

Global CMOS and sCMOS Image Sensors Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CMOS and sCMOS Image Sensors market size is expected to reach \$ 45370 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

In 2024, global CMOS and sCMOS Image Sensors production reached approximately 7.85 billion Units, with an average global market price of around US\$ 2.84 per unit.

CMOS Image Sensor (CIS) and scientific CMOS (sCMOS) Image Sensor are two types of image-sensing devices based on complementary metal-oxide-semiconductor (CMOS) technology, but they target different application scenarios and have distinct performance characteristics.

CMOS Image Sensor (CIS) is a general-purpose semiconductor device that converts optical signals into electrical signals by using the photoelectric effect of CMOS transistors. It integrates pixel arrays, signal readout circuits, and signal processing modules on a single chip. Compared with traditional CCD (Charge-Coupled Device) sensors, CIS has simpler driving circuits, lower power consumption, and is more suitable for mass production, which reduces the manufacturing cost. It can integrate functions such as analog-to-digital conversion (ADC), automatic exposure control, and noise reduction on the chip, realizing a 'system-on-chip' solution. Different types of CIS can be customized according to application needs, such as high resolution for consumer electronics, high dynamic range (HDR) for security monitoring, and car-grade reliability for automotive electronics. Main Application ScenariosIt covers both consumer electronics and B2B industrial fields, including smartphones, security cameras, automotive cameras, industrial machine vision, and medical endoscopes. The mainstream technical architectures are Back-Side Illumination (BSI) and Stacked CMOS.

Scientific CMOS (sCMOS) Image Sensor is a high-performance variant of CMOS image sensors, specifically designed for scientific research and high-precision detection

scenarios. The term 'scientific' highlights its optimization for low noise, high sensitivity, and large dynamic range, filling the gap between traditional CMOS and scientific-grade CCD sensors. It adopts special pixel design (e.g., pinned photodiode structure) and noise suppression technology, with read noise as low as a few electrons (e^-), which can capture weak optical signals accurately. The dynamic range can reach 100 dB-120 dB, which can simultaneously capture both dim and bright areas in a scene without overexposure or underexposure. It has a high conversion rate of photons to electrons (up to 90% in some wavelength bands), which is suitable for low-light scientific experiments such as fluorescence microscopy. It balances high-speed data transmission and low noise, meeting the needs of real-time scientific observation. Global shutter support: All pixels are exposed and read out simultaneously, avoiding motion blur and ensuring the accuracy of fast-moving sample imaging (e.g., particle tracking in biological experiments).

Main Application Scenarios It is mainly used in professional scientific research and high-precision industrial testing, such as biological fluorescence microscopy, astronomical imaging, particle physics detection, high-resolution industrial defect detection, and medical pathological analysis.

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).

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).

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 μ 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.

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 CMOS and sCMOS Image Sensors production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CMOS and sCMOS Image Sensors 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 CMOS and sCMOS Image Sensors that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CMOS and sCMOS Image Sensors total production and demand, 2021-2032, (Million Units)

Global CMOS and sCMOS Image Sensors total production value, 2021-2032, (USD Million)

Global CMOS and sCMOS Image Sensors production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global CMOS and sCMOS Image Sensors consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: CMOS and sCMOS Image Sensors domestic production, consumption, key domestic manufacturers and share

Global CMOS and sCMOS Image Sensors production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global CMOS and sCMOS Image Sensors production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global CMOS and sCMOS Image Sensors production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global CMOS and sCMOS Image Sensors 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 SONY, Samsung, OmniVision, STMicroelectronics, On Semi, SK Hynix, GalaxyCore, Panasonic, Smartsens Technology, Canon, 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 CMOS and sCMOS Image Sensors market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million 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 CMOS and sCMOS Image Sensors Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CMOS and sCMOS Image Sensors Market, Segmentation by Type:

CMOS Image Sensor (CIS)

Scientific CMOS (SCMOS) Image Sensor

Global CMOS and sCMOS Image Sensors Market, Segmentation by Shutter Type:

Rolling Shutter, RS

Global Shutter, GS

Global CMOS and sCMOS Image Sensors Market, Segmentation by pixel size:

Small Pixel

Medium Pixel

Large Pixel

Global CMOS and sCMOS Image Sensors Market, Segmentation by Application:

Mobile

Automotive

Security

Industrial

Medical

Others

Companies Profiled:

SONY

Samsung

OmniVision

STMicroelectronics

On Semi

SK Hynix

GalaxyCore

Panasonic

Smartsens Technology

Canon

SOI

Teledyne Photometrics

Andor Technology

Hamamatsu Photonics

Sharp

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World CMOS and sCMOS Image Sensors Demand (2021-2032)
- 2.2 World CMOS and sCMOS Image Sensors Consumption by Region
 - 2.2.1 World CMOS and sCMOS Image Sensors Consumption by Region (2021-2026)
 - 2.2.2 World CMOS and sCMOS Image Sensors Consumption Forecast by Region (2027-2032)
- 2.3 United States CMOS and sCMOS Image Sensors Consumption (2021-2032)
- 2.4 China CMOS and sCMOS Image Sensors Consumption (2021-2032)
- 2.5 Europe CMOS and sCMOS Image Sensors Consumption (2021-2032)
- 2.6 Japan CMOS and sCMOS Image Sensors Consumption (2021-2032)
- 2.7 South Korea CMOS and sCMOS Image Sensors Consumption (2021-2032)
- 2.8 ASEAN CMOS and sCMOS Image Sensors Consumption (2021-2032)

2.9 India CMOS and sCMOS Image Sensors Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World CMOS and sCMOS Image Sensors Production Value by Manufacturer (2021-2026)

3.2 World CMOS and sCMOS Image Sensors Production by Manufacturer (2021-2026)

3.3 World CMOS and sCMOS Image Sensors Average Price by Manufacturer (2021-2026)

3.4 CMOS and sCMOS Image Sensors Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global CMOS and sCMOS Image Sensors Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for CMOS and sCMOS Image Sensors in 2025

3.5.3 Global Concentration Ratios (CR8) for CMOS and sCMOS Image Sensors in 2025

3.6 CMOS and sCMOS Image Sensors Market: Overall Company Footprint Analysis

3.6.1 CMOS and sCMOS Image Sensors Market: Region Footprint

3.6.2 CMOS and sCMOS Image Sensors Market: Company Product Type Footprint

3.6.3 CMOS and sCMOS Image Sensors 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: CMOS and sCMOS Image Sensors Production Value Comparison

4.1.1 United States VS China: CMOS and sCMOS Image Sensors Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: CMOS and sCMOS Image Sensors Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: CMOS and sCMOS Image Sensors Production Comparison

4.2.1 United States VS China: CMOS and sCMOS Image Sensors Production

Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: CMOS and sCMOS Image Sensors Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: CMOS and sCMOS Image Sensors Consumption Comparison

4.3.1 United States VS China: CMOS and sCMOS Image Sensors Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: CMOS and sCMOS Image Sensors Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based CMOS and sCMOS Image Sensors Manufacturers and Market Share, 2021-2026

4.4.1 United States Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers CMOS and sCMOS Image Sensors Production Value (2021-2026)

4.4.3 United States Based Manufacturers CMOS and sCMOS Image Sensors Production (2021-2026)

4.5 China Based CMOS and sCMOS Image Sensors Manufacturers and Market Share

4.5.1 China Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers CMOS and sCMOS Image Sensors Production Value (2021-2026)

4.5.3 China Based Manufacturers CMOS and sCMOS Image Sensors Production (2021-2026)

4.6 Rest of World Based CMOS and sCMOS Image Sensors Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World CMOS and sCMOS Image Sensors Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 CMOS Image Sensor (CIS)

5.2.2 Scientific CMOS (sCMOS) Image Sensor

5.3 Market Segment by Type

5.3.1 World CMOS and sCMOS Image Sensors Production by Type (2021-2032)

5.3.2 World CMOS and sCMOS Image Sensors Production Value by Type (2021-2032)

5.3.3 World CMOS and sCMOS Image Sensors Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY SHUTTER TYPE

6.1 World CMOS and sCMOS Image Sensors Market Size Overview by Shutter Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Shutter Type

6.2.1 Rolling Shutter, RS

6.2.2 Global Shutter, GS

6.3 Market Segment by Shutter Type

6.3.1 World CMOS and sCMOS Image Sensors Production by Shutter Type (2021-2032)

6.3.2 World CMOS and sCMOS Image Sensors Production Value by Shutter Type (2021-2032)

6.3.3 World CMOS and sCMOS Image Sensors Average Price by Shutter Type (2021-2032)

7 MARKET ANALYSIS BY PIXEL SIZE

7.1 World CMOS and sCMOS Image Sensors Market Size Overview by pixel size: 2021 VS 2025 VS 2032

7.2 Segment Introduction by pixel size

7.2.1 Small Pixel

7.2.2 Medium Pixel

7.2.3 Large Pixel

7.3 Market Segment by pixel size

7.3.1 World CMOS and sCMOS Image Sensors Production by pixel size (2021-2032)

7.3.2 World CMOS and sCMOS Image Sensors Production Value by pixel size (2021-2032)

7.3.3 World CMOS and sCMOS Image Sensors Average Price by pixel size (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World CMOS and sCMOS Image Sensors Market Size Overview by Application:
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Mobile

8.2.2 Automotive

8.2.3 Security

8.2.4 Industrial

8.2.5 Medical

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World CMOS and sCMOS Image Sensors Production by Application (2021-2032)

8.3.2 World CMOS and sCMOS Image Sensors Production Value by Application
(2021-2032)

8.3.3 World CMOS and sCMOS Image Sensors Average Price by Application
(2021-2032)

9 COMPANY PROFILES

9.1 SONY

9.1.1 SONY Details

9.1.2 SONY Major Business

9.1.3 SONY CMOS and sCMOS Image Sensors Product and Services

9.1.4 SONY CMOS and sCMOS Image Sensors Production, Price, Value, Gross
Margin and Market Share (2021-2026)

9.1.5 SONY Recent Developments/Updates

9.1.6 SONY Competitive Strengths & Weaknesses

9.2 Samsung

9.2.1 Samsung Details

9.2.2 Samsung Major Business

9.2.3 Samsung CMOS and sCMOS Image Sensors Product and Services

9.2.4 Samsung CMOS and sCMOS Image Sensors Production, Price, Value, Gross
Margin and Market Share (2021-2026)

9.2.5 Samsung Recent Developments/Updates

9.2.6 Samsung Competitive Strengths & Weaknesses

9.3 OmniVision

9.3.1 OmniVision Details

9.3.2 OmniVision Major Business

9.3.3 OmniVision CMOS and sCMOS Image Sensors Product and Services

9.3.4 OmniVision CMOS and sCMOS Image Sensors 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 STMicroelectronics

9.4.1 STMicroelectronics Details

9.4.2 STMicroelectronics Major Business

9.4.3 STMicroelectronics CMOS and sCMOS Image Sensors Product and Services

9.4.4 STMicroelectronics CMOS and sCMOS Image Sensors Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.4.5 STMicroelectronics Recent Developments/Updates

9.4.6 STMicroelectronics Competitive Strengths & Weaknesses

9.5 On Semi

9.5.1 On Semi Details

9.5.2 On Semi Major Business

9.5.3 On Semi CMOS and sCMOS Image Sensors Product and Services

9.5.4 On Semi CMOS and sCMOS Image Sensors Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.5.5 On Semi Recent Developments/Updates

9.5.6 On Semi Competitive Strengths & Weaknesses

9.6 SK Hynix

9.6.1 SK Hynix Details

9.6.2 SK Hynix Major Business

9.6.3 SK Hynix CMOS and sCMOS Image Sensors Product and Services

9.6.4 SK Hynix CMOS and sCMOS Image Sensors Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.6.5 SK Hynix Recent Developments/Updates

9.6.6 SK Hynix Competitive Strengths & Weaknesses

9.7 GalaxyCore

9.7.1 GalaxyCore Details

9.7.2 GalaxyCore Major Business

9.7.3 GalaxyCore CMOS and sCMOS Image Sensors Product and Services

9.7.4 GalaxyCore CMOS and sCMOS Image Sensors Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.7.5 GalaxyCore Recent Developments/Updates

9.7.6 GalaxyCore Competitive Strengths & Weaknesses

9.8 Panasonic

9.8.1 Panasonic Details

9.8.2 Panasonic Major Business

9.8.3 Panasonic CMOS and sCMOS Image Sensors Product and Services

9.8.4 Panasonic CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Panasonic Recent Developments/Updates

9.8.6 Panasonic Competitive Strengths & Weaknesses

9.9 Smartsens Technology

9.9.1 Smartsens Technology Details

9.9.2 Smartsens Technology Major Business

9.9.3 Smartsens Technology CMOS and sCMOS Image Sensors Product and Services

9.9.4 Smartsens Technology CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Smartsens Technology Recent Developments/Updates

9.9.6 Smartsens Technology Competitive Strengths & Weaknesses

9.10 Canon

9.10.1 Canon Details

9.10.2 Canon Major Business

9.10.3 Canon CMOS and sCMOS Image Sensors Product and Services

9.10.4 Canon CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Canon Recent Developments/Updates

9.10.6 Canon Competitive Strengths & Weaknesses

9.11 SOI

9.11.1 SOI Details

9.11.2 SOI Major Business

9.11.3 SOI CMOS and sCMOS Image Sensors Product and Services

9.11.4 SOI CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 SOI Recent Developments/Updates

9.11.6 SOI Competitive Strengths & Weaknesses

9.12 Teledyne Photometrics

9.12.1 Teledyne Photometrics Details

9.12.2 Teledyne Photometrics Major Business

9.12.3 Teledyne Photometrics CMOS and sCMOS Image Sensors Product and Services

9.12.4 Teledyne Photometrics CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Teledyne Photometrics Recent Developments/Updates

9.12.6 Teledyne Photometrics Competitive Strengths & Weaknesses

9.13 Andor Technology

- 9.13.1 Andor Technology Details
- 9.13.2 Andor Technology Major Business
- 9.13.3 Andor Technology CMOS and sCMOS Image Sensors Product and Services
- 9.13.4 Andor Technology CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.13.5 Andor Technology Recent Developments/Updates
- 9.13.6 Andor Technology Competitive Strengths & Weaknesses
- 9.14 Hamamatsu Photonics
 - 9.14.1 Hamamatsu Photonics Details
 - 9.14.2 Hamamatsu Photonics Major Business
 - 9.14.3 Hamamatsu Photonics CMOS and sCMOS Image Sensors Product and Services
 - 9.14.4 Hamamatsu Photonics CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Hamamatsu Photonics Recent Developments/Updates
 - 9.14.6 Hamamatsu Photonics Competitive Strengths & Weaknesses
- 9.15 Sharp
 - 9.15.1 Sharp Details
 - 9.15.2 Sharp Major Business
 - 9.15.3 Sharp CMOS and sCMOS Image Sensors Product and Services
 - 9.15.4 Sharp CMOS and sCMOS Image Sensors Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Sharp Recent Developments/Updates
 - 9.15.6 Sharp Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

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

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

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

Table 19. Production Market Share of Key CMOS and sCMOS Image Sensors Producers in 2025

Table 20. World CMOS and sCMOS Image Sensors Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global CMOS and sCMOS Image Sensors Company Evaluation Quadrant

Table 22. World CMOS and sCMOS Image Sensors Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and CMOS and sCMOS Image Sensors Production Site of Key Manufacturer

Table 24. CMOS and sCMOS Image Sensors Market: Company Product Type Footprint

Table 25. CMOS and sCMOS Image Sensors Market: Company Product Application Footprint

Table 26. CMOS and sCMOS Image Sensors Competitive Factors

Table 27. CMOS and sCMOS Image Sensors New Entrant and Capacity Expansion Plans

Table 28. CMOS and sCMOS Image Sensors Mergers & Acquisitions Activity

Table 29. United States VS China CMOS and sCMOS Image Sensors Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China CMOS and sCMOS Image Sensors Production Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 31. United States VS China CMOS and sCMOS Image Sensors Consumption Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 32. United States Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers CMOS and sCMOS Image Sensors Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers CMOS and sCMOS Image Sensors Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers CMOS and sCMOS Image Sensors Production (2021-2026) & (Million Units)

Table 36. United States Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share (2021-2026)

Table 37. China Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers CMOS and sCMOS Image Sensors Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers CMOS and sCMOS Image Sensors Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers CMOS and sCMOS Image Sensors Production,

(2021-2026) & (Million Units)

Table 41. China Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share (2021-2026)

Table 42. Rest of World Based CMOS and sCMOS Image Sensors Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production, (2021-2026) & (Million Units)

Table 46. Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share (2021-2026)

Table 47. World CMOS and sCMOS Image Sensors Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World CMOS and sCMOS Image Sensors Production by Type (2021-2026) & (Million Units)

Table 49. World CMOS and sCMOS Image Sensors Production by Type (2027-2032) & (Million Units)

Table 50. World CMOS and sCMOS Image Sensors Production Value by Type (2021-2026) & (USD Million)

Table 51. World CMOS and sCMOS Image Sensors Production Value by Type (2027-2032) & (USD Million)

Table 52. World CMOS and sCMOS Image Sensors Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World CMOS and sCMOS Image Sensors Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World CMOS and sCMOS Image Sensors Production Value by Shutter Type, (USD Million), 2021 & 2025 & 2032

Table 55. World CMOS and sCMOS Image Sensors Production by Shutter Type (2021-2026) & (Million Units)

Table 56. World CMOS and sCMOS Image Sensors Production by Shutter Type (2027-2032) & (Million Units)

Table 57. World CMOS and sCMOS Image Sensors Production Value by Shutter Type (2021-2026) & (USD Million)

Table 58. World CMOS and sCMOS Image Sensors Production Value by Shutter Type (2027-2032) & (USD Million)

Table 59. World CMOS and sCMOS Image Sensors Average Price by Shutter Type (2021-2026) & (US\$/Unit)

Table 60. World CMOS and sCMOS Image Sensors Average Price by Shutter Type (2027-2032) & (US\$/Unit)

Table 61. World CMOS and sCMOS Image Sensors Production Value by pixel size, (USD Million), 2021 & 2025 & 2032

Table 62. World CMOS and sCMOS Image Sensors Production by pixel size (2021-2026) & (Million Units)

Table 63. World CMOS and sCMOS Image Sensors Production by pixel size (2027-2032) & (Million Units)

Table 64. World CMOS and sCMOS Image Sensors Production Value by pixel size (2021-2026) & (USD Million)

Table 65. World CMOS and sCMOS Image Sensors Production Value by pixel size (2027-2032) & (USD Million)

Table 66. World CMOS and sCMOS Image Sensors Average Price by pixel size (2021-2026) & (US\$/Unit)

Table 67. World CMOS and sCMOS Image Sensors Average Price by pixel size (2027-2032) & (US\$/Unit)

Table 68. World CMOS and sCMOS Image Sensors Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World CMOS and sCMOS Image Sensors Production by Application (2021-2026) & (Million Units)

Table 70. World CMOS and sCMOS Image Sensors Production by Application (2027-2032) & (Million Units)

Table 71. World CMOS and sCMOS Image Sensors Production Value by Application (2021-2026) & (USD Million)

Table 72. World CMOS and sCMOS Image Sensors Production Value by Application (2027-2032) & (USD Million)

Table 73. World CMOS and sCMOS Image Sensors Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World CMOS and sCMOS Image Sensors Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. SONY Basic Information, Manufacturing Base and Competitors

Table 76. SONY Major Business

Table 77. SONY CMOS and sCMOS Image Sensors Product and Services

Table 78. SONY CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. SONY Recent Developments/Updates

Table 80. SONY Competitive Strengths & Weaknesses

Table 81. Samsung Basic Information, Manufacturing Base and Competitors

Table 82. Samsung Major Business

Table 83. Samsung CMOS and sCMOS Image Sensors Product and Services

Table 84. Samsung CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Samsung Recent Developments/Updates

Table 86. Samsung Competitive Strengths & Weaknesses

Table 87. OmniVision Basic Information, Manufacturing Base and Competitors

Table 88. OmniVision Major Business

Table 89. OmniVision CMOS and sCMOS Image Sensors Product and Services

Table 90. OmniVision CMOS and sCMOS Image Sensors Production (Million 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. STMicroelectronics Basic Information, Manufacturing Base and Competitors

Table 94. STMicroelectronics Major Business

Table 95. STMicroelectronics CMOS and sCMOS Image Sensors Product and Services

Table 96. STMicroelectronics CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. STMicroelectronics Recent Developments/Updates

Table 98. STMicroelectronics Competitive Strengths & Weaknesses

Table 99. On Semi Basic Information, Manufacturing Base and Competitors

Table 100. On Semi Major Business

Table 101. On Semi CMOS and sCMOS Image Sensors Product and Services

Table 102. On Semi CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. On Semi Recent Developments/Updates

Table 104. On Semi Competitive Strengths & Weaknesses

Table 105. SK Hynix Basic Information, Manufacturing Base and Competitors

Table 106. SK Hynix Major Business

Table 107. SK Hynix CMOS and sCMOS Image Sensors Product and Services

Table 108. SK Hynix CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SK Hynix Recent Developments/Updates

Table 110. SK Hynix Competitive Strengths & Weaknesses

Table 111. GalaxyCore Basic Information, Manufacturing Base and Competitors

Table 112. GalaxyCore Major Business

Table 113. GalaxyCore CMOS and sCMOS Image Sensors Product and Services

Table 114. GalaxyCore CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. GalaxyCore Recent Developments/Updates

Table 116. GalaxyCore Competitive Strengths & Weaknesses

Table 117. Panasonic Basic Information, Manufacturing Base and Competitors

Table 118. Panasonic Major Business

Table 119. Panasonic CMOS and sCMOS Image Sensors Product and Services

Table 120. Panasonic CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Panasonic Recent Developments/Updates

Table 122. Panasonic Competitive Strengths & Weaknesses

Table 123. Smartsens Technology Basic Information, Manufacturing Base and Competitors

Table 124. Smartsens Technology Major Business

Table 125. Smartsens Technology CMOS and sCMOS Image Sensors Product and Services

Table 126. Smartsens Technology CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Smartsens Technology Recent Developments/Updates

Table 128. Smartsens Technology Competitive Strengths & Weaknesses

Table 129. Canon Basic Information, Manufacturing Base and Competitors

Table 130. Canon Major Business

Table 131. Canon CMOS and sCMOS Image Sensors Product and Services

Table 132. Canon CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Canon Recent Developments/Updates

Table 134. Canon Competitive Strengths & Weaknesses

Table 135. SOI Basic Information, Manufacturing Base and Competitors

Table 136. SOI Major Business

Table 137. SOI CMOS and sCMOS Image Sensors Product and Services

Table 138. SOI CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 139. SOI Recent Developments/Updates

Table 140. SOI Competitive Strengths & Weaknesses

Table 141. Teledyne Photometrics Basic Information, Manufacturing Base and Competitors

Table 142. Teledyne Photometrics Major Business

Table 143. Teledyne Photometrics CMOS and sCMOS Image Sensors Product and Services

Table 144. Teledyne Photometrics CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Teledyne Photometrics Recent Developments/Updates

Table 146. Teledyne Photometrics Competitive Strengths & Weaknesses

Table 147. Andor Technology Basic Information, Manufacturing Base and Competitors

Table 148. Andor Technology Major Business

Table 149. Andor Technology CMOS and sCMOS Image Sensors Product and Services

Table 150. Andor Technology CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Andor Technology Recent Developments/Updates

Table 152. Andor Technology Competitive Strengths & Weaknesses

Table 153. Hamamatsu Photonics Basic Information, Manufacturing Base and Competitors

Table 154. Hamamatsu Photonics Major Business

Table 155. Hamamatsu Photonics CMOS and sCMOS Image Sensors Product and Services

Table 156. Hamamatsu Photonics CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Hamamatsu Photonics Recent Developments/Updates

Table 158. Hamamatsu Photonics Competitive Strengths & Weaknesses

Table 159. Sharp Basic Information, Manufacturing Base and Competitors

Table 160. Sharp Major Business

Table 161. Sharp CMOS and sCMOS Image Sensors Product and Services

Table 162. Sharp CMOS and sCMOS Image Sensors Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Sharp Recent Developments/Updates

Table 164. Sharp Competitive Strengths & Weaknesses

Table 165. Global Key Players of CMOS and sCMOS Image Sensors Upstream (Raw Materials)

Table 166. Global CMOS and sCMOS Image Sensors Typical Customers

Table 167. CMOS and sCMOS Image Sensors Typical Distributors

List Of Figures

LIST OF FIGURES

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

Figure 20. Japan CMOS and sCMOS Image Sensors Consumption (2021-2032) & (Million Units)

Figure 21. South Korea CMOS and sCMOS Image Sensors Consumption (2021-2032) & (Million Units)

Figure 22. ASEAN CMOS and sCMOS Image Sensors Consumption (2021-2032) & (Million Units)

Figure 23. India CMOS and sCMOS Image Sensors Consumption (2021-2032) & (Million Units)

Figure 24. Producer Shipments of CMOS and sCMOS Image Sensors by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for CMOS and sCMOS Image Sensors Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for CMOS and sCMOS Image Sensors Markets in 2025

Figure 27. United States VS China: CMOS and sCMOS Image Sensors Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: CMOS and sCMOS Image Sensors Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: CMOS and sCMOS Image Sensors Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share 2025

Figure 31. China Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share 2025

Figure 32. Rest of World Based Manufacturers CMOS and sCMOS Image Sensors Production Market Share 2025

Figure 33. World CMOS and sCMOS Image Sensors Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World CMOS and sCMOS Image Sensors Production Value Market Share by Type in 2025

Figure 35. CMOS Image Sensor (CIS)

Figure 36. Scientific CMOS (SCMOS) Image Sensor

Figure 37. World CMOS and sCMOS Image Sensors Production Market Share by Type (2021-2032)

Figure 38. World CMOS and sCMOS Image Sensors Production Value Market Share by Type (2021-2032)

Figure 39. World CMOS and sCMOS Image Sensors Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World CMOS and sCMOS Image Sensors Production Value by Shutter Type,

(USD Million), 2021 & 2025 & 2032

Figure 41. World CMOS and sCMOS Image Sensors Production Value Market Share by Shutter Type in 2025

Figure 42. Rolling Shutter, RS

Figure 43. Global Shutter, GS

Figure 44. World CMOS and sCMOS Image Sensors Production Market Share by Shutter Type (2021-2032)

Figure 45. World CMOS and sCMOS Image Sensors Production Value Market Share by Shutter Type (2021-2032)

Figure 46. World CMOS and sCMOS Image Sensors Average Price by Shutter Type (2021-2032) & (US\$/Unit)

Figure 47. World CMOS and sCMOS Image Sensors Production Value by pixel size, (USD Million), 2021 & 2025 & 2032

Figure 48. World CMOS and sCMOS Image Sensors Production Value Market Share by pixel size in 2025

Figure 49. Small Pixel

Figure 50. Medium Pixel

Figure 51. Large Pixel

Figure 52. World CMOS and sCMOS Image Sensors Production Market Share by pixel size (2021-2032)

Figure 53. World CMOS and sCMOS Image Sensors Production Value Market Share by pixel size (2021-2032)

Figure 54. World CMOS and sCMOS Image Sensors Average Price by pixel size (2021-2032) & (US\$/Unit)

Figure 55. World CMOS and sCMOS Image Sensors Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World CMOS and sCMOS Image Sensors Production Value Market Share by Application in 2025

Figure 57. Mobile

Figure 58. Automotive

Figure 59. Security

Figure 60. Industrial

Figure 61. Medical

Figure 62. Others

Figure 63. World CMOS and sCMOS Image Sensors Production Market Share by Application (2021-2032)

Figure 64. World CMOS and sCMOS Image Sensors Production Value Market Share by Application (2021-2032)

Figure 65. World CMOS and sCMOS Image Sensors Average Price by Application

(2021-2032) & (US\$/Unit)

Figure 66. CMOS and sCMOS Image Sensors Industry Chain

Figure 67. CMOS and sCMOS Image Sensors Procurement Model

Figure 68. CMOS and sCMOS Image Sensors Sales Model

Figure 69. CMOS and sCMOS Image Sensors Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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