

## Image Sensors Market Tracker

## CMOS Image Sensors Continue to Gain Visible Ground

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
- ASP

**Regions, Markets**

- Worldwide

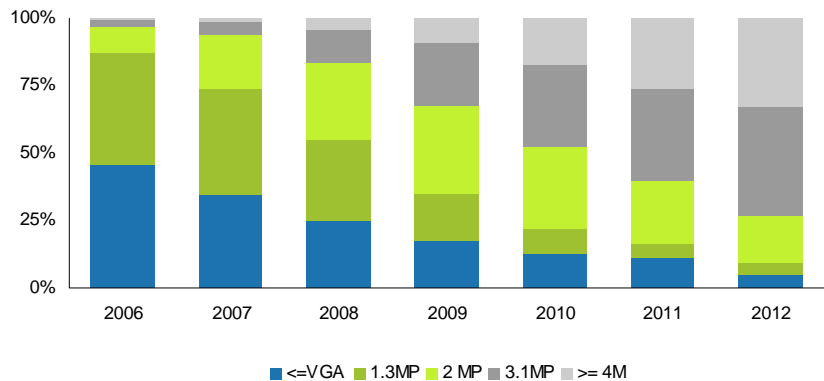
**Applications/Products Covered**

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

The image sensor market was approximately \$7.3 billion in revenues in 2007 and is expected to grow to \$9.7 billion by 2012. Historically, Charged Couple Device (CCD) sensors dominated the sensor market due to their superior image quality. Digital Still Cameras (DSC), security, camcorders were the main applications with much smaller secondary use within other segments. However, CMOS image sensors have challenged CCD's dominance during the last decade by offering a lower cost, lower power solution that has been particularly attractive to the mobile handset market and now in digital single-lens reflex cameras.

This market tracker presents information that exceeds iSuppli's previous image sensor research in both detail and frequency. As with that previous research, this service 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 are the market sizes and forecasts 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 market shares of handset image sensor manufacturers and camera module manufacturers?
- How fast is the PC industry moving to videoconferencing? How quickly is the automotive industry incorporating cameras?

**Who Should Read This?**

- Marketing and Product Managers, Market Analysts, Executives
  - Semiconductor Suppliers
  - OEMs
  - EMS and ODM Companies
  - 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.

**Sample Table of Contents**

Introduction  
 Executive Summary  
 Findings and Implications  
 Appendix A: Image Sensor Definition  
 Appendix B: Image Sensor Suppliers  
 Appendix C: Lens and Camera Module Suppliers

**Figures**

Area Image Sensor Revenue and Shipments  
 CDD 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 Sensor Aggregate Revenue Application Mix  
 Area Image Sensor Aggregate Unit Application Mix  
 Camera Shipments by Type  
 Aggregate DSC Sensor Shipments by Units  
 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 Shipments by Type  
 WebCam/Embedded NB Camera Supply Chain  
 Aggregate Security Sensor Shipments by Type  
 Security Camera Shipments by Type  
 Aggregate Security Camera Shipments by Type  
 Security Camera Supply Chain  
 Camera Based Driver Assistance System Supply Chain  
 Micron Image Sensor Application Mix (Revenue)  
 Omnivision Image Sensor Application Mix (Revenue)  
 STMicroelectronics Image Sensor Application Mix (Revenue)

**Tables**

Comparison of CCD and CMOS Image Sensor Technology  
 (shading indicates advantage)  
 Mapping Image Sensor Manufacturers and Foundry  
 Handset Camera Lens and Camera Module Suppliers

**Sample Database**

Shipment CCD/CMOS Image Sensor Revenue (M) Market  
 Image Sensor Market Forecast  
 Area Consumption Image Sensor Market  
 Area Consumption Image Sensor Revenue  
 Consumption Area Image Sensor Unit Shipments  
 Mobile Handset Camera and Autofocus Penetration  
 Handset CMOS Image Sensor Resolution Mix  
 Handset CCD Image Sensor Resolution Mix  
 Mobile Handset Image Sensor Shipments  
 Handset Image Sensor ASP  
 Handset Camera Sensor Revenue Market Share  
 Handset Camera Module Unit Share  
 Mobile Handset Teardown Data  
 DSC Image Sensor Shipments  
 DSC Shipments by Resolution  
 Camcorder Image Sensor Shipments  
 Videoconferencing Image Sensor Shipments  
 Security Camera Image Sensor Shipments  
 Automotive Image Sensor Shipments  
 Image Sensor Market Share  
 Image Sensor Market Share  
 CCD Image Sensor Revenue Market Share  
 CCD Image Sensor Revenue Market Share  
 CMOS Image Sensor Revenue Market Share  
 CMOS Image Sensor Revenue Market Share  
 Assumptions and Definitions