

Global CMOS Image Sensor Market Research and Analysis, 2015-2022

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Abstracts

Market Insights

The CMOS Image sensor market is projected to witness an impressive growth rate of approx. 12% during the forecasted period 2016-2022. Rising adoption of handheld devices such as tablets and smart phones has led towards the development of smart sensing techniques along with diagnostic & remote monitoring ability. This in turn has widened the scope for CMOS image sensors across application industries. Increasing demand for smart phones is the key force driving the growth of the global market. In 2015, around 1,424 million units of smartphones were sold worldwide, up from 1,244 million units in 2014. Rapidly growing sales of smartphones boosts the growth of CMOS image sensors to an extensive level. In the past few years, the CMOS image sensor market have witnessing significant growth due to increasing application segments coupled with technological advancements resulting in the development of sophisticated sensing technology. CMOS image sensors have find its applications across industries including consumer electronics, healthcare, automotive, security & surveillance, industrial and entertainment. In security & surveillance market, the development of these image sensors is accompanied by the growing popularity of IP networking which significantly demands for high definition resolution. Thus, the growing demand for security and surveillance further propels the market growth. Apart from it, rising demand for minimal invasive procedures have also played a vital role in the growth of the CMOS image sensors market.

High cost & high maintenance of the devices and declining prices influencing market revenue are the key factors hampering the market growth. The global CMOS image sensors market can be characterized by the presence of large number of players offering low cost and differentiated solutions. Price of CMOS image sensors are

declining significantly, which has negatively impacted the market revenue and this trend is projected to continue during the forecasted period. The market possess numerous opportunities for the market players including emerging demand from medical industry along with growing automotive sector in developing economies.

Geographical Insights

Geographically, CMOS image sensors market can be bifurcated into Asia Pacific, North America, Europe and Rest of the World. In 2016, North America leads the global market and accounts for a market share of around 35%. The growth of the region is backed by the higher adoption of new technologies & gadgets and technological advancements. The smart phone sales reached \$55 billion in 2015 in the U.S., significantly higher from \$52.9 billion in 2014. Along with it, the percentage of U.S. Adult wearable users reached 15.8% in 2015 from 12.8% in 2014. The rapid increase in sales of smartphones and growing percentage of wearable devices users within the regional countries creates a scope for CMOS image sensors in North America.

In present times, North America is closely followed by Asia Pacific. This developing region is projected to be the fastest growing region in the upcoming scenario. The growth of the Asia Pacific market is backed by the presence of large number of semiconductor manufacturers specifically in Korea, China and Japan. The key market players present in the region are Sony Corporation and Panasonic Corporation. Apart from it, establishment of manufacturing facilities by the foreign companies along with availability of low cost labor are anticipated to boost productivity within the region. Rising demand for consumer electronics and automobiles have also played a vital role in the growth of the Asia Pacific CMOS image sensor market. In 2016, passenger vehicle sales in China reached around 24.4 million units from 21.1 million units in 2015. Rising demand for consumer electronics in India have also attributed towards the growth of the regional market. According to FICCI, electronics demand in India is estimated to grow at a CAGR of 25% during 2012-2020.

The report includes detailed market overview, market determinants, company profiling, sector analysis, market segmentation, geographical analysis, patent analysis, strategic recommendations, key company analysis, gap analysis, key findings, market estimations, market insights, analyst insights and predictive analysis of the market.

Competitive Insights

The key players of the market include Canon Inc., Samsung Electronics Co., Ltd.,

Omnivision Technologies Inc., Sony Corporation, On Semiconductor Corporation and Panasonic Corporation. Sony Corporation and Samsung Electronics Co. are projected to lead the market owing to the constant efforts undertaken by the companies in terms of product launch and mergers & acquisitions. Partnership & agreement, mergers & acquisitions, product launch and geographical expansion are the key strategies adopted by the market players to strengthen their position in the CMOS image sensor market. On December 2015, Sony purchased Toshiba's image sensor business for around \$155 million. This strategic move is projected to attribute significantly towards the market share of Sony Corporation. On September 2014, Samsung Electronics launched a 280 megapixel APC-C CMOS image sensor which employed advanced BSI (Back-side illuminated) technology as well as a 65 nanometer technology in order to provide energy efficiency and better picture quality.

CMOS Image Sensor Market by Application

Consumer Electronics

Tablet & PC

Smartphone

Wearable Electronics

Camera

Others

Automotive

Industrial

Security & surveillance

Aerospace

Healthcare

Entertainment

Others

CMOS Image Sensor Market by Technology

BSI Technology

FSI Technology

Others

3D Hybrid Stacked

3D Stacked BSI

Others

CMOS Image Sensor Market by Sensor and Wafer Size

CMOS Image Sensor Market by Sensor size

Full frame

Medium format

4/3 inch

APS-H and APS-C

1 inch and below

CMOS Image Sensor Market by Wafer size

200 MM

300 MM

Others

CMOS Image Sensor Market by Specification

CMOS Image Sensor Market by Spectrum

Non-visible spectrum

X-ray light

Infrared invisible spectrum

Visible spectrum

CMOS Image Sensor Market by Processing Type

3D image sensor

2D image sensor

CMOS Image Sensor Market by Array Type

Area image sensor

Linear image sensor

OMR report covers:

Comprehensive research methodology of global CMOS Image Sensor market

In-depth analysis of macro and micro factors influencing the market guided by key recommendations.

Analysis of regional regulations and other government policies impacting the global CMOS Image Sensor market

Insights about market determinants which are stimulating the global CMOS Image Sensor market

Detailed and extensive market segments with regional distribution of researched revenues

Extensive profiles and recent developments of market players

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