

WINTERGREEN RESEARCH, INC.

**Worldwide WebCam Market Shares, Strategies, and
Forecasts, 2009-2015**

**WebCams Intensify Video Social Networking and Security
Surveillance**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

Social Networking WEBCAMS
PC EXTERNALLY CONNECTED WEBCAM
Security Non PC, Internet Directly Connected WebCams
Enterprise WebCams
Externally PC Connected WebCam
WebCam View Overlooking
WebCam Market Shares
WebCam Forecasts
WebCam Market Strategies
Webcam Adoption

Micro Lenses
Color Filter Arrays
Web Camera Image Sensor Control Interface
Active-Pixel Image Sensors
Webcam on Internet
Webcam Network Access
Enterprise Webcam Networks
Webcam Architecture

OPPORTUNITY ABOUNDS

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Worldwide WebCam, Market Shares, Strategies, and Forecasts, 2009-2015

WinterGreen Research announces that it has a new study on Worldwide webcam markets. The 2009 study has 333 pages, 130 Tables and Figures. Worldwide webcams are poised to achieve significant growth as units become smaller and less expensive broadening the types of applications in which they are used and the variety of devices in which they are included.

Trends in the webcam consumer technology market include leveraging brand identity, providing affordability, permitting ease of installation, and permitting ease of use. Visual appeal has become an aspect of the purchase decision when buying a webcam to go with a desktop.

Industry dynamics impact use of webcams for cell phone platforms, video game consoles, digital music players and home-entertainment systems. As additional platforms deliver new functionality, increased processing power and growing communications capabilities, demand to increase add-on, complementary devices connected to these platforms is increasing. The product expertise webcam vendors have developed for the PC platform is being extended to multiple platforms. Expertise provides opportunity for growth and market leverage.

The small office and home networking market is entering a new phase. Consumer electronics are no longer standalone products. The current environment is shifting into a market ripe for integration of data, communication and multimedia devices. Encore strives to explore this trend and continue to offer high performance connectivity devices to the worldwide market.

Logitech is similar to most of the leading market participants in its growth strategy. Success in implementation is the difference between the market share leaders, they all have the vision of innovation for the product lines. Leading vendors sell products to a network of distributors and retail organizations, and to original equipment manufacturers (OEMs).

Microsoft entry into the market has made the competitive environment more intense. Aggressive pricing practices, promotions, and channel marketing on a worldwide basis from Microsoft have had an impact on revenues and margins for all vendors.

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Worldwide retail network includes wholesale distributors, consumer electronics retailers, mass merchandisers, specialty electronics stores, computer and telecommunications stores, value-added resellers and online merchants. The large majority of revenues are derived from sales of products for use by consumers, with sales of products for use by businesses amounting to a small part of revenues.

Markets are competitive and are characterized by short product life cycles, rapidly changing technology, evolving customer demands, and aggressive promotional and pricing practices. In order to remain competitive, continued investment in product research and development is critical to driving innovation.

New and improved products and technologies drive market growth. Logitech is committed to identifying and meeting customer trends with an innovative product portfolio. It seeks to increase the value of the Logitech brand from a competitive, channel partner and consumer experience perspective. Innovation and product quality are helping gain market acceptance and strengthen market leadership.

Architecture Revolution

Architecture allows products to achieve processing speed, signal quality and power consumption performance comparable to that obtained from competing fixed function hardware. Unlike fixed function hardware, which is suitable for single applications such as video processing, products can support a variety of multimedia applications such as audio, video and imaging using a single processor.

This allows achieving levels of integration comparable to those offered by general-purpose semiconductor devices such as CPUs and baseband processors. Since processors are designed solely for multimedia applications, rather than a broad spectrum of computing tasks, processors avoid the need for the complex control software used by CPUs and baseband processors, and can therefore offer significantly better processing speed, signal quality and power consumption performance.

Value of Innovation

Vendors do research on advanced technologies for webcam software products and services. Delivering breakthrough innovation and high-value solutions through integrated software platform is key. Meeting customer needs and achieving growth depends on innovation. Vendors continue to lay the foundation for long-term growth by delivering products and services, creating opportunities for partners, improving customer satisfaction, and improving internal processes.

Microsoft focus is to build on this foundation through ongoing innovation in integrated software platforms; by delivering compelling value propositions to customers; by responding effectively to customer and partner needs; and by continuing to emphasize the importance of product excellence, business efficacy, and accountability.

Cisco Linksys Wireless-G Direct Internet Home Monitoring Security Camera Works without a PC connection. The Cisco Linksys Wireless-G Internet home monitoring camera sends live video through the Internet to a web browser anywhere in the world. This compact, self-contained unit lets you keep track of your home, your kids, your workplace -- whatever's important to you.

Unlike standard "web cams" that require an attached PC, the Internet Home Monitoring Camera contains its own web server, so it can connect directly to a network, either over Wireless-G (802.11g) networking, or over 10/100 Ethernet cable. Choose either MPEG-4 or Motion JPEG video compression for a high-quality, high-frame rate, up to 640x480 video stream.

Markets for webcams at \$1.8 billion in 2008 are anticipated to reach \$3.2 billion by 2015, growing in response to decreases in unit costs and increases. WebCams used in social networking, Internet communications, instant messaging, notebook portable computers, and PCs are proving the technology for video communication. Widespread use in a range of applications proves the feasibility of this technology. The large emerging markets are for video communication and security powered by evolving systems.

Companies Profiled

Market Leaders

Creative Technology Ltd
D-Link1
Logitech International
Microsoft
Philips

Market Participants

A4Tech
Encore Electronics
Micron
Proxicast
Relleek Electronics
Samsung Electronics
Vimicro International

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REPORT METHODOLOGY

THIS IS THE 400TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPANT IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS IS A CENTRAL PART OF THE STUDY. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

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YOU MUST HAVE THIS STUDY

Worldwide WebCam Market Shares, Strategies, and Forecasts, 2009 to 2015

Table of Contents

WEBCAM EXECUTIVE SUMMARY

WEBCAM MARKET EXECUTIVE SUMMARY	ES-1
WebCam Market Driving Forces	ES-1
WebCam Image Quality	ES-6
WebCam Shutter Speed	ES-6
WebCam Network Speed	ES-6
WebCam Sensitivity	ES-7
WebCam Market Shares	ES-7
WebCam Market Forecasts	ES-9
Architecture Revolution	ES-12
Value of Innovation	ES-13
Cisco Linksys Wireless-G Direct Internet Home	ES-13
Monitoring Security Camera Works Without PC Connection	ES-14

WEBCAM DESCRIPTION AND MARKET DYNAMICS

1. WEBCAM MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 Trends In The WebCam Consumer Technology Market	1-1
1.1.1 WebCam Vendor Competitive Strengths	1-2
1.2 Global Presence Issues	1-2
1.2.1 Logistics And Supply Chain Infrastructure	1-3
1.3 Webcam Wireless Network Monitoring Uses	1-6
1.4 WebCam.Com Directory	1-6
1.4.1 Personal Cameras Connected To A Home PC	1-7
1.4.2 Webcam Pointing At A Scene	1-7
1.4.3 WebCams for Promotion; WebCam Toolkit	1-8
1.4.4 Home Video Production	1-9
1.5 Consumer WebCams	1-9
1.5.1 Consumer WebCams Quality Of The Lens	1-9
1.5.2 Free Web-calling	1-10
1.6 Community Police Scanning	1-11
1.7 Entertainment Big Ben, London	1-12
1.7.1 Big Ben WebCam	1-12
1.8 WebCam View Overlooking	1-18
1.9 Camera Types Of Webcams	1-22

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WEBCAM SHARES AND MARKET FORECASTS

2. WEBCAM MARKET SHARES AND MARKET FORECASTS	2-1
2.1 WebCam Market Driving Forces	2-1
2.1.1 WebCam Image Quality	2-6
2.1.2 WebCam Shutter Speed	2-6
2.1.3 WebCam Network Speed	2-6
2.1.4 WebCam Sensitivity	2-7
2.2 WebCam Market Shares	2-7
2.2.1 WebCam External PC and WebCam Router Based Market Shares	2-10
2.2.2 Logitech	2-13
2.2.3 Creative Technology	2-13
2.2.4 Worldwide Social Networking and Enterprise Externally PC Connected WebCam Market Shares	2-14
2.2.5 Microsoft	2-14
2.2.6 Philips Webcams	2-16
2.2.7 Social Networking and Enterprise Externally Connected PC WebCams	2-17
2.2.8 Worldwide Security PC Externally Connected WebCam Market Shares	2-19
2.2.9 D-Link	2-20
2.2.10 Worldwide Security Non PC, Internet Directly Connected WebCams	2-22
2.2.11 Cisco / Linksys	2-24
2.3 Notebook OEM Internally PC Connected WebCam Shipments Market Shares	2-26
2.3.1 Logitech OEM QuickCam® 3000 for Business	2-30
2.3.2 China Manufacturing Hub For PC Cameras	2-30
2.3.3 A4Tech	2-30
2.4 WebCam Market Forecasts	2-31
2.4.1 WebCam Social Networking and Enterprise Market Forecasts	2-34
2.4.2 PC External WebCams Used for Security	2-36
2.4.3 Router Based Security with Non PC WebCams	2-37
2.4.4 OEM Laptop Internal WebCam Market Forecasts	2-38
2.4.5 WiMax Fixed Access IP WebCam Security Market	2-45
2.4.6 Impact of Economic Downturn	2-46
2.4.7 WebCam Applications	2-47
2.4.8 WebCam Pan/Tilt/Zoom (PTZ) Security Cameras	2-49
2.4.9 WebCam Environment	2-49
2.4.10 WebCams for Construction	2-49
2.4.11 Live WebCam Weather Services	2-49
2.4.12 Live WebCam Quality Control Services	2-50
2.4.13 Location Scanning in Communities	2-51
2.4.14 Use of WebCams for Games	2-52
2.4.15 Use of WebCams for Pornography	2-52
2.5 Selected WebCam Prices	2-53
2.5.1 High End Web Cam Prices	2-66
2.6 WebCam Regional Analysis	2-67
2.6.1 Logitech Fiscal Third-Quarter 2008 Revenue	2-71
2.6.2 Vimicron Regional Revenue	2-72
2.6.3 D-Link Regional Revenue	2-73

WEBCAM PRODUCTS

3. WEBCAM PRODUCT DESCRIPTION	3-1
3.1 Logitech	3-1
3.1.1 Logitech Premium Webcam Offerings	3-1
3.1.2 Logitech Mid-Range Webcams	3-2
3.1.3 Logitech Performance Webcams	3-2
3.1.4 Logitech Family Of Webcams	3-3
3.1.5 Logitech QuickCam® Orbit AF	3-6
3.1.6 Logitech Style	3-9
3.1.7 Logitech QuickCam® Orbit AF Security Camera	3-12
3.1.8 Logitech Indoor Camera Video Security	3-16
3.1.9 Logitech WiLife Outdoor Camera	3-18
3.2 Microsoft	3-22
3.2.1 Microsoft LifeCam VX-1000	3-23
3.2.2 Microsoft LifeCam VX-3000	3-29
3.2.3 Microsoft LifeCam VX-7000	3-30
3.2.4 Microsoft LifeCam VX-5000	3-31
3.2.5 Microsoft Notebook Computer LifeCam NX-6000	3-33
3.3 Philips	3-34
3.3.1 Philips SPC1300	3-38
3.4 Creative Technology	3-40
3.4.1 Desktop Creative Live! Cam Video IM Webcam	3-41
3.4.2 Desktop Creative Live! Cam Video IM Pro Webcam	3-43
3.4.3 Desktop Creative Live! Cam Optia Pro Webcam	3-45
3.4.4 Creative Technology Notebook WebCams	3-47
3.4.5 Creative Technology Laptop Pro Webcam	3-48
3.4.6 Creative Live! Cam Notebook Ultra Laptop Webcam	3-49
3.5 Cisco / Linksys	3-50
3.5.1 Cisco Linksys Wireless PTZ Internet Camera with Audio	3-57
3.6 D-Link	3-61
3.7 Encore Electronics	3-75
3.8 iMirco Electronics	3-78
3.9 Relleek Electronics Co. Ltd / Custom Memory Web Cams	3-84
3.10 3DV 3-89	
3.11 Lorex 3-90	
3.11.1 Lorex Color DMC2023 PC Cam –	3-91
3.12 Adomax Electronic Technology (Z.Q.) Ltd WebCams	3-92
3.13 Omega Technology Inc	3-94
3.14 Shenzhen Vigor Electronic & Technology Co.,Ltd	3-97
3.15 10moons Technology Development Co., Ltd	3-99
3.16 Vimicro International Corporation	3-101
3.17 3DV 3D Imaging Camera for Gaming Application	3-103
3.18 Samsung Offers New PC Camera CMOS Image	
Sensor System-on-Chip for Real-time HD Video	3-104
3.19 Selected Webcam Vendors	3-106
3.19.1 Astak 3-106	
3.19.2 D-Link	3-106
3.19.3 ENCORE	3-106
3.19.4 iMicro	3-107
3.19.5 Linksys	3-107
3.19.6 Logitech	3-107
3.19.7 Microsoft	3-108

3.19.8	Zonet 3-109	
3.19.9	Selected Web Cam Drivers	3-109
3.19.10	Selected Webcam Vendors In China	3-110

WEBCAM TECHNOLOGY

4. WEBCAM TECHNOLOGY		4-1
4.1	Web Camera Image Sensor Control Interface	4-1
4.1.1	Detailed System Blocks Description	4-2
4.2	Sony Image Sensor	4-5
4.3	Webcam Application Module	4-8
4.4	Proxicast's LAN-Cell Cellular Router For Secure 3G Wireless Video Communications	4-9
4.4.1	Micron DigitalClarity Technology	4-10
4.5	Micron Technology Image Sensors for the WebCam Market	4-11
4.5.1	Micron Sensor Low Power Usage Extends Battery Life	4-15
4.5.2	Active-Pixel Image Sensors Flexibility From Random Access to Pixel	4-16
4.5.3	Active-Pixel Image Sensors Minimize Artifacts, Smear, Or Blooming For Higher-Quality Images	4-17
4.5.4	Smart Camera Function Evolving Technology	4-18
4.5.5	24-Bit Colors RGB	4-18
4.5.6	Adjusting for the Effect of Light Source	4-21
4.5.7	Aperture Correction	4-22
4.6	New Modality Makes The Production Of Real Time Mixed Reality Video Possible	4-26
4.7	Micro Lenses and Color Filter Arrays	4-27
4.7.1	CMOS Image Sensor Portfolio	4-30
4.7.2	Analog-to-Digital Conversion	4-31
4.8	Telerobotic WebCams	4-32
4.9	Speed	4-32
4.9.1	Sensitivity	4-33
4.10	Network Camera Software for the Enterprise	4-33
4.11	GloopIt.com WebCam utility That Adds Virtual 3D Objects	4-34
4.12	Video Ringtones	4-35

WEBCAM COMPANY PROFILES

5. WEBCAM COMPANY PROFILES		5-1
5.1	A4Tech	5-1
5.2	Creative Technology Ltd	5-2
5.2.1	Creative's Worldwide Network	5-5
5.2.2	Creative Labs Americas	5-5
5.2.3	Creative Labs Europe	5-6
5.2.4	Creative Labs Asia	5-6
5.2.5	Creative Technology Revenue	5-7
5.2.6	Creative Technology Q1 FY09 Revenue	5-9
5.2.7	Creative Technology Sales, By Geographical Region	5-10
5.3	D-Link	5-11
5.3.1	D-Link USB-Powered Monitor for Multi-Tasking PC Users	5-11
5.3.2	D-Link Revenue	5-12
5.3.3	D-Link Regional Revenue	5-13

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5.3.4	D-Link Product Segment Revenue	5-14
5.4	Encore Electronics	5-15
5.4.1	iMirco Electronics	5-16
5.4.2	iMirco Electronics Products	5-17
5.4.3	iMirco Electronics Services	5-17
5.5	Logitech International	5-17
5.5.1	Logitech international S.A. Is a Swiss Holding Company	5-18
5.5.2	Logitech PC Headsets and VoIP Handsets	5-20
5.5.3	Logitech Trends in Business	5-21
5.5.4	Logitech Trends in OEM sales	5-22
5.5.5	Logitech Trends in Retail Seasonality	5-23
5.5.6	Logitech Business Strategy	5-24
5.5.7	Logitech In the Office Environment	5-26
5.5.8	Logitech In the Digital Home Environment	5-26
5.5.9	Logitech In the Mobile Environment	5-27
5.5.10	Logitech Revenue	5-27
5.5.11	Net sales by channel:	5-28
5.5.12	Logitech Fiscal Third-Quarter 2008 Revenue	5-30
5.5.13	Logitech Ultimate Ears Acquisition	5-35
5.6	Micron	5-36
5.7	Microsoft	5-36
5.8	Philips	5-38
5.9	Proxicast	5-39
5.10	Relleek Electronics	5-40
5.11	Samsung Electronics	5-40
5.12	Vimicro International Corporation	5-41
5.12.1	Vimicro Third Quarter 2008 Revenue	5-41
5.12.2	Vimicro Strategy	5-43
5.12.3	Vimicor Architecture Revolution	5-45

List of Tables and Figures

WEBCAM EXECUTIVE SUMMARY

Table ES-1	ES-2
WebCam Market Driving Forces	
Table ES-2	ES-4
Webcam Market Characteristics	
Figure ES-3	ES-8
Worldwide WebCam Shipments Market Shares, 2008	
Figure ES-4	ES-10
Worldwide WebCam Market Forecasts, Shipments, Dollars, 2009-2015	

REPORT # SH29821683 333 PAGES 130 TABLES AND FIGURES 2009
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WEBCAM MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	1-4
Risks Inherent In Doing Business In International Markets	
Table 1-1 (Continued)	1-5
Risks Inherent In Doing Business In International Markets	
Table 1-2	1-11
Consumer WebCam Applications	
Table 1-3	1-13
London Tourist WebCams	
Table 1-3 (Continued)	1-14
London Tourist WebCams	
Table 1-3 (Continued)	1-15
London Tourist WebCams	
Table 1-3 (Continued)	1-16
London Tourist WebCams	
Table 1-3 (Continued)	1-17
London Tourist WebCams	
Table 1-3 (Continued)	1-18
London Tourist WebCams	
Figure 1-4	1-19
Typical WebCam Views	

WEBCAM SHARES AND MARKET FORECASTS

Table 2-1	2-2
WebCam Market Driving Forces	
Table 2-2	2-4
Webcam Market Characteristics	
Figure 2-3	2-8
Worldwide WebCam Shipments Market Shares, 2008	
Figure 2-4	2-9
Worldwide WebCam Shipments Market Shares, 2008	
Figure 2-5	2-11
Worldwide WebCam External PC and WebCam Router Based Shipments Market Shares, 2008	
Table 2-6	2-12
Worldwide WebCam External PC and WebCam Router Based Shipments Market Shares, 2008	
Figure 2-7	2-17
Worldwide Social Networking and Enterprise Externally Connected PC WebCam Shipments Market Shares, Dollars, 2008	
Table 2-8	2-18
Worldwide Social Networking and Enterprise Externally Connected PC WebCam Shipments	

REPORT # SH29821683 333 PAGES 130 TABLES AND FIGURES 2009**\$3,400 SINGLE COPY \$6,800 WEB SITE HOSTING**

Market Shares, Dollars, 2008	
Table 2-9	2-19
WebCam Security Market Driving Forces	
Figure 2-10	2-21
Worldwide Security Externally Connected PC	
WebCam Shipments Market Shares, Dollars, 2008	
Table 2-11	2-22
Worldwide Security Externally PC Connected	
WebCam Shipments Market Shares, Dollars, 2008	
Table 2-12	2-23
Worldwide Security Non PC, Internet Directly	
Connected WebCam Shipments Market Shares, 2008	
Table 2-13	2-24
Worldwide Security Non PC, Internet Directly	
Connected WebCam Shipments Market Shares, 2008	
Table 2-14	2-26
WebCam OEM Market Driving Forces	
Table 2-15	2-28
Worldwide Notebook OEM Internally PC	
Connected WebCam Shipments Market Shares, Dollars, 2008	
Table 2-16	2-29
Worldwide Notebook OEM Internally PC Connected	
WebCam Shipments Market Shares, Dollars, 2008	
Figure 2-17	2-32
Worldwide WebCam Market Forecasts, Shipments,	
Dollars, 2009-2015	
Table 2-18	2-32
Worldwide WebCam Market Forecasts, Shipments,	
Dollars, 2009-2015	
Figure 2-19	2-35
Worldwide Social Networking PC External	
WebCam Market Forecasts, Shipments, Dollars, 2009-2015	
Figure 2-20	2-36
Worldwide PC External WebCams Used for	
Security Market Forecasts, Shipments, Dollars, 2009-2015	
Figure 2-21	2-37
Worldwide Router Based Security with Non PC	
WebCams Market Forecasts, Shipments, Dollars, 2009-2015	
Figure 2-22	2-39
Worldwide WebCams Embedded in Laptops,	
Market Forecasts, Shipments, Dollars, 2008-2015	
Figure 2-23	2-40
Worldwide WebCams Embedded in Laptops,	
Market Forecasts, Shipments, Units, 2008-2015	
Figure 2-24	2-41
Worldwide Laptop Shipments, Market Forecasts, Units,	
2008-2015	
Table 2-25	2-42
Worldwide Laptop	
Market Shares, 2008	
Figure 2-26	2-43
Worldwide WebCams Embedded in Laptops,	

Market Forecasts, Percent Penetration, 2008-2015 Figure 2-27	2-44
Worldwide Laptop Computer and Embedded WebCams, Market Forecasts, 2009-2015 Table 2-28	2-48
Applications for WebCams Table 2-29	2-52
Number of Communities Needing WebCams Figure 2-30	2-68
WebCam Regional Shipment Segments, Dollars, 2008 Table 2-31	2-69
WebCam Regional Shipment Segments, Dollars, 2008	

WEBCAM PRODUCT POSITIONING

Table 3-1	3-1
Logitech Premium Webcam Offerings Table 3-2	3-2
Logitech Mid-Range Webcams Table 3-3	3-3
Logitech Performance Webcams Figure 3-4	3-4
Logitech Webcam Figure 3-5	3-5
Logitech Standalone Webcam Figure 3-6	3-6
Logitech Lens Table 3-7	3-7
Logitech QuickCam® Orbit AF Performance Table 3-7 (Continued)	3-8
Logitech QuickCam® Orbit AF Performance Table 3-8	3-9
Logitech Style Features Table 3-8 (Continued)	3-10
Logitech Style Features Table 3-9	3-10
Logitech Instant Messaging IM Applications Supported Table 3-10	3-11
Logitech QuickCam® Orbit AF Technical Specifications Figure 3-11	3-12
Logitech QuickCam® Orbit AF Security Camera Table 3-12	3-13
Logitech® Indoor Add-On Security Camera WiLife Indoor Master System Features Table 3-12 (Continued)	3-14
Logitech® Indoor Add-On Security Camera WiLife Indoor Master System Features Table 3-13	3-15

Logitech® Automatic Video Storage Functions Table 3-14	3-17
Intelligent Indoor Camera components Table 3-15	3-19
Logitech Intelligent Outdoor Camera Components Table 3-16	3-20
Logitech Outdoor Camera Specifications Table 3-16 (Continued)	3-21
Logitech Outdoor Camera Specifications Table 3-17	3-22
Microsoft LifeCam Webcams & Headsets Table 3-17 (Continued)	3-23
Microsoft LifeCam Webcams & Headsets Figure 3-18	3-25
Microsoft LifeCam VX-1000 Figure 3-19	3-26
Microsoft MS Wired Lifecam VX-1000 Table 3-20	3-27
Microsoft LifeCam VX-1000 Features Table 3-21	3-28
Microsoft LifeCam VX-1000 Optimized for Windows Live Messenger Figure 3-22	3-29
Microsoft LifeCam VX-3000 Figure 3-23	3-30
Microsoft LifeCam VX-7000 Figure 3-24	3-31
Microsoft LifeCam VX-5000 Red / Blue / Green Figure 3-25	3-32
Microsoft LifeCam VX-5500 Figure 3-26	3-33
Microsoft LifeCam NX-6000 Figure 3-27	3-34
Philips SPC530 Figure 3-28	3-36
Philips Rotating Webcam Figure 3-29	3-38
Philips SPC1300 Figure 3-30	3-42
Creative Live! Cam Video IM Webcam Figure 3-31	3-44
Creative Live! Cam Video IM Pro Webcam Figure 3-32	3-45
Creative Live! Cam Optia Pro Webcam Figure 3-33	3-46
Creative Live! Cam Optia AF Webcam Figure 3-34	3-47
Creative Live! Cam Notebook Figure 3-35	3-48
Creative Live! Cam Notebook Pro Laptop Webcam Figure 3-36	3-49
Creative Live! Cam Notebook Ultra Laptop Webcam Table 3-37	3-51

Cisco / Linksys wireless-G Internet Home Monitoring Camera Figure 3-38	3-52
Cisco / Linksys Wireless-G Internet Home Monitoring Camera Table 3-39	3-54
Cisco Linksys Compact Wireless-G Internet Home Monitoring Camera Features Table 3-39 (Continued)	3-55
Cisco Linksys Compact Wireless-G Internet Home Monitoring Camera Features Table 3-40	3-56
Cisco Wireless-G Internet Home Monitoring Camera Controls Table 3-40 (Continued)	3-57
Cisco Wireless-G Internet Home Monitoring Camera Controls Table 3-41	3-58
Cisco Linksys Wireless PTZ Internet Camera with Audio Features Figure 3-42	3-60
Wireless-G VPN Router with RangeBooster Figure 3-43	3-62
D-Link Internet Camera Figure 3-44	3-64
D-Link Secure Cam Table 3-45	3-65
D-Link Secure Cam Product Features: Table 3-46	3-66
D-Life WebCam Products Table 3-47	3-67
D-Life WebCam Product List Table 3-47 (Continued)	3-68
D-Life WebCam Product List Table 3-47 (Continued)	3-69
D-Life WebCam Product List Table 3-47 (Continued)	3-70
D-Life WebCam Product List Table 3-47 (Continued)	3-71
D-Life WebCam Product List Table 3-47 (Continued)	3-72
D-Life WebCam Product List Table 3-47 (Continued)	3-73
D-Life WebCam Product List Figure 3-48	3-73
D-Link Dome Secure Cam Figure 3-49	3-74
3-Axis Lens Adjustment for Ceiling and Wall Mount Application Figure 3-50	3-75
Encore Electronics WebCam Table 3-51	3-76
Encore Electronics WebCam Key Features Figure 3-52	3-79
iMirco Electronics CAM-IMV6 Figure 3-53	3-80
iMirco Electronics CAM-IMT1NB USB Webcam Figure 3-54	3-81

iMirco Electronics Web Cams Figure 3-55	3-82
iMirco Electronics CAM-IM628 Table 3-56	3-83
iMirco Electronics Specifications Figure 3-57	3-84
Custom Memory Web Cams Table 3-58	3-85
Custom Memory WebCam Specifications: Table 3-58 (Continued)	3-86
Custom Memory WebCam Specifications: Figure 3-59	3-87
Custom Memory Web Cams Figure 3-60	3-88
Custom Memory Web Cams Figure 3-61	3-91
Lorex Color DMC2023 PC Cam Figure 3-62	3-92
Lorex DMC2030 Color Web Camera with Night Vision & Audio Table 3-63	3-93
Adomax Electronic Technology (Z.Q.) Ltd Figure 3-64	3-94
Adomax Electronic Technology (Z.Q.) Ltd Table 3-65	3-95
Omega Technology CMOS PC Camera Features Figure 3-66	3-96
Omega Technology CMOS PC Camera Figure 3-67	3-97
Shenzhen Vigor Electronic & Technology Co.,Ltd WebCam Table 3-68	3-98
Shenzhen Vigor Electronic & Technology Co.,Ltd WebCam Features Figure 3-69	3-99
10moons Technology Development Co., Ltd Table 3-70	3-100
10moons Technology Development Co., Ltd	

WEBCAM TECHNOLOGY

Figure 4-1	4-3
Structure of a Controller	
Figure 4-2	4-4
Vicam ASCII Block Diagram	
Table 4-3	4-6
Sony Image Sensor Features	
Table 4-4	4-7
Sony Image Sensor Device Structure	
Figure 4-5	4-8
Sony WebCam Sensor	
Table 4-6	4-12

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Micron Sensor Specifications Table 4-6 (Continued)	4-13
Micron Sensor Specifications Table 4-6 (Continued)	4-14
Micron Sensor Specifications Table 4-7	4-23
Pixel Of A CMOS Active-Pixel Image Sensor Table 4-8	4-24
Image Pixel Of A CMOS Active-Pixel Sensor Table 4-9	4-25
Photodiode Active-Pixel Architecture Table 4-10	4-28
WebCam Sensor Patterns Table 4-11	4-30
On Chip Architecture Figure 4-12	4-31
WebCam Sensor Digital Block	

WEBCAM COMPANY PROFILES

Table 5-1	5-3
Creative Personal Computer Interactive PDE Product Set Table 5-2	5-8
Creative Technology Competitive Positioning Table 5-3	5-15
Encore Supplies Making Connections Easy Table 5-4	5-19
Logitech Webcam Offerings Table 5-5	5-25
Logitech Product Strategy	

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ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

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