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Head Mounted Display (HMD) Market Analysis By Product (Helmet Mounted Display, Wearable Glass), By End-Use (Defense, Consumer), By Application (Imaging, Security, Tracking, Training & Simulation) And Segment Forecasts To 2020

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Abstracts

The global head mounted display market is expected to reach USD 11,793.3 million by 2020. Reducing silicon wafer costs have directly impacted microdisplay prices, which form a sizable percentage of the resultant HMD cost. As a result, declining microdisplay prices coupled with growing demand for wearable, lightweight devices are expected to be key driving forces for the HMD market. Defense services are a key contributor to global demand, wherein head mounted displays aid in security, imaging and tracking.

Head mounted displays offer high degree of mobility and computing power, which has led to increasing market penetration in the consumer sector. Growing demand from automotive prototyping is expected to be a key opportunity for industry participants. Lack of standardization resulting in design issues may restrain market growth over the next six years. This can be mitigated with the help of establishment of necessary guidelines for HMD production.

Further key findings from the study suggest:

Helmet mounted displays accounted for over 60% of the head mounted display market in 2013; these products are expected lose market share due to growing popularity of wearable glass. They are expected to continue enjoying widespread use in defense applications over the next six years.

Defense accounted for over 70% of the head mounted display market in 2013, and is

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expected to remain the dominant end-use segment over the forecast period. HMDs prove highly efficient during training regimes and in locations with poor visibility. Increasing popularity of augmented and virtual reality is expected to drive the consumer segment over the next six years.

Training and simulation is expected to continue accounting for majority of the overall market through 2020. This is a result of the growing use of HMDs in medical as well as military training modules.

North America accounted for over 35% of the global HMD market in 2013; Asia Pacific is expected to exhibit high growth over the forecast period. Establishment of manufacturing facilities along with technology advancement due to the presence of Japan, South Korea and China is expected to fuel regional market growth.

Key companies operating in the market include eMagin Corporation, BAE Systems, Vuzix, Rockwell Collins and Seiko Epson. Major manufacturers have started developing products targeted at entertainment purposes; additionally, geographical expansion is expected to be a key growth strategy.

For the purpose of this study, Grand View Research has segmented the global HMD market on the basis of product, end-use, application and region:

HMD Product Outlook (Revenue, USD Million, 2012 – 2020)

Helmet Mounted Display

Wearable Glass

HMD End-Use Outlook (Revenue, USD Million, 2012 – 2020)

Defense

Consumer

Augmented Reality

Virtual Reality

Video Gaming

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Others

HMD Application Outlook (Revenue, USD Million, 2012 – 2020)

Imaging

Security

Tracking

Training & Simulation

HMD Regional Outlook (Revenue, USD Million, 2012 – 2020)

North America

Europe

Asia Pacific

RoW

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2 EMAGIN CORPORATION

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3 EPSON

4 GOOGLE, INC.

5 KOPIN CORPORATION

6 NEC CORPORATION

7 OCULUS VR

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