



**Global and China CMOS Camera System  
Industry Report, 2017-2021**

**Dec. 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

Global CCM (CMOS Camera Module) market was worth USD16.611 billion in 2015, a year-on-year rise of 3.8% from 2014, the slowest rate since 2010. Global market fell modestly in 2016 due to a drop in shipments of Apple phones that carry CCM with the highest unit price. The market experienced a big rebound in 2017 driven by dual camera, growing by 4.3% to USD17.232 billion, and is expected to attain USD19.134 billion in 2021.

CCM is composed of Lens, VCM, IRCF, CIS, DSP and FPC. Among them, CIS, Lens and VCM have the highest value. Take the mainstream 13-megapixel camera module for example, CIS, Lens and VCM make up about 40.6%, 14.3% and 11.3% of total costs, respectively.

**CIS:** Global CIS market size approximated USD10.516 billion in 2016, up 5.6% from a year ago, and is expected to grow 4.0% in 2017 and hit USD12.621 billion in 2021. Sony is an undisputed leader in the market with a market share of about 42% in 2016, followed by Samsung (18%), OmniVision (12%), ON Semiconductor (6%) and Panasonic (3%). CR3 was 73% and CR5 82% in 2016. Particularly, almost all 13MP-above products are made by first three vendors, indicating a high market concentration, a trend that is growing.

**Optical Lens:** Global shipments of lens (front and rear) totaled 3.49 billion pieces in 2016, a year-on-year rise of 7.9%, including 1.64 billion 5P-above lenses, a 19.7% increase from a year ago, far higher than the growth rate of the industry, compared with a continued fall in shipments of 5P-below lens. The world's shipments of optical lens are expected to reach 3.763 billion pieces in 2021, including 2.728 billion 5P-above lenses, representing a 72.5% market share. Taiwanese LARGAN Precision, a behemoth in the market, shipped 1.15 billion lenses with a market share of 32.9% in 2016. It is expected that, along with hot sales of new-generation iPhone and continuous upgrading of mobile phone lens, LARGAN Precision will seize 34.3% by market share and 16.4% by shipments.

**VCM:** Global demand for mobile phone VCM was 1.49 billion pieces in 2016 and will climb to 3.2 billion pieces in 2021 at a CAGR of 17.1%. Hundreds of VCM producers are primarily divided into Japanese ones (Alps, Mitsumi Electric, TDK), South Korean ones (Samsung Electric, JAHWA, Hysonic and LG) and Chinese ones (New Shicoh Motor, B.L. Electronics, Hozel Electronics, and Liaoning Zhonglan Electronic Technology). Japanese and South Korean players have advanced technologies and mature processes. As Chinese technology and process for VCM advance, local VCM enterprises, with advantages in price and services, have become more competitive and are expected to break monopoly of Japanese and South Korean counterparts.

Global and China CMOS Camera System Industry Report, 2017-2021 highlights the followings:

- CMOS camera module industry and market, 17 relevant vendors;
- CMOS image sensor industry and market, 6 relevant vendors;
- CMOS camera lens industry and market, 11 relevant vendors;
- CMOS camera VCM industry and market, 4 relevant vendors.



Source: Global and China CMOS Camera System Industry Report, 2017-2021 Dec 2017

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