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Global and China CMOS Camera Module Industry Report, 2014-2015

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Abstracts

Global and China CCM (CMOS Camera Module) Industry Report, 2014-2015 covers the following:

1. CIS (CMOS Image Sensor) market and industry
2. Lens industry
3. CCM industry and market
4. Development trend of OIS/dual lens
5. CIS downstream market
6. Study into 7 CIS vendors
7. Research on 15 Lens vendors
8. Analysis of 22 CCM vendors

In 2014, global CCM market size was worth about USD16.402 billion, growing by 13.4% from 2013, mainly stimulated by higher camera pixel of mobile phone and OIS. It is expected that OIS will expand rapidly in 2015, spurring CCM market to rise by 15.9% to USD19.018 billion. Also, the camera pixel of mobile phone will continue to be improved, being one of stimuli for market growth.

In 2014, iPhone 6Plus took up the largest share of mobile phones which adopt OIS with shipments of 18.20 million (about 25%), followed by Samsung Galaxy Note4 with shipments of about 6 million. It is projected that Samsung S6 and most of flagship phones in China will use OIS, and new generation Apple phone will also fully adopt OIS. It is estimated that shipments of mobile phones adopting OIS will amount to 178 million in 2015, surging by 145% against 2014, and will reach 361 million in 2017.

There are two technological routes for OIS camera module of mobile phone: one is

based on Pure shift OIS Motor and the other Tilt-shift AF Motor. Pure shift has significant advantage over Tilt-shift, as the standard has long been established, system maturity is excellent, performance is the best, and supply chain is the most mature with majority of suppliers being Japanese ones. The bulk of vendors like Apple and Nokia adopt Pure shift. Even though the camera has to protrude, Apple insists on using Pure shift, showing powerful competitiveness of Pure shift. Vendors in Mainland China and HTC adopt Tilt-shift without a universally accepted standard. Moreover, there are lots of work to be done by CCM vendors. Low output and lack of unified standard cause the loss of its theoretically low cost advantage. The market may leave no growth room for Tilt-shift, and be swiftly captured by Pure shift.

Qualcomm and MediaTek planned to integrate dual lens software function into chipset and CRB (Customer Reference Board), thus greatly boosting percentage of high-end mainstream mobile phones using dual lens. However, dual lens provide only more special effects, but can't enhance camera performance. Seen from configuration of HTC M8, the mobile phone has 4MP dual cameras, still a gap with mainstream 8 million pixel high-end mobile phones, obvious positioned as a middle-range phone.

If dual cameras both adopt high-pixel CCM, the cost will surge and may surpass that of OIS. Consumers has very low acceptance of dual lens compared with OIS. After all, Apple, Samsung, Nokia and LG have mainstream models using OIS, in contrast to two non-mainstream mobile phones adopting dual lens. Hence, dual lens may appear on middle-range mobile phones, and are unlikely to be utilized by a large number of vendors.

In CIS field, Sony continues to outshine rivals, leading high-end market and chased by OVT, but Samsung is falling short of its desires. With regard to lens, Largan sweeps over the world, grasping almost 90% of profit in the field and leading to sharp decline in revenue and partly operating loss of South Korean vendors which seek to advance into high-end segment. In CCM field, Sharp benefited from OIS and its revenue surged.

SEMCO is the largest supplier for Samsung. In order to reduce its dependence on Samsung and enter the burgeoning mobile phone market in Chinese Mainland, the company spared no effort to exploit the mainland market, but achieved poor results, not only failing to open up the market, but also loosing major customer- Samsung, with revenue declining distinctly. LITEON filled the position of SEMCO quickly, and became the second largest supplier of OIS for Samsung, behind Sharp. LITEON saw a surge in revenue in 2014.

LG INNOTEK is still the largest supplier for Apple, with slight rise in revenue. Thanks to big increase in shipments from major customers including Xiaomi, Lenovo and OPPO, Sunny Optical Technology also saw a substantial rise in revenue. In addition, Sony also entered CCM field with ambition, aiming to earn revenue of over USD1 billion in 2017. Undoubtedly, the competition in CCM field will prick up, and the gross margin will inevitably slide.

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