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Global 140DB HDR CMOS Image Sensor Market Growth 2026-2032

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Abstracts

The global 140DB HDR CMOS Image Sensor market size is predicted to grow from US$ 10788 million in 2025 to US$ 18300 million in 2032; it is expected to grow at a CAGR of 7.9% from 2026 to 2032.

In 2025, global 140DB HDR CMOS Image Sensor production reached approximately 2.83 billion Units, with an average global market price of around US$ 3.9 per unit.

A 140dB HDR CMOS Image Sensor is a CMOS image sensor with an ultra-high dynamic range of 140 decibels. It stands out in dealing with extreme light contrast scenarios. Unlike ordinary sensors that often have overexposed bright areas or underexposed dark areas, it can clearly retain details of both bright and dark parts of the image. It is currently mainly used in the automotive field.

The CMOS image sensor industry chain presents a vertical hierarchical structure with clear division of labor, spanning from upstream core material and equipment supply, midstream sensor design, manufacturing and packaging, to downstream application terminal integration. The industry has strong technical barriers, high concentration of leading enterprises, and close collaborative links between upstream and downstream links.

I. Upstream: Core Materials & Equipment (Technical Core, High Barriers)

The upstream segment provides the essential materials, equipment and intellectual property (IP) required for CIS design and manufacturing, and is the foundation of the entire industry chain. The market is dominated by a small number of international enterprises.

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1. Core Materials

Semiconductor Wafer Substrate for CIS: chip manufacturing, the most critical material with the highest cost.

Photoresist: Key material for photolithography process, determines pixel precision.

Metal Target Material: Used for depositing metal wiring layers (e.g., copper, aluminum).

Packaging Materials: Include lead frames, encapsulants, bonding wires, etc.

2. Manufacturing Equipment

The equipment accounts for a large proportion of CIS production costs, and the core links are monopolized by overseas enterprises:

Photolithography Machine: The core equipment for pixel pattern transfer, directly determines the pixel size and sensor resolution. The leading enterprise is ASML (EUV lithography machines are used for advanced process CIS).

Etching Equipment: Used for pattern processing of wafer layers, with representatives such as Applied Materials, Tokyo Electron (TEL).

Deposition Equipment: For film deposition of various material layers, leading manufacturers include Applied Materials, TEL.

Testing Equipment: Used for performance testing of CIS chips, such as Teradyne, Advantest.

3. IP & Design Tools

IP Authorization: Core technologies such as pixel structure (BSI/Stacked), global shutter, and HDR algorithms are mostly held by professional IP companies, such as ARM, Synopsys, Cadence.

EDA Tools: Essential for CIS circuit design, the market is monopolized by Synopsys, Cadence, and Mentor Graphics.

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II. Midstream: CIS Design, Manufacturing & Packaging (Value Core, High Concentration)

The midstream is the core value link of the industry chain, covering three key links: chip design, wafer fabrication, and packaging and testing. The industry is divided into two business models: IDM (Integrated Device Manufacturer) and Fabless + Foundry + OSAT.

1. Chip Design (Fabless/IDM Design Division)

The link determines the technical route and performance parameters of CIS (e.g., pixel structure, resolution, dynamic range). It has high R&D investment and strong technical barriers, and the market concentration is extremely high.

IDM Mode Enterprises: Integrate design, manufacturing, packaging and testing, with strong technical strength. Representative enterprises: Sony Semiconductor Solutions, Samsung Electronics, OmniVision (partially self-manufactured).

Fabless Mode Enterprises: Focus on design, outsource manufacturing and packaging to third parties. Representative enterprises: On Semiconductor, SK Hynix, GalaxyCore.

2. Wafer Fabrication (Foundry)

It is responsible for manufacturing CIS chips according to the design scheme, and the advanced process (e.g., 45nm, 28nm) is the key to improving sensor performance.

Main Foundries: TSMC (the largest foundry, focusing on high-end stacked CIS), UMC, GlobalFoundries, SMIC (focusing on mid-to-low-end CIS process).

IDM Self-Manufacturing Lines: Sony and Samsung have their own advanced wafer factories, which can realize the rapid iteration of proprietary technologies (e.g., Sony's Stacked CMOS).

3. Packaging and Testing (OSAT)

The link directly affects the reliability, size and heat dissipation performance of CIS, and the advanced packaging technology is the key to miniaturization and high performance.

Traditional Packaging: Includes wire bonding, encapsulation, etc., suitable for mid-to-

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low-end CIS, with manufacturers such as ASE Group, Amkor Technology.

Advanced Packaging: Flip-chip packaging (Flip Chip), wafer-level packaging (WLP), chip-scale packaging (CSP) are the mainstream, which can reduce the sensor size and improve the light sensitivity. Leading enterprises: ASE Group, Amkor, STATS ChipPAC.

Testing: Includes wafer testing (CP) and final testing (FT), to ensure the yield and performance consistency of CIS, with manufacturers such as Xcerra, Teradyne.

III. Downstream: Application Terminal Integration (Demand Core, Diversified Scenarios)

Downstream applications cover consumer electronics, automotive electronics, industrial detection, security monitoring, medical imaging and other fields. The demand of different scenarios drives the iteration of CIS technology, and the B2B field has become the main growth engine in recent years.

1. Consumer Electronics (Traditional Main Market, Gradual Saturation)

Application Scenarios: Smartphones (front and rear cameras), tablets, laptops, digital cameras, drones.

Demand Characteristics: Pursue high resolution (100MP+), small pixel size (0.7?m), stacked structure, but the market growth is slowing down with the saturation of smartphone shipments.

Key Customers: Apple, Samsung, Xiaomi, Huawei, DJI.

2. Automotive Electronics (Fastest Growing Track, High Barriers)

Application Scenarios: Vehicle-mounted cameras (front view, rear view, surround view, in-cabin monitoring), LiDAR supporting sensors, ADAS systems.

Demand Characteristics: Need to meet AEC-Q100 automotive-grade certification, with high requirements for high temperature resistance, anti-electromagnetic interference, high dynamic range (HDR > 120dB) and reliability. The single-vehicle CIS loading quantity can reach 8-16 units with the upgrade of autonomous driving.

Key Customers: Tesla, BYD, Volkswagen, Bosch, Continental.

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3. Security Monitoring (Stable Demand, High Performance Requirements)

Application Scenarios: Network cameras (IPC), analog cameras, ball machines, video recorders (NVR).

Demand Characteristics: Emphasize low illumination imaging ability, wide dynamic range, and night vision effect. 4K high-definition and AI intelligent recognition are the main trends.

Key Customers: Hikvision, Dahua Technology, Uniview.

4. Industrial & Medical Fields (High Profit Margin, Professional Demand)

Industrial Detection: Machine vision cameras, semiconductor detection equipment, barcode scanners, requiring global shutter, high frame rate (thousands of frames/second) and high precision. Key customers: Keyence, Cognex.

Medical Imaging: Endoscopes, dental imaging equipment, portable detectors, requiring high signal-to-noise ratio, low radiation and miniaturization. Key customers: Olympus, Fujifilm.

IV. Industry Chain Characteristics & Profit Distribution

Profit Concentration: The upstream equipment and midstream design links occupy the highest profit margin, while the downstream application terminal profit margin is relatively low.

Technical Synergy: The iteration of downstream application demand (e.g., automotive high dynamic range, industrial global shutter) drives the R&D of midstream design and upstream material and equipment technologies, forming a positive feedback loop.

Regional Concentration: The upstream and midstream high-end links are concentrated in Japan, South Korea, the United States and Taiwan of China; the downstream application market is dominated by China, which is the largest CIS consumer market in the world.

LP Information, Inc. (LPI) ' newest research report, the ?140DB HDR CMOS Image Sensor Industry Forecast? looks at past sales and reviews total world 140DB HDR CMOS Image Sensor sales in 2025, providing a comprehensive analysis by region and

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market sector of projected 140DB HDR CMOS Image Sensor sales for 2026 through 2032. With 140DB HDR CMOS Image Sensor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world 140DB HDR CMOS Image Sensor industry.

This Insight Report provides a comprehensive analysis of the global 140DB HDR CMOS Image Sensor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 140DB HDR CMOS Image Sensor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global 140DB HDR CMOS Image Sensor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 140DB HDR CMOS Image Sensor and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 140DB HDR CMOS Image Sensor.

This report presents a comprehensive overview, market shares, and growth opportunities of 140DB HDR CMOS Image Sensor market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Pixel Size: 2.1 ?m

Pixel Size: 3 ?m

Segmentation by Photosensitive Architecture:

Front Side Illuminated

Back Side Illuminated

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Stacked CMOS Image Sensor

Segmentation by Shutter Type:

Rolling Shutter (RS)

Global Shutter (GS)

Segmentation by Application:

Passenger Car

Commercial Vehicle

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

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India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Smartsens

ON Semi

OmniVision

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Samsung

Key Questions Addressed in this Report

What is the 10-year outlook for the global 140DB HDR CMOS Image Sensor market?

What factors are driving 140DB HDR CMOS Image Sensor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 140DB HDR CMOS Image Sensor market opportunities vary by end market size?

How does 140DB HDR CMOS Image Sensor break out by Type, by Application?

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