Global and China CMOS Camera System Industry Report, 2016-2020

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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Abstract

Global and China CMOS Camera System Industry Report, 2016-2020 covers the following:
1. Analysis of CMOS Image Sensor (CIS) Industry and Market, with 7 vendors involved.
2. Analysis of CMOS Camera Lens Industry and Market, with 14 vendors involved.
3. Analysis of CMOS Camera Module (CCM) Industry and Market, with 24 vendors involved.
4. Analysis of Mobile Phone Market and Development Orientation of Mobile Phone Camera

In 2015, the global CCM (CMOS Camera Module) market size reported USD16.611 billion, up 3.8% from a year earlier but the lowest growth rate since 2010. In 2016, as the shipment of Apple phones with the highest single price of CCM fell, the world CCM market was at low ebb and down 0.5%. Due to the dual-camera stimulus in 2017, the global market rebounds substantially with the growth rate of 4.3% and the size estimated to be USD17.232 billion in 2017 and USD18.512 billion in 2020.

In 2016, Chinese manufacturers made remarkable achievements, while South Korean counterparts saw a drop or slight rise in revenue due to their heavy reliance on Apple and Samsung. Among Chinese players, Q-Tech enjoys the highest growth rate up to 84.5%, followed by Truly, both of which benefited from the outstanding performance of big customers OPPO and VIVO.

It is anticipated that monochrome dual-camera with same pixel will be the mainstream for smart phone brands except Apple in the future, as it is more affordable and can improve nightscape significantly (visible effect betterment for consumers), while Apple will persist in duel-camera design enriching depth of focus. Smart phones tend to be highly homogenized. Although they are still not quite satisfied with the dual-cameras, consumers are more impressed with dual-cameras than mono-camera. So, dual-camera is expected to be a standard configuration in high-end smart phones, and the penetration rate till 2020 would be as high up to 30-40%.

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In 2016, the CIS (CMOS Image Sensor) market size approximated USD10.516 billion, rising by 5.6% from a year ago, but with an obvious fall in the speed of growth compared with the growth rate of 13.5% in 2015, mainly because medium- and high-end products are monopolized by Sony and the manufacturers in low- and medium-end fields are hard to break through the technological barriers and do nothing but hit the price war even in the vehicle field. Although influenced by factors like the Earthquake and the Appreciation of Japanese Yen, Sony still monopolized the medium- and high-end fields by dint of its overwhelming performance superiority and saw an upsurge of 32.9% in its revenue in 2016; by contrast, other players excluding Panasonic and Hynix saw decline. It is expected that, in 2017, the CIS market will grow 4.0%, Sony will see a growth rate of at least 10%, and most others will continue to suffer losses. In spite of being not much expected, the mobile phone market is still the most important market and Sony still monopolizes the high-end mobile phone market.

In 2016, Largan Precision's revenue dropped for the first time over the ten years due to its excessive dependence on Apple's orders, but Largan saw its gross margin further rise from 57.4% in 2015 to 66.2%, showing the strengthened technical competence. Sunny consolidated its hegemony in Chinese market with its revenue surging 52% and gross margin rising from 32.5% to 38.2% (in the first half of 2016), still far behind Largan's but space left for improvement. Largan earnestly draws lessons from heavy reliance on Apple and actively develop new customers, which poses great pressure on Sunny. Currently holding a 33% market share and ranking first in the vehicle camera field worldwide, Sunny is probable to be challenged by Largan and S.Korean Sekonix in the future.

Ranking of CCM Vendors by Revenue, 2010-2016

Unit: Million USD	2010	2011	2012	2013	2014	2015	2016
LG-INNOTEK	508	1,098	1,475	2,304	2,608	2,674	2,502
SHARP	653	774	790	1,037	1,290	1,975	1,857
SEMCO	580	737	1,448	1,893	1,550	1,631	1,708
Sunny	158	186	380	713	1,105	1,319	1,580
O-FILM				90	446	884	996
LITEON	278	413	776	1,108	1,251	1,002	938
Cowell	70	323	528	814	887	980	810
Q-TECH		40	102	228	355	323	596
PRIMAX	198	276	368	490	495	515	563
FOXCONN	902	1,011	857	703	610	520	530
Patron	90	194	560	704	501	521	530
MCNEX	130	165	155	271	389	463	433
TRULY	98	108	151	292	332	350	423
SONY				390	480	420	390
CAMMSYS	124	167	233	345	376	375	314
SAMSUNG Fiberoptic	310	320	362	350	360	320	310
Powerlogic	90	156	170	246	288	343	267
CHICONY	366	425	437	355	362	276	234
STMICRO	597	615	460	360	280	220	210
VISTA POINT	208	188	210	200	160	210	190
TOSHIBA	502	478	460	371	310	220	160
OTHERS	1,688	1,538	1,628	1,283	1,210	1,070	980

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Table of contents

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Table of contents

Selected Charts

- CMOS Camera Module Industry Chain
- 8MP CCM Cost Structure, 2009-2015
- 13MP CCM Cost Structure, 2012-2015
- Supply Chain of Image Sensor Vendors
- CIS Market Size, 2011-2020E
- CIS Market Size by Application, 2014-2017
- Market Share of Global CIS Vendors by Revenue, 2013-2016
- Market Share of Major Global CIS Vendors (by Revenue), 2012
- Market Share of Major Global CIS Vendors (by Shipment), 2012
- Market Share of Major Global CIS Vendors in PC Field, 2012
- Global and China CIS Market Volume for Mobile Phone, 2010-2018E
- Global and China CIS Market by Pixel Count, 2010-2018E
- Market Share of Chinese CIS Vendors by Volume, 2010-2013
- Market Share of Chinese CIS Vendors by Revenue, 2010-2013
- Market Share of Major Global CCM Vendors by Shipment, 2016
- Global CMOS Optical Camera Lens Vendor Rankings by Revenue, 2011-2016
- Global CCM Market Size, 2010-2020E
- Global CCM Vendor Rankings by Revenue, 2010-2016
- Top 10 CCM Vendors by Revenue in China, Oct. 2014
- Distribution of Samsung's Camera Module Suppliers, 2016
- Distribution of Apple's Camera Module Suppliers, 2016
- Distribution of ZTE's Camera Module Suppliers, 2016
- Distribution of Huawei's Camera Module Suppliers, 2016
- Distribution of Lenovo's Camera Module Suppliers, 2013-2014
- Distribution of Xiaomi's Camera Module Suppliers, 2016

Selected Charts

- Distribution of OPPO's Camera Module Suppliers, 2016
- Distribution of VIVO's Camera Module Suppliers, 2016
- VCM Visual View
- VCM Sectional View
- VCM Structure
- Market Share of Major Global VCM Vendors by Shipment, 2016
- Supply Relationship between AFA and Camera Module Vendors
- Market Share of Major Global AFA Vendors, 2015
- Top 10 Most Competitive China-made VCM Motors, 2015
- OIS Structural Diagram
- OIS Schematic Diagram
- Shipment of Mobile Phones with OIS, 2012-2017E
- Market Share of Major OIS Vendors, 2015
- Global Automotive Camera Module Shipment, 2009-2020E
- Market Share of Major Automotive Camera Module Vendors, 2010
- Market Share of Major Automotive Camera Module Vendors, 2011
- Market Share of Major Automotive Camera Module Vendors, 2012
- Market Share of Major Global Automotive CCM Vendors, 2016
- Market Share of Major Global Automotive Vision System Vendors, 2016
- Market Share of Major Global Automotive Lens Vendors, 2016
- Global Mobile Phone Shipment, 2007-2020E
- Market Share of Major Global Smartphone Vendors, 2015Q4-2016Q4
- Market Share of Global Smartphone Vendors, 2016
- Market Share of Major Smartphone Vendors in China, 2014
- Market Share of Major Smartphone Vendors in China, 2016

Selected Charts

- Smartphone Shipment Market Share in China, 2016
- Mainstream Dual-Camera Phones and Supply Module Vendors, 2016
- Samsung 8MP- above CMOS Image Sensor Products List
- OmniVision's Revenue and Gross Margin, FY2009-FY2016
- OmniVision's Revenue and Operating Margin, FY2009-FY2016
- OmniVision's Shipment, FY2009-FY2015
- OmniVision's Revenue by Region, FY2009-FY2015
- OmniVision's Assets by Region, FY2009-FY2015
- OmniVision's Revenue by Application, FY2011-FY2014
- OmniVision's Revenue by Resolution, FY2013-FY2014
- OmniVision's Market Share by Field, 2014
- OmniVision's Supply Chain
- ON Semiconductor's Quarterly Sales and Gross Margin, 2014Q3-2016Q4
- ON Semiconductor Image Sensor Group's Quarterly Revenue, 2014Q3-2016Q3
- Sony Semiconductor Solutions' Organizational Structure
- Sony's Image Sensor Capacity Expansion Plan
- Image Sensor Applications
- Revenue and Gross Margin of Galaxycore, 2011-2014
- Revenue Breakdown of Galaxycore by Product, 2011-2014
- Revenue Breakdown of Galaxycore by Pixel, 2011-2014
- Galaxycore's Product Shipment, 2011-2014
- Galaxycore's Assets, Liabilities and Cash Flow, 2011-2014
- Largan Precision's Revenue and Gross Margin, 2006-2017
- Largan Precision's Revenue and Operating Margin, 2006-2017
- Largan Precision's Monthly Revenue, Dec. 2014-Dec. 2016

Selected Charts

- Largan Precision's Shipment, 2011-2014
- Financial Data of Largan Precision's Subsidiaries in Mainland China, 2015
- Financial Data of Largan Precision's Subsidiaries in Mainland China, 2014
- Financial Data of Largan Precision's Subsidiaries in Mainland China, 2012
- Financial Data of Largan Precision's Subsidiaries in Mainland China, 2013
- GSEO's Revenue and Gross Margin, 2005-2016
- GSEO's Revenue and Operating Margin, 2005-2016
- GSEO's Monthly Revenue, Dec. 2014-Dec. 2016
- Asia Optical's Revenue and Gross Margin, 2007-2016
- Asia Optical's Revenue and Operating Margin, 2007-2016
- Asia Optical's Monthly Revenue, Dec. 2014-Dec. 2016
- Newmax Technology's Revenue and Gross Margin, 2007-2016
- Newmax Technology's Monthly Revenue, Dec. 2014-Dec. 2016
- Ability Opto-Electronics Technology's Revenue and Gross Margin, 2006-2015
- Ability Opto-Electronics Technology's Monthly Revenue, Dec. 2014-Dec. 2016
- Kantatsu Mobile Phone Camera Module Products List
- Diostech's Revenue by Business, 2013
- Diostech's Capacity, Output and Capacity Utilization, 2013
- Diostech's Organizational Structure
- Diostech's Production Line
- Diostech's Customers
- Diostech's Revenue by Pixel, 2012
- Sekonix's Revenue and Operating Margin, 2002-2016
- Sekonix's Revenue by Product, 2009-2015
- Sekonix's Handset Lens Revenue by Pixel, 2009-2014

Selected Charts

- Korea Optical's Revenue and Operating Margin, 2007-2016
- Korea Optical's Roadmap
- Optivision Technology's Revenue and Operating Margin, 2006-2016
- Optivision Technology's Monthly Revenue, Dec. 2014-Dec. 2016
- KMOT's Main Businesses
- Revenue of KMOT's Optical Units for Cell Phones, FY2011-FY2012
- Digital Optics' Revenue and Operating Margin, 2007-2016
- Distribution of Digital Optics' Raw Material Costs, 2011-2014
- Chicony's Revenue and Gross Margin, 2005-2016
- Chicony's Monthly Revenue, Dec. 2014-Dec. 2016
- Financial Data of Chicony's Major Subsidiaries in Mainland China, 2011
- Financial Data of Chicony's Major Subsidiaries in Mainland China, 2012
- Financial Data of Hon Hai's Major Subsidiaries in Optical Field, 2013
- Financial Data of Hon Hai's Major Subsidiaries in Optical Field, 2014
- Financial Data of Hon Hai's Major Subsidiaries in Optical Field, 2015
- LG Innotek's Revenue and Operating Margin, 2006-2017
- LG Innotek's Net Profit, 2008-2018E
- LG Innotek's Revenue by Business, 2013-2017
- LG Innotek's Operating Income by Business, 2011-2015
- LG Innotek's Optical Revenue and Operating Margin by Quarter, 2014Q1-2016Q4
- LG Innotek's Automotive & Electronics Revenue and Operating Margin by Quarter, 2014Q1-2016Q4
- LG Innotek'sCCM Distribution by Piexel, 2014Q1-2016Q4
- Mitsumi Electric's Revenue and Operating Margin, FY2006-FY2016
- Mitsumi Electric's Revenue by Product, FY2006-FY2016
- Holding Structure of Truly International's Subsidiaries

Selected Charts

- Truly International's Revenue and Operating Margin, 2005-2016
- Truly International's Revenue by Segment, 2014-2018E
- Sales and ASP of Truly International's Automotive Products, 2014-2018E
- Truly International's Mobile Phone LCD Customers
- Truly International's Car Display Customers
- Truly International's Touch Screen Capacity
- Truly International's CCM Customers
- Lite-On Technology Corporation
- Lite-on Science Park, Guangzhou
- Lite-on's CCM Technology Roadmap
- Lite-on's Revenue and Operating Margin, 2005-2015
- Primax's Key Milestones
- Primax's Revenue and Operating Margin, 2008-2016
- Primax's Revenue by Division, 2007-2015
- Primax's Monthly Revenue, Dec. 2014-Dec. 2016
- Primax's Global Distribution
- Primax's Product Scope
- Revenue and Operating Income of SEMCO, 2011-2017
- Revenue of SEMCO by Division, 2014-2017
- Operating Income of SEMCO by Dision, 2015-2017
- CCM Business Revenue of SEMCO, 2013Q1-2016Q4
- Revenue and Operating Margin of Partron, 2007-2017
- Revenue of Partron by Customer, 2013-2016
- Revenue and Gross Margin of Sunny Optical, 2004-2016
- Revenue of Sunny Optical by Segment, 2014-2016

Selected Charts

- Financial Summary of Sunny Optical, 2009-2015
- Key Customers of Sunny Optical
- Shipments of Sunny Optical by Product, 2013-2016
- Automotive Lens Shipment and ASP of Sunny Optical, 2014-2018E
- Revenue of Sunny Optical by Division, 2010-2016
- Gross Margin of Sunny Optical by Division, 2010-2016
- Distribution of Sunny Optical's Plants
- Organization Structure of CammSys
- Revenue and Operating Margin of CammSys, 2009-2017
- Raw Material Prices of CammSys, 2011-2014
- Revenue and Operating Income of PowerLogic, 2009-2016
- CCM ASP of PowerLogic, 2012-2014
- CCM Component ASP of PowerLogic, 2012-2014
- Production Capacity of PowerLogic CCM, 2012-2014
- CCM Output of PowerLogic, 2012-2014
- Revenue and Operating Income of MCNEX, 2009-2016
- Revenue of MCNEX by Customer, 2013
- Revenue of MCNEX by Application, 2010-2016
- Major Products of MCNEX in Mobile Phone Field
- Production Capacity of MCNEX by Region
- Revenue and Gross Margin of Cowell, 2011-2017
- Revenue of Cowell by Segment, 2011-2016
- Shipments VS ASP of Cowell, 2011-2015
- Production Capacity of Cowell, Oct 31, 2014
- Cost Structure of Cowell, 2013-2014

Selected Charts

- Revenue and Operating Margin of O-Film, 2007-2017
- Revenue of O-Film by Product, 2009-2017
- Client Structure of O-Film, 2012-2014
- Revenue and Gross Margin of Q-TECH, 2011-2017
- CCM Shipment of Q-TECH, 2013-2017
- Quarterly Shipment of Q-TECH, 2015Q1-2016Q4
- CCM ASP of Q-TECH, 2015-2018
- CCM ASP of Q-TECH by Pixels, 2015-2016
- Client Structure of Q-TECH, 2015
- Revenue and Operating Income of GAI, FY2009-FY2015
- Revenue and Operating Margin of Sharp, FY2008-FY2017
- CCM Business Revenue and Operating Margin of Sharp, 2015Q2-2016Q4
- OIS Roadmap of Sharp
- Revenue of STMicro by Product, FY2014
- Revenue of STMicro by Product, 3Q/2015
- Structure of Hysonic
- Revenue and Operating Income of Hysonic, 2006-2016
- Personnel Organization of Hysonic, end-March 2014
- Major Products of Hysonic
- Revenue of Hysonic by Ultimate Client, 2012-2013
- Revenue of Hysonic by Customer, 2012-2013
- Revenue and Operating Margin of Jahwa, 2005-2017
- Quarterly Revenue of Jahwa by Product, 2013Q1-2015Q4
- Overseas Subsidiaries of Jahwa

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