

## **Broadcast Equipment Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The broadcast equipment market is expected to register a CAGR of approximately 5.79% over the next five years. With consumers' shift from television to digital media, staying relevant in broadcast media is challenging but necessary for long-term viability. Broadcast television is evolving significantly, and there is a requirement to transform to stay relevant.

#### Key Highlights

Over the last few decades, consumers' demand for better-quality video and audio has rapidly upgraded broadcast equipment products and technology. With content being produced in UHD and 4K formats, transmission in the same format for improved viewing quality has led to IP live-production technology. This is significant for live production, where a premium is placed on flexible and efficient system control.

Technological advancement has further driven broadcasters to provide UHD output to their premium users, fueling the market growth. In addition, the increase in the number of digital channels and the growing adoption of advanced broadcasting equipment, with 8K video quality in sports coverage and 4K quality in news coverage, provide impetus to market growth.

The sports section is the biggest market for TV viewers worldwide, finding ways to deliver video content at scale. The increasing number of devices and formats presents several challenges for broadcasters, service providers, content owners, and rights holders. The rental sports broadcast equipment sector is another significant revenue generator for the broadcast equipment market. The increasing number of international sports tournaments drives the rental market for broadcast equipment.

The rapidly evolving nature of digital audio and video formats and the need for open, national, or international consensus standards for creating and preserving digital audio and video are challenging the market's growth. Standards for digital audio and video formats and compression methods are evolving with every new advancement in digital technology.

Notwithstanding the uncertainties of COVID-19, the market is well-positioned to benefit from an economic revival and the industry transition to IP and Cloud-based solutions. The industry has reached a stage where new habits and means of working have settled

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for most broadcast and media organizations. Cloud infrastructure is expected to support remote workflows and eliminate dependency on on-premises systems. For broadcasters, the pandemic has accelerated the adoption of distributed workflows for greater operational agility. Whether for remote production, remote collaboration, or remote operation, broadcast professionals leverage IP streaming technology to collaborate closely with their peers in real time.

## Broadcast Equipment Market Trends

### Encoders is Expected to Witness Significant Growth

Video encoders convert analog or digital video to another digital video format for delivery to a decoder. Video encoders input SDI as an uncompressed digital video signal into H.264 or HEVC for television broadcasting. These encoders are designed for ISR, and IPTV typically accepts analog composite video, SDI, or Ethernet, along with application-specific metadata, for transporting to different viewing or storage devices over a wireless or IP-based network viewing via computer monitors or for being captured by storage devices.

The purpose of encoding a video is to create a digital copy transmitted over the internet. Broadcasters can choose between a hardware or software encoder, depending on the purpose of the stream and the budget. Most professional broadcasters use hardware encoders, but due to the high price point, most beginner-level to mid-experienced broadcasters go with live streaming encoder software.

Hardware and software encoders function very similarly, as they both take RAW video files and convert them into digital files. Hardware encoding devices have the sole purpose of encoding, while software encoders work with a computer's operating system; thus, encoding is not the primary function. Software encoders have graphic interfaces to manage the conversion process and allow control over elements, such as bitrate and stream quality.

In January last year, Magewell launched its new Ultra Encode family of universal live media encoders, providing H.264, H.265, and NDI|HX encoding with multi-protocol support for a wide range of professional applications, live streaming, remote contribution to IP-based production, and AV-over-IP.

The adoption of high-definition content, the transition from analog to digital broadcasting, and easy access to on-demand content through OTT platforms contribute to increased demand for broadcast equipment. Furthermore, broadcasting platforms use video encoders to provide subscribers with improved video quality, driving the global market.

### Asia-Pacific is Expected to Witness the Highest Growth Rate

Asia-Pacific is home to some densely populated countries such as India and China. The region is one of the fastest adopters of technology with increasing high-speed internet penetration.

According to Cisco estimates, it is expected that the number of internet users (%) will reach 72% in the coming year. Additionally, broad average speeds are expected to reach 157.1 Mbps, fueling the market's growth.

Furthermore, according to a recent financial news portal learn bonds report, Asia accounts for half of the internet users worldwide. The region has about 2.3 billion internet users, with 50.3% of global internet penetration.

Countries such as Vietnam, Iran, Bhutan, and Bangladesh are showing the most significant mobile penetration gains, according to a GSMA report. The adoption of smart devices in the region is another factor creating the demand for high-definition videos and audio in the region. According to GSMA, 64% of the residents in APAC already have smartphones, and the adoption is expected to cross the 80% market by 2025.

Local vendors are also investing heavily to capitalize on the opportunities brought by the pandemic. For instance, in March last year, Signiant Inc. announced the acquisition of Kyno, which provides embedded media processing software. The acquisition helps

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Signiant Inc. extend the functionality of the Software-Defined Content Exchange (SDCX) SaaS platform, adding tools for interaction with media assets. With nearly one million users worldwide, the platform connects more than 50,000 Media & Entertainment companies of all sizes.

## Broadcast Equipment Market Competitor Analysis

The competitive rivalry between various firms in the broadcast equipment market depends on price, product, or market share, along with the intensity with which they compete. Some major market players include Cisco Systems Inc., Telefonaktiebolaget LM Ericsson, Harmonic Inc., Evs Broadcast Equipment Sa, and Grass Valley.

July 2022 - A new line of ATEM production switchers with a 3G-SDI connection was introduced by Blackmagic Design. With standards converters on all inputs, a built-in Fairlight audio mixer with six bands parametric EQ, compressors, and limiters on all inputs, internal DVEs, chroma keyers, and professional transitions, the new ATEM SDI series of switchers have been intended to be quick to set up and simple to operate. The ATEM SDI live production switcher could be ideal for broadcasters searching for highly portable and advanced professional functionality.

March 2022 - Telstra Broadcast Services chose Grass Valley for Stan Sport to broadcast premium live and on-demand add-on sports streaming. Stan Sport, with this support, can provide its members with UHD coverage of expensive live events, such as the UEFA Champions League.

### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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