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Global Endoscope CMOS Image Sensor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Endoscope CMOS Image Sensor market size is expected to reach $ 944 million by 2032, rising at a market growth of 9.4% CAGR during the forecast period (2026-2032).

Endoscope CMOS Image Sensor refers to a miniature solid-state imaging device designed for image acquisition inside body cavities, organs, minimally invasive surgical fields, catheters, and other confined medical environments. The product converts visible, near-infrared, or fluorescence light into digital image signals through an integrated pixel array, analog front end, timing circuitry, analog-to-digital conversion, and data-output interface. The study focuses on sensor dies, packaged CMOS image sensors, wafer-level camera devices, chip-on-tip sensor assemblies, and sensor-led miniature cabled modules in which the imaging chip, optics, packaging, and transmission components are closely integrated. Main technical architectures include front-side and backside illumination, rolling-shutter readout, compact chip-scale packaging, wafer-level optics, low-power signal transmission, and application-specific image processing. Key specifications include active resolution, pixel size, optical format, package dimensions, sensitivity, signal-to-noise ratio, dynamic range, frame rate, power consumption, thermal performance, output interface, and spectral response. Endoscope CMOS Image Sensors are primarily used in flexible and rigid endoscopes, capsule endoscopes, ultrathin catheter and needle imaging devices, single-use endoscopes, reusable surgical systems, and robotic or stereo visualization platforms.

Key Findings

2025 equivalent global shipments reached approximately 22.4 million units

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The weighted average selling price was approximately US$21.7 per unit

Single-use endoscopy is the principal volume-growth application across the current product portfolio

Twelve parent companies comprise the verified global Core Formal List

Market Trends

Endoscope CMOS Image Sensor development is moving simultaneously toward smaller distal-tip dimensions, higher resolution, lower power consumption, greater optical integration, and more application-specific imaging. Ultra-miniature products continue to support submillimeter and small-diameter endoscope designs, while two-megapixel and higher-resolution sensors are being introduced for gastrointestinal, surgical, reusable, and premium single-use systems. Backside-illuminated pixels, chip-scale packaging, wafer-level optics, integrated cables, and compact image-signal-processing architectures are reducing the size and engineering complexity of distal camera assemblies. At the higher end of the market, product development is expanding beyond conventional visible-light imaging toward near-infrared fluorescence, multispectral imaging, stereo vision, and low-latency visualization for robot-guided surgery. The market is therefore developing along two parallel paths: cost-optimized standard platforms for high-volume disposable devices and differentiated, higher-value sensors for advanced reusable and surgical systems. Recent dedicated-product introductions by Chinese suppliers also indicate that medical endoscopy is evolving from a supply base dominated by established international vendors toward a broader, more regionally diversified sensor ecosystem.

Market Dynamics

Drivers

Market demand is supported by the continuing adoption of minimally invasive procedures, the shift from fiber-based image transmission toward distal electronic imaging, and the expansion of single-use endoscopes in applications where infection control, workflow efficiency, and reduced reprocessing requirements are important. Sensor miniaturization allows manufacturers to reduce insertion-tube diameter or

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increase the size of the working channel, while higher sensitivity and resolution improve visualization in low-light anatomical environments. The introduction of integrated sensor, optics, cable, and image-processing solutions also shortens product-development cycles for endoscope manufacturers and lowers the engineering barrier for new device platforms.

Restraints

The market is constrained by long medical-device qualification cycles, demanding image-quality validation, strict reliability requirements, and limited transparency regarding application-specific shipment and pricing data. Small-volume custom projects may carry high development costs, while high-volume disposable applications face continuous pressure to reduce sensor and module prices. Miniature packaging, optical alignment, thermal management, cable integrity, sterilization compatibility, and stable low-light performance can increase engineering and manufacturing complexity. Once a sensor is incorporated into a regulated device platform, changing suppliers may require hardware, software, optical, clinical, and regulatory revalidation, which slows substitution despite creating strong supplier retention.

Opportunities

The most attractive opportunities are associated with single-use flexible endoscopes, ultrathin catheter visualization, capsule imaging, robotic surgery, stereo endoscopy, and fluorescence-assisted procedures. Sensor suppliers can capture additional value by moving beyond standalone chips toward wafer-level optical devices, preassembled chip-on-tip modules, thin cable solutions, reference designs, and compatible image-signal processors. Further opportunities exist in sensors that combine small package dimensions with higher resolution, wider dynamic range, improved near-infrared response, lower distal-tip heat generation, and simplified system integration. Emerging Asian suppliers also have an opportunity to support local endoscope manufacturers seeking shorter supply chains, alternative sourcing, and lower-cost medical-grade imaging components.

Challenges

Long-term challenges include balancing medical-grade image quality with disposable-device cost targets, maintaining product consistency across outsourced wafer

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fabrication and packaging networks, and achieving sufficient production scale without compromising traceability or qualification discipline. The absence of fully standardized sensor interfaces, module dimensions, optical configurations, and image-processing requirements limits interchangeability between endoscope platforms. New entrants must also overcome established suppliers' design-in relationships, reference designs, image-tuning experience, and accumulated reliability data. Portfolio restructuring and ownership changes within the specialist sensor sector may create temporary uncertainty concerning product road maps, engineering support, and long-term supply commitments; as of the latest official reporting, the announced transfer of the ams OSRAM CMOS image sensor business to indie Semiconductor remained pending.

Industry Chain Analysis

The upstream portion of the Endoscope CMOS Image Sensor industry includes CMOS imaging process development, silicon wafers, wafer fabrication, backside-illumination processing, color filters, microlenses, wafer-level optics, specialty packaging materials, microcables, and semiconductor assembly and testing. Many specialist suppliers operate under a fabless or hybrid model, retaining ownership of pixel architecture, sensor design, firmware, and product qualification while relying on external foundries and packaging partners. IDM suppliers maintain greater direct control over selected fabrication processes, but they still interact with external optical, cable, packaging, and medical-device manufacturing partners.

The midstream value chain covers sensor design, wafer and package qualification, optical integration, chip-on-tip assembly, cable attachment, image tuning, interface development, testing, and medical customer support. Downstream value creation occurs when these components are integrated into reusable or single-use endoscopes, catheter systems, capsule platforms, surgical visualization equipment, and robotic systems. The principal cost components include engineering and mask expenditure, wafer processing, yield-sensitive miniature packaging, optical alignment, cable assembly, testing, and customer qualification. Proprietary sensor design, custom engineering, medical reliability data, and tightly integrated miniature modules generally support higher value capture, while standardized lower-resolution products face greater price competition as volumes increase.

Segment Insights

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By product type, packaged CMOS sensors remain the core commercial form for manufacturers with established optical and electronic integration capabilities, while wafer-level camera devices and cabled chip-on-tip modules are gaining strategic importance in smaller and single-use endoscopes. Integrated products command higher unit value because they combine imaging, optical alignment, packaging, and transmission functions, but their reported pricing is less directly comparable with standalone sensor prices. Full-custom and semi-custom sensors represent a smaller volume segment, yet they can generate attractive project economics through engineering fees, specialized performance, and long product lifecycles.

By application, single-use flexible endoscopy contributes the largest incremental unit demand, whereas reusable surgical and premium endoscopy systems retain a higher average sensor value. Low-resolution and sub-megapixel sensors remain important in ultrathin probes and cost-sensitive devices, while one-megapixel, two-megapixel, and higher-resolution products are expanding in applications requiring better tissue visualization and larger display formats. Visible-light color imaging continues to account for the mainstream product base, but near-infrared fluorescence, stereo, and specialized imaging represent higher-value development directions. The fastest product innovation is occurring where miniature package size, higher resolution, low power, integrated optics, and simplified cable transmission can be delivered together.

Downstream Market Opportunities

Downstream opportunities are strongest where improved visualization can expand minimally invasive diagnosis or treatment without materially increasing insertion diameter, heat generation, or system complexity. Single-use bronchoscopes, ureteroscopes, ENT scopes, and other flexible devices offer recurring sensor demand, while capsule endoscopy and catheter-based imaging create opportunities for ultra-low-power and extremely small devices. Surgical and robotic platforms offer lower unit volumes but higher requirements for image quality, synchronization, dynamic range, fluorescence response, and long-term reliability. Suppliers able to provide validated reference designs and preintegrated optical or cable assemblies may benefit as emerging medical-device companies seek to shorten development and regulatory preparation cycles.

Regional Insights

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In supply terms, Asia has the broadest manufacturing footprint, combining Japanese high-end image-sensor expertise, Taiwan-based wafer fabrication and packaging resources, mainland Chinese sensor design and product development, and Southeast Asian module assembly capacity. Japan remains influential in high-image-quality and reusable medical systems, while mainland China is the most active source of newly introduced dedicated endoscopy sensors. The Chinese supplier base is still earlier in customer qualification and commercial ramp-up than established international competitors, but it is increasing alternative sourcing options for Asian endoscope manufacturers.

North America and Europe retain strong positions in custom CMOS design, medical imaging engineering, chip-on-tip technology, miniature optics, and high-value project support. These regions are particularly relevant to specialized surgical, robotic, fluorescence, and low-volume custom applications. South Korea and Taiwan possess substantial general CMOS image sensor capabilities, although the number of companies with publicly verified dedicated endoscope products remains limited. Southeast Asia primarily participates through packaging, cable, component, and module manufacturing rather than through independent merchant sensor brands.

Competitive Landscape Analysis

The competitive landscape is concentrated among a small number of established sensor platforms but remains fragmented in custom and specialty segments. Sony Group Corporation and OmniVision Integrated Circuits Group, Inc. have broad commercial relevance through dedicated medical image-sensor portfolios, established design-in positions, and the ability to support multiple endoscope formats. Teledyne Technologies Incorporated, AMETEK, Inc., and ams-OSRAM AG compete through custom engineering, chip-on-tip expertise, and ultra-miniature camera products, while STMicroelectronics and Himax Technologies participate through broader CMOS sensor platforms with verified medical or endoscopy applications. Gpixel Changchun Microelectronics Inc., SmartSens Technology (Shanghai) Co., Ltd., Brigates Microelectronics Co., Ltd., and Pixelplus Co., Ltd. expand the competitive field with dedicated or medically positioned products, although their commercial scale and medical qualification maturity differ. Caeleste CV remains relevant in specialized custom design. Competition is based less on corporate semiconductor revenue alone than on sensor size, low-light performance, optical and cable integration, medical qualification experience, customer support, and continuity of supply. The verified Core Formal List contains 12 parent companies after consolidating subsidiaries and business brands

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under their controlling groups, reflecting a market with a concentrated standard-product tier and a broader specialist-development tier.

Report Scope

This report studies the global Endoscope CMOS Image Sensor production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Endoscope CMOS Image Sensor total production and demand, 2021-2032, (K Units)

Global Endoscope CMOS Image Sensor total production value, 2021-2032, (USD Million)

Global Endoscope CMOS Image Sensor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Endoscope CMOS Image Sensor consumption by region & country, CAGR, 2021-2032 & (K Units)

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

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

Global Endoscope CMOS Image Sensor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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Global Endoscope CMOS Image Sensor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Endoscope 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 Sony Group Corporation, OmniVision Integrated Circuits Group, Inc., Teledyne Technologies Incorporated, AMETEK, Inc., ams-OSRAM AG, STMicroelectronics N.V., SmartSens Technology (Shanghai) Co., Ltd., Himax Technologies, Inc., Gpixel Changchun Microelectronics Inc., Pixelplus Co., Ltd., 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 Endoscope 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 Endoscope CMOS Image Sensor Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Endoscope CMOS Image Sensor Market, Segmentation by Type:

Packaged CMOS Image Sensor

Wafer-Level Camera Device

Chip-on-Tip Sensor Module

Cabled Camera Module

Other

Global Endoscope CMOS Image Sensor Market, Segmentation by Active Resolution:

Up to 0.1 Megapixel

Above 0.1 to 0.5 Megapixel

Above 0.5 to 1 Megapixel

Above 1 to 2 Megapixels

Above 2 Megapixels

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Global Endoscope CMOS Image Sensor Market, Segmentation by Imaging Mode:

Visible-Light Color Imaging

Near-Infrared Imaging

Fluorescence Imaging

Other Imaging Modes

Global Endoscope CMOS Image Sensor Market, Segmentation by Usage Model:

Single-Use

Reusable

Global Endoscope CMOS Image Sensor Market, Segmentation by Application:

Flexible Endoscopy

Rigid Endoscopy

Capsule Endoscopy

Catheter and Needle Endoscopy

Other

Companies Profiled:

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Sony Group Corporation

OmniVision Integrated Circuits Group, Inc.

Teledyne Technologies Incorporated

AMETEK, Inc.

ams-OSRAM AG

STMicroelectronics N.V.

SmartSens Technology (Shanghai) Co., Ltd.

Himax Technologies, Inc.

Gpixel Changchun Microelectronics Inc.

Pixelplus Co., Ltd.

Brigates Microelectronics Co., Ltd.

Caeleste CV

Key Questions Answered

1. How big is the global Endoscope CMOS Image Sensor market?
2. What is the demand of the global Endoscope CMOS Image Sensor market?
3. What is the year over year growth of the global Endoscope CMOS Image Sensor market?
4. What is the total value of the global Endoscope CMOS Image Sensor market?
5. Who are the Major Players in the global Endoscope CMOS Image Sensor market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

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3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Endoscope CMOS Image Sensor Production Value by Manufacturer (2021-2026)
3.2 World Endoscope CMOS Image Sensor Production by Manufacturer (2021-2026)
3.3 World Endoscope CMOS Image Sensor Average Price by Manufacturer (2021-2026)
3.4 Endoscope CMOS Image Sensor Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Endoscope CMOS Image Sensor Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Endoscope CMOS Image Sensor in 2025
  3.5.3 Global Concentration Ratios (CR8) for Endoscope CMOS Image Sensor in 2025
3.6 Endoscope CMOS Image Sensor Market: Overall Company Footprint Analysis
  3.6.1 Endoscope CMOS Image Sensor Market: Region Footprint
  3.6.2 Endoscope CMOS Image Sensor Market: Company Product Type Footprint
  3.6.3 Endoscope 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: Endoscope CMOS Image Sensor Production Value Comparison
  4.1.1 United States VS China: Endoscope CMOS Image Sensor Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Endoscope CMOS Image Sensor Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Endoscope CMOS Image Sensor Production Comparison
  4.2.1 United States VS China: Endoscope CMOS Image Sensor Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Endoscope CMOS Image Sensor Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Endoscope CMOS Image Sensor Consumption

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

5 MARKET ANALYSIS BY TYPE

5.1 World Endoscope CMOS Image Sensor Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Packaged CMOS Image Sensor
5.2.2 Wafer-Level Camera Device
5.2.3 Chip-on-Tip Sensor Module
5.2.4 Cabled Camera Module
5.2.5 Other

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5.3 Market Segment by Type
5.3.1 World Endoscope CMOS Image Sensor Production by Type (2021-2032)
5.3.2 World Endoscope CMOS Image Sensor Production Value by Type (2021-2032)
5.3.3 World Endoscope CMOS Image Sensor Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ACTIVE RESOLUTION

6.1 World Endoscope CMOS Image Sensor Market Size Overview by Active Resolution: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Active Resolution
6.2.1 Up to 0.1 Megapixel
6.2.2 Above 0.1 to 0.5 Megapixel
6.2.3 Above 0.5 to 1 Megapixel
6.2.4 Above 1 to 2 Megapixels
6.2.5 Above 2 Megapixels
6.3 Market Segment by Active Resolution
6.3.1 World Endoscope CMOS Image Sensor Production by Active Resolution (2021-2032)
6.3.2 World Endoscope CMOS Image Sensor Production Value by Active Resolution (2021-2032)
6.3.3 World Endoscope CMOS Image Sensor Average Price by Active Resolution (2021-2032)

7 MARKET ANALYSIS BY IMAGING MODE

7.1 World Endoscope CMOS Image Sensor Market Size Overview by Imaging Mode: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Imaging Mode
7.2.1 Visible-Light Color Imaging
7.2.2 Near-Infrared Imaging
7.2.3 Fluorescence Imaging
7.2.4 Other Imaging Modes
7.3 Market Segment by Imaging Mode
7.3.1 World Endoscope CMOS Image Sensor Production by Imaging Mode (2021-2032)
7.3.2 World Endoscope CMOS Image Sensor Production Value by Imaging Mode (2021-2032)
7.3.3 World Endoscope CMOS Image Sensor Average Price by Imaging Mode (2021-2032)

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info@marketpublishers.com

8 MARKET ANALYSIS BY USAGE MODEL

8.1 World Endoscope CMOS Image Sensor Market Size Overview by Usage Model: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Usage Model
  8.2.1 Single-Use
  8.2.2 Reusable
8.3 Market Segment by Usage Model
  8.3.1 World Endoscope CMOS Image Sensor Production by Usage Model (2021-2032)
  8.3.2 World Endoscope CMOS Image Sensor Production Value by Usage Model (2021-2032)
  8.3.3 World Endoscope CMOS Image Sensor Average Price by Usage Model (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Endoscope CMOS Image Sensor Market Size Overview by Application: 2021 VS 2025 VS 2032
9.2 Segment Introduction by Application
  9.2.1 Flexible Endoscopy
  9.2.2 Rigid Endoscopy
  9.2.3 Capsule Endoscopy
  9.2.4 Catheter and Needle Endoscopy
  9.2.5 Other
9.3 Market Segment by Application
  9.3.1 World Endoscope CMOS Image Sensor Production by Application (2021-2032)
  9.3.2 World Endoscope CMOS Image Sensor Production Value by Application (2021-2032)
  9.3.3 World Endoscope CMOS Image Sensor Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Sony Group Corporation
  10.1.1 Sony Group Corporation Details
  10.1.2 Sony Group Corporation Major Business
  10.1.3 Sony Group Corporation Endoscope CMOS Image Sensor Product and

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Services
10.1.4 Sony Group Corporation Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.1.5 Sony Group Corporation Recent Developments/Updates
10.1.6 Sony Group Corporation Competitive Strengths & Weaknesses
10.2 OmniVision Integrated Circuits Group, Inc.
10.2.1 OmniVision Integrated Circuits Group, Inc. Details
10.2.2 OmniVision Integrated Circuits Group, Inc. Major Business
10.2.3 OmniVision Integrated Circuits Group, Inc. Endoscope CMOS Image Sensor Product and Services
10.2.4 OmniVision Integrated Circuits Group, Inc. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.2.5 OmniVision Integrated Circuits Group, Inc. Recent Developments/Updates
10.2.6 OmniVision Integrated Circuits Group, Inc. Competitive Strengths & Weaknesses
10.3 Teledyne Technologies Incorporated
10.3.1 Teledyne Technologies Incorporated Details
10.3.2 Teledyne Technologies Incorporated Major Business
10.3.3 Teledyne Technologies Incorporated Endoscope CMOS Image Sensor Product and Services
10.3.4 Teledyne Technologies Incorporated Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.3.5 Teledyne Technologies Incorporated Recent Developments/Updates
10.3.6 Teledyne Technologies Incorporated Competitive Strengths & Weaknesses
10.4 AMETEK, Inc.
10.4.1 AMETEK, Inc. Details
10.4.2 AMETEK, Inc. Major Business
10.4.3 AMETEK, Inc. Endoscope CMOS Image Sensor Product and Services
10.4.4 AMETEK, Inc. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.4.5 AMETEK, Inc. Recent Developments/Updates
10.4.6 AMETEK, Inc. Competitive Strengths & Weaknesses
10.5 ams-OSRAM AG
10.5.1 ams-OSRAM AG Details
10.5.2 ams-OSRAM AG Major Business
10.5.3 ams-OSRAM AG Endoscope CMOS Image Sensor Product and Services
10.5.4 ams-OSRAM AG Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.5.5 ams-OSRAM AG Recent Developments/Updates

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info@marketpublishers.com

10.5.6 ams-OSRAM AG Competitive Strengths & Weaknesses
10.6 STMicroelectronics N.V.
10.6.1 STMicroelectronics N.V. Details
10.6.2 STMicroelectronics N.V. Major Business
10.6.3 STMicroelectronics N.V. Endoscope CMOS Image Sensor Product and Services
10.6.4 STMicroelectronics N.V. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.6.5 STMicroelectronics N.V. Recent Developments/Updates
10.6.6 STMicroelectronics N.V. Competitive Strengths & Weaknesses
10.7 SmartSens Technology (Shanghai) Co., Ltd.
10.7.1 SmartSens Technology (Shanghai) Co., Ltd. Details
10.7.2 SmartSens Technology (Shanghai) Co., Ltd. Major Business
10.7.3 SmartSens Technology (Shanghai) Co., Ltd. Endoscope CMOS Image Sensor Product and Services
10.7.4 SmartSens Technology (Shanghai) Co., Ltd. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.7.5 SmartSens Technology (Shanghai) Co., Ltd. Recent Developments/Updates
10.7.6 SmartSens Technology (Shanghai) Co., Ltd. Competitive Strengths & Weaknesses
10.8 Himax Technologies, Inc.
10.8.1 Himax Technologies, Inc. Details
10.8.2 Himax Technologies, Inc. Major Business
10.8.3 Himax Technologies, Inc. Endoscope CMOS Image Sensor Product and Services
10.8.4 Himax Technologies, Inc. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.8.5 Himax Technologies, Inc. Recent Developments/Updates
10.8.6 Himax Technologies, Inc. Competitive Strengths & Weaknesses
10.9 Gpixel Changchun Microelectronics Inc.
10.9.1 Gpixel Changchun Microelectronics Inc. Details
10.9.2 Gpixel Changchun Microelectronics Inc. Major Business
10.9.3 Gpixel Changchun Microelectronics Inc. Endoscope CMOS Image Sensor Product and Services
10.9.4 Gpixel Changchun Microelectronics Inc. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.9.5 Gpixel Changchun Microelectronics Inc. Recent Developments/Updates
10.9.6 Gpixel Changchun Microelectronics Inc. Competitive Strengths & Weaknesses
10.10 Pixelplus Co., Ltd.

+357 96 030922
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10.10.1 Pixelplus Co., Ltd. Details
10.10.2 Pixelplus Co., Ltd. Major Business
10.10.3 Pixelplus Co., Ltd. Endoscope CMOS Image Sensor Product and Services
10.10.4 Pixelplus Co., Ltd. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.10.5 Pixelplus Co., Ltd. Recent Developments/Updates
10.10.6 Pixelplus Co., Ltd. Competitive Strengths & Weaknesses
10.11 Brigates Microelectronics Co., Ltd.
10.11.1 Brigates Microelectronics Co., Ltd. Details
10.11.2 Brigates Microelectronics Co., Ltd. Major Business
10.11.3 Brigates Microelectronics Co., Ltd. Endoscope CMOS Image Sensor Product and Services
10.11.4 Brigates Microelectronics Co., Ltd. Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.11.5 Brigates Microelectronics Co., Ltd. Recent Developments/Updates
10.11.6 Brigates Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
10.12 Caeleste CV
10.12.1 Caeleste CV Details
10.12.2 Caeleste CV Major Business
10.12.3 Caeleste CV Endoscope CMOS Image Sensor Product and Services
10.12.4 Caeleste CV Endoscope CMOS Image Sensor Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.12.5 Caeleste CV Recent Developments/Updates
10.12.6 Caeleste CV Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Endoscope CMOS Image Sensor Industry Chain
11.2 Endoscope CMOS Image Sensor Upstream Analysis
11.2.1 Endoscope CMOS Image Sensor Core Raw Materials
11.2.2 Main Manufacturers of Endoscope CMOS Image Sensor Core Raw Materials
11.3 Midstream Analysis
11.4 Downstream Analysis
11.5 Endoscope CMOS Image Sensor Production Mode
11.6 Endoscope CMOS Image Sensor Procurement Model
11.7 Endoscope CMOS Image Sensor Industry Sales Model and Sales Channels
11.7.1 Endoscope CMOS Image Sensor Sales Model
11.7.2 Endoscope CMOS Image Sensor Typical Distributors

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12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology
13.2 Research Process and Data Source
13.3 Disclaimer

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List Of Tables

LIST OF TABLES

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

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

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Table 41. China Based Manufacturers Endoscope CMOS Image Sensor Production Market Share (2021-2026)
Table 42. Rest of World Based Endoscope CMOS Image Sensor Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Endoscope CMOS Image Sensor Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Endoscope CMOS Image Sensor Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Endoscope CMOS Image Sensor Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Endoscope CMOS Image Sensor Production Market Share (2021-2026)
Table 47. World Endoscope CMOS Image Sensor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Endoscope CMOS Image Sensor Production by Type (2021-2026) & (K Units)
Table 49. World Endoscope CMOS Image Sensor Production by Type (2027-2032) & (K Units)
Table 50. World Endoscope CMOS Image Sensor Production Value by Type (2021-2026) & (USD Million)
Table 51. World Endoscope CMOS Image Sensor Production Value by Type (2027-2032) & (USD Million)
Table 52. World Endoscope CMOS Image Sensor Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Endoscope CMOS Image Sensor Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Endoscope CMOS Image Sensor Production Value by Active Resolution, (USD Million), 2021 & 2025 & 2032
Table 55. World Endoscope CMOS Image Sensor Production by Active Resolution (2021-2026) & (K Units)
Table 56. World Endoscope CMOS Image Sensor Production by Active Resolution (2027-2032) & (K Units)
Table 57. World Endoscope CMOS Image Sensor Production Value by Active Resolution (2021-2026) & (USD Million)
Table 58. World Endoscope CMOS Image Sensor Production Value by Active Resolution (2027-2032) & (USD Million)
Table 59. World Endoscope CMOS Image Sensor Average Price by Active Resolution (2021-2026) & (US$/Unit)
Table 60. World Endoscope CMOS Image Sensor Average Price by Active Resolution

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(2027-2032) & (US$/Unit)
Table 61. World Endoscope CMOS Image Sensor Production Value by Imaging Mode, (USD Million), 2021 & 2025 & 2032
Table 62. World Endoscope CMOS Image Sensor Production by Imaging Mode (2021-2026) & (K Units)
Table 63. World Endoscope CMOS Image Sensor Production by Imaging Mode (2027-2032) & (K Units)
Table 64. World Endoscope CMOS Image Sensor Production Value by Imaging Mode (2021-2026) & (USD Million)
Table 65. World Endoscope CMOS Image Sensor Production Value by Imaging Mode (2027-2032) & (USD Million)
Table 66. World Endoscope CMOS Image Sensor Average Price by Imaging Mode (2021-2026) & (US$/Unit)
Table 67. World Endoscope CMOS Image Sensor Average Price by Imaging Mode (2027-2032) & (US$/Unit)
Table 68. World Endoscope CMOS Image Sensor Production Value by Usage Model, (USD Million), 2021 & 2025 & 2032
Table 69. World Endoscope CMOS Image Sensor Production by Usage Model (2021-2026) & (K Units)
Table 70. World Endoscope CMOS Image Sensor Production by Usage Model (2027-2032) & (K Units)
Table 71. World Endoscope CMOS Image Sensor Production Value by Usage Model (2021-2026) & (USD Million)
Table 72. World Endoscope CMOS Image Sensor Production Value by Usage Model (2027-2032) & (USD Million)
Table 73. World Endoscope CMOS Image Sensor Average Price by Usage Model (2021-2026) & (US$/Unit)
Table 74. World Endoscope CMOS Image Sensor Average Price by Usage Model (2027-2032) & (US$/Unit)
Table 75. World Endoscope CMOS Image Sensor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 76. World Endoscope CMOS Image Sensor Production by Application (2021-2026) & (K Units)
Table 77. World Endoscope CMOS Image Sensor Production by Application (2027-2032) & (K Units)
Table 78. World Endoscope CMOS Image Sensor Production Value by Application (2021-2026) & (USD Million)
Table 79. World Endoscope CMOS Image Sensor Production Value by Application (2027-2032) & (USD Million)

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Table 80. World Endoscope CMOS Image Sensor Average Price by Application (2021-2026) & (US$/Unit)
Table 81. World Endoscope CMOS Image Sensor Average Price by Application (2027-2032) & (US$/Unit)
Table 82. Sony Group Corporation Basic Information, Manufacturing Base and Competitors
Table 83. Sony Group Corporation Major Business
Table 84. Sony Group Corporation Endoscope CMOS Image Sensor Product and Services
Table 85. Sony Group Corporation Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. Sony Group Corporation Recent Developments/Updates
Table 87. Sony Group Corporation Competitive Strengths & Weaknesses
Table 88. OmniVision Integrated Circuits Group, Inc. Basic Information, Manufacturing Base and Competitors
Table 89. OmniVision Integrated Circuits Group, Inc. Major Business
Table 90. OmniVision Integrated Circuits Group, Inc. Endoscope CMOS Image Sensor Product and Services
Table 91. OmniVision Integrated Circuits Group, Inc. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 92. OmniVision Integrated Circuits Group, Inc. Recent Developments/Updates
Table 93. OmniVision Integrated Circuits Group, Inc. Competitive Strengths & Weaknesses
Table 94. Teledyne Technologies Incorporated Basic Information, Manufacturing Base and Competitors
Table 95. Teledyne Technologies Incorporated Major Business
Table 96. Teledyne Technologies Incorporated Endoscope CMOS Image Sensor Product and Services
Table 97. Teledyne Technologies Incorporated Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. Teledyne Technologies Incorporated Recent Developments/Updates
Table 99. Teledyne Technologies Incorporated Competitive Strengths & Weaknesses
Table 100. AMETEK, Inc. Basic Information, Manufacturing Base and Competitors
Table 101. AMETEK, Inc. Major Business
Table 102. AMETEK, Inc. Endoscope CMOS Image Sensor Product and Services
Table 103. AMETEK, Inc. Endoscope CMOS Image Sensor Production (K Units), Price

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(US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. AMETEK, Inc. Recent Developments/Updates
Table 105. AMETEK, Inc. Competitive Strengths & Weaknesses
Table 106. ams-OSRAM AG Basic Information, Manufacturing Base and Competitors
Table 107. ams-OSRAM AG Major Business
Table 108. ams-OSRAM AG Endoscope CMOS Image Sensor Product and Services
Table 109. ams-OSRAM AG Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 110. ams-OSRAM AG Recent Developments/Updates
Table 111. ams-OSRAM AG Competitive Strengths & Weaknesses
Table 112. STMicroelectronics N.V. Basic Information, Manufacturing Base and Competitors
Table 113. STMicroelectronics N.V. Major Business
Table 114. STMicroelectronics N.V. Endoscope CMOS Image Sensor Product and Services
Table 115. STMicroelectronics N.V. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 116. STMicroelectronics N.V. Recent Developments/Updates
Table 117. STMicroelectronics N.V. Competitive Strengths & Weaknesses
Table 118. SmartSens Technology (Shanghai) Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 119. SmartSens Technology (Shanghai) Co., Ltd. Major Business
Table 120. SmartSens Technology (Shanghai) Co., Ltd. Endoscope CMOS Image Sensor Product and Services
Table 121. SmartSens Technology (Shanghai) Co., Ltd. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 122. SmartSens Technology (Shanghai) Co., Ltd. Recent Developments/Updates
Table 123. SmartSens Technology (Shanghai) Co., Ltd. Competitive Strengths & Weaknesses
Table 124. Himax Technologies, Inc. Basic Information, Manufacturing Base and Competitors
Table 125. Himax Technologies, Inc. Major Business
Table 126. Himax Technologies, Inc. Endoscope CMOS Image Sensor Product and Services
Table 127. Himax Technologies, Inc. Endoscope CMOS Image Sensor Production (K

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Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 128. Himax Technologies, Inc. Recent Developments/Updates
Table 129. Himax Technologies, Inc. Competitive Strengths & Weaknesses
Table 130. Gpixel Changchun Microelectronics Inc. Basic Information, Manufacturing Base and Competitors
Table 131. Gpixel Changchun Microelectronics Inc. Major Business
Table 132. Gpixel Changchun Microelectronics Inc. Endoscope CMOS Image Sensor Product and Services
Table 133. Gpixel Changchun Microelectronics Inc. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 134. Gpixel Changchun Microelectronics Inc. Recent Developments/Updates
Table 135. Gpixel Changchun Microelectronics Inc. Competitive Strengths & Weaknesses
Table 136. Pixelplus Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 137. Pixelplus Co., Ltd. Major Business
Table 138. Pixelplus Co., Ltd. Endoscope CMOS Image Sensor Product and Services
Table 139. Pixelplus Co., Ltd. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 140. Pixelplus Co., Ltd. Recent Developments/Updates
Table 141. Pixelplus Co., Ltd. Competitive Strengths & Weaknesses
Table 142. Brigates Microelectronics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 143. Brigates Microelectronics Co., Ltd. Major Business
Table 144. Brigates Microelectronics Co., Ltd. Endoscope CMOS Image Sensor Product and Services
Table 145. Brigates Microelectronics Co., Ltd. Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 146. Brigates Microelectronics Co., Ltd. Recent Developments/Updates
Table 147. Brigates Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
Table 148. Caeleste CV Basic Information, Manufacturing Base and Competitors
Table 149. Caeleste CV Major Business
Table 150. Caeleste CV Endoscope CMOS Image Sensor Product and Services
Table 151. Caeleste CV Endoscope CMOS Image Sensor Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 152. Caeleste CV Recent Developments/Updates
Table 153. Caeleste CV Competitive Strengths & Weaknesses
Table 154. Global Key Players of Endoscope CMOS Image Sensor Upstream (Raw Materials)
Table 155. Global Endoscope CMOS Image Sensor Typical Customers
Table 156. Endoscope CMOS Image Sensor Typical Distributors

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List Of Figures

LIST OF FIGURES

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

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Figure 22. ASEAN Endoscope CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 23. India Endoscope CMOS Image Sensor Consumption (2021-2032) & (K Units)
Figure 24. Producer Shipments of Endoscope CMOS Image Sensor by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Endoscope CMOS Image Sensor Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Endoscope CMOS Image Sensor Markets in 2025
Figure 27. United States VS China: Endoscope CMOS Image Sensor Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Endoscope CMOS Image Sensor Production Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States VS China: Endoscope CMOS Image Sensor Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States Based Manufacturers Endoscope CMOS Image Sensor Production Market Share 2025
Figure 31. China Based Manufacturers Endoscope CMOS Image Sensor Production Market Share 2025
Figure 32. Rest of World Based Manufacturers Endoscope CMOS Image Sensor Production Market Share 2025
Figure 33. World Endoscope CMOS Image Sensor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 34. World Endoscope CMOS Image Sensor Production Value Market Share by Type in 2025
Figure 35. Packaged CMOS Image Sensor
Figure 36. Wafer-Level Camera Device
Figure 37. Chip-on-Tip Sensor Module
Figure 38. Cabled Camera Module
Figure 39. Other
Figure 40. World Endoscope CMOS Image Sensor Production Market Share by Type (2021-2032)
Figure 41. World Endoscope CMOS Image Sensor Production Value Market Share by Type (2021-2032)
Figure 42. World Endoscope CMOS Image Sensor Average Price by Type (2021-2032) & (US$/Unit)
Figure 43. World Endoscope CMOS Image Sensor Production Value by Active Resolution, (USD Million), 2021 & 2025 & 2032

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Figure 44. World Endoscope CMOS Image Sensor Production Value Market Share by Active Resolution in 2025
Figure 45. Up to 0.1 Megapixel
Figure 46. Above 0.1 to 0.5 Megapixel
Figure 47. Above 0.5 to 1 Megapixel
Figure 48. Above 1 to 2 Megapixels
Figure 49. Above 2 Megapixels
Figure 50. World Endoscope CMOS Image Sensor Production Market Share by Active Resolution (2021-2032)
Figure 51. World Endoscope CMOS Image Sensor Production Value Market Share by Active Resolution (2021-2032)
Figure 52. World Endoscope CMOS Image Sensor Average Price by Active Resolution (2021-2032) & (US$/Unit)
Figure 53. World Endoscope CMOS Image Sensor Production Value by Imaging Mode, (USD Million), 2021 & 2025 & 2032
Figure 54. World Endoscope CMOS Image Sensor Production Value Market Share by Imaging Mode in 2025
Figure 55. Visible-Light Color Imaging
Figure 56. Near-Infrared Imaging
Figure 57. Fluorescence Imaging
Figure 58. Other Imaging Modes
Figure 59. World Endoscope CMOS Image Sensor Production Market Share by Imaging Mode (2021-2032)
Figure 60. World Endoscope CMOS Image Sensor Production Value Market Share by Imaging Mode (2021-2032)
Figure 61. World Endoscope CMOS Image Sensor Average Price by Imaging Mode (2021-2032) & (US$/Unit)
Figure 62. World Endoscope CMOS Image Sensor Production Value by Usage Model, (USD Million), 2021 & 2025 & 2032
Figure 63. World Endoscope CMOS Image Sensor Production Value Market Share by Usage Model in 2025
Figure 64. Single-Use
Figure 65. Reusable
Figure 66. World Endoscope CMOS Image Sensor Production Market Share by Usage Model (2021-2032)
Figure 67. World Endoscope CMOS Image Sensor Production Value Market Share by Usage Model (2021-2032)
Figure 68. World Endoscope CMOS Image Sensor Average Price by Usage Model (2021-2032) & (US$/Unit)

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Figure 69. World Endoscope CMOS Image Sensor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 70. World Endoscope CMOS Image Sensor Production Value Market Share by Application in 2025
Figure 71. Flexible Endoscopy
Figure 72. Rigid Endoscopy
Figure 73. Capsule Endoscopy
Figure 74. Catheter and Needle Endoscopy
Figure 75. Other
Figure 76. World Endoscope CMOS Image Sensor Production Market Share by Application (2021-2032)
Figure 77. World Endoscope CMOS Image Sensor Production Value Market Share by Application (2021-2032)
Figure 78. World Endoscope CMOS Image Sensor Average Price by Application (2021-2032) & (US$/Unit)
Figure 79. Endoscope CMOS Image Sensor Industry Chain
Figure 80. Endoscope CMOS Image Sensor Procurement Model
Figure 81. Endoscope CMOS Image Sensor Sales Model
Figure 82. Endoscope CMOS Image Sensor Sales Channels, Direct Sales, and Distribution
Figure 83. Methodology
Figure 84. Research Process and Data Source

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