



MRS30-294 · Smart Manufacturing Technologies

Machine Vision Quality Systems

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Machine vision quality systems give factories automated sight — spanning AI / deep-learning vision, smart cameras, embedded vision sensors, 3D vision systems and inspection software that detect defects faster and more consistently than human inspectors. This decision-grade study sizes the global market three ways — value, units shipped and inspection stations — across system type, vision technology and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Machine vision cuts scrap, rework and recalls while improving yield and material productivity, strengthening the resource-efficiency story.

Mapped Sustainable Development Goals:

SDG 9 Industry & Innovation	SDG 12 Responsible Consumption	SDG 8 Decent Work & Growth	SDG 7 Affordable & Clean Energy	SDG 13 Climate Action
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Measurable sustainability outcomes assessed:

- Scrap, rework and recall reduction
- Yield improvement and material productivity
- Traceability and compliance assurance
- Camera e-waste, data governance and algorithmic bias as material considerations

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped



MARKET OVERVIEW

From rule-based inspection to deep-learning vision — where AI detects subtle, variable and novel defects rule-based systems cannot.

The machine vision quality systems market is read three ways — value, volume and inspection stations — and forecast under four scenarios, each region reported separately. Demand is propelled by the drivers below, supported by maturing incentives across Europe, North America and Asia Pacific.

- Asia Pacific is profiled first — China, Japan, South Korea, Taiwan — Keyence, Omron, Hikrobot, Mech-Mind
- Europe automation leader — Germany, Italy, Switzerland — Basler, ISRA Vision, MVTec, Datalogic, Baumer
- Segmentation reads the value across the report’s structure, technology and application axes
- Resource-and-outcome economics is the differentiator — increasingly with service and data revenue

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	Scale engine	China, Japan, South Korea, Taiwan — Keyence, Omron, Hikrobot, Mech-Mind
Europe	Automation leader	Germany, Italy, Switzerland — Basler, ISRA Vision, MVTec, Datalogic, Baumer
North America	Platform leader	United States, Canada — Cognex, NI, Landing AI, Teledyne/DALSA
Latin America	Emerging	Brazil, Mexico — automotive & packaging inspection
Africa	Frontier	South Africa, Egypt — manufacturing-quality modernisation
Middle East	Frontier	Saudi Arabia, UAE, Israel — electronics, defence, smart-factory quality

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restrains
<ul style="list-style-type: none"> • Zero-defect & quality-cost targets • Traceability & compliance mandates • Labour scarcity in inspection roles • Deep-learning accuracy breakthroughs • Electronics & semiconductor demand 	<ul style="list-style-type: none"> • Lighting, optics & setup complexity • Data and training-image requirements • Integration with line speed & PLCs • High cost for 3D / high-res systems • Skills gap in vision engineering

**SEGMENTATION SNAPSHOT**

By System Type	Smart cameras · embedded vision sensors · 3D vision systems · inspection software
By Vision Technology	2D vision · 3D vision · AI / deep-learning
By Component	Cameras / optics · lighting · processing · software
By Application	Electronics / semiconductor · automotive · pharma / packaging
By End User	Manufacturers · system integrators · OEMs · quality teams
By Deployment	Inline · standalone station · edge / cloud-assisted

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

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- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

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- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
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- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape



Part V — Company, Competition, Patent and Project Intelligence

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- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established machine-vision majors, smart-camera and 3D-vision specialists, and inspection-software vendors. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable solutions.

Representative players profiled in the full report:

Cognex Corporation · Keyence Corporation · Basler AG · OMRON Corporation · Teledyne Technologies Incorporated (Teledyne DALSA) · and 20+ further profiled players across hardware, software and integration.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global machine vision quality systems market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do resource-and-outcome economics change returns versus conventional methods?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear investment verdict.

WHO SHOULD BUY THIS REPORT

Investors, manufacturers, system integrators, OEMs, plant operators, policymakers, lenders, research institutions, strategic corporate planners, decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.