

Global CMOS and sCMOS Image Sensors Market Growth 2026-2032

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Abstracts

The global CMOS and sCMOS Image Sensors market size is predicted to grow from US\$ 21784 million in 2025 to US\$ 44570 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

In 2024, global CMOS and sCMOS Image Sensors production reached approximately 7.85 billion Units, with an average global market price of around US\$ 2.84 per unit.

CMOS Image Sensor (CIS) and scientific CMOS (sCMOS) Image Sensor are two types of image-sensing devices based on complementary metal-oxide-semiconductor (CMOS) technology, but they target different application scenarios and have distinct performance characteristics.

CMOS Image Sensor (CIS) is a general-purpose semiconductor device that converts optical signals into electrical signals by using the photoelectric effect of CMOS transistors. It integrates pixel arrays, signal readout circuits, and signal processing modules on a single chip. Compared with traditional CCD (Charge-Coupled Device) sensors, CIS has simpler driving circuits, lower power consumption, and is more suitable for mass production, which reduces the manufacturing cost. It can integrate functions such as analog-to-digital conversion (ADC), automatic exposure control, and noise reduction on the chip, realizing a 'system-on-chip' solution. Different types of CIS can be customized according to application needs, such as high resolution for consumer electronics, high dynamic range (HDR) for security monitoring, and car-grade reliability for automotive electronics. Main Application ScenariosIt covers both consumer electronics and B2B industrial fields, including smartphones, security cameras, automotive cameras, industrial machine vision, and medical endoscopes. The mainstream technical architectures are Back-Side Illumination (BSI) and Stacked

CMOS.

Scientific CMOS (sCMOS) Image Sensor is a high-performance variant of CMOS image sensors, specifically designed for scientific research and high-precision detection scenarios. The term 'scientific' highlights its optimization for low noise, high sensitivity, and large dynamic range, filling the gap between traditional CMOS and scientific-grade CCD sensors. It adopts special pixel design (e.g., pinned photodiode structure) and noise suppression technology, with read noise as low as a few electrons (e⁻), which can capture weak optical signals accurately. The dynamic range can reach 100 dB–120 dB, which can simultaneously capture both dim and bright areas in a scene without overexposure or underexposure. It has a high conversion rate of photons to electrons (up to 90% in some wavelength bands), which is suitable for low-light scientific experiments such as fluorescence microscopy. It balances high-speed data transmission and low noise, meeting the needs of real-time scientific observation. Global shutter support: All pixels are exposed and read out simultaneously, avoiding motion blur and ensuring the accuracy of fast-moving sample imaging (e.g., particle tracking in biological experiments).

Main Application Scenarios It is mainly used in professional scientific research and high-precision industrial testing, such as biological fluorescence microscopy, astronomical imaging, particle physics detection, high-resolution industrial defect detection, and medical pathological analysis.

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.

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.

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-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 μ 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.

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 "CMOS and sCMOS Image Sensors Industry Forecast" looks at past sales and reviews total world CMOS and sCMOS Image Sensors sales in 2025, providing a comprehensive analysis by region and market sector of projected CMOS and sCMOS Image Sensors sales for 2026 through 2032. With CMOS and sCMOS Image Sensors sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of

the world CMOS and sCMOS Image Sensors industry.

This Insight Report provides a comprehensive analysis of the global CMOS and sCMOS Image Sensors 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 CMOS and sCMOS Image Sensors portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global CMOS and sCMOS Image Sensors market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for CMOS and sCMOS Image Sensors 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 CMOS and sCMOS Image Sensors.

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

Segmentation by Type:

CMOS Image Sensor (CIS)

Scientific CMOS (sCMOS) Image Sensor

Segmentation by Shutter Type:

Rolling Shutter, RS

Global Shutter, GS

Segmentation by pixel size:

Small Pixel

Medium Pixel

Large Pixel

Segmentation by Application:

Mobile

Automotive

Security

Industrial

Medical

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

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.

SONY

Samsung

OmniVision

STMicroelectronics

On Semi

SK Hynix

GalaxyCore

Panasonic

Smartsens Technology

Canon

SOI

Teledyne Photometrics

Andor Technology

Hamamatsu Photonics

Sharp

Key Questions Addressed in this Report

What is the 10-year outlook for the global CMOS and sCMOS Image Sensors market?

What factors are driving CMOS and sCMOS Image Sensors market growth, globally and by region?

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

How do CMOS and sCMOS Image Sensors market opportunities vary by end market

size?

How does CMOS and sCMOS Image Sensors break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global CMOS and sCMOS Image Sensors Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for CMOS and sCMOS Image Sensors by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for CMOS and sCMOS Image Sensors by Country/Region, 2021, 2025 & 2032
- 2.2 CMOS and sCMOS Image Sensors Segment by Type
 - 2.2.1 CMOS Image Sensor (CIS)
 - 2.2.2 Scientific CMOS (SCMOS) Image Sensor
 - 2.2.3 CMOS and sCMOS Image Sensors Sales by Type
 - 2.2.3.1 Global CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global CMOS and sCMOS Image Sensors Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global CMOS and sCMOS Image Sensors Sale Price by Type (2021-2026)
- 2.3 CMOS and sCMOS Image Sensors Segment by Shutter Type
 - 2.3.1 Rolling Shutter, RS
 - 2.3.2 Global Shutter, GS
 - 2.3.3 CMOS and sCMOS Image Sensors Sales by Shutter Type
 - 2.3.3.1 Global CMOS and sCMOS Image Sensors Sales Market Share by Shutter Type (2021-2026)
 - 2.3.3.2 Global CMOS and sCMOS Image Sensors Revenue and Market Share by Shutter Type (2021-2026)
 - 2.3.3.3 Global CMOS and sCMOS Image Sensors Sale Price by Shutter Type

(2021-2026)

2.4 CMOS and sCMOS Image Sensors Segment by pixel size

2.4.1 Small Pixel

2.4.2 Medium Pixel

2.4.3 Large Pixel

2.4.4 CMOS and sCMOS Image Sensors Sales by pixel size

2.4.4.1 Global CMOS and sCMOS Image Sensors Sales Market Share by pixel size

(2021-2026)

2.4.4.2 Global CMOS and sCMOS Image Sensors Revenue and Market Share by pixel size (2021-2026)

2.4.4.3 Global CMOS and sCMOS Image Sensors Sale Price by pixel size

(2021-2026)

2.5 CMOS and sCMOS Image Sensors Segment by Application

2.5.1 Mobile

2.5.2 Automotive

2.5.3 Security

2.5.4 Industrial

2.5.5 Medical

2.5.6 Others

2.5.7 CMOS and sCMOS Image Sensors Sales by Application

2.5.7.1 Global CMOS and sCMOS Image Sensors Sale Market Share by Application

(2021-2026)

2.5.7.2 Global CMOS and sCMOS Image Sensors Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global CMOS and sCMOS Image Sensors Sale Price by Application

(2021-2026)

3 GLOBAL BY COMPANY

3.1 Global CMOS and sCMOS Image Sensors Breakdown Data by Company

3.1.1 Global CMOS and sCMOS Image Sensors Annual Sales by Company

(2021-2026)

3.1.2 Global CMOS and sCMOS Image Sensors Sales Market Share by Company

(2021-2026)

3.2 Global CMOS and sCMOS Image Sensors Annual Revenue by Company

(2021-2026)

3.2.1 Global CMOS and sCMOS Image Sensors Revenue by Company (2021-2026)

3.2.2 Global CMOS and sCMOS Image Sensors Revenue Market Share by Company

(2021-2026)

- 3.3 Global CMOS and sCMOS Image Sensors Sale Price by Company
- 3.4 Key Manufacturers CMOS and sCMOS Image Sensors Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers CMOS and sCMOS Image Sensors Product Location Distribution
 - 3.4.2 Players CMOS and sCMOS Image Sensors Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR CMOS AND sCMOS IMAGE SENSORS BY GEOGRAPHIC REGION

- 4.1 World Historic CMOS and sCMOS Image Sensors Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global CMOS and sCMOS Image Sensors Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global CMOS and sCMOS Image Sensors Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic CMOS and sCMOS Image Sensors Market Size by Country/Region (2021-2026)
 - 4.2.1 Global CMOS and sCMOS Image Sensors Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global CMOS and sCMOS Image Sensors Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas CMOS and sCMOS Image Sensors Sales Growth
- 4.4 APAC CMOS and sCMOS Image Sensors Sales Growth
- 4.5 Europe CMOS and sCMOS Image Sensors Sales Growth
- 4.6 Middle East & Africa CMOS and sCMOS Image Sensors Sales Growth

5 AMERICAS

- 5.1 Americas CMOS and sCMOS Image Sensors Sales by Country
 - 5.1.1 Americas CMOS and sCMOS Image Sensors Sales by Country (2021-2026)
 - 5.1.2 Americas CMOS and sCMOS Image Sensors Revenue by Country (2021-2026)
- 5.2 Americas CMOS and sCMOS Image Sensors Sales by Type (2021-2026)
- 5.3 Americas CMOS and sCMOS Image Sensors Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC CMOS and sCMOS Image Sensors Sales by Region

6.1.1 APAC CMOS and sCMOS Image Sensors Sales by Region (2021-2026)

6.1.2 APAC CMOS and sCMOS Image Sensors Revenue by Region (2021-2026)

6.2 APAC CMOS and sCMOS Image Sensors Sales by Type (2021-2026)

6.3 APAC CMOS and sCMOS Image Sensors Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe CMOS and sCMOS Image Sensors by Country

7.1.1 Europe CMOS and sCMOS Image Sensors Sales by Country (2021-2026)

7.1.2 Europe CMOS and sCMOS Image Sensors Revenue by Country (2021-2026)

7.2 Europe CMOS and sCMOS Image Sensors Sales by Type (2021-2026)

7.3 Europe CMOS and sCMOS Image Sensors Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa CMOS and sCMOS Image Sensors by Country

8.1.1 Middle East & Africa CMOS and sCMOS Image Sensors Sales by Country (2021-2026)

8.1.2 Middle East & Africa CMOS and sCMOS Image Sensors Revenue by Country

(2021-2026)

8.2 Middle East & Africa CMOS and sCMOS Image Sensors Sales by Type

(2021-2026)

8.3 Middle East & Africa CMOS and sCMOS Image Sensors Sales by Application

(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of CMOS and sCMOS Image Sensors

10.3 Manufacturing Process Analysis of CMOS and sCMOS Image Sensors

10.4 Industry Chain Structure of CMOS and sCMOS Image Sensors

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 CMOS and sCMOS Image Sensors Distributors

11.3 CMOS and sCMOS Image Sensors Customer

12 WORLD FORECAST REVIEW FOR CMOS AND sCMOS IMAGE SENSORS BY GEOGRAPHIC REGION

12.1 Global CMOS and sCMOS Image Sensors Market Size Forecast by Region

12.1.1 Global CMOS and sCMOS Image Sensors Forecast by Region (2027-2032)

12.1.2 Global CMOS and sCMOS Image Sensors Annual Revenue Forecast by Region (2027-2032)

- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global CMOS and sCMOS Image Sensors Forecast by Type (2027-2032)
- 12.7 Global CMOS and sCMOS Image Sensors Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 SONY

- 13.1.1 SONY Company Information
- 13.1.2 SONY CMOS and sCMOS Image Sensors Product Portfolios and Specifications
- 13.1.3 SONY CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 SONY Main Business Overview
- 13.1.5 SONY Latest Developments

13.2 Samsung

- 13.2.1 Samsung Company Information
- 13.2.2 Samsung CMOS and sCMOS Image Sensors Product Portfolios and Specifications
- 13.2.3 Samsung CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Samsung Main Business Overview
- 13.2.5 Samsung Latest Developments

13.3 OmniVision

- 13.3.1 OmniVision Company Information
- 13.3.2 OmniVision CMOS and sCMOS Image Sensors Product Portfolios and Specifications
- 13.3.3 OmniVision CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 OmniVision Main Business Overview
- 13.3.5 OmniVision Latest Developments

13.4 STMicroelectronics

- 13.4.1 STMicroelectronics Company Information
- 13.4.2 STMicroelectronics CMOS and sCMOS Image Sensors Product Portfolios and Specifications
- 13.4.3 STMicroelectronics CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.4.4 STMicroelectronics Main Business Overview
- 13.4.5 STMicroelectronics Latest Developments
- 13.5 On Semi
 - 13.5.1 On Semi Company Information
 - 13.5.2 On Semi CMOS and sCMOS Image Sensors Product Portfolios and Specifications
 - 13.5.3 On Semi CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 On Semi Main Business Overview
 - 13.5.5 On Semi Latest Developments
- 13.6 SK Hynix
 - 13.6.1 SK Hynix Company Information
 - 13.6.2 SK Hynix CMOS and sCMOS Image Sensors Product Portfolios and Specifications
 - 13.6.3 SK Hynix CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 SK Hynix Main Business Overview
 - 13.6.5 SK Hynix Latest Developments
- 13.7 GalaxyCore
 - 13.7.1 GalaxyCore Company Information
 - 13.7.2 GalaxyCore CMOS and sCMOS Image Sensors Product Portfolios and Specifications
 - 13.7.3 GalaxyCore CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 GalaxyCore Main Business Overview
 - 13.7.5 GalaxyCore Latest Developments
- 13.8 Panasonic
 - 13.8.1 Panasonic Company Information
 - 13.8.2 Panasonic CMOS and sCMOS Image Sensors Product Portfolios and Specifications
 - 13.8.3 Panasonic CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Panasonic Main Business Overview
 - 13.8.5 Panasonic Latest Developments
- 13.9 Smartsens Technology
 - 13.9.1 Smartsens Technology Company Information
 - 13.9.2 Smartsens Technology CMOS and sCMOS Image Sensors Product Portfolios and Specifications
 - 13.9.3 Smartsens Technology CMOS and sCMOS Image Sensors Sales, Revenue,

Price and Gross Margin (2021-2026)

13.9.4 Smartsens Technology Main Business Overview

13.9.5 Smartsens Technology Latest Developments

13.10 Canon

13.10.1 Canon Company Information

13.10.2 Canon CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.10.3 Canon CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Canon Main Business Overview

13.10.5 Canon Latest Developments

13.11 SOI

13.11.1 SOI Company Information

13.11.2 SOI CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.11.3 SOI CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 SOI Main Business Overview

13.11.5 SOI Latest Developments

13.12 Teledyne Photometrics

13.12.1 Teledyne Photometrics Company Information

13.12.2 Teledyne Photometrics CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.12.3 Teledyne Photometrics CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Teledyne Photometrics Main Business Overview

13.12.5 Teledyne Photometrics Latest Developments

13.13 Andor Technology

13.13.1 Andor Technology Company Information

13.13.2 Andor Technology CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.13.3 Andor Technology CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Andor Technology Main Business Overview

13.13.5 Andor Technology Latest Developments

13.14 Hamamatsu Photonics

13.14.1 Hamamatsu Photonics Company Information

13.14.2 Hamamatsu Photonics CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.14.3 Hamamatsu Photonics CMOS and sCMOS Image Sensors Sales, Revenue,

Price and Gross Margin (2021-2026)

13.14.4 Hamamatsu Photonics Main Business Overview

13.14.5 Hamamatsu Photonics Latest Developments

13.15 Sharp

13.15.1 Sharp Company Information

13.15.2 Sharp CMOS and sCMOS Image Sensors Product Portfolios and Specifications

13.15.3 Sharp CMOS and sCMOS Image Sensors Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Sharp Main Business Overview

13.15.5 Sharp Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. CMOS and sCMOS Image Sensors Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. CMOS and sCMOS Image Sensors Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of CMOS Image Sensor (CIS)

Table 4. Major Players of Scientific CMOS (sCMOS) Image Sensor

Table 5. Global CMOS and sCMOS Image Sensors Sales by Type (2021-2026) & (Million Units)

Table 6. Global CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)

Table 7. Global CMOS and sCMOS Image Sensors Revenue by Type (2021-2026) & (\$ million)

Table 8. Global CMOS and sCMOS Image Sensors Revenue Market Share by Type (2021-2026)

Table 9. Global CMOS and sCMOS Image Sensors Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Rolling Shutter, RS

Table 11. Major Players of Global Shutter, GS

Table 12. Global CMOS and sCMOS Image Sensors Sales by Shutter Type (2021-2026) & (Million Units)

Table 13. Global CMOS and sCMOS Image Sensors Sales Market Share by Shutter Type (2021-2026)

Table 14. Global CMOS and sCMOS Image Sensors Revenue by Shutter Type (2021-2026) & (\$ million)

Table 15. Global CMOS and sCMOS Image Sensors Revenue Market Share by Shutter Type (2021-2026)

Table 16. Global CMOS and sCMOS Image Sensors Sale Price by Shutter Type (2021-2026) & (US\$/Unit)

Table 17. Major Players of Small Pixel

Table 18. Major Players of Medium Pixel

Table 19. Major Players of Large Pixel

Table 20. Global CMOS and sCMOS Image Sensors Sales by pixel size (2021-2026) & (Million Units)

Table 21. Global CMOS and sCMOS Image Sensors Sales Market Share by pixel size (2021-2026)

Table 22. Global CMOS and sCMOS Image Sensors Revenue by pixel size (2021-2026) & (\$ million)
Table 23. Global CMOS and sCMOS Image Sensors Revenue Market Share by pixel size (2021-2026)
Table 24. Global CMOS and sCMOS Image Sensors Sale Price by pixel size (2021-2026) & (US\$/Unit)
Table 25. Global CMOS and sCMOS Image Sensors Sale by Application (2021-2026) & (Million Units)
Table 26. Global CMOS and sCMOS Image Sensors Sale Market Share by Application (2021-2026)
Table 27. Global CMOS and sCMOS Image Sensors Revenue by Application (2021-2026) & (\$ million)
Table 28. Global CMOS and sCMOS Image Sensors Revenue Market Share by Application (2021-2026)
Table 29. Global CMOS and sCMOS Image Sensors Sale Price by Application (2021-2026) & (US\$/Unit)
Table 30. Global CMOS and sCMOS Image Sensors Sales by Company (2021-2026) & (Million Units)
Table 31. Global CMOS and sCMOS Image Sensors Sales Market Share by Company (2021-2026)
Table 32. Global CMOS and sCMOS Image Sensors Revenue by Company (2021-2026) & (\$ millions)
Table 33. Global CMOS and sCMOS Image Sensors Revenue Market Share by Company (2021-2026)
Table 34. Global CMOS and sCMOS Image Sensors Sale Price by Company (2021-2026) & (US\$/Unit)
Table 35. Key Manufacturers CMOS and sCMOS Image Sensors Producing Area Distribution and Sales Area
Table 36. Players CMOS and sCMOS Image Sensors Products Offered
Table 37. CMOS and sCMOS Image Sensors Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 38. New Products and Potential Entrants
Table 39. Market M&A Activity & Strategy
Table 40. Global CMOS and sCMOS Image Sensors Sales by Geographic Region (2021-2026) & (Million Units)
Table 41. Global CMOS and sCMOS Image Sensors Sales Market Share Geographic Region (2021-2026)
Table 42. Global CMOS and sCMOS Image Sensors Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 43. Global CMOS and sCMOS Image Sensors Revenue Market Share by Geographic Region (2021-2026)

Table 44. Global CMOS and sCMOS Image Sensors Sales by Country/Region (2021-2026) & (Million Units)

Table 45. Global CMOS and sCMOS Image Sensors Sales Market Share by Country/Region (2021-2026)

Table 46. Global CMOS and sCMOS Image Sensors Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global CMOS and sCMOS Image Sensors Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas CMOS and sCMOS Image Sensors Sales by Country (2021-2026) & (Million Units)

Table 49. Americas CMOS and sCMOS Image Sensors Sales Market Share by Country (2021-2026)

Table 50. Americas CMOS and sCMOS Image Sensors Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas CMOS and sCMOS Image Sensors Sales by Type (2021-2026) & (Million Units)

Table 52. Americas CMOS and sCMOS Image Sensors Sales by Application (2021-2026) & (Million Units)

Table 53. APAC CMOS and sCMOS Image Sensors Sales by Region (2021-2026) & (Million Units)

Table 54. APAC CMOS and sCMOS Image Sensors Sales Market Share by Region (2021-2026)

Table 55. APAC CMOS and sCMOS Image Sensors Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC CMOS and sCMOS Image Sensors Sales by Type (2021-2026) & (Million Units)

Table 57. APAC CMOS and sCMOS Image Sensors Sales by Application (2021-2026) & (Million Units)

Table 58. Europe CMOS and sCMOS Image Sensors Sales by Country (2021-2026) & (Million Units)

Table 59. Europe CMOS and sCMOS Image Sensors Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe CMOS and sCMOS Image Sensors Sales by Type (2021-2026) & (Million Units)

Table 61. Europe CMOS and sCMOS Image Sensors Sales by Application (2021-2026) & (Million Units)

Table 62. Middle East & Africa CMOS and sCMOS Image Sensors Sales by Country

(2021-2026) & (Million Units)

Table 63. Middle East & Africa CMOS and sCMOS Image Sensors Revenue Market Share by Country (2021-2026)

Table 64. Middle East & Africa CMOS and sCMOS Image Sensors Sales by Type (2021-2026) & (Million Units)

Table 65. Middle East & Africa CMOS and sCMOS Image Sensors Sales by Application (2021-2026) & (Million Units)

Table 66. Key Market Drivers & Growth Opportunities of CMOS and sCMOS Image Sensors

Table 67. Key Market Challenges & Risks of CMOS and sCMOS Image Sensors

Table 68. Key Industry Trends of CMOS and sCMOS Image Sensors

Table 69. CMOS and sCMOS Image Sensors Raw Material

Table 70. Key Suppliers of Raw Materials

Table 71. CMOS and sCMOS Image Sensors Distributors List

Table 72. CMOS and sCMOS Image Sensors Customer List

Table 73. Global CMOS and sCMOS Image Sensors Sales Forecast by Region (2027-2032) & (Million Units)

Table 74. Global CMOS and sCMOS Image Sensors Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Americas CMOS and sCMOS Image Sensors Sales Forecast by Country (2027-2032) & (Million Units)

Table 76. Americas CMOS and sCMOS Image Sensors Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. APAC CMOS and sCMOS Image Sensors Sales Forecast by Region (2027-2032) & (Million Units)

Table 78. APAC CMOS and sCMOS Image Sensors Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Europe CMOS and sCMOS Image Sensors Sales Forecast by Country (2027-2032) & (Million Units)

Table 80. Europe CMOS and sCMOS Image Sensors Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. Middle East & Africa CMOS and sCMOS Image Sensors Sales Forecast by Country (2027-2032) & (Million Units)

Table 82. Middle East & Africa CMOS and sCMOS Image Sensors Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Global CMOS and sCMOS Image Sensors Sales Forecast by Type (2027-2032) & (Million Units)

Table 84. Global CMOS and sCMOS Image Sensors Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 85. Global CMOS and sCMOS Image Sensors Sales Forecast by Application (2027-2032) & (Million Units)

Table 86. Global CMOS and sCMOS Image Sensors Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. SONY Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 88. SONY CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 89. SONY CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 90. SONY Main Business

Table 91. SONY Latest Developments

Table 92. Samsung Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 93. Samsung CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 94. Samsung CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 95. Samsung Main Business

Table 96. Samsung Latest Developments

Table 97. OmniVision Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 98. OmniVision CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 99. OmniVision CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 100. OmniVision Main Business

Table 101. OmniVision Latest Developments

Table 102. STMicroelectronics Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 103. STMicroelectronics CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 104. STMicroelectronics CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. STMicroelectronics Main Business

Table 106. STMicroelectronics Latest Developments

Table 107. On Semi Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 108. On Semi CMOS and sCMOS Image Sensors Product Portfolios and

Specifications

Table 109. On Semi CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 110. On Semi Main Business

Table 111. On Semi Latest Developments

Table 112. SK Hynix Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 113. SK Hynix CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 114. SK Hynix CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. SK Hynix Main Business

Table 116. SK Hynix Latest Developments

Table 117. GalaxyCore Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 118. GalaxyCore CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 119. GalaxyCore CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. GalaxyCore Main Business

Table 121. GalaxyCore Latest Developments

Table 122. Panasonic Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 123. Panasonic CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 124. Panasonic CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. Panasonic Main Business

Table 126. Panasonic Latest Developments

Table 127. Smartsens Technology Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 128. Smartsens Technology CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 129. Smartsens Technology CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. Smartsens Technology Main Business

Table 131. Smartsens Technology Latest Developments

Table 132. Canon Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 133. Canon CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 134. Canon CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Canon Main Business

Table 136. Canon Latest Developments

Table 137. SOI Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 138. SOI CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 139. SOI CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. SOI Main Business

Table 141. SOI Latest Developments

Table 142. Teledyne Photometrics Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 143. Teledyne Photometrics CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 144. Teledyne Photometrics CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 145. Teledyne Photometrics Main Business

Table 146. Teledyne Photometrics Latest Developments

Table 147. Andor Technology Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 148. Andor Technology CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 149. Andor Technology CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Andor Technology Main Business

Table 151. Andor Technology Latest Developments

Table 152. Hamamatsu Photonics Basic Information, CMOS and sCMOS Image Sensors Manufacturing Base, Sales Area and Its Competitors

Table 153. Hamamatsu Photonics CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 154. Hamamatsu Photonics CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Hamamatsu Photonics Main Business

Table 156. Hamamatsu Photonics Latest Developments

Table 157. Sharp Basic Information, CMOS and sCMOS Image Sensors Manufacturing

Base, Sales Area and Its Competitors

Table 158. Sharp CMOS and sCMOS Image Sensors Product Portfolios and Specifications

Table 159. Sharp CMOS and sCMOS Image Sensors Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Sharp Main Business

Table 161. Sharp Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of CMOS and sCMOS Image Sensors

Figure 2. CMOS and sCMOS Image Sensors Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global CMOS and sCMOS Image Sensors Sales Growth Rate 2021-2032
(Million Units)

Figure 7. Global CMOS and sCMOS Image Sensors Revenue Growth Rate 2021-2032
(\$ millions)

Figure 8. CMOS and sCMOS Image Sensors Sales by Geographic Region (2021, 2025
& 2032) & (\$ millions)

Figure 9. CMOS and sCMOS Image Sensors Sales Market Share by Country/Region
(2025)

Figure 10. CMOS and sCMOS Image Sensors Sales Market Share by Country/Region
(2021, 2025 & 2032)

Figure 11. Product Picture of CMOS Image Sensor (CIS)

Figure 12. Product Picture of Scientific CMOS (sCMOS) Image Sensor

Figure 13. Global CMOS and sCMOS Image Sensors Sales Market Share by Type in
2026

Figure 14. Global CMOS and sCMOS Image Sensors Revenue Market Share by Type
(2021-2026)

Figure 15. Product Picture of Rolling Shutter, RS

Figure 16. Product Picture of Global Shutter, GS

Figure 17. Global CMOS and sCMOS Image Sensors Sales Market Share by Shutter
Type in 2026

Figure 18. Global CMOS and sCMOS Image Sensors Revenue Market Share by
Shutter Type (2021-2026)

Figure 19. Product Picture of Small Pixel

Figure 20. Product Picture of Medium Pixel

Figure 21. Product Picture of Large Pixel

Figure 22. Global CMOS and sCMOS Image Sensors Sales Market Share by pixel size
in 2026

Figure 23. Global CMOS and sCMOS Image Sensors Revenue Market Share by pixel
size (2021-2026)

Figure 24. CMOS and sCMOS Image Sensors Consumed in Mobile

Figure 25. Global CMOS and sCMOS Image Sensors Market: Mobile (2021-2026) & (Million Units)

Figure 26. CMOS and sCMOS Image Sensors Consumed in Automotive

Figure 27. Global CMOS and sCMOS Image Sensors Market: Automotive (2021-2026) & (Million Units)

Figure 28. CMOS and sCMOS Image Sensors Consumed in Security

Figure 29. Global CMOS and sCMOS Image Sensors Market: Security (2021-2026) & (Million Units)

Figure 30. CMOS and sCMOS Image Sensors Consumed in Industrial

Figure 31. Global CMOS and sCMOS Image Sensors Market: Industrial (2021-2026) & (Million Units)

Figure 32. CMOS and sCMOS Image Sensors Consumed in Medical

Figure 33. Global CMOS and sCMOS Image Sensors Market: Medical (2021-2026) & (Million Units)

Figure 34. CMOS and sCMOS Image Sensors Consumed in Others

Figure 35. Global CMOS and sCMOS Image Sensors Market: Others (2021-2026) & (Million Units)

Figure 36. Global CMOS and sCMOS Image Sensors Sale Market Share by Application (2025)

Figure 37. Global CMOS and sCMOS Image Sensors Revenue Market Share by Application in 2026

Figure 38. CMOS and sCMOS Image Sensors Sales by Company in 2026 (Million Units)

Figure 39. Global CMOS and sCMOS Image Sensors Sales Market Share by Company in 2026

Figure 40. CMOS and sCMOS Image Sensors Revenue by Company in 2026 (\$ millions)

Figure 41. Global CMOS and sCMOS Image Sensors Revenue Market Share by Company in 2026

Figure 42. Global CMOS and sCMOS Image Sensors Sales Market Share by Geographic Region (2021-2026)

Figure 43. Global CMOS and sCMOS Image Sensors Revenue Market Share by Geographic Region in 2026

Figure 44. Americas CMOS and sCMOS Image Sensors Sales 2021-2026 (Million Units)

Figure 45. Americas CMOS and sCMOS Image Sensors Revenue 2021-2026 (\$ millions)

Figure 46. APAC CMOS and sCMOS Image Sensors Sales 2021-2026 (Million Units)

Figure 47. APAC CMOS and sCMOS Image Sensors Revenue 2021-2026 (\$ millions)

Figure 48. Europe CMOS and sCMOS Image Sensors Sales 2021-2026 (Million Units)

Figure 49. Europe CMOS and sCMOS Image Sensors Revenue 2021-2026 (\$ millions)

Figure 50. Middle East & Africa CMOS and sCMOS Image Sensors Sales 2021-2026 (Million Units)

Figure 51. Middle East & Africa CMOS and sCMOS Image Sensors Revenue 2021-2026 (\$ millions)

Figure 52. Americas CMOS and sCMOS Image Sensors Sales Market Share by Country in 2026

Figure 53. Americas CMOS and sCMOS Image Sensors Revenue Market Share by Country (2021-2026)

Figure 54. Americas CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)

Figure 55. Americas CMOS and sCMOS Image Sensors Sales Market Share by Application (2021-2026)

Figure 56. United States CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC CMOS and sCMOS Image Sensors Sales Market Share by Region in 2026

Figure 61. APAC CMOS and sCMOS Image Sensors Revenue Market Share by Region (2021-2026)

Figure 62. APAC CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)

Figure 63. APAC CMOS and sCMOS Image Sensors Sales Market Share by Application (2021-2026)

Figure 64. China CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 67. Southeast Asia CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 68. India CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$

millions)

Figure 69. Australia CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 71. Europe CMOS and sCMOS Image Sensors Sales Market Share by Country in 2026

Figure 72. Europe CMOS and sCMOS Image Sensors Revenue Market Share by Country (2021-2026)

Figure 73. Europe CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)

Figure 74. Europe CMOS and sCMOS Image Sensors Sales Market Share by Application (2021-2026)

Figure 75. Germany CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 76. France CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa CMOS and sCMOS Image Sensors Sales Market Share by Country (2021-2026)

Figure 81. Middle East & Africa CMOS and sCMOS Image Sensors Sales Market Share by Type (2021-2026)

Figure 82. Middle East & Africa CMOS and sCMOS Image Sensors Sales Market Share by Application (2021-2026)

Figure 83. Egypt CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries CMOS and sCMOS Image Sensors Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of CMOS and sCMOS Image Sensors in 2026

Figure 89. Manufacturing Process Analysis of CMOS and sCMOS Image Sensors

Figure 90. Industry Chain Structure of CMOS and sCMOS Image Sensors

Figure 91. Channels of Distribution

Figure 92. Global CMOS and sCMOS Image Sensors Sales Market Forecast by Region (2027-2032)

Figure 93. Global CMOS and sCMOS Image Sensors Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global CMOS and sCMOS Image Sensors Sales Market Share Forecast by Type (2027-2032)

Figure 95. Global CMOS and sCMOS Image Sensors Revenue Market Share Forecast by Type (2027-2032)

Figure 96. Global CMOS and sCMOS Image Sensors Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global CMOS and sCMOS Image Sensors Revenue Market Share Forecast by Application (2027-2032)

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