

Access Control & Anti-Intrusion



August 2010 US\$495

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ACCESS CONTROL & ANTI-INTRUSION

Supplier capability in China

EXECUTIVE SUMMARY

Rebounding from last year's economic slowdown, China's access control and anti-intrusion segment is poised to grow by as much as 20 percent by end-2010. Industry estimates indicate that exports of access control systems will surpass \$900 million. Shipments of peripherals such as cards, readers, ICs and modules are projected to breach \$640 million.

Total sales from anti-intrusion products, meanwhile, are expected to rise 9 percent YoY and hit \$350 million by the end of the year.

In response to heightened demand for residential and commercial security devices, many suppliers have increased production and are planning to raise capital expenditure to boost capacity. R&D is also on an upswing, fueled by technological advances in networking, multidevice interoperability and application-oriented software.

The following are the key trends in the industry:

- A growing number of access control systems will be built with more powerful ICs and processors to support not only enhanced performance but also various connectivity options such as video surveillance and remote monitoring.

- RFID technologies are evolving from being based mainly on LF and HF bands toward supporting UHF and UWF, longer operating ranges and larger data capacity.

- Led by fingerprint models, biometric systems continue to adopt enhanced algorithms aimed at more accurate verification methods. Makers forecast other biometric technologies, particularly facial recognition, will gradually reach maturity and penetrate the market in coming years.

- Highlighting reliability and reduced false alarms, makers release intrusion detection products in diverse configurations to maximize efficiency based on location and environmental

conditions. Upgraded sensors use optical or temperature compensation circuits to improve sensitivity, some even able to analyze detected objects.

- More sophisticated intruder alarms feature Internet access and 3G mobile phone communication, allowing realtime monitoring and expanded user interface. Other enhancements, including embedded OS and Arm processors, improve processing speed and support add-ons such as interactive video surveillance and data transmission and storage.

- Among the challenges makers are facing are rising manufacturing costs. Workers' wage increases, in particular, are already raising alarm in the electronics industry as key sourcing hubs, including Guangdong and other coastal provinces, experience labor shortage.

- While most companies intend to keep prices stable, some said that fluctuating costs might pressure them to adjust quotes.

This report covers biometric and nonbiometric access control products, video door phones, car park management systems and intruder alarms and sensors.

The Industry Overview section discusses developments in China's manufacturing and exporting situation. It provides insight on key issues and challenges currently faced by suppliers.

Individual sections on featured product categories tackle R&D trends and price movements in coming months. Each portion details the differences among low-end, midrange and upscale models, and presents comprehensive price guides.

Guangdong province, China's electronic security powerhouse, hosts the majority of suppliers, which take advantage of the hub's strategic location and comprehensive supply chain.

In this report

- 32 in-depth company profiles
- 17 additional suppliers
- 129 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that are verified by Global Sources.

Each supplier is confirmed to be authentic with a legally registered business. All companies are visited three or more times to ensure they are export-ready and have real offices and products.

The listed contact person has been verified to represent the registered company. In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice.

Suppliers are ranked based on a 6-star ranking system. Companies with a higher star ranking provide more business information and verification reports on their Global Sources online homepages.

Suppliers rated 5 or 6 stars have a Credit Check report from First Advantage or Sino-Trust and a Supplier Capability Assessment report provided by Bureau Veritas online.

The rankings are correct at the time of publication and may be subject to change.

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INDUSTRY OVERVIEW

China's access control and anti-intrusion industry is anticipated to see a strong rebound in 2010, with double-digit growth rates pegged at 15 to 20 percent YoY.

The 300 makers of access control systems in the country are expected to export more than \$900 million products by year-end, according to industry estimates. These include building and car park management applications, comprising \$790 million nonbiometric and \$130 million biometric-based models.

Figures exclude sales from accessory makers that pursue RFID cards and readers and fingerprint ICs and modules. Overseas shipments of these products are projected to exceed \$640 million.

The retail market for other access control devices, including video door phones and EAS products, will be valued at \$400 million and \$240 million in the same period.

In the anti-intrusion devices segment, the 500-strong supplier base is on track to achieve \$350 million in intruder alarm and detector total sales this year. This will raise annual growth by 9 percent from \$320 million in 2009.

Manufacturers thrive mainly in the low-end and midrange lines, which account for 70 to 80 percent of overall output. The emphasis on low prices, however, does not impede most makers' continued R&D and pursuit of advanced technologies.

Networking, multidevice interaction and application-oriented designs represent the general development trends in the industry.

Makers have begun to use 32-bit DSPs or Arm processors in their access control systems to enhance performance and support a range of connectivity options. New models integrate video surveillance, fire control and intruder alarm.

Application-oriented products are optimized for various environments

such as large buildings, parks, shops and residences. User-friendly interface is emphasized to facilitate easy operation.

Product development in the nonbiometric segment focuses on RFID technology evolution. ICs and ID cards operating on LF and HF bands still dominate output, while newer models adopt customizable designs that support multiprotocol cards.

Advanced R&D directions are moving toward UHF and UWF band compatibility, longer operating ranges and larger data capacity.

As for biometric systems, makers continue to improve verification technologies and raise accuracy levels.

With fingerprint recognition leading the mainstream line, trends consist of efficiency and algorithm enhancements.

Some companies are pursuing advanced RF sensors that eliminate false recognition and prohibit fake identities. Others focus on simplifying R&D requirements for downstream manufacturers.

Other biometric technologies, particularly facial recognition, are gradually reaching maturity and are expected to penetrate the market slowly in coming years.

As with most security products, reliability tops product development efforts in intrusion detection devices.

Sensors, for instance, now come in diverse configurations, including PIR, photo-beam, microwave, door/window and hybrid units, to maximize detection efficiency depending on the location and environmental conditions.

False alarms are reduced in upgraded models using optical or temperature compensation circuits and specialized ASICs to improve sensitivity and detection range. Some devices can analyze the form, size, speed and duration of detected objects, and distinguish real threat from other factors.

Supplier summary

Suppliers surveyed	32
Export sales	\$143.2mn
Export ratio	59%
OEM business	51%
Capacity utilized	68%
Annual R&D spending	\$21.7mn
Full-time employees	11,330

Data: All surveyed suppliers

Many makers are also leveraging advancements in telecom and networking, integrating these functions into their more sophisticated intruder alarms. Internet access and 3G mobile phone communication, in particular, have revolutionized midrange and high-end products into becoming realtime monitoring systems that allow users to have better control over their security equipment.

Other enhancements include embedded OS and Arm processors that improve processing speed and support add-on features such as interactive video surveillance and data transmission and storage.

Challenges

Rising production costs continue to plague access control and anti-intrusion makers in China as most of them concentrate on the price-sensitive low-end and midrange segments.

The current labor shortage in the country, in particular, is starting to cripple manufacture and threaten the stability of some businesses. Wages increased 20 to 30 percent at the beginning of 2010 in Guangdong province, due mainly to comparative adjustments in other economic zones such as central and western China. Some coastal cities and provinces also increased minimum compensation levels by more than 10 percent as of June 2010.

Several companies worry that Foxconn's announcement to raise its workers' income by 30 percent will

Anposi Products Ltd



Established in 1999, the ISO 9001:2000-compliant supplier offers a range of biometric access control products and video door phones. Overall sales amounted to \$10 million last year, with the line accounting for 40 percent.

Export revenue from the sector is expected to increase between 10 and 20 percent in the next 12 months. Anposi plans to raise annual capital expenditure by up to 50 percent in the same period.

The bulk of shipments go to Europe, North America, the Asia-Pacific

region and the Middle East.

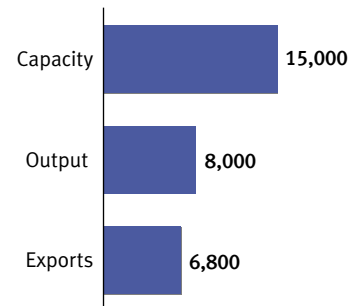
Two factories in Guangdong province with a total area of 8,008sqm can produce 15,000 units monthly. Utilizing 53 percent of capacity, the company currently turns out 8,000 units every month.

The company also produces CCTV devices, security cameras and car rear view systems.

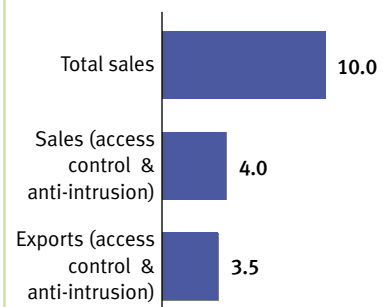
The mainland China-owned manufacturer has a 10-member team that carries out QC procedures, while a group of 30 personnel handles product development.

Profile

Production units/mth



Sales \$mn/yr



Contact details

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Company facts

Year established	1999
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Number of factories	2
Factory location(s)	Shenzhen (Guangdong)
Total factory area	8,008sqm
No. of full-time employees	250
No. of R&D/design staff	30
No. of QC staff	10
Annual sales (all products)	\$10.0mn
Annual R&D spending	\$500,000
ISO certification	Yes

Sales & output: Access control & anti-intrusion

Annual sales	\$4.0mn
Share of total sales	40%
Annual export sales	\$3.5mn
Total monthly capacity	15,000 units
Average monthly output	8,000 units
Capacity utilized	53%
Average monthly exports	6,800 units
Export ratio	85%
OEM % of exports	30%
ODM % of exports	50%
OBM % of exports	20%
Other products exported	CCTV products, car rearview systems, security cameras

Capability

In-house processes

Mold making	No
Software design	Yes
PCB assembly	Yes
Plastic injection	No
Sensor module production	No
Interference testing	Yes
Sensitivity testing	Yes
Extreme environment testing	Yes
RoHS line	Yes

Exports by product

Nonbiometric access control	—
Biometric access control	5%
Video door phones	95%
Car park management systems	—
Intruder alarms & sensors	—

Exports by market

North America	10%
European Union	30%
Europe (non-EU)	30%
Asia-Pacific	15%
Middle East	5%
Other	10%

Survey

- **Export prices**
Increased
- **Export price increase**
Less than 5%
- **Export sales**
Increase 10-20%
- **Target market**
Europe (non-EU)
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Price competition
- **Export capability**
Improve operating efficiency
- **R&D focus**
Adopt wireless technology

Popular export models



Video door phone

Model	VD221AW
MOQ	200 sets
Packaging	Blister, color box
Delivery	30 days
Price	•

Description: Video door phone; 2.4in, 480x240-pixel TFT screen; alarm, monitor, unlock functions; 2/4+2-wire system; 270x80x52mm indoor unit



Video door phone

Model	VD222DS
MOQ	200 sets
Packaging	Blister, color box
Delivery	30 days
Price	•

Description: Video door phone; 2.4in, 480x240-pixel TFT screen; alarm, monitor, unlock functions; 2/4+2-wire system; 265x94x45mm indoor unit



Video door phone

Model	VD272C
MOQ	200 sets
Packaging	Blister, color box
Delivery	30 days
Price	•

Description: Video door phone; intercom; alarm; digital photo frame; JPEG; MP3/MP4 player; SD card reader; USB port; remote control; multilanguage manual

• Information not disclosed

PRODUCT GALLERY

Biometric access control



Anviz
 (profile page 40)
Model: OA1000
MOQ: 1 set
Packaging: Carton
Delivery: 1 day
Price: •
Description: Fingerprint access control product; fingerprint, card+fingerprint, card, ID+password; RFID, Mifare, HID cards; 3,000 fingerprints, 50,000 records; Samsung 400MHz Arm 9 processor; TCP/IP, RS-232, USB Host, Wiegand ports; TransFlash card



Anviz
 (profile page 40)
Model: T5
MOQ: 1 set
Packaging: Carton
Delivery: 1 day
Price: •
Description: Fingerprint and card reader; fingerprint, card; 512 fingerprints; 32,000 records; infrared auto-activate; Mini-USB, EIA-485, Wiegand26/34 ports; seamless connection with controller



Anviz
 (profile page 40)
Model: T50
MOQ: 1 set
Packaging: Carton
Delivery: 1 day
Price: •
Description: Fingerprint access control product; fingerprint, ID+fingerprint, ID+password; 512 fingerprints; 32,000 records; musical buzzer; RS-232, EIA-485, dry contact, Wiegand26, optional TCP/IP; door bell; optional zinc alloy casing, water-resistant cover



Anviz
 (profile page 40)
Model: T60
MOQ: 1 set
Packaging: Carton
Price: •
Description: Fingerprint access control product; fingerprint, ID+fingerprint, ID+password; ID, Mifare, HID cards; 2,000 fingerprints; 30,000 records; group and time zone control, tamper alarm; Mini-USB, EIA-485, Wiegand26, optional TCP/IP; white LCD; multilanguage support



Anviz
 (profile page 40)
Model: VF30
MOQ: 1 set
Packaging: Carton
Price: •
Description: Fingerprint access control product; fingerprint, card; 16-key numeric keypad with backlight; 3-color LED indicator, light, door bell; 1,000 fingerprints; 32,000 records; time zone access control, bell scheduler; Mini-USB, EIA-485, Wiegand26/34, TCP/IP



CiVinTec
 (profile page 46)
Model: CV8460 EL640
MOQ: 1 unit
Packaging: Carton
Price: •
Description: Fingerprint access and T/A system; card+fingerprint, ID+fingerprint, card, PIN, card+PIN; 4,000 fingerprints for 4MB memory; 13.56MHz, 125kHz; 2,000 users; 100,000 records for 32KB EEPROM; RS-232, EIA-485, TCP/IP; LCD, backlight; 155.2x170x40mm; 560g

• Information not disclosed

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