

Consumer Platforms Topical Report

Rising Demand in Consumer End Products Equals Sales, Revenue for Image Sensors

By Pam Tufegdzcic, Analyst

Forecast

Frequency, Time Period

- Quarterly updates
- 5-year annual forecast
- 3-year rolling quarterly forecast
- Annual and quarterly market share for CCD, CMOS and overall

Measures

- Revenue
- Shipments
- ASPs

Regions, Markets

- Worldwide

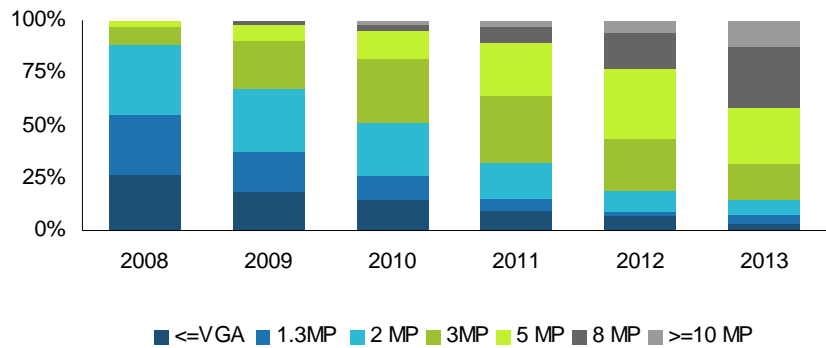
Applications/Products Covered

- Mobile Handset
 - 1G to 2G+
 - 3G +
 - 4G+
- Digital Still Cameras (DSCs)
 - DSLR
 - Point and Shoot
- Camcorders
- Videoconferencing
 - PC/Web External
 - Enterprise
 - Notebook Integrated
 - Monitor Integrated Embedded
- Security
 - CCTV
 - IP
- Automotive
- Other

The area image sensor market was approximately \$7.4 billion in revenues in 2008 and is expected to grow to \$9.3 billion by 2013. However, unit shipments for the primary application markets for image sensors—including consumer electronics such as digital still cameras (DSCs) and camcorders, as well as mobile devices—declined in 2009 as consumers around the world slowed down spending on such items. In the wake of decreasing demand from a weak economy, these end devices suffered a surplus of backed-up inventory in the channels in the first half of 2009. Nevertheless, the shift to higher-resolution image sensors within handsets and DSCs helped to somewhat cushion the decline.

This topical focuses on area image sensors used primarily for visible light applications. Forecasts for the image sensor market cover key applications (mobile handsets, camcorder, video conferencing, security, and automotive) and include both units and average selling prices. Furthermore, quarterly market share data is provided by technology (CCD vs. CMOS) and overall.

Handset CMOS Image Sensor Resolution Mix



Critical Questions Answered

- What is the market size and forecast for image sensors?
- What is the future of CCD technology in the face of competition from CMOS image sensors?
- What are the various trends in cameras used in mobile handsets?
- What are the revenue market shares of Handsets, DSCs, Automotive, Security and Video Conferencing image sensor manufacturers?
- How fast is the PC industry moving to videoconferencing? How quickly is the automotive industry incorporating cameras?
- What are the Handset, DSC and DSLR resolution mixes?
- What trends are taking place in the image sensor market?

Who Should Read This?

- Marketing and Product Managers, Market Analysts, Executives
 - Semiconductor Suppliers
 - OEMs
 - EMS and ODMs
 - Service Providers
 - Trade Associations
- Financial Institutions: Banks, Securities Firms, Venture Capitalists

Lead Analyst**Pamela Tufegdzcic, Analyst**

At iSuppli, Pam contributes to the iSuppli wireless and consumer electronics research, analysis, and forecasting. Her coverage areas include mobile handsets, home entertainment multimedia, digital video, image sensors, along with music and gaming.

Prior to joining iSuppli, Pam was a research analyst at In-Stat within the networking group. Her coverage included Ethernet switch and router markets. Prior to In-Stat, Pam was a research analyst at an investment banking company dedicated to providing acquisition services for financial and strategic buyers. She also has prior experience working as a systems analyst for a startup software development company.

Pam received a Bachelor of Business Administration, Cum Laude with a major in Computer Information Systems.

Table of Contents

- Introduction
- Executive Summary
 - Micron sells Aptina Imaging Corporation
- Findings and Implications
- Impact of Government Stimulus Packages around the World
- Appendix: Image Sensor Definition

Figures

- Revenue and Shipments for Area Image Sensors
- CCD Aggregate Revenue Application Mix
- CCD Aggregate Unit Application Mix
- Handset Camera Supply Chain
- CMOS Aggregate Revenue Application Mix
- CMOS Aggregate Unit Application Mix
- Area Image Sensors Aggregate Revenue Application Mix
- Area Image Sensors Aggregate Unit Application Mix
- Camera Shipments by Type
- Aggregate DSC Sensor Shipments by Unit
- Aggregate DSC Sensor Shipments by Revenue
- Handset Image Sensor Shipments
- Aggregate Handset Camera Mix
- Handset Camera Feature Penetration
- Weighted Average Resolution
- Aggregate Handset CMOS Sensor Resolution Mix
- Handset CMOS ASP by Resolution
- Aggregate Videoconferencing Sensor
- Aggregate Sensor Unit Shipments by Type
- Security Camera Shipments by Type
- Aggregate Security Camera Unit Shipments by Type
- Security Camera Supply Chain
- Automotive Image Sensor Unit Shipments by Technology
- Total Image Sensor Revenue Share by Company, 2008
- Automotive Image Sensors Types: The Present and Future

Tables

- Comparison of CCD and CMOS Image Sensor Technology