



China Digital TV Transmitter Market Report, 2012

Oct. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include the State Administration of Radio, Film, and Television and the Ministry of Industry and Information Technology etc.

Abstract

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.

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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.

1. Introduction of Digital TV Transmitter

- 1.1 Definition
- 1.2 Product Characteristics
- 1.3 Key Equipment and Technical Indicators

2. Global Digital TV Transmitter Market

- 2.1 USA
- 2.2 Japan
- 2.3 Europe
- 2.4 Other Countries

3. China Digital TV Transmitter Market

- 3.1 Development Course
- 3.2 Market Scale Changes and Forecast
- 3.3 In-depth Market Analysis

4. Digital TV Transmitter Industrial Chain

- 4.1 Digital TV Market
- 4.2 CMMB
- 4.3 TV Media Industry

5. Key Players in China

- 5.1 Industrial Concentration Degree
- 5.2 Beijing Tongfang Gigamega Technology Co., Ltd.
 - 5.2.1 Profile
 - 5.2.2 Output
 - 5.2.3 Technology Features

5.3 Beijing BBEF Electronics Group Co., Ltd.

- 5.3.1 Profile
- 5.3.2 Output
- 5.3.3 Technologies

5.4 Dalian Toshiba Broadcasting Systems Co., Ltd.

- 5.4.1 Profile
- 5.4.2 Output
- 5.4.3 Technology Features

5.5 Rohde & Schwarz China Co., Ltd.

- 5.5.1 Profile
- 5.5.2 Output
- 5.5.3 Technology Features

5.6 Shanghai Mingzhu Broadcasting TV Science & Technology Co., Ltd.

- 5.6.1 Profile
- 5.6.2 Output
- 5.6.3 Technology Features

5.7 Fujian Sunnada Communication Co., Ltd.

- 5.7.1 Profile
- 5.7.2 Output

5.8 Allwin Telecommunication Co., Ltd.

- 5.8.1 Profile
- 5.8.2 Output

5.9 Sunwave Communications Co., Ltd.

- 5.9.1 Profile
- 5.9.2 Output

6. Industrial Standards and Relevant Policies

- 6.1 Standards
- 6.2 Policies
 - 6.2.1 Policies Regarding Digital TV Industry
 - 6.2.2 Policies Regarding Digital TV Transmitter

- Distribution of Global Digital TV Standards
- Output and Sales Volume of Digital TV Transmitter in China, 2008-2010
- Number of Television Broadcasting Transmitting Stations in China, 2006-2011
- China's Demand for Digital TV Transmitters, 2012-2016
- Digital TV Network Investment Structure
- Forecast of Urban Terrestrial TV Network Configuration in China, 2015E
- China's TV Transmitter Distribution, 2007 & 2009
- Distribution of TV Transmission Power in China, 2007 & 2009
- Overview of Broadcasting TV Transmission Devices in China, 2007 & 2009
- Number of Cable/Digital TV Subscribers in China, 2006-2011
- Television Population Coverage, 2004-2011
- CMMB Digital TV Transmitter Shipments, 2008-2010
- China's TV Channel Quantity and Telecast Time, 2004-2011
- China's Key TV Transmitter Producers and Their Products, 2009-2012
- Financial Results of Beijing Tongfang Gigamega Technology, 2007-2010
- Digital TV Business Revenue and Proportion of Beijing Tongfang Gigamega Technology, 2009-H1 2012
- Financial Results of Beijing BBEF Electronics Group, 2007-2009
- Financial Statement of Dalian Toshiba Broadcasting Systems, 2008-2009
- Financial Statement of Shanghai Mingzhu Broadcasting TV Science & Technology, 2007-2009
- Revenue Breakdown of Fujian Sunnada Communication by Products, 2007-2011
- Radio & TV Equipment Revenue of Fujian Sunnada Communication, 2012-2014E
- Revenue Breakdown of Allwin Telecommunication by Products, 2007-2011

- Radio & TV Product Revenue of Allwin Telecommunication, 2012-2014E
- Revenue Breakdown of Sunwave Communications by Products, 2007-2011
- Radio & TV Equipment Revenue of Sunwave Communications, 2012-2014E

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