

# Global Gesture Recognition for Smart TV Market Size study & Forecast, by Component (Software [2D & 3D Image Sensor] and Hardware [Image Sensor, IR Proximity Sensor, IR Temperature Sensor, Light Sensors, & Semiconductor ICs]) and Regional Forecasts 2025-2035

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## Abstracts

The Global Gesture Recognition for Smart TV Market is valued approximately at USD 21.58 billion in 2024 and is anticipated to grow with a robust CAGR of around 14.17% during the forecast period 2025–2035. Gesture recognition technology has redefined the way consumers interact with their smart devices, introducing a seamless bridge between human intention and digital response. In the context of smart televisions, gesture recognition leverages advanced sensors, infrared detection, and intelligent algorithms to translate physical movements into operational commands—eliminating the need for traditional remote controls. The technology enhances user convenience, accessibility, and engagement by enabling touchless control, intuitive navigation, and immersive multimedia experiences. The rapid evolution of AI and machine learning, combined with the increasing integration of Internet of Things (IoT) ecosystems within households, is driving the exponential adoption of gesture recognition in smart TVs. Additionally, surging consumer demand for contactless interfaces, particularly following the pandemic era, has further reinforced market momentum.

The rising adoption of smart homes and the proliferation of connected devices across urban households are major contributors to market growth. As consumers increasingly prioritize convenience and futuristic interfaces, television manufacturers are embedding gesture recognition technologies to elevate user interaction and differentiate their product lines. According to industry data, global smart TV shipments exceeded 260

million units in 2023, reflecting consumers' rapid transition toward intelligent home entertainment systems. Continuous innovations in sensor accuracy, depth mapping, and motion-tracking algorithms have made gesture interfaces more responsive and precise, resulting in widespread adoption among top-tier television brands. Moreover, the introduction of 3D sensing and AI-enabled motion detection has revolutionized in-home entertainment, offering personalized and interactive viewing experiences. However, the high cost of implementation and limited standardization across hardware components pose challenges that could temper widespread market penetration during the forecast period.

The detailed segments and sub-segments included in the report are:

By Component:

Software

2D & 3D Image Sensor

Hardware

Image Sensor

IR Proximity Sensor

IR Temperature Sensor

Light Sensors

Semiconductor ICs

By Region:

North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

### The Hardware Segment is Expected to Dominate the Market

The hardware segment is anticipated to hold the largest market share throughout the forecast period, primarily driven by the widespread use of sophisticated sensors and semiconductor ICs that enable precise motion detection and gesture-based control. With manufacturers constantly refining hardware components to deliver faster response times and higher accuracy, the segment continues to capture the lion's share of industry revenues. Image sensors, IR proximity detectors, and temperature sensors play pivotal roles in capturing real-time hand or body movements, ensuring fluid and reliable control mechanisms in smart TVs. Moreover, ongoing miniaturization of electronic components, coupled with cost optimization strategies by major manufacturers, has further strengthened the dominance of the hardware segment. The convergence of advanced sensing technology and AI-backed image processing is expected to sustain this segment's leadership throughout the projection period.

### Software Segment Leads in Revenue Contribution

From a revenue perspective, the software segment remains at the forefront due to its integral role in enhancing the intelligence and adaptability of gesture recognition systems. Modern smart TVs rely heavily on advanced algorithms that can interpret multidimensional inputs and translate them into specific commands in milliseconds. The rising adoption of AI and deep learning frameworks has empowered gesture recognition software to evolve beyond basic motion tracking—enabling predictive recognition, contextual response, and adaptive personalization. The 3D image sensing sub-segment is particularly gaining traction as it enhances spatial accuracy and depth perception, thereby enriching the immersive viewing experience. Consequently, while hardware forms the foundation of system functionality, software innovation dictates differentiation and consumer appeal, making it a key contributor to market growth.

The key regions considered for the Global Gesture Recognition for Smart TV Market

study include Asia Pacific, North America, Europe, Latin America, and the Middle East & Africa. North America held the dominant market share in 2025, owing to its early adoption of smart home technologies, the presence of major television manufacturers, and a tech-savvy consumer base that actively embraces intuitive user interfaces. Europe follows closely, driven by stringent regulations on energy efficiency and a growing focus on sustainable, contactless technology solutions. Meanwhile, Asia Pacific is projected to exhibit the fastest growth over the forecast period. The region's expansion is fueled by its vast population base, rapid urbanization, and surging disposable incomes in emerging economies such as China, India, and South Korea. Additionally, the proliferation of low-cost smart TVs integrated with gesture control and the expanding electronics manufacturing ecosystem in the region further underpin its high growth trajectory.

Major market players included in this report are:

Samsung Electronics Co., Ltd.

Sony Group Corporation

Apple Inc.

Intel Corporation

Microsoft Corporation

Google LLC

Qualcomm Technologies, Inc.

PointGrab Ltd.

eyeSight Technologies Ltd.

Panasonic Holdings Corporation

Infineon Technologies AG

Omron Corporation

SoftKinetic Systems S.A.

LG Electronics Inc.

MediaTek Inc.

## Global Gesture Recognition for Smart TV Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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