

Television And Set Top Box - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Television And Set Top Box Market size in terms of shipment volume is expected to grow from 307.10 Million units in 2025 to 402.13 Million units by 2030, at a CAGR of 5.54% during the forecast period (2025-2030).

Key Highlights

- The growing demand for TV set-top boxes (STBs) is driven by several factors, including technological advancements, the rise of streaming services, and evolving consumer preferences. As the television viewing landscape transforms, the role of set-top boxes continues to expand, making them integral to modern home entertainment systems.
- Also, the integration of smart technology has revolutionized set-top boxes. Many set-top boxes now come equipped with operating systems such as Android TV or proprietary software that enables users to install apps, access streaming services, browse the internet, and even play games. This convergence of traditional TV and internet-based content into a single device has significantly boosted their appeal.
- The government regulations mandating the installation of set-top boxes, deployment of available OS-based devices by STB vendors, and analog switch-off transition in emerging countries are driving the demand for the STB market. For instance, the Government of India has made STBs compulsory through an amendment to the Cable Television Networks (Regulation) Act. STBs provide a better viewing experience because of digital signals and help prevent illegal channels from being broadcasted in India.
- Also, the rise in various technological innovations led to development a wide range of STBs with various innovative features. This, in turn, has made the competition fierce among the set-top box companies. Moreover, digital video recording is one of the most desired features, enabling viewers to watch and record their favorite shows.
- Additionally, the market is witnessing the integration of digital entertainment services and IPTV. For instance, in the second quarter of this year, Asia's first 4K RDK IPTV box provider Skyworth Digital announced that Bhimavaram Community Network (BCN), India's multi-system operator, had selected Skyworth Digital as the source of BCN's digital entertainment offerings.

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- Also, according to Conviva, streaming service has grown by 266% in the last three years and is expected that it will overtake the traditional TV in the coming years. Further, TV viewership continued to surge during the pandemic, as per the report published by Broadcast Audience Research Council of India (BARC India) which is a television viewership measurement agency. Such trends are further expected to act as catalysts for the growth of the studied market.
- In addition, tailored and on-demand content consumption is becoming more and more popular among consumers. The days of having to watch shows on set times are coming to an end. The freedom to watch what they want, when they want, and anywhere they want is preferred by modern viewers. In order to accommodate these choices, set-top boxes offer functions like time-shifted viewing, video-on-demand (VOD), and access to large content libraries.
- Also, the user experience is a crucial factor. Set-top boxes with intuitive interfaces, voice control, and advanced search capabilities make it easier for users to find and enjoy their favorite content. It also offers personalized recommendations based on viewing habits further enhance the user experience, making set-top boxes an attractive option for consumers.

Television And Set Top Box Market Trends

Satellite Technology is Expected to Witness Significant Market Growth

- Satellite television is one of the most significant applications of the set-top box market. One innovation in satellite TV is introducing a show-recording facility, which enables consumers to record their shows in real-time and watch them later at their convenience.
- Also, the satellite STB units are increasingly equipped with various interactive features, like video-on-demand, electronic program guides, etc. More advanced STB units also provide a suite of interactive and multimedia services directly through a user television system, such as internet browsing, email, instant messaging, and basic functionality.
- Further, many channels are unavailable through cable networks, and overseas programming can be transmitted via satellite technology. Customers looking for various viewing options, such as international channels, specialized sports programming, and exclusive entertainment, find this wide content selection appealing. Set-top boxes are also essential for accessing and using this vast content library. Also, with features like configurable channel lists, parental controls, and electronic program guides (EPGs), many companies offering STBs are launching products that make it simpler for users to locate and manage their preferred programs.
- Moreover, the growing demand for smart TVs is driving the demand for satellite based set top box. As consumer preferences shift towards more integrated and advanced entertainment systems, the demand for satellite set-top boxes is undergoing a transformation. As per the report by die medienanstalten, the share of smart tv among the users in Germany is continuously growing, as in 2018 the share of smart TV households was 31.9% which reached 59.0% in 2023. Such growing demand for smart TVs drives the market of satellite based TV set top box.

Asia Pacific to Hold Major Market Share

- The Asia-Pacific region is also one of the prominent regions in terms of technology adoption. Due to the market saturation of Pay-TV consumers and stiff competition, vendors in the Asia-Pacific region are constantly trying to add features to their Smart Android-based televisions, such as gateway abilities, security, applications, and HD functionality.
- Moreover, the supportive government regulations mandating the installation of set-top boxes in Asian countries are driving the growth of the Asia Pacific set-top box market. In May 2024, the government of India announced that it is launching its own OTT streaming platform that will focus on showcasing content that provides family-friendly entertainment suitable for all ages. Such new launches drives the demand for TV set top boxes in the country.

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- Additionally, the region's market is expanding due to the growing emphasis on higher-quality movies and potent technological interfaces and the nation's low production costs brought on by the availability of plentiful resources and labor. Companies such as Technicolor and others have been expanding their manufacturing capabilities in Asian countries such as India. Moreover, in the third quarter of last year, Tata Sky also unveiled its first batch of India-made set-top boxes. The set-top boxes were manufactured in partnership with Technicolor Connected Home and Flextronics.
- Further, the region has clearly seen the transition from cable to over-the-top (OTT). These platforms are growing significantly in many countries. According to Ministry of Information and Broadcasting, Government of India, there are 60 OTT platforms in India out of which around 30 percent of the OTT are operated in the regional language and is expected that it will go by 50 percent.

Television And Set Top Box Industry Overview

The TV Set Top Box Market is competitive and has several major players. However, many companies are increasing their market presence by securing new contracts and acquiring other companies. Key companies in the market include ARRIS International PLC, Intek Digital Inc., ZTE Corporation, Samsung Electronics Co. Ltd., and LG Electronics, which continuously innovate and seek market expansion through strategic mergers, acquisitions, and partnerships.

In summary, the set-top box market is evolving rapidly with technological innovations and shifting consumer behaviors favoring smart devices and on-demand content access. As manufacturers continue to enhance their offerings with AI capabilities and gaming integrations, the landscape will likely become increasingly competitive and diverse.

Additional Benefits:

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

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