

Image Sensors Market Analysis By Technology (CCD, CMOS, CIS), By Application (Automotive, Consumer Electronics, Defense & Aerospace, Industrial, Medical, Surveillance) And Segment Forecasts To 2020

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Abstracts

The global market for image sensors is expected to reach USD 12,028.2 million by 2020. Image sensors are primarily used in camera phones and tablets; therefore, growing demand for these devices is expected to be the key driving force for the market. Furthermore, growth in industrial, automotive and medical industries is expected to fuel market growth in the coming years.

Focus on minimally invasive procedures such as endoscopy, as well as advancements in the healthcare space are estimated to boost market penetration. Additionally, image sensor prices have been declining, a trend that is expected to continue through the forecast period. The advent of backside illumination (BSI) technology has resulted in surge in demand for CMOS image sensors. However, lower power efficiency of CCD image sensors is expected to steadily erode demand for this segment on a global level.

Further Key findings from the study suggest:

Global image sensor shipments were estimated to be 1,797.9 million units in 2012; they are expected to reach 3,009.2 million units by 2020, growing at a CAGR of 6.7% from 2014 to 2020.

CMOS image sensors offer a number of benefits including superior image quality over their CCD counterparts. CMOS image sensors dominated the market in 2012, accounting for 83.2% of total shipments. Contact image sensors (CIS) require lesser power, and can be used in smaller devices; the segment is estimated to grow at a

CAGR of 4.4% from 2014 to 2020.

Consumer electronics was estimated to be the largest application segment in 2012 in value and volume terms, fuelled by surging demand for mobile phones and tablets. Majority of smartphones are fitted with primary as well as secondary cameras in order to facilitate video calling among other activities. Demand for digital cameras such as DSLRs is also expected to be positive, giving impetus to the market. This application segment was valued at USD 4,479.3 million in 2012. Medical applications are expected to be the fastest growing segment, with an estimated CAGR of 9.2% in terms of shipments from 2014 to 2020.

Asia Pacific is expected to be the largest and fastest growing regional market during the forecast period. It accounted for 35.9% of the global shipments in 2012 and is expected to grow at a CAGR of 7.4% from 2014 to 2020. This can primarily be attributed to considerable demand for consumer electronics in the region. In addition to smartphone proliferation, there are a significant number of first-time buyers of products such as compact point & shoot cameras and DSLRs, thereby boosting demand for image sensors.

The global market is moderately concentrated in nature, with strong focus on product development and innovation. Major industry participants include Sony Corporation, Aptina Imaging, OmniVision, Canon, Inc., STMicroelectronics, Teledyne DALSA, and Samsung Electronics among others.

For the purpose of this study, Grand View Research has segmented the global image sensors market on the basis of technology, application and region:

Image Sensors Technology Outlook (Volume, Million Units and Revenue, USD Million; 2012 – 2020)

CCD

CMOS

CIS

Image Sensors Application Outlook (Volume, Million Units and Revenue, USD Million; 2012 – 2020)

Automotive

Consumer Electronics

Defense & Aerospace

Industrial

Medical

Surveillance

Others

Image Sensors Regional Outlook (Volume, Million Units and Revenue, USD
Million; 2012 – 2020)

North America

Europe

Asia Pacific

RoW

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