

Machine Vision Market Report by Product (Vision Systems, Cameras, and Others), Component (Hardware, Software), Application (Positioning, Identification, Verification, Measurement, Flaw Detection, and Others), Industry (Electronics and Semiconductor, Automotive, Medical and Pharmaceutical, Food, Packaging and Printing, Security and Surveillance, Intelligent Traffic System, and Others), and Region 2024-2032

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Abstracts

The global machine vision market size reached US\$ 13.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 25.4 Billion by 2032, exhibiting a growth rate (CAGR) of 7.3% during 2024-2032. The increasing demand for automation and quality control in manufacturing industries, numerous advancements in artificial intelligence and deep learning algorithms, and the rising need for efficient inspection are some of the major factors propelling the market.

Machine vision, also known as computer vision, is a field of artificial intelligence (AI) and image processing that enables machines, typically computers, to interpret and understand visual information from the world. It involves the development of algorithms and techniques that allow machines to analyze, process, and extract meaningful insights from images or videos. Machine vision systems utilize cameras or other imaging devices to capture visual data and then use various computational methods to detect patterns, recognize objects, track movements, and perform tasks that require visual understanding. As a result, machine vision technology finds applications in diverse industries, such as robotics, autonomous vehicles, quality control, and medical

imaging.

The rising adoption of machine vision systems due to the increasing demand for automation and quality control across industries, including manufacturing, automotive, electronics, and pharmaceuticals, will stimulate the growth of the market during the forecast period. These systems enhance production efficiency, reduce errors, and ensure consistent product quality. Moreover, the advent of artificial intelligence (AI) and deep learning technologies that empower machine vision to achieve greater accuracy and versatility in image analysis and pattern recognition tasks has accelerated the product adoption rate. Furthermore, the widespread integration of machine vision for real-time monitoring and threat detection owing to the escalating need for safety and surveillance in various applications, such as smart cities, transportation, and healthcare, is propelling the market growth. Additionally, the decreasing costs of cameras, sensors, and processing hardware that makes machine vision solutions more affordable and accessible to a broader range of businesses has catalyzed the market growth.

Machine Vision Market Trends/Drivers:

Advancements in artificial intelligence and deep learning

The continuous advancements in artificial intelligence (AI) and deep learning have significantly boosted the capabilities of machine vision systems. AI algorithms, especially deep learning techniques like convolutional neural networks (CNNs), have revolutionized image processing and pattern recognition. With the ability to learn from vast datasets, machine vision systems can now accurately identify and categorize objects, faces, and scenes. This progress has led to remarkable improvements in applications such as facial recognition, autonomous vehicles, medical imaging, and security surveillance. As AI continues to evolve, machine vision is expected to become more sophisticated, adaptable, and capable of tackling even more complex visual challenges, further driving growth and innovation in the machine vision landscape.

Advent of Industry 4.0 and automation

The advent of Industry 4.0 and the widespread adoption of automation across different industries represent the major factors fueling the market growth.. In the era of smart manufacturing, businesses strive to optimize their production processes, ensure consistent product quality, and minimize defects. Machine vision technology plays a crucial role in achieving these objectives by providing automated inspection, precise defect detection, and real-time quality control throughout the manufacturing workflow. By integrating machine vision with robotic systems and the Internet of Things (IoT)

devices, companies can streamline operations, decrease human errors, and enhance overall efficiency. The relentless pursuit of improved productivity and reduced operational costs continues to propel the demand for machine vision solutions in the industrial sector.

Expansion of applications and industry verticals

Machine vision's versatility has led to its widespread adoption in an expanding array of applications and industry verticals. Beyond its traditional use in manufacturing, machine vision now finds applications in diverse sectors such as agriculture, healthcare, retail, and entertainment. In the agriculture industry, it aids in crop monitoring, yield prediction, and precision farming. In healthcare, machine vision assists with medical diagnostics, image analysis, and robotic-assisted surgeries. In the retail sector, it facilitates cashier-less checkout systems, inventory management, and customer analytics. Furthermore, machine vision is increasingly being employed in entertainment and gaming for gesture recognition and augmented reality (AR) experiences. The technology's ability to enhance processes, provide valuable insights, and improve decision-making across various domains will stimulate the growth of the market for machine vision.

Machine Vision Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global machine vision market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on product, component, application, and industry.

Breakup by Product:

Vision Systems

Cameras

Others

Vision systems dominate the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes vision systems, cameras, and others. According to the report, vision systems represented the largest segment.

Vision systems, also known as machine vision systems, are sophisticated technologies that enable machines to perceive and interpret visual information from the surrounding

environment. These systems consist of cameras or other imaging devices, image processing software, and advanced algorithms that analyze and extract meaningful data from images or videos. Vision systems can perform various tasks, including object recognition, defect detection, measurement, sorting, and tracking. By providing machines with the ability to "see" and understand the world, vision systems aid in revolutionizing industries across the board.

Furthermore, they enhance automation and quality control in manufacturing, optimize processes in logistics and packaging, improve medical diagnostics and healthcare, and bolster security and surveillance systems. The increasing demand for intelligent, data-driven solutions to boost productivity, accuracy, and efficiency will propel the growth of the market as vision systems become indispensable tools for businesses across diverse sectors.

Breakup by Component:

Hardware
Software

Hardware holds the largest share in the market

A detailed breakup and analysis of the market based on the component has also been provided in the report. This includes hardware and software. According to the report, hardware accounted for the largest market share.

Hardware refers to the physical components and devices used to capture, process, and transmit visual data. It typically includes cameras, lenses, image sensors, lighting systems, frame grabbers, processing units (such as GPUs or specialized vision processors), and communication interfaces. These hardware components form the foundation of machine vision systems, enabling the acquisition of visual information from the environment. The performance, accuracy, and capabilities of the hardware directly impact the overall effectiveness and efficiency of machine vision applications.

As hardware technology advances, with improvements in sensor resolution, faster processing speeds, and higher data throughput, machine vision systems become more powerful, versatile, and accessible. Upgraded hardware allows real-time processing, higher-quality imaging, and more complex algorithms, which in turn favors the expansion of machine vision into new industries and applications, making it a major driving force behind the growth of the market.

Breakup by Application:

- Positioning
- Identification
- Verification
- Measurement
- Flaw Detection
- Others

Flaw detection represents the leading application segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes positioning, identification, verification, measurement, flaw detection, and others. According to the report, flaw detection represented the largest segment.

Flaw detection refers to the process of identifying defects, imperfections, or abnormalities in products or materials during manufacturing or quality control processes. Machine vision systems use advanced imaging techniques and algorithms to analyze visual data and compare it against predefined standards to detect flaws accurately and efficiently. Flaw detection plays a crucial role in ensuring product quality, reducing waste, and maintaining consistent standards in various industries such as manufacturing, automotive, electronics, and pharmaceuticals. As industries increasingly prioritize quality control and automation, the demand for reliable flaw detection solutions has grown significantly. Machine vision's ability to provide fast, non-destructive, and precise flaw detection has become a driving force behind the adoption of machine vision technology. As the market recognizes the potential of machine vision in flaw detection to optimize production processes, enhance product reliability, and reduce costs, its growth and integration across industries continue to accelerate.

Breakup by Industry:

- Electronics and Semiconductor
- Automotive
- Medical and Pharmaceutical
- Food, Packaging and Printing
- Security and Surveillance
- Intelligent Traffic System

Others

Electronics and semiconductor account for the majority of the share in the market

The report has provided a detailed breakup and analysis of the market based on the industry. This includes electronics and semiconductor, automotive, medical and pharmaceutical, food, packaging and printing, security and surveillance, intelligent traffic system, and others. According to the report, electronics and semiconductor represented the largest segment.

The electronics and semiconductor industry significantly contributes to the market growth due to its rigorous demand for high-quality production and precision manufacturing processes. In this industry, the miniaturization of components and the complexity of integrated circuits require meticulous inspection and defect detection at microscopic levels. Machine vision systems offer a reliable and efficient solution for inspecting semiconductor wafers, PCBs, electronic components, and assembly processes. They ensure consistent product quality, reduce defects, and improve overall manufacturing efficiency. As technological advancements continue to push the boundaries of electronics and semiconductors, the need for advanced machine vision solutions becomes even more critical. The ability of machine vision to perform high-speed, accurate inspection and analysis enables electronics and semiconductor manufacturers to stay competitive and meet the ever-increasing demands for quality and innovation. Therefore, the growth of the electronics and semiconductor industry goes hand in hand with the expansion of the machine vision market.

Breakup by Region:

Asia Pacific

Europe

North America

Middle East and Africa

Latin America

Asia Pacific exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific is a significant driving force behind the growth of the machine vision market due to several key factors. Firstly, the region's thriving manufacturing industries, particularly in countries like China, Japan, South Korea, and India, are increasingly adopting automation and robotics to improve productivity and product quality. Machine vision plays a vital role in these processes by providing precise inspection, defect detection, and assembly verification. Secondly, the rising demand for consumer electronics, automotive, and semiconductor products in the Asia Pacific region fuels the need for stringent quality control, which further boosts the adoption of machine vision systems.

Additionally, the increasing focus on industrial automation, Industry 4.0 initiatives, and smart manufacturing practices in the region drive the integration of machine vision technologies to optimize production processes and enhance efficiency. The rapid technological advancements and the presence of major machine vision solution providers in Asia Pacific also contribute to its driving role in the expansion of the global machine vision industry.

Competitive Landscape:

The market is experiencing a lower-than-anticipated demand compared to pre-pandemic levels. However, this is likely to witness a paradigm shift over the next decade with the growing integration of machine vision with edge computing and IoT devices, enabling real-time analysis and decision-making at the edge of networks, leading to reduced latency and improved responsiveness in various applications. Additionally, key players are developing 3D machine vision technologies that enable precise depth perception and object reconstruction, revolutionizing applications such as robot guidance and augmented reality. Furthermore, ongoing advancements in multispectral and hyperspectral imaging have enhanced the ability to capture and analyze data beyond the visible spectrum, leading to new possibilities in fields such as precision agriculture, medical diagnostics, and materials inspection. We also expect the market to witness new entrants, consolidation of portfolio and increased collaborations among key players to drive healthy competition within the machine vision domain.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Cognex Corporation
Basler AG

Omron Corporation
National Instruments Corporation
Keyence Corporation
Sony Corporation
Teledyne Technologies, Inc.
Texas Instruments, Inc,
Allied Vision Technologies GmbH
Intel Corporation
Baumer Optronic GmbH
Jai A/S

Recent Developments:

In March 2021, Basler AG introduced an Embedded Vision Processing Kit featuring multiple interfaces for image processing and seamless connectivity with various camera types. The kit incorporates the reliable pylon Camera Software Suite, offering certified drivers for diverse camera interfaces, user-friendly programming interfaces, and a comprehensive array of tools for easy camera setup.

In August 2021, OMRON Corporation introduced the revolutionary "VT-SIO Series" PCB inspection system, marking a significant leap forward in the realm of electronic substrate inspection. This cutting-edge technology is poised to transform the electronics manufacturing industry by enabling automated and high-precision inspections of printed circuit boards, all achieved without the need for specialized knowledge or expertise from operators. The traditional PCB inspection process has often been labour-intensive and time-consuming, demanding skilled personnel to meticulously examine and detect defects or errors on the electronic substrates.

In September 2021, KEYENCE launched the CV-X/XG-X Series of high-resolution cameras, featuring a 64 MP sensor that greatly enhances accuracy in conventional inspections. This advanced camera's built-in angle sensor simplifies installation and allows for quick detection of any misalignment during operation. The combination of ultra-high resolution and angle sensor technology empowers users to achieve more precise and efficient inspection processes, making it a valuable addition to the machine vision market.

Key Questions Answered in This Report

1. What was the size of the global machine vision market in 2023?
2. What is the expected growth rate of the global machine vision market during 2024-2032?
3. What are the key factors driving the global machine vision market?
4. What has been the impact of COVID-19 on the global machine vision market?

5. What is the breakup of the global machine vision market based on the product?
6. What is the breakup of the global machine vision market based on the component?
7. What is the breakup of the global machine vision market based on the application?
8. What is the breakup of the global machine vision market based on the industry?
9. What are the key regions in the global machine vision market?
10. Who are the key players/companies in the global machine vision market?

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