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Global 140DB HDR CMOS Image Sensor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 140DB HDR CMOS Image Sensor market size is expected to reach $ 18759 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).
In 2025, global 140DB HDR CMOS Image Sensor production reached approximately 2.83 billion Units, with an average global market price of around US$ 3.9 per unit.
A 140dB HDR CMOS Image Sensor is a CMOS image sensor with an ultra-high dynamic range of 140 decibels. It stands out in dealing with extreme light contrast scenarios. Unlike ordinary sensors that often have overexposed bright areas or underexposed dark areas, it can clearly retain details of both bright and dark parts of the image. It is currently mainly used in the automotive field.
The CMOS image sensor industry chain presents a vertical hierarchical structure with clear division of labor, spanning from upstream core material and equipment supply, midstream sensor design, manufacturing and packaging, to downstream application terminal integration. The industry has strong technical barriers, high concentration of leading enterprises, and close collaborative links between upstream and downstream links.
I. Upstream: Core Materials & Equipment (Technical Core, High Barriers)
The upstream segment provides the essential materials, equipment and intellectual property (IP) required for CIS design and manufacturing, and is the foundation of the entire industry chain. The market is dominated by a small number of international enterprises.
1. Core Materials
Semiconductor Wafer Substrate for CIS: chip manufacturing, the most critical material with the highest cost.
Photoresist: Key material for photolithography process, determines pixel precision.
Metal Target Material: Used for depositing metal wiring layers (e.g., copper, aluminum).

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Packaging Materials: Include lead frames, encapsulants, bonding wires, etc.

2. Manufacturing Equipment

The equipment accounts for a large proportion of CIS production costs, and the core links are monopolized by overseas enterprises:

Photolithography Machine: The core equipment for pixel pattern transfer, directly determines the pixel size and sensor resolution. The leading enterprise is ASML (EUV lithography machines are used for advanced process CIS).

Etching Equipment: Used for pattern processing of wafer layers, with representatives such as Applied Materials, Tokyo Electron (TEL).

Deposition Equipment: For film deposition of various material layers, leading manufacturers include Applied Materials, TEL.

Testing Equipment: Used for performance testing of CIS chips, such as Teradyne, Advantest.

3. IP & Design Tools

IP Authorization: Core technologies such as pixel structure (BSI/Stacked), global shutter, and HDR algorithms are mostly held by professional IP companies, such as ARM, Synopsys, Cadence.

EDA Tools: Essential for CIS circuit design, the market is monopolized by Synopsys, Cadence, and Mentor Graphics.

II. Midstream: CIS Design, Manufacturing & Packaging (Value Core, High Concentration)

The midstream is the core value link of the industry chain, covering three key links: chip design, wafer fabrication, and packaging and testing. The industry is divided into two business models: IDM (Integrated Device Manufacturer) and Fabless + Foundry + OSAT.

1. Chip Design (Fabless/IDM Design Division)

The link determines the technical route and performance parameters of CIS (e.g., pixel structure, resolution, dynamic range). It has high R&D investment and strong technical barriers, and the market concentration is extremely high.

IDM Mode Enterprises: Integrate design, manufacturing, packaging and testing, with strong technical strength. Representative enterprises: Sony Semiconductor Solutions, Samsung Electronics, OmniVision (partially self-manufactured).

Fabless Mode Enterprises: Focus on design, outsource manufacturing and packaging to third parties. Representative enterprises: On Semiconductor, SK Hynix, GalaxyCore.

2. Wafer Fabrication (Foundry)

It is responsible for manufacturing CIS chips according to the design scheme, and the advanced process (e.g., 45nm, 28nm) is the key to improving sensor performance.

Main Foundries: TSMC (the largest foundry, focusing on high-end stacked CIS), UMC, GlobalFoundries, SMIC (focusing on mid-to-low-end CIS process).

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IDM Self-Manufacturing Lines: Sony and Samsung have their own advanced wafer factories, which can realize the rapid iteration of proprietary technologies (e.g., Sony's Stacked CMOS).
3. Packaging and Testing (OSAT)
The link directly affects the reliability, size and heat dissipation performance of CIS, and the advanced packaging technology is the key to miniaturization and high performance.
Traditional Packaging: Includes wire bonding, encapsulation, etc., suitable for mid-to-low-end CIS, with manufacturers such as ASE Group, Amkor Technology.
Advanced Packaging: Flip-chip packaging (Flip Chip), wafer-level packaging (WLP), chip-scale packaging (CSP) are the mainstream, which can reduce the sensor size and improve the light sensitivity. Leading enterprises: ASE Group, Amkor, STATS ChipPAC.
Testing: Includes wafer testing (CP) and final testing (FT), to ensure the yield and performance consistency of CIS, with manufacturers such as Xcerra, Teradyne.
III. Downstream: Application Terminal Integration (Demand Core, Diversified Scenarios)
Downstream applications cover consumer electronics, automotive electronics, industrial detection, security monitoring, medical imaging and other fields. The demand of different scenarios drives the iteration of CIS technology, and the B2B field has become the main growth engine in recent years.
1. Consumer Electronics (Traditional Main Market, Gradual Saturation)
Application Scenarios: Smartphones (front and rear cameras), tablets, laptops, digital cameras, drones.
Demand Characteristics: Pursue high resolution (100MP+), small pixel size (0.7?m), stacked structure, but the market growth is slowing down with the saturation of smartphone shipments.
Key Customers: Apple, Samsung, Xiaomi, Huawei, DJI.
2. Automotive Electronics (Fastest Growing Track, High Barriers)
Application Scenarios: Vehicle-mounted cameras (front view, rear view, surround view, in-cabin monitoring), LiDAR supporting sensors, ADAS systems.
Demand Characteristics: Need to meet AEC-Q100 automotive-grade certification, with high requirements for high temperature resistance, anti-electromagnetic interference, high dynamic range (HDR > 120dB) and reliability. The single-vehicle CIS loading quantity can reach 8-16 units with the upgrade of autonomous driving.
Key Customers: Tesla, BYD, Volkswagen, Bosch, Continental.
3. Security Monitoring (Stable Demand, High Performance Requirements)
Application Scenarios: Network cameras (IPC), analog cameras, ball machines, video recorders (NVR).
Demand Characteristics: Emphasize low illumination imaging ability, wide dynamic range, and night vision effect. 4K high-definition and AI intelligent recognition are the main trends.

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Key Customers: Hikvision, Dahua Technology, Uniview.
4. Industrial & Medical Fields (High Profit Margin, Professional Demand)
Industrial Detection: Machine vision cameras, semiconductor detection equipment, barcode scanners, requiring global shutter, high frame rate (thousands of frames/second) and high precision. Key customers: Keyence, Cognex.
Medical Imaging: Endoscopes, dental imaging equipment, portable detectors, requiring high signal-to-noise ratio, low radiation and miniaturization. Key customers: Olympus, Fujifilm.
IV. Industry Chain Characteristics & Profit Distribution
Profit Concentration: The upstream equipment and midstream design links occupy the highest profit margin, while the downstream application terminal profit margin is relatively low.
Technical Synergy: The iteration of downstream application demand (e.g., automotive high dynamic range, industrial global shutter) drives the R&D of midstream design and upstream material and equipment technologies, forming a positive feedback loop.
Regional Concentration: The upstream and midstream high-end links are concentrated in Japan, South Korea, the United States and Taiwan of China; the downstream application market is dominated by China, which is the largest CIS consumer market in the world.
This report studies the global 140DB HDR CMOS Image Sensor production, demand, key manufacturers, and key regions.
This report is a detailed and comprehensive analysis of the world market for 140DB HDR CMOS Image Sensor and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 140DB HDR CMOS Image Sensor that contribute to its increasing demand across many markets.
Highlights and key features of the study
Global 140DB HDR CMOS Image Sensor total production and demand, 2021-2032, (K Units)
Global 140DB HDR CMOS Image Sensor total production value, 2021-2032, (USD Million)
Global 140DB HDR CMOS Image Sensor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)
Global 140DB HDR CMOS Image Sensor consumption by region & country, CAGR, 2021-2032 & (K Units)
U.S. VS China: 140DB HDR CMOS Image Sensor domestic production, consumption, key domestic manufacturers and share
Global 140DB HDR CMOS Image Sensor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

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Global 140DB HDR CMOS Image Sensor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
Global 140DB HDR CMOS Image Sensor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
This report profiles key players in the global 140DB HDR CMOS Image Sensor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Smartsens, ON Semi, OmniVision, Samsung, etc.
This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.
Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 140DB HDR CMOS Image Sensor market
Detailed Segmentation:
Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.
Global 140DB HDR CMOS Image Sensor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 140DB HDR CMOS Image Sensor Market, Segmentation by Type:

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Pixel Size: 2.1 ?m

Pixel Size: 3 ?m

Global 140DB HDR CMOS Image Sensor Market, Segmentation by Photosensitive Architecture:

Front Side Illuminated

Back Side Illuminated

Stacked CMOS Image Sensor

Global 140DB HDR CMOS Image Sensor Market, Segmentation by Shutter Type:

Rolling Shutter (RS)

Global Shutter (GS)

Global 140DB HDR CMOS Image Sensor Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

Smartsens

ON Semi

OmniVision

Samsung

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Key Questions Answered:

1. How big is the global 140DB HDR CMOS Image Sensor market?
2. What is the demand of the global 140DB HDR CMOS Image Sensor market?
3. What is the year over year growth of the global 140DB HDR CMOS Image Sensor market?
4. What is the production and production value of the global 140DB HDR CMOS Image Sensor market?
5. Who are the key producers in the global 140DB HDR CMOS Image Sensor market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 140DB HDR CMOS Image Sensor Introduction
1.2 World 140DB HDR CMOS Image Sensor Supply & Forecast
  1.2.1 World 140DB HDR CMOS Image Sensor Production Value (2021 & 2025 & 2032)
  1.2.2 World 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.2.3 World 140DB HDR CMOS Image Sensor Pricing Trends (2021-2032)
1.3 World 140DB HDR CMOS Image Sensor Production by Region (Based on Production Site)
  1.3.1 World 140DB HDR CMOS Image Sensor Production Value by Region (2021-2032)
  1.3.2 World 140DB HDR CMOS Image Sensor Production by Region (2021-2032)
  1.3.3 World 140DB HDR CMOS Image Sensor Average Price by Region (2021-2032)
  1.3.4 North America 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.3.5 Europe 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.3.6 China 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.3.7 Japan 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.3.8 South Korea 140DB HDR CMOS Image Sensor Production (2021-2032)
  1.3.9 China Taiwan 140DB HDR CMOS Image Sensor Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 140DB HDR CMOS Image Sensor Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 140DB HDR CMOS Image Sensor Major Market Trends

2 DEMAND SUMMARY

2.1 World 140DB HDR CMOS Image Sensor Demand (2021-2032)
2.2 World 140DB HDR CMOS Image Sensor Consumption by Region
  2.2.1 World 140DB HDR CMOS Image Sensor Consumption by Region (2021-2026)
  2.2.2 World 140DB HDR CMOS Image Sensor Consumption Forecast by Region (2027-2032)
2.3 United States 140DB HDR CMOS Image Sensor Consumption (2021-2032)
2.4 China 140DB HDR CMOS Image Sensor Consumption (2021-2032)
2.5 Europe 140DB HDR CMOS Image Sensor Consumption (2021-2032)
2.6 Japan 140DB HDR CMOS Image Sensor Consumption (2021-2032)
2.7 South Korea 140DB HDR CMOS Image Sensor Consumption (2021-2032)

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2.8 ASEAN 140DB HDR CMOS Image Sensor Consumption (2021-2032)
2.9 India 140DB HDR CMOS Image Sensor Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World 140DB HDR CMOS Image Sensor Production Value by Manufacturer (2021-2026)
3.2 World 140DB HDR CMOS Image Sensor Production by Manufacturer (2021-2026)
3.3 World 140DB HDR CMOS Image Sensor Average Price by Manufacturer (2021-2026)
3.4 140DB HDR CMOS Image Sensor Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global 140DB HDR CMOS Image Sensor Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for 140DB HDR CMOS Image Sensor in 2025
  3.5.3 Global Concentration Ratios (CR8) for 140DB HDR CMOS Image Sensor in 2025
3.6 140DB HDR CMOS Image Sensor Market: Overall Company Footprint Analysis
  3.6.1 140DB HDR CMOS Image Sensor Market: Region Footprint
  3.6.2 140DB HDR CMOS Image Sensor Market: Company Product Type Footprint
  3.6.3 140DB HDR CMOS Image Sensor Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: 140DB HDR CMOS Image Sensor Production Value Comparison
  4.1.1 United States VS China: 140DB HDR CMOS Image Sensor Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: 140DB HDR CMOS Image Sensor Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: 140DB HDR CMOS Image Sensor Production Comparison
  4.2.1 United States VS China: 140DB HDR CMOS Image Sensor Production

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Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: 140DB HDR CMOS Image Sensor Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: 140DB HDR CMOS Image Sensor Consumption Comparison
4.3.1 United States VS China: 140DB HDR CMOS Image Sensor Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: 140DB HDR CMOS Image Sensor Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based 140DB HDR CMOS Image Sensor Manufacturers and Market Share, 2021-2026
4.4.1 United States Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers 140DB HDR CMOS Image Sensor Production Value (2021-2026)
4.4.3 United States Based Manufacturers 140DB HDR CMOS Image Sensor Production (2021-2026)
4.5 China Based 140DB HDR CMOS Image Sensor Manufacturers and Market Share
4.5.1 China Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers 140DB HDR CMOS Image Sensor Production Value (2021-2026)
4.5.3 China Based Manufacturers 140DB HDR CMOS Image Sensor Production (2021-2026)
4.6 Rest of World Based 140DB HDR CMOS Image Sensor Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World 140DB HDR CMOS Image Sensor Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Pixel Size: 2.1 ?m

+357 96 030922
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5.2.2 Pixel Size: 3 ?m
5.3 Market Segment by Type
5.3.1 World 140DB HDR CMOS Image Sensor Production by Type (2021-2032)
5.3.2 World 140DB HDR CMOS Image Sensor Production Value by Type (2021-2032)
5.3.3 World 140DB HDR CMOS Image Sensor Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PHOTOSENSITIVE ARCHITECTURE

6.1 World 140DB HDR CMOS Image Sensor Market Size Overview by Photosensitive Architecture: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Photosensitive Architecture
6.2.1 Front Side Illuminated
6.2.2 Back Side Illuminated
6.2.3 Stacked CMOS Image Sensor
6.3 Market Segment by Photosensitive Architecture
6.3.1 World 140DB HDR CMOS Image Sensor Production by Photosensitive Architecture (2021-2032)
6.3.2 World 140DB HDR CMOS Image Sensor Production Value by Photosensitive Architecture (2021-2032)
6.3.3 World 140DB HDR CMOS Image Sensor Average Price by Photosensitive Architecture (2021-2032)

7 MARKET ANALYSIS BY SHUTTER TYPE

7.1 World 140DB HDR CMOS Image Sensor Market Size Overview by Shutter Type: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Shutter Type
7.2.1 Rolling Shutter (RS)
7.2.2 Global Shutter (GS)
7.3 Market Segment by Shutter Type
7.3.1 World 140DB HDR CMOS Image Sensor Production by Shutter Type (2021-2032)
7.3.2 World 140DB HDR CMOS Image Sensor Production Value by Shutter Type (2021-2032)
7.3.3 World 140DB HDR CMOS Image Sensor Average Price by Shutter Type (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

+357 96 030922
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8.1 World 140DB HDR CMOS Image Sensor Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Passenger Car
  8.2.2 Commercial Vehicle
8.3 Market Segment by Application
  8.3.1 World 140DB HDR CMOS Image Sensor Production by Application (2021-2032)
  8.3.2 World 140DB HDR CMOS Image Sensor Production Value by Application (2021-2032)
  8.3.3 World 140DB HDR CMOS Image Sensor Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Smartsens
  9.1.1 Smartsens Details
  9.1.2 Smartsens Major Business
  9.1.3 Smartsens 140DB HDR CMOS Image Sensor Product and Services
  9.1.4 Smartsens 140DB HDR CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
  9.1.5 Smartsens Recent Developments/Updates
  9.1.6 Smartsens Competitive Strengths & Weaknesses
9.2 ON Semi
  9.2.1 ON Semi Details
  9.2.2 ON Semi Major Business
  9.2.3 ON Semi 140DB HDR CMOS Image Sensor Product and Services
  9.2.4 ON Semi 140DB HDR CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
  9.2.5 ON Semi Recent Developments/Updates
  9.2.6 ON Semi Competitive Strengths & Weaknesses
9.3 OmniVision
  9.3.1 OmniVision Details
  9.3.2 OmniVision Major Business
  9.3.3 OmniVision 140DB HDR CMOS Image Sensor Product and Services
  9.3.4 OmniVision 140DB HDR CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
  9.3.5 OmniVision Recent Developments/Updates
  9.3.6 OmniVision Competitive Strengths & Weaknesses
9.4 Samsung

+357 96 030922
info@marketpublishers.com

9.4.1 Samsung Details
9.4.2 Samsung Major Business
9.4.3 Samsung 140DB HDR CMOS Image Sensor Product and Services
9.4.4 Samsung 140DB HDR CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Samsung Recent Developments/Updates
9.4.6 Samsung Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 140DB HDR CMOS Image Sensor Industry Chain
10.2 140DB HDR CMOS Image Sensor Upstream Analysis
10.2.1 140DB HDR CMOS Image Sensor Core Raw Materials
10.2.2 Main Manufacturers of 140DB HDR CMOS Image Sensor Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 140DB HDR CMOS Image Sensor Production Mode
10.6 140DB HDR CMOS Image Sensor Procurement Model
10.7 140DB HDR CMOS Image Sensor Industry Sales Model and Sales Channels
10.7.1 140DB HDR CMOS Image Sensor Sales Model
10.7.2 140DB HDR CMOS Image Sensor Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. World 140DB HDR CMOS Image Sensor Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World 140DB HDR CMOS Image Sensor Production Value by Region (2021-2026) & (USD Million)
Table 3. World 140DB HDR CMOS Image Sensor Production Value by Region (2027-2032) & (USD Million)
Table 4. World 140DB HDR CMOS Image Sensor Production Value Market Share by Region (2021-2026)
Table 5. World 140DB HDR CMOS Image Sensor Production Value Market Share by Region (2027-2032)
Table 6. World 140DB HDR CMOS Image Sensor Production by Region (2021-2026) & (K Units)
Table 7. World 140DB HDR CMOS Image Sensor Production by Region (2027-2032) & (K Units)
Table 8. World 140DB HDR CMOS Image Sensor Production Market Share by Region (2021-2026)
Table 9. World 140DB HDR CMOS Image Sensor Production Market Share by Region (2027-2032)
Table 10. World 140DB HDR CMOS Image Sensor Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World 140DB HDR CMOS Image Sensor Average Price by Region (2027-2032) & (US$/Unit)
Table 12. 140DB HDR CMOS Image Sensor Major Market Trends
Table 13. World 140DB HDR CMOS Image Sensor Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World 140DB HDR CMOS Image Sensor Consumption by Region (2021-2026) & (K Units)
Table 15. World 140DB HDR CMOS Image Sensor Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World 140DB HDR CMOS Image Sensor Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key 140DB HDR CMOS Image Sensor Producers in 2025
Table 18. World 140DB HDR CMOS Image Sensor Production by Manufacturer (2021-2026) & (K Units)

+357 96 030922
info@marketpublishers.com

Table 19. Production Market Share of Key 140DB HDR CMOS Image Sensor Producers in 2025
Table 20. World 140DB HDR CMOS Image Sensor Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global 140DB HDR CMOS Image Sensor Company Evaluation Quadrant
Table 22. World 140DB HDR CMOS Image Sensor Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and 140DB HDR CMOS Image Sensor Production Site of Key Manufacturer
Table 24. 140DB HDR CMOS Image Sensor Market: Company Product Type Footprint
Table 25. 140DB HDR CMOS Image Sensor Market: Company Product Application Footprint
Table 26. 140DB HDR CMOS Image Sensor Competitive Factors
Table 27. 140DB HDR CMOS Image Sensor New Entrant and Capacity Expansion Plans
Table 28. 140DB HDR CMOS Image Sensor Mergers & Acquisitions Activity
Table 29. United States VS China 140DB HDR CMOS Image Sensor Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China 140DB HDR CMOS Image Sensor Production Comparison, (2021 & 2025 & 2032) & (K Units)
Table 31. United States VS China 140DB HDR CMOS Image Sensor Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers 140DB HDR CMOS Image Sensor Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers 140DB HDR CMOS Image Sensor Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers 140DB HDR CMOS Image Sensor Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share (2021-2026)
Table 37. China Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers 140DB HDR CMOS Image Sensor Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers 140DB HDR CMOS Image Sensor Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers 140DB HDR CMOS Image Sensor Production,

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(2021-2026) & (K Units)
Table 41. China Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share (2021-2026)
Table 42. Rest of World Based 140DB HDR CMOS Image Sensor Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share (2021-2026)
Table 47. World 140DB HDR CMOS Image Sensor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World 140DB HDR CMOS Image Sensor Production by Type (2021-2026) & (K Units)
Table 49. World 140DB HDR CMOS Image Sensor Production by Type (2027-2032) & (K Units)
Table 50. World 140DB HDR CMOS Image Sensor Production Value by Type (2021-2026) & (USD Million)
Table 51. World 140DB HDR CMOS Image Sensor Production Value by Type (2027-2032) & (USD Million)
Table 52. World 140DB HDR CMOS Image Sensor Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World 140DB HDR CMOS Image Sensor Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World 140DB HDR CMOS Image Sensor Production Value by Photosensitive Architecture, (USD Million), 2021 & 2025 & 2032
Table 55. World 140DB HDR CMOS Image Sensor Production by Photosensitive Architecture (2021-2026) & (K Units)
Table 56. World 140DB HDR CMOS Image Sensor Production by Photosensitive Architecture (2027-2032) & (K Units)
Table 57. World 140DB HDR CMOS Image Sensor Production Value by Photosensitive Architecture (2021-2026) & (USD Million)
Table 58. World 140DB HDR CMOS Image Sensor Production Value by Photosensitive Architecture (2027-2032) & (USD Million)
Table 59. World 140DB HDR CMOS Image Sensor Average Price by Photosensitive Architecture (2021-2026) & (US$/Unit)

+357 96 030922
info@marketpublishers.com

Table 60. World 140DB HDR CMOS Image Sensor Average Price by Photosensitive Architecture (2027-2032) & (US$/Unit)
Table 61. World 140DB HDR CMOS Image Sensor Production Value by Shutter Type, (USD Million), 2021 & 2025 & 2032
Table 62. World 140DB HDR CMOS Image Sensor Production by Shutter Type (2021-2026) & (K Units)
Table 63. World 140DB HDR CMOS Image Sensor Production by Shutter Type (2027-2032) & (K Units)
Table 64. World 140DB HDR CMOS Image Sensor Production Value by Shutter Type (2021-2026) & (USD Million)
Table 65. World 140DB HDR CMOS Image Sensor Production Value by Shutter Type (2027-2032) & (USD Million)
Table 66. World 140DB HDR CMOS Image Sensor Average Price by Shutter Type (2021-2026) & (US$/Unit)
Table 67. World 140DB HDR CMOS Image Sensor Average Price by Shutter Type (2027-2032) & (US$/Unit)
Table 68. World 140DB HDR CMOS Image Sensor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World 140DB HDR CMOS Image Sensor Production by Application (2021-2026) & (K Units)
Table 70. World 140DB HDR CMOS Image Sensor Production by Application (2027-2032) & (K Units)
Table 71. World 140DB HDR CMOS Image Sensor Production Value by Application (2021-2026) & (USD Million)
Table 72. World 140DB HDR CMOS Image Sensor Production Value by Application (2027-2032) & (USD Million)
Table 73. World 140DB HDR CMOS Image Sensor Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World 140DB HDR CMOS Image Sensor Average Price by Application (2027-2032) & (US$/Unit)
Table 75. Smartsens Basic Information, Manufacturing Base and Competitors
Table 76. Smartsens Major Business
Table 77. Smartsens 140DB HDR CMOS Image Sensor Product and Services
Table 78. Smartsens 140DB HDR CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Smartsens Recent Developments/Updates
Table 80. Smartsens Competitive Strengths & Weaknesses
Table 81. ON Semi Basic Information, Manufacturing Base and Competitors

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Table 82. ON Semi Major Business
Table 83. ON Semi 140DB HDR CMOS Image Sensor Product and Services
Table 84. ON Semi 140DB HDR CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. ON Semi Recent Developments/Updates
Table 86. ON Semi Competitive Strengths & Weaknesses
Table 87. OmniVision Basic Information, Manufacturing Base and Competitors
Table 88. OmniVision Major Business
Table 89. OmniVision 140DB HDR CMOS Image Sensor Product and Services
Table 90. OmniVision 140DB HDR CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. OmniVision Recent Developments/Updates
Table 92. OmniVision Competitive Strengths & Weaknesses
Table 93. Samsung Basic Information, Manufacturing Base and Competitors
Table 94. Samsung Major Business
Table 95. Samsung 140DB HDR CMOS Image Sensor Product and Services
Table 96. Samsung 140DB HDR CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Samsung Recent Developments/Updates
Table 98. Samsung Competitive Strengths & Weaknesses
Table 99. Global Key Players of 140DB HDR CMOS Image Sensor Upstream (Raw Materials)
Table 100. Global 140DB HDR CMOS Image Sensor Typical Customers
Table 101. 140DB HDR CMOS Image Sensor Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. 140DB HDR CMOS Image Sensor Picture
Figure 2. World 140DB HDR CMOS Image Sensor Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World 140DB HDR CMOS Image Sensor Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 5. World 140DB HDR CMOS Image Sensor Average Price (2021-2032) & (US$/Unit)
Figure 6. World 140DB HDR CMOS Image Sensor Production Value Market Share by Region (2021-2032)
Figure 7. World 140DB HDR CMOS Image Sensor Production Market Share by Region (2021-2032)
Figure 8. North America 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 9. Europe 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 10. China 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 11. Japan 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 12. South Korea 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 13. China Taiwan 140DB HDR CMOS Image Sensor Production (2021-2032) & (K Units)
Figure 14. 140DB HDR CMOS Image Sensor Market Drivers
Figure 15. Factors Affecting Demand
Figure 16. World 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 17. World 140DB HDR CMOS Image Sensor Consumption Market Share by Region (2021-2032)
Figure 18. United States 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 19. China 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 20. Europe 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 21. Japan 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)

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Figure 22. South Korea 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 23. ASEAN 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 24. India 140DB HDR CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 25. Producer Shipments of 140DB HDR CMOS Image Sensor by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 26. Global Four-firm Concentration Ratios (CR4) for 140DB HDR CMOS Image Sensor Markets in 2025
Figure 27. Global Four-firm Concentration Ratios (CR8) for 140DB HDR CMOS Image Sensor Markets in 2025
Figure 28. United States VS China: 140DB HDR CMOS Image Sensor Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States VS China: 140DB HDR CMOS Image Sensor Production Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States VS China: 140DB HDR CMOS Image Sensor Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 31. United States Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share 2025
Figure 32. China Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share 2025
Figure 33. Rest of World Based Manufacturers 140DB HDR CMOS Image Sensor Production Market Share 2025
Figure 34. World 140DB HDR CMOS Image Sensor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 35. World 140DB HDR CMOS Image Sensor Production Value Market Share by Type in 2025
Figure 36. Pixel Size: 2.1 ?m
Figure 37. Pixel Size: 3 ?m
Figure 38. World 140DB HDR CMOS Image Sensor Production Market Share by Type (2021-2032)
Figure 39. World 140DB HDR CMOS Image Sensor Production Value Market Share by Type (2021-2032)
Figure 40. World 140DB HDR CMOS Image Sensor Average Price by Type (2021-2032) & (US$/Unit)
Figure 41. World 140DB HDR CMOS Image Sensor Production Value by Photosensitive Architecture, (USD Million), 2021 & 2025 & 2032
Figure 42. World 140DB HDR CMOS Image Sensor Production Value Market Share by

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Photosensitive Architecture in 2025
Figure 43. Front Side Illuminated
Figure 44. Back Side Illuminated
Figure 45. Stacked CMOS Image Sensor
Figure 46. World 140DB HDR CMOS Image Sensor Production Market Share by Photosensitive Architecture (2021-2032)
Figure 47. World 140DB HDR CMOS Image Sensor Production Value Market Share by Photosensitive Architecture (2021-2032)
Figure 48. World 140DB HDR CMOS Image Sensor Average Price by Photosensitive Architecture (2021-2032) & (US$/Unit)
Figure 49. World 140DB HDR CMOS Image Sensor Production Value by Shutter Type, (USD Million), 2021 & 2025 & 2032
Figure 50. World 140DB HDR CMOS Image Sensor Production Value Market Share by Shutter Type in 2025
Figure 51. Rolling Shutter (RS)
Figure 52. Global Shutter (GS)
Figure 53. World 140DB HDR CMOS Image Sensor Production Market Share by Shutter Type (2021-2032)
Figure 54. World 140DB HDR CMOS Image Sensor Production Value Market Share by Shutter Type (2021-2032)
Figure 55. World 140DB HDR CMOS Image Sensor Average Price by Shutter Type (2021-2032) & (US$/Unit)
Figure 56. World 140DB HDR CMOS Image Sensor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 57. World 140DB HDR CMOS Image Sensor Production Value Market Share by Application in 2025
Figure 58. Passenger Car
Figure 59. Commercial Vehicle
Figure 60. World 140DB HDR CMOS Image Sensor Production Market Share by Application (2021-2032)
Figure 61. World 140DB HDR CMOS Image Sensor Production Value Market Share by Application (2021-2032)
Figure 62. World 140DB HDR CMOS Image Sensor Average Price by Application (2021-2032) & (US$/Unit)
Figure 63. 140DB HDR CMOS Image Sensor Industry Chain
Figure 64. 140DB HDR CMOS Image Sensor Procurement Model
Figure 65. 140DB HDR CMOS Image Sensor Sales Model
Figure 66. 140DB HDR CMOS Image Sensor Sales Channels, Direct Sales, and Distribution

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Figure 67. Methodology
Figure 68. Research Process and Data Source

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