5.2.4 Shanghai Sanzhou Xunchi Digital Technology Co., Ltd.
  • 5.2.5 Sichuan Kingvon Electronic Technology Co., Ltd.

6. Key Middleware Suppliers
• 6.1 NDS
• 6.2 Shenzhen iPanel Technologies Ltd.
• 6.3 Shenzhen Advanced Video Info-Tech Co., Ltd.
• 6.4 Irdeto
Selected Charts

• Software and Hardware Environment of Digital STB
• Functions of STB
• Cable Digital TV User Scale in China, 2005-2010H1
• Digitalization Degree of CATV in China by Region, 2010
• User Quantity and Proportion of Chinese IPTV Operators, 2009
• IPTV User Quantity in China, 2004-2010E
• Digital STB Industrial Chain
• Present and Future Profit Models of Digital STB
• Global and China’s STB Shipment, 2003-2010E
• STB Ownership Structure in China by Type, 2007-2009
• China’s STB Shipment Percentage Structure by Type, 2007-2009
• Market Share of Cable STB Brands in China by Shipment, 2009
• Cable STB Shipment in China, Q1-Q3, 2008-2010
• Market Share of Cable STB Brands in China by Ownership, 2010
• Terrestrial STB Shipment by Market, 2007-2009
• Market Share of Terrestrial STB Brands by Ownership, 2010
• Bid Winners of SARFT ‘Extending Coverage to Every Village’ Phase I Project
• Bid Winners of SARFT ‘Extending Coverage to Every Village’ Phase II Project
• Chinese Cable STB Shipment: Unidirectional vs. Bidirectional, 2010
• Bidirectional Digital STB Shipment in China, 2009 vs. 2010
• Market Share of High Definition STB in China by Brand, 2009
• Market Share of High Definition STB in China by Brand, 2010
• Upstream & Downstream Partners of STB Products of Shenzhen Coship Electronics Co., Ltd.
• Operating Income and Total Profit of Blossoms Digital Technology Co., Ltd., 2007-2009E
• Operating Income and Total Profit of Guangxi Daesang, 2007-2009
• Operating Income, STB Business Revenue and Growth Rate of Shenzhen MTC Co., Ltd., 2007-2010H1
• Consolidated Gross Margin and STB Business Gross Margin of Shenzhen MTC Co., Ltd., 2007-2010H1
• Operating Income and Net Income of UTStarcom
• Broadband Network STB Products and Characteristics of ZTE Corporation
• Panasonic High Definition STB Product Specification
• Basic Data of Skyworth-Hightong
• STB Specification of Skyworth-Hightong
• Operating Income, Net Income and Growth of Chengdu Geeya Technology Co., Ltd., 2006-2010H1
• Operating Income of Chengdu Geeya Technology Co., Ltd. (by Product), 2010H1
• Operating Income and Total Profit of Gospell Digital Technology Co., Ltd., 2007-2009E
• Operating Income and Total Profit of Fuzhou ZhuoYi Electronics Co., Ltd., 2007-2009E
• Basic Data of Dalian Daxian Network System Co. Ltd.
• Operating Income and Total Profit of Shanghai DareGlobal Technologies Co., Ltd., 2007-2009E
• Operating Income and Total Profit of Fujian Tiancheng Electronics Sci&Tech Co., Ltd., 2007-2009E
• Operating Income and Total Profit of Beijing Tongfang Gigamega Technology Co., Ltd., 2007-2009E
• Operating Income of Doyen Information Technology Co., Ltd., 2008
• Operating Income and Total Profit of Zhejiang BOXSAM Electronics Co., Ltd., 2007-2009E
- Major Manufacturers of STB Chip in China
- STB Chip (SoC) Products of STMicroelectronics
- STB Solutions of STMicroelectronics
- Clients of STMicroelectronics
- STB Chip Products of Zoran
- Global Sales Proportion of NXP Semiconductors, 2009
- Operating Income and Total Profit of Haier (Beijing) IC Design Co., Ltd., 2007-2009
- Chip Products of HDIC
- Products of Hangzhou Nationalchip Science & Technology Co., Ltd.
- Operating Income and Total Profit of Hangzhou Nationalchip Science & Technology Co., Ltd., 2007-2009E
- STB Chips of HiSilicon Technologies Co., Ltd.
- CA Card Circulation in China, 2008H2-2010H1
- Operating Income and Net Income of Novel-SuperTV Digital TV Technology Co., Ltd., 2006-2010H1
- CA Smart Card Sales Volume of Beijing Sumavision Technologies Co., Ltd., 2007-2009
- Operating Income and Total Profit of Sichuan Kingvon Electronic Technology Co., Ltd., 2007-2009E
# How to Buy

<table>
<thead>
<tr>
<th>Product details</th>
<th>How to Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single user</td>
<td>By email: <a href="mailto:report@researchinchina.com">report@researchinchina.com</a></td>
</tr>
<tr>
<td>1,900 USD File</td>
<td>By fax: 86-10-82601570</td>
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<tr>
<td>Enterprisewide</td>
<td>By online: <a href="http://www.researchinchina.com">www.researchinchina.com</a></td>
</tr>
<tr>
<td>2,800 USD File</td>
<td></td>
</tr>
<tr>
<td>Publication date: Dec. 2010</td>
<td></td>
</tr>
</tbody>
</table>

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