

Digital TV Market Tracker

Boom to Follow Gloom? DTV Semi Rollercoaster Expected Until 2010

By Randy Lawson, Senior Analyst

Forecast

Frequency, Time Period

- 5-year annual + 3-year rolling quarterly forecasts

Measures

- TV Semiconductor unit volumes
- TV Semiconductor content and revenues
- Regional trend towards Digital TV, units
- Regional TV manufacturing, units
- Semiconductor vendors market shares

Regions, Markets

- North America
- Europe
- Middle East / Africa
- Japan
- China
- Asia Pacific
- Latin America

Detail Level

- By technology – CRT, LCD, PDP & RPTV
- By size
- By tuner functionality – Analog, Integrated Digital tuner
- Sample block diagrams
- By Semiconductor type

Technologies Covered

- DTV Video Processors
- Decoders/CODECs
- Tuners, Demodulators
- MEMC, Video scaling
- Connectivity

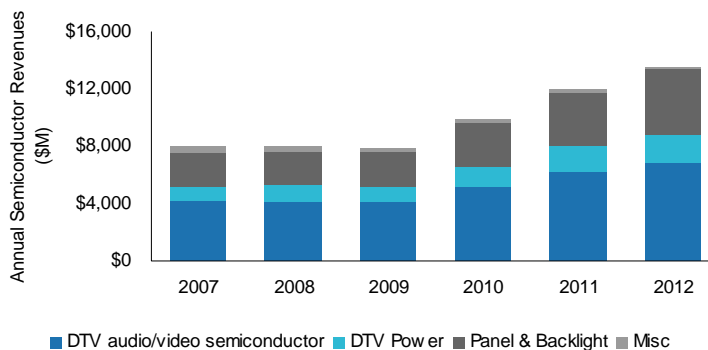
Applications/Products Covered

- Digital and Analog TVs of all technology types (PDP, LCD, DLP, CRT)

The worldwide transition to Digital TV broadcasting is gaining momentum and is offering growth potential to the DTV semiconductor market as it increases the complexity of the electronics. Advanced new technologies are also making their way into more TV sets, such as wireless HD connections, networking interfaces, multi-format decoders and solid state backlighting, all of which are helping to increase the average semiconductor content TV sets, even while growth rates for the systems themselves will slow throughout the forecast period. This continuous innovation to the displays and the underlying electronics, along with continued steep decline in retail pricing for new TV sets will help to contribute to healthy growth for the DTV semiconductor market.

Understanding the details of these markets, in which varying regional requirements, technologies, and screen sizes can impact the market potential, requires an in-depth market model. The Digital TV Semiconductors Market Tracker combines 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 opportunity in this dynamic market. The DTV market has been segmented into over 20 types of televisions with varying levels of functionality to generate a realistic BOM model of the entire market, which is then used to generate the overall DTV semiconductor revenue opportunity.

Semiconductor Revenue by Component for DTVs, 2007-2012



Critical Questions Answered

- What is the size of the DTV market by technology, region, and screen size?
- What is the semiconductor content and semiconductor revenue for over 20 different classifications of DTVs?
- What new features and applications are in development for DTV?
- What is the Bill of Material cost model for the various types of DTVs?
- Which semiconductor companies manufacture which types of devices?
- What is the regional trend for adoption of Digital tuners in TVs?

Who Should Read This?

- DTV semiconductor manufacturers
 - Marketing
 - Market intelligence
 - Sales
 - Product definition & systems engineers
- TV OEM & ODM manufacturers
 - Marketing
 - Procurement
 - Product definition & systems engineers
- Financial community

Lead Analyst

Randy Lawson, Senior Analyst

Randy comes to iSuppli with extensive industry experience in semiconductor design and applications for consumer electronics and DTV systems. He spent over 15 years with Texas Instruments in various engineering design, product definition and management roles. He began his career in display electronics design, afterwards moving to PC and CE connectivity applications and technical marketing. He has also been involved in both chip level and DTV systems design, helping lead teams that developed some of the first 1394 devices that supported DTCP content protection and high speed networking applications. Randy worked as a systems engineer on the recent Slim DLP program focused on both China and U.S. markets. His most recent role was as an engineering Program Manager with Texas Instruments DLP TV group.

Randy is an alumni of the University of Tennessee and holds a Bachelor of Science in Electrical Engineering.

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Appendix Table 2: Digital Terrestrial Television Systems by Region

Sample Database (continued)

Digital Television Shipments (000s) - CONSUMPTION

Digital Television Shipments (000s)

Semiconductor Content (\$)

Semiconductor Revenue (\$M)

Total DTV Semiconductors (\$M)

DTV ASSP Forecast

LCD TV LED BLU Forecast

Multi-std decoder forecast

DTV Power IC Forecast

DTV Company Listing

DTV Company Matrix

BOM

System BOM Costs

Display Processor Market Share

Customer Matrix for Major Display Processor Companies

DTV Systems Definitions

DTT Regional Systems

Regions Definition Note

Forecast Assumptions