The DTV semiconductor market continues to grow much faster every year compared to semiconductors for the overall CE market. Continuing adoption is expected for a wide range of advanced flat-panel TV technologies, including LED backlighting, 3-D, 240Hz frame rates, built-in cameras for Skype video chatting, Internet connectivity with Wi-Fi chipsets, Bluetooth, and RF4CE remote controls. DTV IC revenue exceeded $15.8 billion at the end of 2011—up nearly 8 percent from 2010 levels—with the TV semiconductor segment accounting for more than a quarter of total CE semiconductor revenues. Nonetheless, chip suppliers face steep pricing pressure following commoditization of the low-end TV market, along with weakness in the sales of premium television models. The dominance of Taiwanese chip suppliers MStar Semiconductor and MediaTek has also contributed to a flurry of exits among key suppliers, including the likes of Broadcom, Zoran and even Intel.

Understanding the DTV semiconductor space requires an in-depth model that examines both the broad-based market as well as regional variations and requirements. The IHS iSuppli Digital TV & STB Semiconductor Market Tracker serves as a valuable reference document every quarter, combining forecasts for television production by technology, screen size, and region with an evolving set of DTV BOM models, broken out by function to analyze the semiconductor opportunities available for this dynamic industry during the period under study. Included are more than 20 television types with varying levels of functionality, producing a realistic BOM model of the entire market, which is then used to generate the overall DTV semiconductor revenue opportunity.

Key Issues Addressed

- What is the size of the DTV market by technology, region, and screen size?
- What is the semiconductor content and revenue for more than 20 different DTV classifications?
- What is the expected adoption rate for new features such as Internet-enabled connectivity and wireless video in digital TVs?
- How are Internet access capabilities forcing connectivity changes in the TV?
- What is the Bill of Materials cost model for various DTVs?

Applicable To

- DTV/STB Semiconductor Manufacturers
  - Marketing
  - Market intelligence
  - Sales
  - Product Definition & Systems Engineers
- Consumer Electronics OEMs & ODMs
  - Marketing
  - Procurement
  - Product Definition & Systems Engineers
- Financial Community

Actualls and Forecast

Frequency, Time Period
- 5-year annual + 3-year rolling quarterly forecasts

Measures
- TV & STB semiconductor unit production & consumption volumes
- TV & STB semiconductor content and revenues
- Regional adoption of digital TV, units
- Regional TV manufacturing, units
- TV semiconductor vendors market share: Worldwide
- Video processor suppliers market share: Worldwide, North America, China
- Advanced features adoption rate (LED, multiformat decoder, wireless video)

Regions, Markets
- North America
- Western & Eastern Europe
- Middle East / Africa
- Japan
- China
- Asia-Pacific
- Latin America

Level of Detail
- By technology – CRT, LCD, PDP & RPTV
- By screen size
- By tuner functionality – analog, integrated digital tuner
- Sample block diagrams
- By semiconductor type

Technologies Covered
- Digital and analog TVs for all technology types (PDP, LCD, DLP, CRT)
- Digital set-top box semiconductors

Applications / Products Covered
- DTV & STB video processors
- Decoders/CODECs
- Tuners, demodulators
- MEMC, video scaling
- Connectivity

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Lead Analyst

Brian O’Rourke, Senior Principal Analyst

Brian is responsible for display electronics at IHS, including the Display Driver IC quarterly tracker and the Digital Television and Set-top Box semiconductor tracker products. In addition, he follows the markets for products with HDMI, DisplayPort and wireless video technologies.

Brian has 16 years of experience in high-technology market analysis and consulting, ranging up the value chain from semiconductors to devices to services. Previously, he worked at NPD In-Stat, where he covered numerous topics over 12 years, most recently as a principal analyst in wired and wireless device connectivity, including USB, HDMI, DisplayPort and Wi-Fi display. Prior to that, he was a senior analyst at Strategies Unlimited, a California-based market analysis firm where he specialized in optoelectronic semiconductor technologies. Brian also has experience in business development in the medical device industry.

Brian received a Bachelor of Arts in Economics from the University of California, Berkeley and a Master of Arts in History from the University of California, Santa Barbara.

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