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Depth Sensing Market Research Report - Global Forecast till 2032

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Description:

Global Depth Sensing Market Overview:

The Depth Sensing Market size was valued at USD 5.2 Billion in 2022. The depth sensing industry is projected to grow from USD 5.8 Billion in 2023 to USD 13.96 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 11.60% during the forecast period (2023 - 2032). An increase in the use of depth sensing technology in gaming applications, the increasing use of depth-sensing techniques in smartphones to enable facial detection, and an increase in end-user demand for enhanced security and surveillance systems are the key market drivers enhancing the market growth.

Global Depth Sensing Market

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Depth Sensing Market Trends

- **Technological adoption and demand from consumer electronics are driving the market growth.**

Market CAGR for depth sensing is driven by the advanced driver assistance systems in cars, which deliver the driver with convenience and a human-machine interface for secure guiding and easy operation, which are the main applications of LiDAR. The vehicle's autonomous nature requires extremely high precision and support for obstacle recognition to avoid them and navigate safely through traffic. Firms have recognized the need for LiDAR, and numerous industry giants are investing in this technology. For instance, In Feb 2022, Mercedes Benz proclaimed its partnership with Luminar Inc to provide LiDAR for its autonomous driving systems. The collaboration will allow the automaker to accelerate the growth of its future automated driving technologies. Such consequences from the automotive dealers are further strengthening the market growth.

Additionally, the Rise in the use of smartphones with the latest technology innovations is the major driving force behind the expansion of the depth sensing industry. Depth sensing has been used for various applications such as logistics, navigation systems, quality inspection, and facial recognition. Virtual reality gaming fuels the growth of the depth sensing market growth, owing to the increase in the adoption and popularity of video games. Moreover, an increase in the use of depth sensing in other sectors such as military & defense, automotive, and healthcare is expected to boost the depth sensing market revenue.

Increasing demand for rising surveillance and security systems drives the market's growth. The increasing demand for these devices in use includes facial recognition, gesture control, augmented reality, and virtual reality. Due to factors including an expansion in the usage of depth-sensing technology in gaming applications and an expansion in end-user demand for advanced security and surveillance systems, the global depth-sensing market is growing quickly. The demand for depth sensing would increase due to the growing use of smartphone depth sensing technologies to enable facial detection, recognition, and authentication.

Increasing the adoption of sensors in various industry verticals has led to the development of 3D technology that can gauge shapes in real-time. The LiDAR systems offer short- and long-range 3D sensing that enables vehicles to independently assess their surroundings in real-time. For instance, in February 2021, LeddarTech, a prominent player in Level 1-5 ADAS and AD sensing technology, announced the availability of Leddar PixSet, a sensor dataset for ADAS and autonomous driving research and development.

Depth Sensing Market Segment Insights:

Depth Sensing Type Insights

The Depth Sensing Market segmentation, based on type, includes active depth sensing and passive depth sensing. The active depth sensing segment dominated the market, accounting for 35% of market revenue (2.03 Billion). In developing economies, category growth is driven by the increasing requirement for precise depth calculations in various industries, including consumer electronics, industrial, automotive, etc. However,

passive depth sensing is the fastest-growing category due to the high advantages of these products, such as low cost and low maintenance.

Depth Sensing Component Insights

The Depth Sensing Market segmentation, based on component, includes camera/lens module, sensors, and illuminator. The sensors category generated the most income (70.4%). This is due to the extreme demand for 3D depth sensors and extensive growth in consumer electronics applications. However, the illuminator is the fastest-growing category as it can determine the depth of the subject by processing the displacement of the dots and creating a depth map.

Depth Sensing Technology Insights

The Depth Sensing Market segmentation, based on technology, includes stereo vision, structured light, and time-of-flight. The time-of-flight segment dominated the market, accounting for major market revenue. Low power consumption, precise depth data, and straightforward software and hardware requirements can all be credited for this industry expansion. However, stereo vision is the fastest-growing category as it exhibits adjustable range, making it suitable for applications such as 3D movies and photography, range imaging, and stereo views.

Figure 1: Depth Sensing Market, by Technology, 2022 & 2032 (USD Billion)

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Depth Sensing Verticals Insights

The Depth Sensing Market segmentation, based on verticals, includes automotive, industrial, consumer electronics, medical, and others. The automotive category generated the most income due to the rising usage of depth sensing in the automotive industry to develop autonomous vehicles. However, illuminator is the fastest-growing category owing to the growing demand for applications like face recognition, gesture control, AR-VR, and scanning.

Depth Sensing Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific and the Rest of the World. The Asia-Pacific depth sensing market will dominate owing to the massive demand for 3D depth sensors from the consumers of electronic gadgets, and IoT applications will boost the market growth in this region. Moreover, China's depth-sensing market held the largest market share, and the Indian depth-sensing market was the fastest-growing market in the Asia-Pacific region.

Further, the prominent countries studied in the market report are The US, Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: Depth Sensing Market SHARE BY REGION 2022 (USD Billion)

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe's depth sensing market accounts for the second-largest market share due to the rising penetration of smartphones, and rising disposable income will drive the market in this region. Further, the German depth sensing market held the largest market share, and the UK depth sensing market was the fastest-growing market in the European region.

The North American depth sensing market is expected to grow at the fastest CAGR from 2023 to 2032. This is due to the growing adoption of various consumer electronics products such as smartphones, laptops, PCs, tablets, headsets, etc. will fuel the market in this region. Further, the US depth sensing market held the largest market share, and the Canada depth sensing market was the fastest growing market in the North American region.

Depth Sensing Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the depth sensing market grow even more. Market participants are also undertaking numerous strategic activities to expand their global footprint, with important market developments including new product launches, mergers and acquisitions, higher investments, contractual agreements, and collaboration with other organizations. To expand and survive in a more competitive and rising market climate, the depth sensing industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the global depth sensing industry to benefit clients and increase the market sector. Major players in the depth sensing market, including Texas Instruments (US), Intel (US), Qualcomm (US), Stereolabs (US), Infineon Technologies (Germany), and others, are attempting to increase market demand by investing in research and development operations.

STMicroelectronics NV is a manufacturer and provider of semiconductors. The firm develops and markets a range of products, such as discrete and standard commodity components, application-specific standard and integrated circuits, and custom devices and semi-custom devices. It also produces and sells power modules, switches, clocks, data converters, automotive ADAS devices, imaging and photonics solutions, silicon chips and smartcards. STM uses numerous chip fabrication technologies, such as advanced FD-SOI, CMOS,

embedded non-volatile memories, RF-SOI, optical sensing, analog and MEMS, mixed-signal, and smart power processes. It serves consumers in various markets, such as industrial, automotive, personal electronics, computers, communications equipment, and peripherals. In February 2022, STMicroelectronics launched its new series of high-resolution Time-of-Flight sensors to provide advanced 3D depth imaging for smartphones and other devices. With the launch of the VD55H1 3D depth sensor, ST aims to strengthen its market position in the Time-of-Flight (ToF) product market and complement its full range of depth sensing technologies.

Analog Devices Inc designs, manufactures and markets analog, mixed-signal, and digital signal-processing integrated circuits (ICs). It serves instrumentation, aerospace and defense, building technology, consumer, communications, healthcare, energy, security and surveillance, and automotive industries. Analog Devices markets products through a direct sales force, independent sales representatives, third-party distributors, and through the website. The company operates manufacturing centers in the US, the Philippines, Ireland, Thailand and Malaysia. In June 2022, Analogue Devices, Inc. launched the first high-resolution, commercial-grade indirect Time-of-Flight module for 3D depth sensing and vision systems. The recent ADTF3175 module provides quite precise +/-3mm iToF technology for machine concept applications from industrial automation to logistics and increased reality, permitting cameras and sensors to sense 3D space in one-megapixel resolution.

Key Companies in the Depth Sensing market include

- Texas Instruments (US)
- Intel (US)
- Qualcomm (US)
- Stereolabs (US)
- Infineon Technologies (Germany)
- Creative Technology (Singapore)
- pmdtechnologies AG (Germany)
- Nerian Vision Technologies (Germany)
- Melexis (Belgium)
- Tower Semiconductor (Israel)
- Vrmagic Holding AG (Germany)
- Occipital (US)
- Sunny Optical Technology (China)
- PrimeSense (Israel)
- ASUSTeK Computer (Taiwan)
- LIPS Corporation (Taiwan)

Depth Sensing Industry Developments

May 2023: ATONATON's Dr. Madeline Gannon and ABB's IRB 8700 robot partnered on a project dubbed Two Circles. The robot consists of a huge googly eye that can detect the presence of humans. RobotStudio from ABB and NVIDIA's Isaac Sim is used to detect and react to human movement with the help of depth-sensing cameras.

Depth Sensing Market Segmentation:

Depth Sensing Type Outlook

- Active Depth Sensing
- Passive Depth Sensing

Depth Sensing Component Outlook

- Camera/Lens Module
- Sensors
- Illuminator

Depth Sensing Technology Outlook

- Stereo Vision
- Structured Light
- Time-Of-Flight

Depth Sensing Industry Verticals Outlook

- Automotive
- Industrial
- Consumer Electronics
- Medical
- Others

Depth Sensing Regional Outlook

- North America

- US
- Canada

- Europe
  - Germany
  - France
  - UK
  - Italy
  - Spain
  - Rest of Europe

- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Australia
  - Rest of Asia-Pacific

- Rest of the World

- Middle East
- Africa
- Latin America

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