“Total industrial machine vision sales expected to reach $2B in 2018,” says Yole Développement

Lyon, France – June 24, 2013: Yole Développement announces its Machine vision technology & market trends report. Yole Développement’s report provides a complete analysis on machine vision market, including segmentation and market forecasts 2013-2018, detailed value chain and supply chain. It also focuses on machine vision technology’s evolution: CCD vs. CMOS/3D imaging/BSI/hyperspectral.

Exclusive market segmentation and identification of nine key growth segments

The machine vision market is complex, composed of myriad niche applications that are either industrial or non-industrial. To simplify the machine vision market’s structure and dynamics, Yole Développement has proposed a novel market segmentation that cross-references technical and behavioral criteria. By cross-referencing technical and behavioral needs, nine homogeneous groups of key machine vision customers have been defined.

From an industrial point-of-view, versatile detection, versatile inspection and compact 3D inspection will fuel most of the machine vision industrial market’s growth, driven by new low-end applications. From a non-industrial standpoint, all identified segments will sustain steady, high growth at a 15%+ CAGR; namely high-end IP surveillance, license plate recognition and automotive safety.

Yole Développement’s report includes a structuring segmentation to help facilitate machine vision market comprehension. It also highlights key growth areas and the available strategies to gain profitability or market share.
By 2018, the industrial machine vision market will reach nearly $2B!

“Total industrial machine vision sales accounted for 1.2M cameras in 2012, a number expected to reach $2B in 2018, at an 8% CAGR. After moderate 1% growth in 2012 (a reflection of the economic downturn facing the global industry), an upturn is expected in the future, thanks to the automatization trend in Asian factories, new capital expenditures in the semiconductor industry and the emergence of new low-end applications,” explains Paul Danini, Technology & Market Analyst, Imaging Technologies & MEMS Devices, at Yole Développement. Growth in the low-end segments will be driven by strong price erosion stemming from the commoditization of machine vision subsystems.

Machine vision players’ main challenge will be how to gain market share in the dynamic low-end market segments while maintaining sustainable profitability.

Concurrently, adjacent non-industrial applications are expected to burgeon at a double-digit rate, driving future growth.

Yole Développement’s report includes market insights in the form of units & revenue for market segments in both industrial and non-industrial machine vision. Industrial machine vision market forecasts are realized for 2013-2018 and include industrial cameras, smart cameras and vision sensors.

Fragmented shares will fuel market consolidation

Machine vision applications’ complex diversity resulted in the emergence of a multitude of small machine vision camera manufacturers. Consequently, the machine vision market is very fragmented at the camera level. On the flip side, the machine vision image sensor market is quite concentrated due to the presence of strong technical know-how necessary for designing to a specific sensor.

From a technological standpoint, industrial machine vision is mostly characterized by incremental innovations: subsystem manufacturers increasing resolution, frame rate and subsystem capacity. The market’s technological maturity makes disruptive innovation challenging, and minimizes any unique selling proposition.

The combination of high fragmentation and limited product differentiation has led the machine vision market to unavoidable commoditization, driven by strong price competition from companies like Point Grey Research and Basler. Now that the market has attained significant manufacturing volume, it’s highly probable that a consolidation will occur at the low-end through successive acquisitions by market leaders strategically positioned there.

In Yole Développement’s report you’ll enjoy a detailed analysis of the machine vision value chain and supply chain, along with market share at both image sensor and subsystem level.

About Machine Vision Technology & Market Trends report:

- Author:
  - Paul Danini is the market & technology analyst in charge of the imaging technologies studies at Yole Développement. He holds a master of engineering in instrumental physics, and a master degree in Technology and Innovation Management from Grenoble Business School.

- Catalogue price:
  - Euros 5,990.00 (Multi user license) / Euros 2,490.00 (Executive Summary) - Publication date: July 2013.
  - For special offers and the price in dollars, please contact David Jourdan (jourdan@yole.fr or +33 472 83 01 90).

- Companies cited in the report:
ADIMEC, Alexima, Allied Vision Technology, Anafocus, Aphesa, Aptina Imaging, Awaiba, Basler,
Banner Engineering, Baumer Optronics, Bluetechnix, CMOSIS, Cognex, Critical Link, Datalogic, Dongbu
Hitek, Dynamax Imaging, e2v, Edixia, Edmund Optics, EVT, Fotonic, FRAMOS, Hamamatsu Photonics,
IDS Imaging, IFM, IMEC, ImperX, Industriesensorik GmbH, ISRA Vision, JAI, JDSU, Kappa Optronics
GmbH, Leuze Electronic, Lfoundry, LMI Technologies, Lumenera, Matrix Vision, Matrox Imaging,
Melexis, MESA Imaging, Micron, Microscan, Mobotix, New Imaging Technologies, NED, Odos Imaging,
OmniVision, Omron, ON Semiconductor, Optomotive Mechatronics, Panasonic, Pelco, Photonfocus,
PMD Technologies, Point Grey Research, Pyxalis, SensoPart, SICK IVP, SK Hynix, SmartRay,
SoftKinetics, Sony, Stemmer Imaging, SVS Vistek, Teledyne DALSA, The Imaging Source, Toshiba Teli,
TowerJazz, Viimagic, Vieworks, Vision Components, Viscom, Vitronic, VR Magic, Wenglor, WLCSP,
Ximea, X-Fab, 1st Vision and many more.

About Yole Développement — [www.yole.fr](http://www.yole.fr)

Founded in 1998, Yole Développement has grown to become a group of companies providing marketing,
technology and strategy consulting, media in addition to corporate finance services. With a strong focus on
emerging applications using silicon and/or micro manufacturing, Yole Développement group has expanded to
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