

Global Second and Third Generation Image Intensifier Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Second and Third Generation Image Intensifier market size is expected to reach \$ 1701 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Low-light image intensifiers currently mainly refer to second- and third-generation image intensifier products. Second- and third-generation image intensifiers are photoelectric vacuum devices that enhance weak optical images into bright, visible images, forming the core of low-light night vision equipment. They utilize the photoelectric effect to convert weak light signals into visible light images, and are also known as image tubes. Core components include a photocathode, an electron lens (electrostatic focusing or magnetic focusing), and a fluorescent screen. The upstream of the second- and third-generation image intensifier industry chain involves the supply of raw materials and core components such as optical materials, semiconductor materials, special glass, and vacuum packaging components. The midstream involves the manufacturing of image intensifiers, including chip fabrication, component integration, vacuum packaging, and testing, which have extremely high technological barriers. The downstream covers military applications (such as night vision devices and aiming scopes), healthcare and biotechnology (such as high-end microscopic imaging), electronics and semiconductors (such as testing equipment), and other industrial applications. The entire industry chain is characterized by high technological barriers in upstream materials, high concentration in midstream manufacturing, and specialized downstream application requirements. In 2025, global sales of second- and third-generation image intensifiers reached 305,000 units, with an average selling price of \$3,300 per unit.

Market drivers primarily include the following

The continued growth of the second- and third-generation image intensifier market stems mainly from the ever-increasing demands in the military and civilian sectors, as well as the inherent driving force of the technology itself.

In the military and security sectors, the continuous global demand for defense modernization constitutes the core driving force of the market. Low-light night vision technology, as a key to enhancing individual soldier combat capabilities and the all-weather combat effectiveness of weaponry, is undeniably important. Armies worldwide are actively procuring and upgrading night vision equipment, from individual helmets and handheld observation devices to vehicle-mounted and airborne targeting systems. These diverse application scenarios create a stable and broad market space for image intensifiers. Furthermore, in security fields such as border patrol and law enforcement surveillance, this technology also plays an indispensable role, further expanding its application boundaries.

Technological evolution and performance improvement are the endogenous driving forces behind market development. From the first generation to the third and fourth generations, the core goal of low-light image intensifiers has always been the pursuit of higher performance indicators. Manufacturers are committed to continuously improving the signal-to-noise ratio and resolution of their products through material innovation and structural optimization, ensuring clearer and more detailed images even in extremely low light conditions. Simultaneously, extending device lifespan, enhancing reliability and durability in complex environments, and optimizing design to make products smaller, lighter, and consume less power to meet the needs of portable devices are all concrete manifestations of technology driving market progress.

The continued penetration and expansion of the civilian market has injected new vitality into industry growth. With technological maturity and cost optimization, second- and third-generation image intensifiers are gradually moving beyond the single military application field, demonstrating enormous application potential in multiple civilian industries. In healthcare and biotechnology, they are used in high-end microscopes and bioimaging systems, aiding scientific research and clinical diagnosis. In the electronics and semiconductor field, they play a role in precision industrial inspection and automation equipment. Furthermore, second- and third-generation image intensifiers have found new applications in scientific research fields such as astronomical observation and ocean exploration, as well as in professional broadcasting and high-end video recording fields with stringent image quality requirements, indicating a broad market prospect for the future.

This report studies the global Second and Third Generation Image Intensifier production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Second and Third Generation Image Intensifier 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 Second and Third Generation Image Intensifier that contribute to its increasing demand across many

markets.

Highlights and key features of the study

Global Second and Third Generation Image Intensifier total production and demand, 2021-2032, (K Units)

Global Second and Third Generation Image Intensifier total production value, 2021-2032, (USD Million)

Global Second and Third Generation Image Intensifier production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Second and Third Generation Image Intensifier consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Second and Third Generation Image Intensifier domestic production, consumption, key domestic manufacturers and share

Global Second and Third Generation Image Intensifier production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Second and Third Generation Image Intensifier production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Second and Third Generation Image Intensifier production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Second and Third Generation Image Intensifier 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 L3 Harris, Elbit Systems, Exosens, Katod, Northern Night Vision, Hamamatsu Photonics, Intevac Photonics (EOTECH), Newcon Optik, HARDER digital GmbH, Photek, 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 Second and Third Generation Image Intensifier 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 Second and Third Generation Image Intensifier Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Second and Third Generation Image Intensifier Market, Segmentation by Type:

Generation 2/2+

Generation 3

Global Second and Third Generation Image Intensifier Market, Segmentation by Electro-optical Systems:

Electrostatic Focusing System

Electromagnetic Composite Focusing System

Global Second and Third Generation Image Intensifier Market, Segmentation by Product Forms:

Image Reversal Tube

Proximity Focusing Tube

Global Second and Third Generation Image Intensifier Market, Segmentation by

Application:

Military Reconnaissance

Security Monitoring

Industrial Inspection

Other

Companies Profiled:

L3 Harris

Elbit Systems

Exosens

Katod

Northern Night Vision

Hamamatsu Photonics

Intevac Photonics (EOTECH)

Newcon Optik

HARDER digital GmbH

Photek

Chenyun Technology

Rongzhe Optoelectronics

Armasight

Key Questions Answered:

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

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