



**Global and China Automatic Optical  
Inspection (AOI) Industry Report,  
2017-2021**

**Mar.2017**

## **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.

## Abstract

As electronic products become smaller and consume less energy, the components within them are increasingly miniaturized, making it impossible to inspect component assembly process with human eyes and creating greater demand for automated inspection equipment. Following a few years of rapid development, the Chinese automated optical inspection (AOI) equipment market reached RMB8.81 billion in 2016, an 18.4% rise over the previous year and 20.1% of global AOI market, and is expected to present a CAGR of 9.6% during 2016-2021.

AOI is primarily used in PCB, FPD, semiconductor, and photovoltaic cell industries. In China, AOI finds the most widespread application in PCB industry, followed by in FPD and semiconductor sectors but with a relatively small market scale. The three industries accounted for 61.9%, 14.8%, and 16.9% respectively of the total AOI market in 2016.

Chinese AOI equipment market remains dominated by foreign players. Emerging local companies including ALeader Vision Technology, JUTZE Intelligence Technology, EKTion (Shenzhen) Technology, ZhenHuaXing Technology (Shenzhen), Zhejiang Ovi Technology, and Shenzhen JT Automation Equipment provide products mainly for downstream manufacturing processes (like PCB), resulting in cut-throat competition.

Chinese Automated Optical Inspection (AOI) Market Size, 2014-2021E



Source: Global and China Automated Optical Inspection Industry Report, 2017-2021 Mar 2017

In contrast, some big international companies, represented by Orbotech (Israel), Screen (Japan), and Koh Young Technology (South Korea), occupy major segments with full product lines, while some ones, represented by Omron, KLA-Tencor, and HB, aim at front-end industries (like semiconductor and FPD) and have a stranglehold on high-end markets. In addition, some Taiwanese players, such as Test Research, UTECHZONE, and MACHVISION, extend to the Chinese mainland market and form another force by virtue of their supporting relationship with Taiwan's component industry, but are affected by political climate and Chinese mainland's own supply chain, and have weakened since 2015.

Global and China Automated Optical Inspection (AOI) Industry Report, 2017-2021 highlights the following:

- ◆ Overview of AOI industry (definition, classification, composition, advantages, technologies, industry chain, market characteristics, business model, etc.);
- ◆ Global AOI market (status quo, market scale, competitive landscape, development trends, etc.);
- ◆ Chinese AOI market (industrial policies, status quo, market scale, market demand, competitive landscape, development prospects, etc.);
- ◆ Downstream industries of AOI (market scale, demand, etc. of PCB, FPD, and IC industries);
- ◆ 11 major global AOI companies (Orbotech, Camtek, Omron, Screen, HB, Koh Young Technology, KLA-Tencor, Test Research, UTECHZONE, Mirtec, Saki) (profile, business performance, revenue structure, R&D spending, AOI business, development strategy, business in China, etc.);
- ◆ 10 major Chinese AOI companies (ALeader Vision Technology, JUTZE Intelligence Technology, EKTion (Shenzhen) Technology, ZhenHuaXing Technology (Shenzhen), Zhejiang Ovi Technology, Shenzhen JT Automation Equipment, 3i-Systems, Nanjing Xieli Electronics Technology Group, etc.) (profile, business performance, revenue structure, R&D spending, AOI business, development strategy, etc.)

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