

**Global and China Machine Vision Industry
Report, 2017-2021**

Apr.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

Machine vision is a system consisting of lens, camera, frame grabber, and image processing software. Compared with manual detection, machine vision has the advantages of high efficiency, being less error-prone, stable detection, and low cost of use.

Global machine vision market size reported about USD6.8 billion in 2016, up 6.3% from a year ago, and is expected to reach USD7.2 billion in 2017 and exceed USD9 billion in 2021 at a CAGR of around 7.5% during 2017-2021. Germany and America are the two largest markets, each holding over 30% shares of the global machine vision market in 2016.

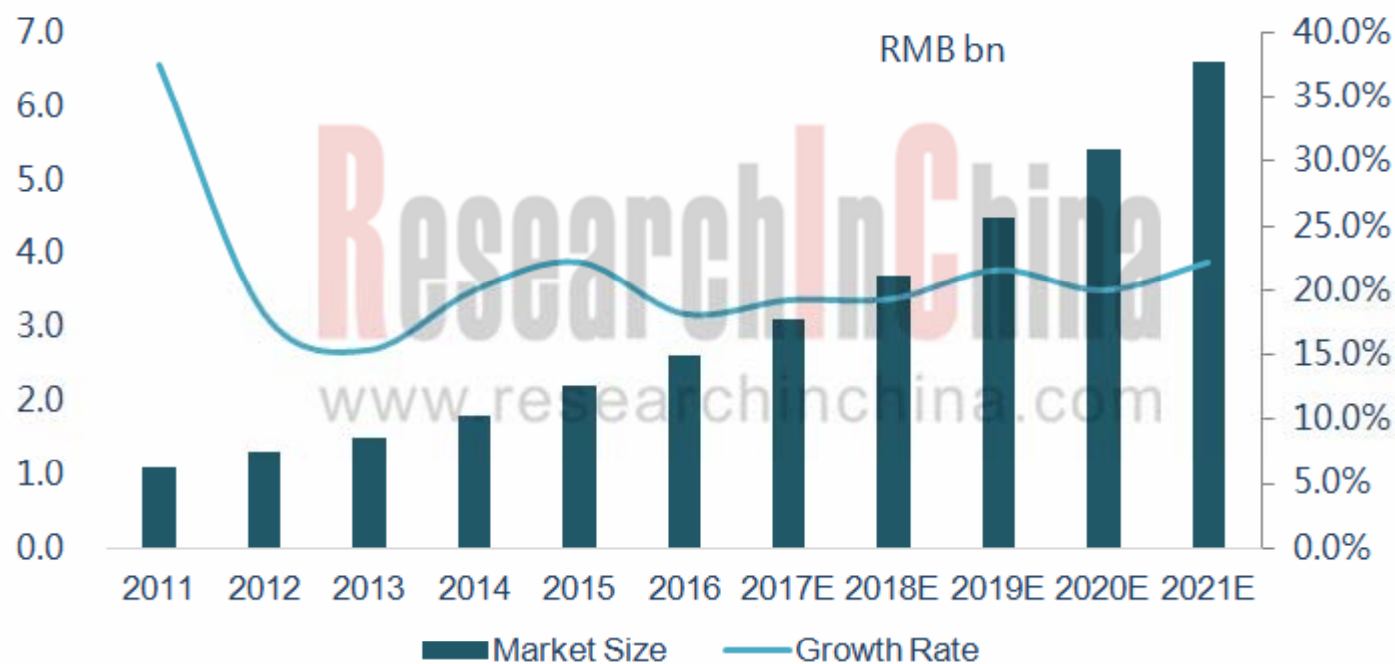
Machine vision industry started in China after 2010 and now develops rapidly. The market was worth RMB2.6 billion (about USD390 million) in 2016, 5.7% of the global market and an 18.2% increase over the previous year. As sectors become more automated and intelligent, the Chinese machine vision market is expected to see an AAGR of 20% or so between 2017 and 2021, higher than the global average.

Major global machine vision vendors include Keyence, Cognex, DALSA, Panasonic, and Omron, holding a combined market share of around 35.0% in 2016. Typical Chinese enterprises are Daheng New Epoch Technology and Shenzhen JT Automation Equipment which are less competitive compared with international well-known players and each made up less than 1.5% in 2016.

Machine vision products are primarily applied to semiconductor & electronic manufacturing and automobile, the two fields that accounted for nearly 60% of total demand for machine vision in 2016. The penetration of machine vision in automobile manufacturing is higher as a whole, usually a dozen sets of machine vision systems for one production line. Machine vision will find a broader range of application, such as object recognition for autonomous vehicle, as the car becomes more intelligent,

With growing applications of machine vision, downstream producers have been active in developing their machine vision business to strengthen industry-chain advantage. For instance, Estun Automation acquired Euclid Labs SRL (a provider of automated production line solutions that masters 3D machine vision technology) in Feb 2016; Ford acquired SAIPS (a provider of image & video algorithm solutions, deep learning, and signal processing & classification technology) in Aug 2016.

Chinese Machine Vision Market Size and Growth Rate, 2017-2021



Global and China Machine Vision Industry Report, 2017-2021 by ResearchInChina

Global and China Machine Vision Industry Report, 2017-2021 highlights the following:

- ◆ Machine vision industry (definition, industry chain, problems in the industry, etc.);
- ◆ Machine vision on a globe scale (development environment, status quo of market, patents, competitive landscape, etc.);
- ◆ Machine vision in China (development environment, market situation, patents, cost structure, competitive landscape, development trends, etc.);
- ◆ Markets for major machine vision components (light source, lens, industrial camera, frame grabber, image processing software, system integration, etc.);
- ◆ Main machine vision applications (semiconductor and electronic manufacturing, automobile, pharmaceutical, food & packaging machinery, robotic vacuum cleaner, etc.);
- ◆ 8 global and 12 Chinese machine vision-related enterprises (operation, machine vision business, etc.)

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