

Global High Performance CMOS Image Sensor Market Growth 2026-2032

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Abstracts

The global High Performance CMOS Image Sensor 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 2025, global High Performance CMOS Image Sensor production reached approximately 7.95 billion Units, with an average global market price of around US\$ 2.8 per unit.

High Performance CMOS Image Sensor (High Performance CIS) refers to a type of CMOS image sensor that has excellent performance in core imaging indicators, and is optimized for scenarios with high requirements for imaging quality, speed, and environmental adaptability. It is different from general-purpose CIS that balances cost and basic performance, and its design focuses on breaking through the limits of imaging performance.

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 ?High Performance CMOS

Image Sensor Industry Forecast? looks at past sales and reviews total world High Performance CMOS Image Sensor sales in 2025, providing a comprehensive analysis by region and market sector of projected High Performance CMOS Image Sensor sales for 2026 through 2032. With High Performance 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 High Performance CMOS Image Sensor industry.

This Insight Report provides a comprehensive analysis of the global High Performance 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 High Performance 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 High Performance CMOS Image Sensor market.

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

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

Segmentation by Type:

Front Side Illuminated

Back Side Illuminated

Stacked CMOS Image Sensor

Segmentation by Shutter Type:

Rolling Shutter (RS)

Global Shutter (GS)

Segmentation by Performance Optimization Direction:

Ultra-Low Noise High Performance CIS

High Dynamic Range High Performance CIS

High-Speed High Performance CIS

High-Resolution High Performance CIS

Segmentation by Application:

Scientific Research

Automotive

Industrial

Professional Photography

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

GalaxyCore

Panasonic

Smartsens Technology

Canon

SOI

Key Questions Addressed in this Report

What is the 10-year outlook for the global High Performance CMOS Image Sensor market?

What factors are driving High Performance CMOS Image Sensor market growth, globally and by region?

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

How do High Performance CMOS Image Sensor market opportunities vary by end market size?

How does High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for High Performance CMOS Image Sensor by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for High Performance CMOS Image Sensor by Country/Region, 2021, 2025 & 2032

2.2 High Performance CMOS Image Sensor Segment by Type

- 2.2.1 Front Side Illuminated
- 2.2.2 Back Side Illuminated
- 2.2.3 Stacked CMOS Image Sensor
- 2.2.4 High Performance CMOS Image Sensor Sales by Type
 - 2.2.4.1 Global High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global High Performance CMOS Image Sensor Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global High Performance CMOS Image Sensor Sale Price by Type (2021-2026)

2.3 High Performance CMOS Image Sensor Segment by Shutter Type

- 2.3.1 Rolling Shutter (RS)
- 2.3.2 Global Shutter (GS)
- 2.3.3 High Performance CMOS Image Sensor Sales by Shutter Type
 - 2.3.3.1 Global High Performance CMOS Image Sensor Sales Market Share by Shutter Type (2021-2026)
 - 2.3.3.2 Global High Performance CMOS Image Sensor Revenue and Market Share

by Shutter Type (2021-2026)

2.3.3.3 Global High Performance CMOS Image Sensor Sale Price by Shutter Type (2021-2026)

2.4 High Performance CMOS Image Sensor Segment by Performance Optimization Direction

2.4.1 Ultra-Low Noise High Performance CIS

2.4.2 High Dynamic Range High Performance CIS

2.4.3 High-Speed High Performance CIS

2.4.4 High-Resolution High Performance CIS

2.4.5 High Performance CMOS Image Sensor Sales by Performance Optimization Direction

2.4.5.1 Global High Performance CMOS Image Sensor Sales Market Share by Performance Optimization Direction (2021-2026)

2.4.5.2 Global High Performance CMOS Image Sensor Revenue and Market Share by Performance Optimization Direction (2021-2026)

2.4.5.3 Global High Performance CMOS Image Sensor Sale Price by Performance Optimization Direction (2021-2026)

2.5 High Performance CMOS Image Sensor Segment by Application

2.5.1 Scientific Research

2.5.2 Automotive

2.5.3 Industrial

2.5.4 Professional Photography

2.5.5 High Performance CMOS Image Sensor Sales by Application

2.5.5.1 Global High Performance CMOS Image Sensor Sale Market Share by Application (2021-2026)

2.5.5.2 Global High Performance CMOS Image Sensor Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global High Performance CMOS Image Sensor Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global High Performance CMOS Image Sensor Breakdown Data by Company

3.1.1 Global High Performance CMOS Image Sensor Annual Sales by Company (2021-2026)

3.1.2 Global High Performance CMOS Image Sensor Sales Market Share by Company (2021-2026)

3.2 Global High Performance CMOS Image Sensor Annual Revenue by Company (2021-2026)

- 3.2.1 Global High Performance CMOS Image Sensor Revenue by Company (2021-2026)
- 3.2.2 Global High Performance CMOS Image Sensor Revenue Market Share by Company (2021-2026)
- 3.3 Global High Performance CMOS Image Sensor Sale Price by Company
- 3.4 Key Manufacturers High Performance CMOS Image Sensor Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers High Performance CMOS Image Sensor Product Location Distribution
 - 3.4.2 Players High Performance CMOS Image Sensor 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 HIGH PERFORMANCE CMOS IMAGE SENSOR BY GEOGRAPHIC REGION

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

5 AMERICAS

- 5.1 Americas High Performance CMOS Image Sensor Sales by Country

5.1.1 Americas High Performance CMOS Image Sensor Sales by Country (2021-2026)

5.1.2 Americas High Performance CMOS Image Sensor Revenue by Country
(2021-2026)

5.2 Americas High Performance CMOS Image Sensor Sales by Type (2021-2026)

5.3 Americas High Performance CMOS Image Sensor Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC High Performance CMOS Image Sensor Sales by Region

6.1.1 APAC High Performance CMOS Image Sensor Sales by Region (2021-2026)

6.1.2 APAC High Performance CMOS Image Sensor Revenue by Region (2021-2026)

6.2 APAC High Performance CMOS Image Sensor Sales by Type (2021-2026)

6.3 APAC High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor by Country

7.1.1 Europe High Performance CMOS Image Sensor Sales by Country (2021-2026)

7.1.2 Europe High Performance CMOS Image Sensor Revenue by Country
(2021-2026)

7.2 Europe High Performance CMOS Image Sensor Sales by Type (2021-2026)

7.3 Europe High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor by Country

8.1.1 Middle East & Africa High Performance CMOS Image Sensor Sales by Country (2021-2026)

8.1.2 Middle East & Africa High Performance CMOS Image Sensor Revenue by Country (2021-2026)

8.2 Middle East & Africa High Performance CMOS Image Sensor Sales by Type (2021-2026)

8.3 Middle East & Africa High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor

10.3 Manufacturing Process Analysis of High Performance CMOS Image Sensor

10.4 Industry Chain Structure of High Performance CMOS Image Sensor

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 High Performance CMOS Image Sensor Distributors

11.3 High Performance CMOS Image Sensor Customer

12 WORLD FORECAST REVIEW FOR HIGH PERFORMANCE CMOS IMAGE

SENSOR BY GEOGRAPHIC REGION

12.1 Global High Performance CMOS Image Sensor Market Size Forecast by Region

12.1.1 Global High Performance CMOS Image Sensor Forecast by Region
(2027-2032)

12.1.2 Global High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Forecast by Type (2027-2032)

12.7 Global High Performance CMOS Image Sensor Forecast by Application
(2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 SONY

13.1.1 SONY Company Information

13.1.2 SONY High Performance CMOS Image Sensor Product Portfolios and
Specifications

13.1.3 SONY High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Product Portfolios and
Specifications

13.2.3 Samsung High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Product Portfolios and
Specifications

13.3.3 OmniVision High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Product Portfolios and Specifications
 - 13.4.3 STMicroelectronics High Performance CMOS Image Sensor 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 High Performance CMOS Image Sensor Product Portfolios and Specifications
 - 13.5.3 On Semi High Performance CMOS Image Sensor 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 GalaxyCore
 - 13.6.1 GalaxyCore Company Information
 - 13.6.2 GalaxyCore High Performance CMOS Image Sensor Product Portfolios and Specifications
 - 13.6.3 GalaxyCore High Performance CMOS Image Sensor Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 GalaxyCore Main Business Overview
 - 13.6.5 GalaxyCore Latest Developments
- 13.7 Panasonic
 - 13.7.1 Panasonic Company Information
 - 13.7.2 Panasonic High Performance CMOS Image Sensor Product Portfolios and Specifications
 - 13.7.3 Panasonic High Performance CMOS Image Sensor Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Panasonic Main Business Overview
 - 13.7.5 Panasonic Latest Developments
- 13.8 Smartsens Technology
 - 13.8.1 Smartsens Technology Company Information
 - 13.8.2 Smartsens Technology High Performance CMOS Image Sensor Product Portfolios and Specifications
 - 13.8.3 Smartsens Technology High Performance CMOS Image Sensor Sales,

Revenue, Price and Gross Margin (2021-2026)

13.8.4 Smartsens Technology Main Business Overview

13.8.5 Smartsens Technology Latest Developments

13.9 Canon

13.9.1 Canon Company Information

13.9.2 Canon High Performance CMOS Image Sensor Product Portfolios and Specifications

13.9.3 Canon High Performance CMOS Image Sensor Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Canon Main Business Overview

13.9.5 Canon Latest Developments

13.10 SOI

13.10.1 SOI Company Information

13.10.2 SOI High Performance CMOS Image Sensor Product Portfolios and Specifications

13.10.3 SOI High Performance CMOS Image Sensor Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 SOI Main Business Overview

13.10.5 SOI Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. High Performance CMOS Image Sensor Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. High Performance CMOS Image Sensor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Front Side Illuminated
- Table 4. Major Players of Back Side Illuminated
- Table 5. Major Players of Stacked CMOS Image Sensor
- Table 6. Global High Performance CMOS Image Sensor Sales by Type (2021-2026) & (K Units)
- Table 7. Global High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)
- Table 8. Global High Performance CMOS Image Sensor Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global High Performance CMOS Image Sensor Revenue Market Share by Type (2021-2026)
- Table 10. Global High Performance CMOS Image Sensor Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 11. Major Players of Rolling Shutter (RS)
- Table 12. Major Players of Global Shutter (GS)
- Table 13. Global High Performance CMOS Image Sensor Sales by Shutter Type (2021-2026) & (K Units)
- Table 14. Global High Performance CMOS Image Sensor Sales Market Share by Shutter Type (2021-2026)
- Table 15. Global High Performance CMOS Image Sensor Revenue by Shutter Type (2021-2026) & (\$ million)
- Table 16. Global High Performance CMOS Image Sensor Revenue Market Share by Shutter Type (2021-2026)
- Table 17. Global High Performance CMOS Image Sensor Sale Price by Shutter Type (2021-2026) & (US\$/Unit)
- Table 18. Major Players of Ultra-Low Noise High Performance CIS
- Table 19. Major Players of High Dynamic Range High Performance CIS
- Table 20. Major Players of High-Speed High Performance CIS
- Table 21. Major Players of High-Resolution High Performance CIS
- Table 22. Global High Performance CMOS Image Sensor Sales by Performance Optimization Direction (2021-2026) & (K Units)

Table 23. Global High Performance CMOS Image Sensor Sales Market Share by Performance Optimization Direction (2021-2026)

Table 24. Global High Performance CMOS Image Sensor Revenue by Performance Optimization Direction (2021-2026) & (\$ million)

Table 25. Global High Performance CMOS Image Sensor Revenue Market Share by Performance Optimization Direction (2021-2026)

Table 26. Global High Performance CMOS Image Sensor Sale Price by Performance Optimization Direction (2021-2026) & (US\$/Unit)

Table 27. Global High Performance CMOS Image Sensor Sale by Application (2021-2026) & (K Units)

Table 28. Global High Performance CMOS Image Sensor Sale Market Share by Application (2021-2026)

Table 29. Global High Performance CMOS Image Sensor Revenue by Application (2021-2026) & (\$ million)

Table 30. Global High Performance CMOS Image Sensor Revenue Market Share by Application (2021-2026)

Table 31. Global High Performance CMOS Image Sensor Sale Price by Application (2021-2026) & (US\$/Unit)

Table 32. Global High Performance CMOS Image Sensor Sales by Company (2021-2026) & (K Units)

Table 33. Global High Performance CMOS Image Sensor Sales Market Share by Company (2021-2026)

Table 34. Global High Performance CMOS Image Sensor Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global High Performance CMOS Image Sensor Revenue Market Share by Company (2021-2026)

Table 36. Global High Performance CMOS Image Sensor Sale Price by Company (2021-2026) & (US\$/Unit)

Table 37. Key Manufacturers High Performance CMOS Image Sensor Producing Area Distribution and Sales Area

Table 38. Players High Performance CMOS Image Sensor Products Offered

Table 39. High Performance CMOS Image Sensor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global High Performance CMOS Image Sensor Sales by Geographic Region (2021-2026) & (K Units)

Table 43. Global High Performance CMOS Image Sensor Sales Market Share Geographic Region (2021-2026)

Table 44. Global High Performance CMOS Image Sensor Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 45. Global High Performance CMOS Image Sensor Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global High Performance CMOS Image Sensor Sales by Country/Region (2021-2026) & (K Units)

Table 47. Global High Performance CMOS Image Sensor Sales Market Share by Country/Region (2021-2026)

Table 48. Global High Performance CMOS Image Sensor Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global High Performance CMOS Image Sensor Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas High Performance CMOS Image Sensor Sales by Country (2021-2026) & (K Units)

Table 51. Americas High Performance CMOS Image Sensor Sales Market Share by Country (2021-2026)

Table 52. Americas High Performance CMOS Image Sensor Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas High Performance CMOS Image Sensor Sales by Type (2021-2026) & (K Units)

Table 54. Americas High Performance CMOS Image Sensor Sales by Application (2021-2026) & (K Units)

Table 55. APAC High Performance CMOS Image Sensor Sales by Region (2021-2026) & (K Units)

Table 56. APAC High Performance CMOS Image Sensor Sales Market Share by Region (2021-2026)

Table 57. APAC High Performance CMOS Image Sensor Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC High Performance CMOS Image Sensor Sales by Type (2021-2026) & (K Units)

Table 59. APAC High Performance CMOS Image Sensor Sales by Application (2021-2026) & (K Units)

Table 60. Europe High Performance CMOS Image Sensor Sales by Country (2021-2026) & (K Units)

Table 61. Europe High Performance CMOS Image Sensor Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe High Performance CMOS Image Sensor Sales by Type (2021-2026) & (K Units)

Table 63. Europe High Performance CMOS Image Sensor Sales by Application

(2021-2026) & (K Units)

Table 64. Middle East & Africa High Performance CMOS Image Sensor Sales by Country (2021-2026) & (K Units)

Table 65. Middle East & Africa High Performance CMOS Image Sensor Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa High Performance CMOS Image Sensor Sales by Type (2021-2026) & (K Units)

Table 67. Middle East & Africa High Performance CMOS Image Sensor Sales by Application (2021-2026) & (K Units)

Table 68. Key Market Drivers & Growth Opportunities of High Performance CMOS Image Sensor

Table 69. Key Market Challenges & Risks of High Performance CMOS Image Sensor

Table 70. Key Industry Trends of High Performance CMOS Image Sensor

Table 71. High Performance CMOS Image Sensor Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. High Performance CMOS Image Sensor Distributors List

Table 74. High Performance CMOS Image Sensor Customer List

Table 75. Global High Performance CMOS Image Sensor Sales Forecast by Region (2027-2032) & (K Units)

Table 76. Global High Performance CMOS Image Sensor Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas High Performance CMOS Image Sensor Sales Forecast by Country (2027-2032) & (K Units)

Table 78. Americas High Performance CMOS Image Sensor Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC High Performance CMOS Image Sensor Sales Forecast by Region (2027-2032) & (K Units)

Table 80. APAC High Performance CMOS Image Sensor Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe High Performance CMOS Image Sensor Sales Forecast by Country (2027-2032) & (K Units)

Table 82. Europe High Performance CMOS Image Sensor Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa High Performance CMOS Image Sensor Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Middle East & Africa High Performance CMOS Image Sensor Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global High Performance CMOS Image Sensor Sales Forecast by Type (2027-2032) & (K Units)

Table 86. Global High Performance CMOS Image Sensor Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global High Performance CMOS Image Sensor Sales Forecast by Application (2027-2032) & (K Units)

Table 88. Global High Performance CMOS Image Sensor Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. SONY Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 90. SONY High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 91. SONY High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 92. SONY Main Business

Table 93. SONY Latest Developments

Table 94. Samsung Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 95. Samsung High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 96. Samsung High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 97. Samsung Main Business

Table 98. Samsung Latest Developments

Table 99. OmniVision Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 100. OmniVision High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 101. OmniVision High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 102. OmniVision Main Business

Table 103. OmniVision Latest Developments

Table 104. STMicroelectronics Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 105. STMicroelectronics High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 106. STMicroelectronics High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 107. STMicroelectronics Main Business

Table 108. STMicroelectronics Latest Developments

Table 109. On Semi Basic Information, High Performance CMOS Image Sensor

Manufacturing Base, Sales Area and Its Competitors

Table 110. On Semi High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 111. On Semi High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 112. On Semi Main Business

Table 113. On Semi Latest Developments

Table 114. GalaxyCore Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 115. GalaxyCore High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 116. GalaxyCore High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 117. GalaxyCore Main Business

Table 118. GalaxyCore Latest Developments

Table 119. Panasonic Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 120. Panasonic High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 121. Panasonic High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 122. Panasonic Main Business

Table 123. Panasonic Latest Developments

Table 124. Smartsens Technology Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 125. Smartsens Technology High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 126. Smartsens Technology High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 127. Smartsens Technology Main Business

Table 128. Smartsens Technology Latest Developments

Table 129. Canon Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 130. Canon High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 131. Canon High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 132. Canon Main Business

Table 133. Canon Latest Developments

Table 134. SOI Basic Information, High Performance CMOS Image Sensor Manufacturing Base, Sales Area and Its Competitors

Table 135. SOI High Performance CMOS Image Sensor Product Portfolios and Specifications

Table 136. SOI High Performance CMOS Image Sensor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 137. SOI Main Business

Table 138. SOI Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of High Performance CMOS Image Sensor
- Figure 2. High Performance CMOS Image Sensor Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global High Performance CMOS Image Sensor Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global High Performance CMOS Image Sensor Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. High Performance CMOS Image Sensor Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. High Performance CMOS Image Sensor Sales Market Share by Country/Region (2025)
- Figure 10. High Performance CMOS Image Sensor Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Front Side Illuminated
- Figure 12. Product Picture of Back Side Illuminated
- Figure 13. Product Picture of Stacked CMOS Image Sensor
- Figure 14. Global High Performance CMOS Image Sensor Sales Market Share by Type in 2026
- Figure 15. Global High Performance CMOS Image Sensor Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Rolling Shutter (RS)
- Figure 17. Product Picture of Global Shutter (GS)
- Figure 18. Global High Performance CMOS Image Sensor Sales Market Share by Shutter Type in 2026
- Figure 19. Global High Performance CMOS Image Sensor Revenue Market Share by Shutter Type (2021-2026)
- Figure 20. Product Picture of Ultra-Low Noise High Performance CIS
- Figure 21. Product Picture of High Dynamic Range High Performance CIS
- Figure 22. Product Picture of High-Speed High Performance CIS
- Figure 23. Product Picture of High-Resolution High Performance CIS
- Figure 24. Global High Performance CMOS Image Sensor Sales Market Share by Performance Optimization Direction in 2026
- Figure 25. Global High Performance CMOS Image Sensor Revenue Market Share by

Performance Optimization Direction (2021-2026)

Figure 26. High Performance CMOS Image Sensor Consumed in Scientific Research

Figure 27. Global High Performance CMOS Image Sensor Market: Scientific Research (2021-2026) & (K Units)

Figure 28. High Performance CMOS Image Sensor Consumed in Automotive

Figure 29. Global High Performance CMOS Image Sensor Market: Automotive (2021-2026) & (K Units)

Figure 30. High Performance CMOS Image Sensor Consumed in Industrial

Figure 31. Global High Performance CMOS Image Sensor Market: Industrial (2021-2026) & (K Units)

Figure 32. High Performance CMOS Image Sensor Consumed in Professional Photography

Figure 33. Global High Performance CMOS Image Sensor Market: Professional Photography (2021-2026) & (K Units)

Figure 34. Global High Performance CMOS Image Sensor Sale Market Share by Application (2025)

Figure 35. Global High Performance CMOS Image Sensor Revenue Market Share by Application in 2026

Figure 36. High Performance CMOS Image Sensor Sales by Company in 2026 (K Units)

Figure 37. Global High Performance CMOS Image Sensor Sales Market Share by Company in 2026

Figure 38. High Performance CMOS Image Sensor Revenue by Company in 2026 (\$ millions)

Figure 39. Global High Performance CMOS Image Sensor Revenue Market Share by Company in 2026

Figure 40. Global High Performance CMOS Image Sensor Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global High Performance CMOS Image Sensor Revenue Market Share by Geographic Region in 2026

Figure 42. Americas High Performance CMOS Image Sensor Sales 2021-2026 (K Units)

Figure 43. Americas High Performance CMOS Image Sensor Revenue 2021-2026 (\$ millions)

Figure 44. APAC High Performance CMOS Image Sensor Sales 2021-2026 (K Units)

Figure 45. APAC High Performance CMOS Image Sensor Revenue 2021-2026 (\$ millions)

Figure 46. Europe High Performance CMOS Image Sensor Sales 2021-2026 (K Units)

Figure 47. Europe High Performance CMOS Image Sensor Revenue 2021-2026 (\$

millions)

Figure 48. Middle East & Africa High Performance CMOS Image Sensor Sales 2021-2026 (K Units)

Figure 49. Middle East & Africa High Performance CMOS Image Sensor Revenue 2021-2026 (\$ millions)

Figure 50. Americas High Performance CMOS Image Sensor Sales Market Share by Country in 2026

Figure 51. Americas High Performance CMOS Image Sensor Revenue Market Share by Country (2021-2026)

Figure 52. Americas High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)

Figure 53. Americas High Performance CMOS Image Sensor Sales Market Share by Application (2021-2026)

Figure 54. United States High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC High Performance CMOS Image Sensor Sales Market Share by Region in 2026

Figure 59. APAC High Performance CMOS Image Sensor Revenue Market Share by Region (2021-2026)

Figure 60. APAC High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)

Figure 61. APAC High Performance CMOS Image Sensor Sales Market Share by Application (2021-2026)

Figure 62. China High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 66. India High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe High Performance CMOS Image Sensor Sales Market Share by Country in 2026

Figure 70. Europe High Performance CMOS Image Sensor Revenue Market Share by Country (2021-2026)

Figure 71. Europe High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)

Figure 72. Europe High Performance CMOS Image Sensor Sales Market Share by Application (2021-2026)

Figure 73. Germany High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 74. France High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa High Performance CMOS Image Sensor Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa High Performance CMOS Image Sensor Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa High Performance CMOS Image Sensor Sales Market Share by Application (2021-2026)

Figure 81. Egypt High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 85. GCC Countries High Performance CMOS Image Sensor Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of High Performance CMOS Image

Sensor in 2026

Figure 87. Manufacturing Process Analysis of High Performance CMOS Image Sensor

Figure 88. Industry Chain Structure of High Performance CMOS Image Sensor

Figure 89. Channels of Distribution

Figure 90. Global High Performance CMOS Image Sensor Sales Market Forecast by Region (2027-2032)

Figure 91. Global High Performance CMOS Image Sensor Revenue Market Share Forecast by Region (2027-2032)

Figure 92. Global High Performance CMOS Image Sensor Sales Market Share Forecast by Type (2027-2032)

Figure 93. Global High Performance CMOS Image Sensor Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global High Performance CMOS Image Sensor Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global High Performance CMOS Image Sensor Revenue Market Share Forecast by Application (2027-2032)

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