Global and China Machine Vision Industry Report, 2019-2025

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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

In the wake of industry 4.0, machine vision, a branch of steadily growing AI industry is prospering. Global machine vision market was worth roughly USD8.9 billion in 2018, presenting a year-on-year surge of 18.7%, and is projected to outstrip USD14 billion in 2025. The European and American regions have commanded over 70% of the market.

Chinese machine vision market which sprung up over the last decade was valued at virtually RMB6.5 billion (approximately USD980 million at a ratio of 1:6.6174) in 2018, a spurt of 47.7% on an annualized basis, or 11.0% of the global total, before reaching estimated RMB7.9 billion in 2019. It is expected that the figure will exceed RMB17 billion in 2025.

Machine vision was first applied to semiconductor and electronics manufacturing, automotive manufacturing and pharmaceutical production among other fields, where it sustained growth rates of over 20% on average each year during 2015-2018. The prevalence of intelligent manufacturing will be a boon for penetration of machine vision in these sectors.

Besides traditional manufacturing, machine vision also found broad application in security, intelligent transportation and new retailing in recent years. In particular, favorable policies concerning safe city and smart city programs rendered rapid adoption of the technology to security and intelligent transportation, in which it grew at an AAGR of over 50% in recent two years.

Global machine vision industry is not highly concentrated now. The world's key suppliers consist mainly of American, Japanese and Chinese players, such as Keyence, Cognex, Panasonic, Omron and Daheng New Epoch Technology. In 2018, the global market recorded lower than 40% in CR5 but boasted a relatively stable competitive pattern: Keyence was still the champion with a market share of 10%, followed by Cognex, while Daheng New Epoch Technology as the largest provider of machine vision systems in China was less competitive with a mere 1.6%.

The expansion of machine vision market comes with a growing number of entrants, which may lead to a lower industry concentration. Currently, conventional suppliers work hard to gain a firm foothold, and some outsiders also try to enter the market by way of investment and acquisition as they did in 2019 when Facebook and Alibaba made their deployments through buying machine vision firms.

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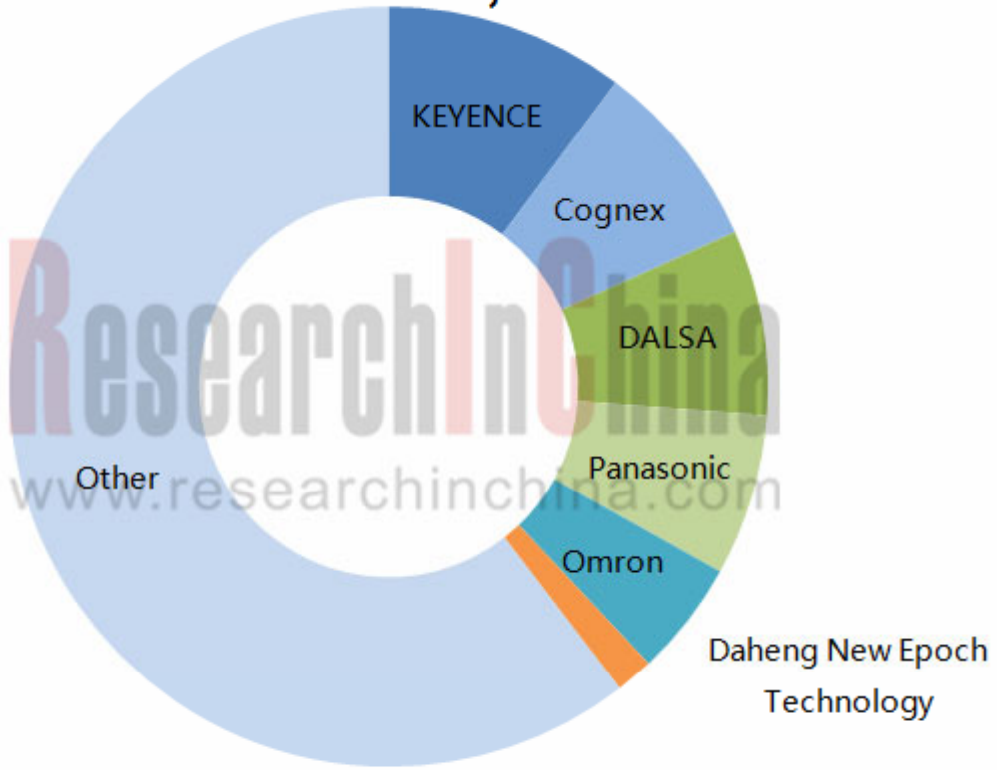
Competitive Landscape of Global Machine Vision Market, 2018



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Global and China Machine Vision Industry Report, 2019-2025 highlights the following:

- Machine vision industry (definition, classification, main functions and features, industry chain, etc.);
- Machine vision on a globe scale (development environment, market size, market structure, major regions (North America, Japan and Europe), status quo, competitive landscape, etc.);
- Machine vision in China (development environment, market size, market structure, 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.) and major suppliers;
- Main machine vision applications (semiconductor and electronic manufacturing, automobile, pharmaceutical, food & packaging machinery, robotic vacuum cleaner, intelligent transport, new retail, etc.);
- 11 global and 13 Chinese machine vision-related enterprises (operation, machine vision business, etc.).

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