In-Stat **In-Depth Analysis**

Worldwide Blu-ray and DVD Player Semiconductors

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Executive Summary

The transition from DVD to Blu-ray players and recorders is creating a substantial opportunity for Blu-ray semiconductor companies. DVD players/recorders are projected to decline at a slow but steady rate as consumers opt for Blu-ray as replacement or upgrades in the primary television room. In-Stat expects this to translate into steadily declining DVD semiconductor shipments and revenues and significantly higher Blu-ray unit shipments coupled with higher Blu-ray semiconductor revenues.

Blu-ray player semiconductor content overtook DVD player semiconductor content for the first time in 2009 and is projected to account for �% of combined Blu-ray/DVD player semiconductor content revenues by 2013. The total available market (TAM) for worldwide semiconductor content in Blu-ray and DVD players will peak this year (2010), at $� billion, before flattening out.

HIGHLIGHTS

- Worldwide DVD player semi TAM declines from $� million in 2009 to $� million in 2013.
- Worldwide Blu-ray player semi TAM increases from $� million in 2009 to $� million in 2013.
- The semi bill-of-material (BOM) cost for Blu-ray players declines from $� in 2009 to $� in 2013.

Figure 1. Worldwide DVD and Blu-ray Semiconductor TAM (2008–2013), (US$ in Millions)

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Report Summary

The transition from DVD to Blu-ray players and recorders is creating an opportunity for semiconductor vendors. This report includes a Bill-of-Materials (BOM) for DVD and Blu-ray players. It also includes the Total Available Market (TAM) for DVD and Blu-ray player semiconductors. Silicon vendor market shares for 2008 as well as discussion of the major silicon vendors round out the report.

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Methodology

The topics covered in this report relate to DVD and next-generation blue-laser disc playback and recording devices that connect to TV sets, not PCs. This report, and the information presented in it, was developed with a combination of primary and secondary research techniques.

Research for this report consisted of the following:

- In-person phone and email interviews with manufacturers of DVD players, recorders, and their components.
- Analysis of DVD IC shipments.
- Analysis of product literature from vendors of DVD players, DVD recorders, and their components.
- Analysis of In-Stat's proprietary market information and verification with other industry analysts.
- Analysis of information reported in secondary sources, such as trade journals, newspapers, and magazines.

All numbers representing unit quantities are given in thousands, unless specifically noted otherwise. Revenue numbers are presented in US$ thousands, except in Figure 1, where they are presented in US$ millions. Note that some of the numbers in this report may not calculate exactly due to rounding. The numbers are calculated at a higher precision than shown.

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Related In-Stat Reports

#IN1004547ME *Worldwide Blu-Ray and DVD Player/Recorder Market*, January 2010
http://www.instat.com/catalog/mmcatalogue.asp?id=162#IN1004547ME

#IN0904544ME *DTV 2009: Declining Costs, Increasing Shipments, and Network Capability*, October 2009
http://www.instat.com/catalog/mmcatalogue.asp?id=162#IN0904544ME