



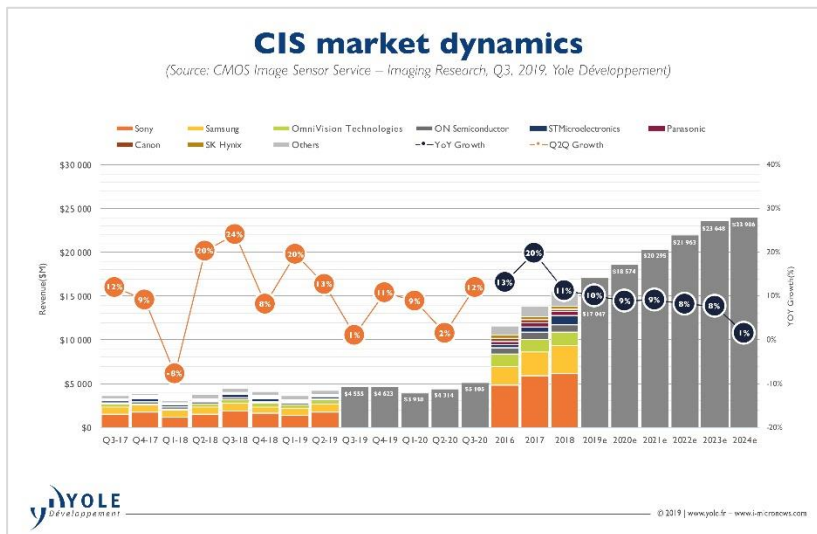
即时发布:

CIS 产业：2019 年第 2 季度增长背后的真相是什么？

摘自：

- 《CMOS 图像传感器服务—成像研究》– Yole Développement, 2019 年第 3 季度
- 《CMOS 图像传感器行业状态》报告– Yole Développement, 2018 年

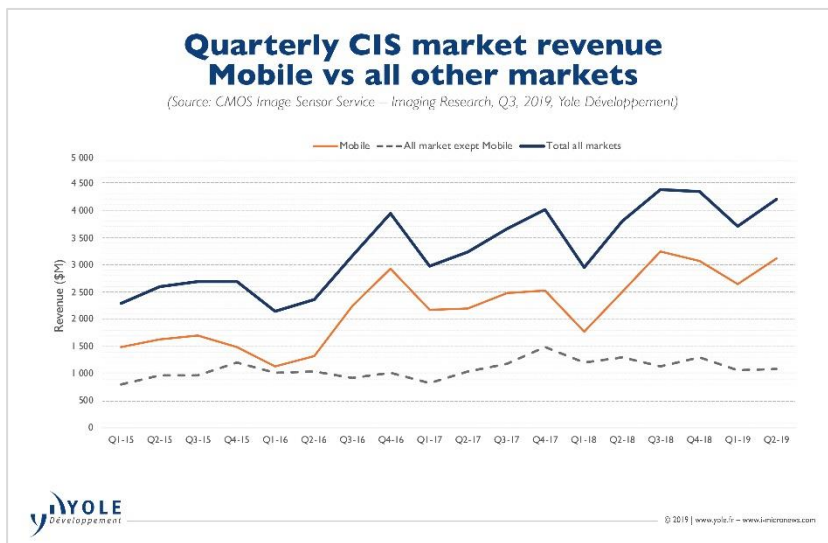
法国里昂讯—2019 年 10 月 4 日：“2019 年第 2 季度增长超过 7%，超出了我们的预期，但除了移动市场就没有什么好消息了”，[Yole Développement \(Yole\)](#) 成像业务的高级分析师 **Pierre Cambou** 宣称道。2019 年，由于移动市场走势强劲，CIS 产业依然有可观的增长。但针对各个市场和厂商的季度分析表明，实际情况和全局数据所显示的情况大不相同。



最新消息是什么？市场指标的最新状态如何？市场是在增长还是在衰退？领先企业有多少收益？他们将利用何种策略来充分利用市场变革？Yole 在[《CIS 季度市场监测 2019 年第 3 季度分析》](#)中回答了这些问题。Yole 的分析师们在近期对 DRAM 和 NAND 这样的存储器市场做了类似分析，而《CIS 季度市场监测》是这一系列的最新文章。

CIS 这一特种半导体市场增长幅度客观，2018 年的收益达到了 155 亿美元。主要 CIS 市场和厂商的规模与活跃度让 Yole 确定，要对 CIS 市场的短期和中期趋势进行更好的监控和更深的了解，按季度检测必不可少。与此同时，Yole 仍将每年通过其《CMOS 图像传感器行业状态》报告发布跨度更广的五年期预测。这两项产品都属于 Yole 的成像研究业务范畴，是对同一产业进行的互补性分析。

CIS 产业：自带前进引擎的市场



与去年在 Yole 的《2018 年 CIS 行业状态》报告中发布的预测相符，CIS 产业今年此时的态势与 Yole 分析师们的预测完全一致。2018 年的第 1 季度有点不可靠，2019 年的第 1 季度却可以代表过去五年的季节性特征，随后的 2019 年第 2 季度其实略略优于预期（+7%）。这两个季度在传统上是 CIS 最低迷的季度，移动类和消费类产品的销

销售额都是最低的。移动市场占了 CIS 总销售额的 68%，根据 Yole 分析师们的判断，未来五年内这一情况不会有什么改变。

Yole 认为，按照预期中 2019 年 10% 的年同比增长率，CIS 紧接着在第 4 季度的季度销售额将达到 46 亿美元。这样两位数的增长前景真是令人难以置信，尤其是在移动市场饱和且行业整体进入周期性衰退的背景下。

是的，Yole 的分析师们可以肯定地说：CIS 绝对拥有自己的增长引擎——这一引擎的动力来自于移动设备中摄像头的普及，由于大多数高端旗舰产品平均一个手机就带有 5-6 个摄像头，这一普及程度也在 2019 年再创新高。Yole 预期这种趋势在未来 3-4 年间还将继续，然后会比较突然地止步。为了说明这一观点，分析师们将 2024 年的预期年同比增长率姑且设定在 1%。

2019 年第 1 和第 2 季度：汽车和安保成为 CIS 第二大细分市场

“如果我们透过 CIS 市场的表面仔细观察其内部，情况就很有意思得多了——也让我们的季度分析变得更有价值”，Yole 的成像业务技术与市场分析师 **Chenmeijing Liang** 解释道。她详细介绍了 Yole 的分析内容：

- 自 2017 年第 4 季度起，“除移动市场以外的所有市场”都在下滑。当时它们达到了 15 亿美元，但现在已跌至 11 亿美元，下降了 26%。这个“除移动市场以外的所有市场”集合通常对季节性不那么敏感。由于多种原因，这些市场在 2016 年走过了一段艰难时期，具有持续多年的增长动力。事实上，这些市场的价值总和自 2015 年第 1 季度已经翻番，也就是从 2015 年到 2017 年的 CAGR（复合年均增长率）超过 26%。但该产业随后

几乎损失了一整年的增长，那么在 Yole 的季度监测观察之下，到底发生了什么呢？

仔细研究这个“其他类”市场的构成，最大的两个细分市场是消费摄影产品（DSC、DSLR、运动相机、无人机）和计算机类产品（个人电脑、笔记本电脑、平板电脑），它们长期以来一直处于下滑状态，如今又多了另外两个并驾齐驱的细分市场：汽车和安保。

- 值得注意的是，2019 年第 1 季度和第 2 季度是汽车和紧随其后的安保成为了 CIS 的第二大细分市场。这绝对是突破性的，而且会影响到主要 CIS 厂商的排名和策略。然而，这对汽车和安保市场而言并不完全是“光辉与荣耀”：

虽然每辆车上的摄像头数量有所增加，但中国和美国汽车市场的下滑正在影响汽车 CIS 销售额。Yole 对汽车 CIS 市场最初的五年期预期是 19% 以上，但 2019 年的年同比增长率趋向于下降 5% 到 10%。

安保市场的情况也差不多。Yole 的分析师们原本宣布该市场的五年期 CAGR 为 19% 以上，但不幸的是，2019 年的年同比增长率可能将持平。

最令人失望的是工业细分市场，从 2014 年到 2017 年间其 CAGR 超过了 26%，但在 2017 年第 4 季度达到 1.35 亿美元之后，如今已回落至每季度 1 亿美元的范围。半导体和汽车行业中的全球性资本支出停滞可能是主要原因。就积极的方面而言，来自中国的正面消息让我们相信，这只是市场周期所需的一项调整，目前看似已经触底，因此 2020 年或许能再续增长趋势。在我们拭目以待的同时，我们的季度性分析将是追踪这些 CIS 市场所不可或缺的资源。

成像产业：下一步会如何？

Yole 的分析师们与领先 CIS 厂商合作，收集并分析有价值的市场与技术数据。其他的优势包括对这些厂商眼中产业前景的了解，以及持续性地评估市场发展态势和技术变革。

此外，Yole 的成像团队全年都在参加一系列精心挑选的关键性会议、贸易展会和网络广播。这些实地或在线活动为 Yole 的成像专家们提供了与领先厂商分享产业愿景、探讨切磋的机会。

- 九月初，Yole 的成像业务团队有幸迎来多家领先公司，欢迎他们参加由 Yole 主办的第 2 届消费应用 3D 传感技术高管论坛。在几个小时的时间里，各成像公司和 Yole 的分析师们利用这一机会就最新的技术与市场趋势交换意见并各抒己见。他们讨论了每家领先厂商的策略，并明确了商

业机遇。会后报告和讲演资料已发布在 [i-Micronews.com](https://www.i-micronews.com) 网站上。

- 去年六月，Yole 的成像业务团队在一场网络广播中详细阐述了对车用成像市场的前景分析：[汽车成像走向传感技术](#)。Yole 的分析师们与 System Plus Consulting 公司的专家携手，得以对成像技术在汽车细分市场内的渗透进行强调和分析。

“汽车成像在市场中的重要意义已经远远超过了消费型数码相机在 2012 年鼎盛时期的水平”，Yole 的 Pierre Cambou 称。“2018 年用于汽车应用的摄像头单元产量为 1.24 亿个，略多于同一年轻型汽车 9600 万的产量。这里的关键指标是平均每辆车安装的摄像头数量，该指标预期将一路攀升，可望在 2024 年之前向 3 靠拢……”

这场网络广播现在仍可观看。您可以通过 [i-Micronews.com](https://www.i-micronews.com) 网站观看录播版本。

敬请关注 [i-Micronews.com](https://www.i-micronews.com)，了解 Yole 成像业务活动的详情！

ABOUT THE QUARTERLY MARKET MONITOR

CMOS IMAGE SENSOR Service – Imaging Research:

As camera quantity and die size increase per end-device, a 10.1% year-on-year growth rate is expected for 2019. – Powered by Yole Développement

Key features of the monitor:

- Quarterly update of the data
- Market forecast through 2024 in \$US, units, and wafers
- Market share (Sony, Samsung, OmniVision, ON Semiconductor, STMicroelectronics, Panasonic, Canon, SK Hynix) from 2015 to present: by revenue (\$US), segment (\$US), technology (wafer), and foundry (wafer)
 - Demand forecast through 2024 by category (i.e. mobile, consumer, security, auto), in revenue (\$US) and units
 - Supply forecast through 2024: by supplier for wafer production (wpm, by fab), technology mix (% of wafers), and process node (% of wafers)



As well as :

- [Status of the CMOS Image Sensor Industry 2018](#)

Proliferation of cameras for imaging and sensing is driving CMOS image sensor (CIS) growth – Produced by Yole Développement.

About the Imaging team:

Pierre Cambou has been part of the imaging industry since 1999. He first took several positions at Thomson TCS, which became Atmel Grenoble in 2001 and e2v Semiconductors in 2006. In 2012 Pierre founded Vence Innovation, later renamed Irlynx, to bring to market an infrared sensor technology for smart environments and interactions. He has an Engineering degree from Université de Technologie de Compiègne and a Master of Science from Virginia Tech. Pierre also graduated with an MBA from Grenoble Ecole de Management. In 2014 he joined Yole Développement as Principal Analyst, Imaging at Yole Développement (Yole).

Guillaume Girardin, PhD is Director of the Photonics, Sensing & Display Division at Yole Développement, part of Yole Group of Companies. As director he also performs several technical activities covering sensing technologies, including solid-state lighting & display, MEMS, sensors, actuators, imaging, photonics and optoelectronics fields.

Based on his valuable experience in the semiconductor industry, Guillaume manages the expansion of the technical and market expertise of his team, by increasing synergies around imaging, lighting and display, and enlarging the optoelectronics scope. The team interacts daily with leading companies allowing the analysts to collect a large amount of data and integrate their understanding of the evolution of the market with technology breakthroughs. In parallel, Guillaume's mission is focused on the management of business relationships with leaders of the industry and the development of market research and strategy consulting activities within the Yole Group.

Dr Girardin holds a Ph.D. In Physics and Nanotechnology from the Claude Bernard University Lyon I (Lyon, France) and an M.Sc. in Technology and Innovation Management from EM Lyon School of Business (Lyon, France).

Chenmeijing Liang works as a Technology & Market Analyst within the Photonics, Sensing & Display Division at Yole Développement (Yole). As part of the Imaging team, Chenmeijing contributes daily to analyses of CIS markets, related technologies and market strategies of the leading semiconductor companies, as well as the quarterly reports. Prior to Yole, she was engaged in the development of R&D projects: Chenmeijing was a member of Group PSA R&D department where she worked on Vehicle 3D Holography Imaging projects. In addition, she assisted with various technical and commercial projects. Chenmeijing Liang holds a master's Degree in the field of Applied physics and Optical engineering from Paris-Saclay University and University Pierre and Marie Curie (UPMC) (Paris, France).

Richard Liu is a Technology and Market Analyst in the Photonics, Sensing & Display division at Yole Développement, part of Yole Group of Companies. Based in Shenzhen (China), Richard is dedicated on imaging activity (Monitors) as well as the development of technology & market reports

Prior to Yole, Richard was engaged in camera module design on image sensor, AF/OIS at Onsemi, before this, he worked as a customer-application-technologist in Micron/Aptina Imaging. Richard has over 12 years post graduate experience in both of imaging semiconductor and camera module industry, he has the successful track record in developing projects for the tier one smart phone and module makers, which brought him wide industry connection in the CMOS image sensor supply chain and ecosystem

Richard graduated from Wuhan University (China) and holds an Electronics Engineering Degree.

ABOUT YOLE DEVELOPPEMENT

Founded in 1998, Yole Développement has grown to become a group of companies providing marketing, technology and strategy consulting, media and corporate finance services, reverse engineering and reverse costing services and well as IP and patent analysis. With a strong focus on emerging applications using silicon and/or micro manufacturing, the Yole group of companies has expanded to include more than 80 collaborators worldwide covering MEMS and image sensors, Compound Semiconductors, RF Electronics, Solid-state lighting, Displays, software, Optoelectronics, Microfluidics & Medical, Advanced Packaging, Manufacturing, Nanomaterials, Power Electronics, Batteries



& Energy Management and Memory.

The “More than Moore” market research, technology and strategy consulting company Yole Développement, along with its partners System Plus Consulting, PISEO and KnowMade, support industrial companies, investors and R&D organizations worldwide to help them understand markets and follow technology trends to grow their business. . For more information, visit www.yole.fr and follow Yole on [LinkedIn](#) and [Twitter](#).

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