

## China's Mobile TV Market: CMMB Takes Off in 2009

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### Report Summary

Following a year of hypothesizing and guesswork in 2007, the relative positions of China's mobile TV standards became clear in 2008. On the one hand, TMMB, one of China's home-grown mobile TV standards, defeated DMB-T/H and CDMB to become China's national mobile TV standard; on the other, the State Administration of Radio, Film and Television (SARFT) has strongly supported CMMB, and hence CMMB is considered the industry standard.

Due to its strong SARFT support, CMMB was chosen to launch as the standard for the Beijing Olympic Games in 2008, and has since rapidly developed its value chain and user base. Development of other mobile TV standards such as TMMB and DAB has been limited due to lack of support, and the analog mobile TV market has reached its peak and is will be outplayed by CMMB. Therefore, In-Stat believes that CMMB will dominate China's mobile TV market in 2009 and continue its fast growth during the forecast period.

This report introduces the market status for China's main mobile TV standards, examines in detail the development of CMMB in 2008 and the reasons for its success, provides an in-depth analysis of the CMMB value chain and business models, and outlines trends in the CMMB industry and market. Finally, this report provides forecasts for CMMB chipset shipments and revenue during the next five years.

### What's in the Report?

- Forecasts for China's mobile TV market
- CMMB chipset forecasts (units and revenues)
- The current status of China's mobile TV standards and their market trends
- An analysis of the outstanding development of CMMB in 2008
- An analysis of CMMB's advantages over its competitors
- An in-depth study of the CMMB value chain and business models

### HIGHLIGHTS

- China's mobile TV market made remarkable progress in 2008, gaining 4.5 million users by the end of the year.
- Of the various mobile TV standards, CMMB had the most remarkable launch in 2008. By the end of the year, it had gained more than one million users.
- In-Stat believes that CMMB will enter a period of rapid growth in 2009, will continue to grow during the forecast period, and will eventually dominate China's mobile TV market.
- In-Stat predicts that CMMB will serve more than 150 million mobile TV subscribers by 2013.

For more information or to purchase, see the [report online](#) or call 1.480.483.4441.

## Companies and Organizations Mentioned in this Report

- A-King
- Aigo
- Aisino
- Aocos
- Benephone
- Benss
- CEC
- ChangHong
- ChangHui
- China Mobile and Satellite Broadcasting Corporation (CMSBC)
- China Telecom
- China Unicom
- CMCC
- CoolPad
- Daxian
- Haier
- High Life
- HT Mobile
- HUAYU
- Innofidei
- JinPeng
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- Panasonic
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- Samsung
- Shinco
- SIANO
- Sony-Ericsson
- SpreadTrum
- T-Land
- Telepath
- ZTE
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## Who Will be Interested in This Report?

- Mobile TV chipset providers
- Mobile device manufacturers
- Mobile device channels
- Mobile TV content providers

## Whose Needs Does This Report Address?

- Mobile TV chipset providers
- Mobile device manufacturers
- Mobile TV content providers
- The financial community
- Investment organizations interested in the mobile TV market

**What Questions Does This Report Answer?**

- What is the future of China's mobile TV market?
- What is the current market size?
- Why is CMMB outplaying its competitors?
- What is the key in promoting CMMB?
- What are CMMB's business model and value chain?
- How big is CMMB's future market?

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## Methodologies

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Primary and secondary sources of information were used in this report and consist of the following:

- Secondary research on China's mobile market, various mobile TV standards, the CMMB value chain, and the roles played by different participants.
- Face-to-face or telephone interviews conducted with national and provincial SARFT operators to develop a clearer picture of the value chain.
- Face-to-face or telephone interviews conducted with mobile TV chipset provider to develop a deeper understanding of CMMB technology, distribution model, and chipset development.
- Face-to-face interviews with mobile device manufacturers to enhance understanding of CMMB market status and trends.

In-Stat conducted interviews with CMSBC, Lenovo, Panasonic, Nokia, Motorola, Benophon, ZTE, Innofidei, SIANO, MTK, and NagraVision.

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## Related In-Stat Reports

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- #IN0703901CWW *In-Depth Analysis: Handset Concerns May Block Boom in China's Mobile TV Market*, August 2007  
<http://www.instat.com/Abstract.asp?ID=279&SKU=IN0703901CWW>
- #IN0703490CWW *Mobile TV in China: Call for New Convergent End-Device*, November 2007  
<http://www.instat.com/Abstract.asp?ID=279&SKU=IN0703490CWW>
- #IN0804267CCM *China's Mobile TV Receiving Chipset Market: CMMB Outperforms Other Standards*, March 2008  
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