

# **Global and China Automated Optical Inspection (AOI) Industry Report, 2018-2022**

**June 2018**

## **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

Miniaturization of electronic products conduces to components of all sorts being smaller and smaller and spurs the growing demand for automated inspection equipment. In the wake of a transfer of electronic components production capacity to China, the AOI equipment has been developing by leaps and bounds over the past several years. In 2017, Chinese AOI market was worth RMB9.52 billion, a surge of 10.3% from a year earlier and making up 21.7% of the global AOI market size. As the industries such as artificial intelligence and automotive electronics are advancing rapidly and China's policies on high-end equipment manufacturing are being implemented, the market of high-end equipment inclusive of AOI will be booming and it is projected that the Chinese AOI market size will keep a CAGR of 8.9% between 2017 and 2022.

AOI is primarily served for PCB, FPD, semiconductor and photovoltaic cell, and finds most application in PCB sector. There is a limited market size of AOI applied in FPD industry and semiconductor industry. In 2017, AOI use in PCB, FPD and semiconductor seized a respective market share of 63.9%, 15.6% and 13.7% in total AOI market size.

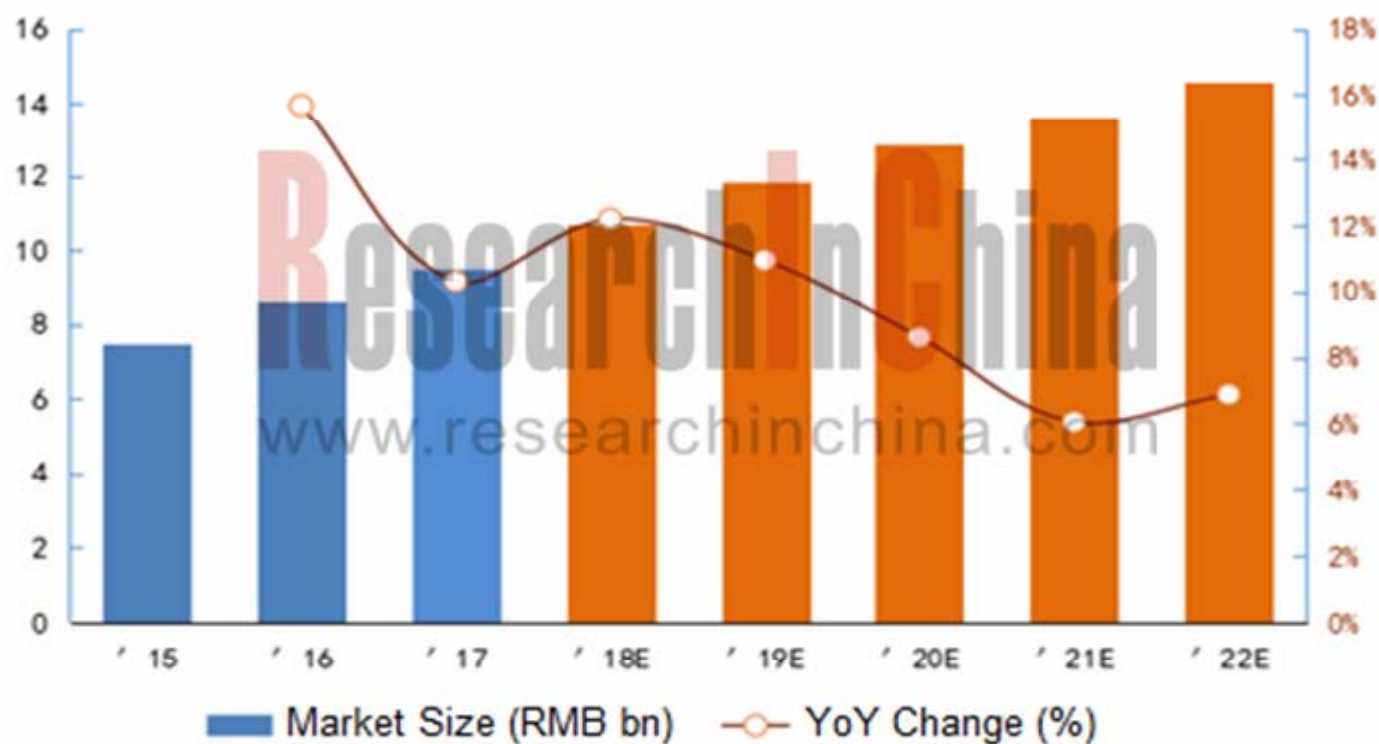
As concerns competition, the Chinese AOI equipment market is still firmly dominated by foreign companies while Chinese players have come to the fore, such as Aleader, Jutze Intelligence, Ekt-Tech, Zhenhuaxing Technology, Ovi Technology and JT Automation Equipment. Those Chinese firms focus on the downstream process (like PCB) and compete fiercely due to weak R&D capability and lack of technological innovation, and consequently most of them saw a drop in both revenue and market share in 2017.

By comparison, the large multinational corporations represented by Israel-based Orbotech, Japan-based Screen and South Korea-based Koh Young Technology make foray into market segments with full product portfolios, or the foreign players represented by Omron, KLA-Tencor and HB target the front end industry (like semiconductor and FPD) and occupy the high-end market. Along with the higher and higher demanding on the yield of electronic components in China, the demand for high-end AOI keeps expanding and the international giants seize more and more market shares. In addition, Taiwanese vendors (like Test Research, Inc., Utechzone, and Machvision) approach the Mainland Chinese market by dint of Taiwan's components supply relationship and form a competitive force which however was beginning to wind down owing to the deteriorating political climate since 2015.

The report highlights the followings:

- ◆AOI industry overview (definition, classification, composition, advantages, technologies, market features, industrial chain, business model, etc.);
- ◆Global AOI market (status quo, market size, competitive landscape, development trends, etc.);
- ◆Chinese AOI market (policy, status quo, market size, demand, competitive pattern, development prospects, etc.);
- ◆Downstream of AOI Industry (market size, demand and so forth of PCB industry, FPD industry, IC industry, etc.);
- ◆11 world-renowned companies (Orbotech, Camtek, Omron, Screen, HB, Koh Young Technology, KLA-Tencor, TRI, Utechzone, Mirtec, SAKI), involving profile, performance, revenue structure, R&D expenditure, AOI business, development strategy, operations in China, etc.);
- ◆10 Chinese AOI companies (Aleader, Jutze Intelligence, Ekt-Tech, Zhenhuaxing Technology, Ovi Technology, 3i Systems, Xieli Electronic, JT Automation Equipment, Star River Comtes, and Mingfu Automation), involving profile, performance, revenue structure, R&D expenditure, AOI business, development strategy, etc.)

## China's AOI Market Size, 2015-2022E



Source: Global and China Automated Optical Inspection (AOI) Industry Report, 2018-2022

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##### 1.1.1 Definition

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