

Global 3D Machine Vision Market By Offering (Hardware and Software), By Product (PC Based and Smart Camera Based), By Application (Quality Assurance & Inspection, Positioning & Guidance, Measurement and Identification), By Industry Vertical (Automotive, Postal & Logistics, Electronics & Semiconductor, Printing & Labeling, Pulp & Paper, Food & Beverage, Pharmaceuticals & Chemicals and Others), By Region, Industry Analysis and Forecast, 2020 - 2026

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Abstracts

The Global 3D Machine Vision Market size is expected to reach \$2.8 billion by 2026, rising at a market growth of 18.3% CAGR during the forecast period. A 3D machine vision system includes a variety of techniques comprising stereo vision, 3D triangulation, and, point clouds that allow automatic sensing, and it receives and interprets a real scene image to get information and control processes or machines. It consists of multiple cameras or various laser displacement sensors that deliver the robots information about the parts.

The rising demand and concern for quality are encouraging developing as well as developed countries to adopt 3D machine vision systems that would be beneficial in keeping up with the requirements of the customers for automated inspection. To remain competitive in the market, companies in industry verticals are rapidly opting for automation to improve their manufacturing processes. The 3D machine vision systems are used in a number of industries, from pharmaceuticals to textiles

The growing demand for quality inspection and increasing adoption of automation in

different verticals of the industrial is expected to drive the market of machine vision. Moreover, the growing need for vision-guided robotic systems in automotive, pharmaceutical & chemical, food & beverage, and packaging segments are likely to have a positive impact on market growth. The application-oriented machine vision system's demand is rising, it is also increasing the adoption of the technology in the coming years. 3D machine vision (MV) systems include the computer's ability to observe, inspect, and scrutinize the overall performance of the work by employing video cameras, analog to digital conversion and digital signal processing. Captured data from the camera is then transferred to the computer system to analyse and give the desired output.

Based on Offering, the market is segmented into Hardware and Software. Based on Product, the market is segmented into PC Based and Smart Camera Based. Based on Application, the market is segmented into Quality Assurance & Inspection, Positioning & Guidance, Measurement and Identification. Based on Industry Vertical, the market is segmented into Automotive, Postal & Logistics, Electronics & Semiconductor, Printing & Labeling, Pulp & Paper, Food & Beverage, Pharmaceuticals & Chemicals and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Product Launches and Acquisitions. Based on the Analysis presented in the Cardinal matrix; Keyence Corporation and Omron Corporation are the forerunners in the 3D Machine Vision Market. Companies such as Cognex Corporation, Stemmer Imaging AG, ISRA Vision AG, TKH Group NV, Basler AG, Sick AG, and National Instruments Corporation are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Keyence Corporation, Cognex Corporation, Basler AG, Sick AG, Omron Corporation, National Instruments Corporation, ISRA Vision AG (Atlas Copco), Stemmer Imaging AG (SI Holding GmbH), TKH Group NV and Tordivel AS.

Recent strategies deployed in 3D Machine Vision Market
Partnerships, Collaborations, and Agreements:

June-2020: Basler came into partnership with NVIDIA Corporation, a leader in edge computing. Following the partnership, Basler launched the Embedded Vision Development Kit and two Add-on Camera Kits powered by the NVIDIA Jetson platform. The Embedded Vision Development Kit, which includes the Jetson Nano Developer Kit, comes with a Basler dart BCON for MIPI camera with 13 MP, S-mount lens, an adapter

board specifically developed for the Jetson Nano module and accessories. The two Add-on Camera Kits deliver the appropriate vision extension for developers already working with a Jetson Nano processor board. The Add-on Camera Kits contain either a 5 MP or a 13 MP Basler dart BCON for MIPI camera with an S-mount lens, an adapter board, and accessories.

Jul-2019: Stemmer Imaging signed an agreement with 3D machine vision camera company, Zivid for the distribution of its market-leading Zivid One+ cameras and software across Europe. The cameras support the fast-growing market of collaborative robotics and 3D vision systems.

Acquisition and Mergers:

Oct-2019: Cognex acquired SUALAB, a leading Korean-based developer of vision software using deep learning for industrial applications. The acquisition accelerated Cognex's existing deep learning capabilities

Based on technology acquired from ViDi Systems.

Sep-2019: TKH Group completed the acquisition of SVS-Vistek GmbH, the Machine vision camera manufacturer. The acquisition broadened TKH's portfolio of vision technology companies that includes Allied Vision, Chromasens, LMI Technologies, Mikrotron, NET, and Tattile.

Sep-2019: TKH Group announced the acquisition of Lakesight Technologies, a global vision technology company providing innovative high-end technologies for imaging systems. The acquisition helped the company in becoming the leader in the machine vision industry.

Aug-2019: ISRA Vision AG completed the acquisition of Photonfocus AG, a leading developer, and manufacturer of the high-performance CMOS image sensor and camera technologies for the machine vision industry. The acquisition complemented the company's business and expanded it into smart factory automation through embedded sensor technology.

Jul-2019: Stemmer Imaging announced the acquisition of the Spanish group, Infaimon S.L. The acquisition complemented Stemmer's of state-of-the-art bin-picking solutions, an important capability in the context of Industry 4.0 applications, which further strengthened the company's product and service portfolio.

Jul-2018: Stemmer Imaging took over French Elvitec SAS, an established provider of machine vision products and services. The acquisition broadened its portfolio with an optimally connected distributor. Moreover, it strengthened its presence in the French market and expertise for francophone countries.

Feb-2018: ISRA Vision completed the acquisition of Polymetric GmbH, a company that designs and develops health care software. Following the acquisition, ISRA expanded

3D technologies for the further development of product lines

Based on integrated machine vision systems.

Jul-2017: Omron took over Sentech Co., Ltd., a leading industrial camera maker offering a comprehensive range of cameras. Following the acquisition, ST renamed as Omron Sentech Co., Ltd. Omron Sentech develops ultra-compact, high-definition smart cameras that can be easily installed virtually anywhere.

Apr-2017: Cognex took over ViDi Systems SA, a developer of deep learning software for industrial machine vision. ViDi's deep learning software uses artificial intelligence techniques to improve image analysis in applications where it is difficult to predict the full range of image variations that might be encountered. The acquisition broadened the scope of applications that can be addressed at a world-class level with Cognex vision.

Nov-2016: Cognex announced the acquisition of Boulder, a Colorado-based Chiaro Technologies, and maker of an innovative 3D machine vision sensor called Cloudburst. The acquisition complemented Cognex's high-performance 3D sensors, which are used for the most challenging 3D vision applications.

Oct-2016: Cognex completed the acquisition of EnShape GmbH, a maker of advanced 3D vision sensors and software. EnShape's 3D sensors use patented area-scan technology for fast image capture at high resolution, and eliminate the need to mechanically move objects in front of the device as required with laser line scanners. The acquisition complemented the company's capabilities in vision software.

Aug-2016: Cognex acquired AQSense, a provider of 3D vision software based in Girona, Spain. AQSense develops and sells a library of field-tested 3D vision tools and a configuration software package that helps customers easily set up their 3D vision applications. The acquisition accelerated its ability to bring innovative new 3D products to the market.

Product Launches and Product Expansions:

Aug-2020: Cognex announced the launch of the new 3D-A1000 Item Detection System. This motion-capable smart camera can identify the presence or absence of objects with high accuracy on different types of sorters traveling at production line speeds. The system's new features have been designed to help retail and logistics companies reduce delivery errors, improve throughput, and increase fulfillment efficiency.

Aug-2020: Omron Automation Americas unveiled the FJ2 cameras, the complete machine vision solutions package that can be easily installed on PC-based systems. The new FJ2 cameras feature state-of-the-art complementary metal-oxide-semiconductor (CMOS) sensors, frame rates as fast as 282 frames per second (FPS), and resolutions ranging from 0.4MP up to 5MP in both monochrome and color versions. The PC-based FJ2 cameras enabled manufacturers to incorporate machine vision into their existing systems while continuing to use their PC or industrial PC.

Nov-2019: Stemmer Imaging made upgradation to the CVB machine vision

programming library by launching CVB 2019. This solution provides APIs to provide an innovative way of developing machine vision solutions with Common Vision Blox, together with an impressive range of new tools. These tools offer functionality for hyperspectral and polarization imaging, as well as OPC UA machine to machine communication capability for Industry 4.0 requirements. Additionally, it is possible to develop machine learning solutions on embedded platforms.

Oct-2019: Omron launched the new E3AS Series Reflective-Type Photoelectric Sensors that integrated accurate detection for diverse targets, exceptional sensing distance, environmental robustness, and compact size. These sensors have been designed for helping manufacturers in managing varied and flexible production needs more effectively.

Jul-2019: Keyence Corporation of America launched the world's first 4K ultra-high accuracy microscope, the VHX-7000. This has been marked as the 5th generation of the digital microscope product line. This versatile system incorporates the capabilities of multiple microscopes: stereoscope, metallurgical, measuring, and entry-level SEM. The system displays images in 4K Ultra HD, providing the most accurate images. It also has in-demand features such as high NA lenses (up to 0.9) and automated inspection.

Jul-2019: Basler is launching the second generation of its 3D camera portfolio, the Basler blaze. The Basler Blaze has a GigE interface, VGA resolution, and the latest Sony DepthSense sensor technology, which made the Basler blaze the ideal camera for measuring the location, position, and volume of objects and for detecting obstacles.

Apr-2019: ISRA Vision unveiled a quad-camera sensor solution for bin picking. The solution has top speeds in scanning and data processing, which takes fully automated bin picking to the next level of performance. It enabled significantly higher throughput and faster cycle times than comparable solutions and other technologies.

Mar-2019: Keyence introduced the latest high-precision color 3D scanner, the 3D scanner CMM. The scanner has a fixed structure design and a rotating 360° stage, enabling the generation of high-resolution data with millions of shape profiles from all angles. The CMM collects color data from a surface to accurately represent the scanned part for reverse engineering and 3D printed models.

Mar-2019: Keyence Corporation of America released the IX Series, a new image-based laser sensor. By combining a camera with a laser, users can determine part position before performing laser inspection, reducing hardware and installation costs. The IX Series was designed for tackling four types of inspection situations: Unrepeatable target locations, reference height checks, low-contrast targets, and inspections of multiple areas at once.

Feb-2019: Omron announced the launch of a new smart camera for machine vision applications, the FHV7-series smart camera. The camera features a multi-color light, an autofocus lens, and a range of CMOS image sensors to serve inspection of varied

products on single production lines. The camera also features a dual-core CPU and high-speed image compression algorithm that enables the saving of image data while inspecting a second image in parallel.

Scope of the Study

Market Segmentation:

By Offering

Hardware

Software

By Product

PC Based

Smart Camera Based

By Application

Quality Assurance & Inspection

Positioning & Guidance

Measurement

Identification

By Industry Vertical

Automotive

Postal & Logistics

Electronics & Semiconductor

Printing & Labeling

Pulp & Paper

Food & Beverage

Pharmaceuticals & Chemicals

Others

By Geography

North America

- o US
- o Canada
- o Mexico
- o Rest of North America

Europe

- o Germany
- o UK
- o France
- o Russia
- o Spain
- o Italy
- o Rest of Europe

Asia Pacific

- o China
- o Japan

- o India
- o South Korea
- o Singapore
- o Malaysia
- o Rest of Asia Pacific

LAMEA

- o Brazil
- o Argentina
- o UAE
- o Saudi Arabia
- o South Africa
- o Nigeria
- o Rest of LAMEA

Companies Profiled

Keyence Corporation

Cognex Corporation

Basler AG

Sick AG

Omron Corporation

National Instruments Corporation

ISRA Vision AG (Atlas Copco)

Stemmer Imaging AG (SI Holding GmbH)

TKH Group NV

Tordivel AS

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FIG 5 KEY STRATEGIC MOVE: (ACQUISITION AND MERGERS: 2016, AUG – 2019, OCT) LEADING PLAYERS

FIG 6 SWOT ANALYSIS: KEYENCE CORPORATION

FIG 7 RECENT STRATEGIES AND DEVELOPMENTS: COGNEX CORPORATION

FIG 8 RECENT STRATEGIES AND DEVELOPMENTS: BASLER AG

FIG 9 SWOT ANALYSIS: SICK AG

FIG 10 RECENT STRATEGIES AND DEVELOPMENTS: OMRON CORPORATION

FIG 11 SWOT ANALYSIS: OMRON CORPORATION

FIG 12 RECENT STRATEGIES AND DEVELOPMENTS: ISRA VISION AG

FIG 13 RECENT STRATEGIES AND DEVELOPMENTS: STEMMER IMAGING AG

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