

**China's Cable STB Update Report:  
HD STB Will Boom In 2012**

SKU: IN1004806CCM

Analysts: Michael Chang and Bloom Li

Michael.chang@instat.com.cn, Bloom.li@instat.com.cn

+1 86 10 66422042 267

April 2010

## Report Summary

---

2009 marked the sixth year of the digitization of cable TV in China. Cable subscribers numbered more than 163 million and digital cable subscribers accounted for about 40% of the total, reaching 65 million. While the whole system shift experienced steady growth, growth will be negative for basic STBs in coming years.

However, in China, a new potential market for HD STBs is blooming, prompting In-Stat to predict that shipments of HD STBs will reach more than 19 million by 2014, while revenues reach US\$1.3 billion during the same period.

This report examines the changes taking place as the market moves from SD to HD STBs, analyzes the main difficulties hindering the development of HD STBs and how these things will affect HD STBs' future development. Also, market trends and other detailed drivers/ barriers to the forecasts are provided in this report.

## **Table of Contents**

---

### **Executive Summary**

### **Definition**

### **Market Overview**

- Whole system shift update
- Two-way network reconstruction update
- STB shipment and market share
- HD STB shipment update

### **HD STB Value Chain Analysis**

### **Trends and Forecast**

- Trends
- Drivers and barriers
- Forecast

## List of Tables

---

- Slide 13. Chinese Total STB Vendor Market Shares 2009 (Units in Millions)
- Slide 16. Chinese Total HD STB Vendor Market Shares 2009 (Units in Thousands)
- Slide 19. The Main Channels for Distributing HD STB 2009 (Units in Thousands)

## List of Figures

---

- Slide 5: STB Shipment Forecast (Units in Millions)
- Slide 5: HD STB Revenue Forecast (US\$ in Millions)
- Slide 12. Chinese Total STB Vendor Market Shares 2009
- Slide 15. Chinese Vendor Market Shares for HD STBs in 2009
- Slide 18. The Main Channels for Distributing HD STB 2009
- Slide 38. Total Digital Cable STB Shipment Forecast—2009 to 2014 (Units in Millions)
- Slide 40. HDTV Subscriber Forecast (in Millions)
- Slide 42. HD STB Revenue (US\$ in Millions)