



# **Global and China Camera Module Industry Report, 2019-2025**

**May 2019**

## **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.

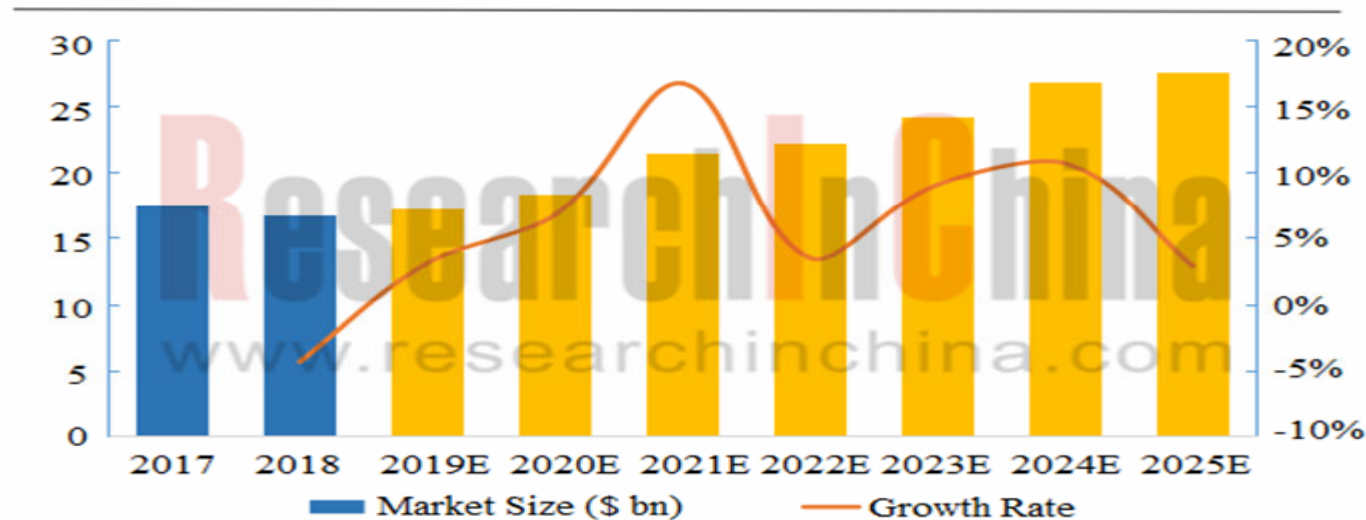
## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Affected by factors like the maturity of mobile phone markets worldwide and the prolonged replacement of mobile phone by users, the mobile phone market has undergone a slowdown in growth rate. From Q4 2017 to Q1 2019, the quarterly global smartphone shipments saw a year-on-year decline for six consecutive quarters. Albeit the stagnant or even lower smartphone shipments, functional modules with continuous innovation opportunities, such as camera modules, will still remain a focus in the future. Thanks to the sizeable growth of multi-camera and 3D camera smartphones, the global smartphone camera market size will soar from USD16.7 billion in 2018 to USD27.6 billion in 2025, presenting a CAGR of 7.4%.

Global Mobile Phone Camera Module Market Size and Growth Rate, 2017-2025E



It is an inevitable trend that smartphone cameras will be featured with SLR performance, and camera innovation will play a main role in smartphone innovation in future. In 2019, the triple-camera will find wider application in high-end smartphones and the penetration rate may reach 8.7% worldwide. Quad-camera mobile phones are expected to be mass-produced and shipped in 2021. The penetration rate of multi-camera mobile phones (with triple-camera and above) will stand at 78.1% by 2025.

Led by iPhone, 3D cameras are expected to penetrate rapidly in China-made mobile phones in the future. The global penetration rate will reach 17.5% in 2020 and 91.5% in 2025.

As for competition, the mobile phone camera module industry is characterized by extremely fierce competition and a low concentration ratio, with the CR3 of 25% and the CR5 of about 36%. O-Film and Sunny Optical rank among the top two. With years of experience in camera module production, O-Film has become a leading camera module vendor in China and has ranked first in the world by module shipments for many years. In recent years, it has enhanced its production and R&D capabilities by acquiring Sony Electronics Huanan, Fujitsu Tianjin and Fujifilm's lens patents. Targeting medium and high-end mobile phone lens module market, Sunny Optical has always been the market leader in terms of module fabrication technology. Currently, it has developed 3D sensing, periscope-style and triple-camera modules, and further delved in R&D of automotive cameras to occupy a place in the field of ADAS.

The report highlights the following:

- Camera module industry overview, including industry chain and related technology roadmap;
- Global camera module market size and competitive landscape;
- Global camera module market segments: including mobile phones and automobiles;
- Multi-camera and 3D camera module technologies;
- Operating performance, main products, supply, production layout, production and marketing, development strategy, etc. of 17 camera module vendors like Chicony, O-Film and Sunny Optical.

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