

Machine Vision Lighting Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Lighting Type [LEDs, Fiber Optic Lights (Halogen), Fluorescent Lighting, Xenon, and Others], Spectrum of Light (Visible Spectrum, IR Spectrum, and UV Spectrum), and Application (Automotive, Food & Beverage, Pharmaceuticals, Consumer Electronics, Logistics, and Others)

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Abstracts

The Machine Vision Lighting market size is expected to reach US\$ 1.59 billion by 2022 from 2.88 billion in 2030, at an estimated CAGR of 7.7% from 2022 to 2030.

The manufacturing industry trends in North America, specifically in the US, have been the most influential market trends over the past few years. This is majorly due to the region's ability to remain the sole bright spot for economic recovery. Also, the manufacturing industry in this region gives significant importance to the country's economy and workforce, which further drives the demand for supremely efficient manufacturing tools. Some major manufacturing industries in North America include aerospace, automotive, and construction.

The manufacturing sector of Mexico is experiencing tremendous growth. This includes industries such as automotive & aerospace, medical devices, and consumer electronics. Some of the largest consumer electronics and TV manufacturers, such as Sony, Phillips, Dell, and Panasonic, have set up their operations in Mexico. As per the US Bureau Of Labor Statistics data, 591,720 manufacturing businesses in the US represent

many industries and services. This number represents facilities for food, transportation, manufacturing equipment, chemicals, petroleum and coal products, machinery, and electronics. This has resulted in the high adoption of automation, including systems in machine vision lighting market. Even Canada is experiencing a declining dollar and availability of cheaper power; thus, positively influencing the growth of the manufacturing sector.

North America is also considered one of the most competitive landscapes, attracting numerous manufacturing and technology-based companies to venture into this region. However, the uncompetitive legacy commitments, lax corporate governance, and high structural and acquiescence costs are projected to hinder manufacturing competitiveness in some of the industries. Similarly, restrictive immigration policies and uncompetitive labor and tax policies can also put North American manufacturers at a notable disadvantage against their competitors worldwide.

Nonetheless, the rising focus of the manufacturing industries on enhancing their quality standards and manufacturing policies has led to an increase in the demand for lighting systems, image boards, and software for vision systems, generating ample opportunities for the machine vision lighting market to grow moderately in North America.

By spectrum of light, the market is segmented into visible spectrum, UV spectrum, and IR spectrum. In systems in machine vision lighting market, the color of light delivered by the line scan illumination system can have a remarkable effect on image rendering and contrast. Currently, the visible spectrum is the most popular choice. Visible light is neutral and suitable for heightening product detail. However, the use of visible light is widespread and flexible; specific wavelengths can often enhance contrast and feature extraction. For example, the use of red light improves blue text on an object, improving the contrast of the text and making it more readable. This method is often used in the printing and packaging industries. IR spectrum generates very high brightness at lower power levels across noteworthy distances. The IR spectrum is used for the inspection of defects invisible to the human eye. Some of the common applications of the IR spectrum include the detection of exothermic chemical variations in samples, industrial inspections, and absolute measurements against an established threshold. IR spectrum can be used where reflective surfaces produce high levels of visible-spectrum noise, high or low levels of illumination, or target areas with variable light intensities.

Based on application, the Machine Vision Lighting market is segmented into automotive, consumer electronics, food & beverage, pharmaceuticals, and logistics. Operations in

the automobile industry are increasingly growing complex and thus bring the potential for errors. In the automotive industry, machine vision is used for applications such as inspections and robotic guidance. The embedded sensors and systems in machine vision lighting market can find objects in the 2D or 3D space and accordingly adjust paths for their placement while assembling. Robots, with the help of systems in machine vision lighting market, can achieve higher efficiencies and accuracies and eliminate risks and errors associated with critical activities with human labor. The activities done by robots using systems in machine vision lighting market include bin picking, auto racking, and placement of parts for assembly. The other jobs of systems in machine vision lighting market include inspections, where they check for any functional flaws in the design of the automotive part. The automotive industry is growing worldwide; for instance, according to CEIC data, US Motor Vehicle Production was reported at 10,060,339 units in December 2022. This records an increase from the previous number of 9,157,205 units in December 2021. US Motor Vehicle Production data is updated yearly, averaging 11,295,017 units from December 1997 to December 2022. This will further propel the growth of automotive manufacturing in the country, thereby accelerating the growth of the machine vision lighting market. The food & beverages industry faces distinctive challenges and has nil to very low margin of error. Machine vision technology, when applied, helps in achieving 100% quality assurance and productivity. Moreover, systems in machine vision lighting market work vigorously to perform imaging processes 24/7 and at speeds at which humans' visibility is limited to a blur. These systems have created a competitive environment among the companies in the F&B industry.

Quality control of meats, fish, and bakery products, as well as evaluation of grain, fruit, and vegetable quality, is quite a critical aspect that is simplified with the help of intelligent machine vision systems. Machine vision systems not only cater to quality control functions but also have introduced innovative technologies in harvesting, portioning, pick and pack functions, and many more. Various players across the globe provide machine vision lighting for applications in the food & beverages industry. For example, ProPhotonix offers the COBRA MultiSpec and COBRA HyperSpec LED Line lights to address multispectral and hyperspectral imaging applications. Moreover, ProPhotonix worked in partnership with the customer to develop a detailed understanding of their application requirements and designed a custom RGB-IR LED light for high-speed inspection of fruits and vegetables. The presence of such players propels the growth of the machine vision lighting market.

Cognex Corporation, Advanced Illumination Inc., Effilux, Moritex Corporation, National Instruments Corporation, Omron Microscans Systems Inc., ProPhotonix Limited,

Spectrum Illumination, and TPL Vision are among the key Machine Vision Lighting market players that are profiled in this market study.

The overall Machine Vision Lighting Market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Machine Vision Lighting Market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the Machine Vision Lighting Market.

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