

Access Control Products



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ACCESS CONTROL PRODUCTS

Supplier capability in China

EXECUTIVE SUMMARY

China suppliers of access control products will make the most of maturing technologies as they broaden selections and venture further into the security and surveillance market.

Driven by the integration trend and growth opportunities in home automation, companies are gearing R&D toward complete systems. Recently released security solutions enable users to monitor and control lighting, power, air-conditioning systems and appliances in addition to physical entry.

Amid the popularity of multifunction models, makers are also ramping up development of traditional access control products.

Export data is unavailable, although several research organizations estimate that global demand for biometric and nonbiometric security devices will reach \$10 billion in the next two to three years. The two categories are the core products of the industry.

Aiming to capture a substantial share of the market, suppliers are enhancing critical aspects of performance, including speed and accuracy, to expand the range of suitable applications.

The following are some of the key trends and issues impacting the industry:

- Prices will play an important part in driving sales in the year ahead. Many companies are planning to lower quotes to attract orders amid intense competition despite the pressure such a move would put on profits.

- With this in mind, makers will rely on their solid grasp of key technologies such as RFID and fingerprint recognition to offset cost concerns. The last stems from the industry practice of overseas procurement. Critical parts are often sourced from Taiwan, South Korea and Japan, with suppliers turning to top-tier providers in the US for high-end models that require sophisticated components.

- Aware that they cannot compete solely on price, companies will emphasize design capability as part of differentiation strategies. Integration, and consequently, convenience will be the primary drivers of R&D, although suppliers will be lining up cosmetic enhancements.

- Makers will continue to target the EU. Shipments to emerging markets such as the Asia-Pacific region and the Middle East, however, will expand as companies gear up to achieve growth targets averaging 20 percent.

This report covers the major types of access control products manufactured in China.

The Products & Prices section classifies them into three groups, namely access control systems, video door phones and home automation. The first category covers biometric and nonbiometric devices.

The section provides detailed descriptions of each product line, with emphasis on technical parameters. The most-common types of models available and the factors that influence pricing are also discussed.

The Industry Overview focuses on the major issues affecting production and exports and how companies are coping with these challenges.

The section also elaborates on the composition of each category's supplier pool and explains the manufacturing and exporting capability of small, midsize and large makers.

The majority of featured manufacturers are mainland China-owned, although the report also includes companies with Taiwan or Hong Kong investment, closely mirroring the structure of the industry. All profiled suppliers are capable of exporting directly.

In addition, three-quarters of makers are located in Guangdong province, which is the largest exporter of access control products in China.

In this report

- 23 in-depth company profiles
- 75 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 may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

China's access control industry will continue to expand as certain key technologies mature, enabling suppliers to venture into integration, and improve convenience, performance and aesthetics.

This is under efforts to keep overseas trade strong in the year ahead, an endeavor reinforced by the Global Sources survey.

Results indicate optimistic projections. Nearly half of respondents estimate more than 20 percent growth in sales as makers strengthen their foothold in both traditional and emerging markets.

The export thrust is notable in the RFID segment of nonbiometric access control where companies are combining frequencies to broaden the range of applications for proximity cards.

Suppliers of readers are carrying out similar expansion endeavors by moving up the frequency band and introducing models that operate on 915MHz and 2.45GHz.

Data for nonbiometric access control products is not available, although research company Freedonia estimated that global demand will rise 8 percent annually to reach \$2.5 billion in 2010. In addition to proximity cards and readers, the line includes RFID tags, which have undergone a cosmetic upgrade through the use of glossy or matte finishing.

A solid grasp of fingerprint-recognition technologies, meanwhile, is driving growth in the industry's biometrics segment.

Suppliers are now integrating the function into T/A recording, nonbiometric access control systems and law enforcement fingerprint identification systems, information security products and locks.

Some companies are carrying out another type of diversification by merging biometric and nonbiometric recognition technologies.

Such hybrids adopt different identification methods in a range of

combinations, including fingerprint template, multiple fingerprints, contactless IC card, and ID/password/contact card.

In terms of performance, upgrades focus on FAR/FRR, recognition speed and accuracy, and customization.

These enhancements are in line with suppliers' aim of capturing a significant share of the fast-growing business in biometrics. According to statistics from International Biometrics, the market will be worth \$7.4 billion by 2012.

Growth opportunities in home automation are spurring integration in video door phones.

Some models have safety and security functions, enabling interoperability with gas, smoke or PIR detectors and intruder alarms. Others are incorporated into advanced systems that monitor physical entry, lighting, security, power, and HVAC and entertainment appliances.

Industry composition

Most, if not all, China suppliers of access control products are specialists. This is because biometric and nonbiometric security devices, video door phones and home automation systems have varying manufacturing and technological requirements.

Differing target applications and markets are the other factors driving specialization. Classified further under biometric and nonbiometric, access control products, for example, are designed primarily for commercial establishments such as banks, schools and offices. Video door phones, on the other hand, are geared toward residential use.

Even within the access control systems segment, there is minimal overlap among manufacturers of card- and fingerprint recognition-based units. These front-end devices are the core products of the industry.

Only a handful of makers can offer both types and even then, companies tend to focus on one or the other.

Supplier summary

Suppliers surveyed	23
Export sales	\$86.2mn
Export ratio	52%
OEM business	37%
Capacity utilized	56%
Annual R&D spending	\$26.0mn
Full-time employees	7,926

Data: All surveyed suppliers

Access control: Most manufacturers of access control devices engage only in final assembly, outsourcing software, IC solutions, sensor modules, card readers and other processes such as PCB layout, auto insertion and SMT.

The factories of small companies cover an area of 500 to 1,000sqm with monthly capacity not exceeding 5,000 sets.

Capable of turning out 5,000 to 15,000 sets every month, midrange makers perform software application and function development in their plants, which range from 1,000 to 2,000sqm.

The majority of large enterprises carry out all processes in-house. Usually employing more than 20 engineers, such suppliers have strong R&D capability, enabling them to engage actively in the development of hardware platforms, identification algorithms and data processing.

When classified according to specialization, nearly 80 percent of the approximately 500 makers of access control systems in China focus on nonbiometric or card-based models utilizing mostly RFID technology.

This particular product line is split further into tags and cards, and readers, which consist of 50 and 300 manufacturers, respectively. Eighty percent of these companies are based in Shenzhen, Guangdong province.

Suppliers usually concentrate on final assembly. Fifty, however, are capable of developing core technologies, including data collection and processing, and management and control software.

Anviz Biometric Technology Co. Ltd

Shanghai-based Anviz exports more than 60 percent of its output of access control products. North America, the EU and Central and South America and Africa are the largest markets, absorbing 75 percent of shipments combined.

The line accounts for 60 percent of sales and consists of access control systems and models that operate on biometrics and RFID. About 12,000 units are produced every month as Anviz's 50,000sqm factory utilizes about two-thirds of current capacity.

There are 500 personnel in the plant, including 50 in R&D.

Another 50 are responsible for QC.

Products bearing the in-house Anviz and Bio-office brands account for half of exports. ODM designs represent 30 percent of shipments and OEM models, 20 percent.

Anviz is projecting a price increase of more than 15 percent in the next half-year while growth in sales is expected to exceed 20 percent.

The company plans to raise capital expenditure by more than 50 percent.

Fingerprint safes, time recorders, and core FP modules, software and accessories are also available.

Company facts

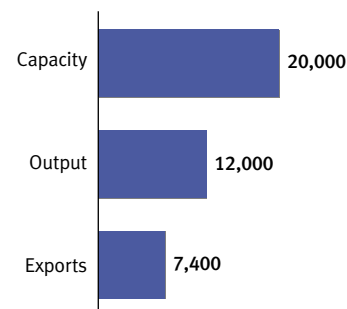
Year established	2001
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shanghai
Number of factories	1
Factory location(s)	Shanghai
Total factory area	50,000sqm
No. of full-time employees	500
No. of R&D/design staff	50
No. of QC staff	50
Annual sales (all products)	\$20.0mn
Annual R&D spending	\$2.0mn
ISO certification	Yes

Sales & output: Access control products

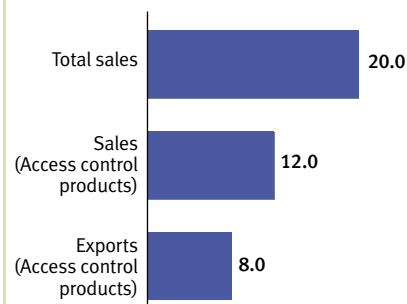
Annual sales	\$12.0mn
Share of total sales	60%
Annual export sales	\$8.0mn
Total monthly capacity	20,000 units
Average monthly output	12,000 units
Capacity utilized	60%
Average monthly exports	7,400 units
Export ratio	62%
OEM % of exports	20%
ODM % of exports	30%
OEM % of exports	50%
Other products made	Fingerprint safes, time recorders, core FP modules, software and accessories

Profile

Production units/mth



Sales \$mn/yr



Contact details

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Capability

Production checklist

Sensor production	Yes
Module making	Yes
Software design	Yes
Mold making	Yes
PCB making/design	Yes
SMT	No
Plastic injection	No
Silkscreen/offset printing	Yes
Final assembly	Yes
QC/QA testing	Yes

Exports by product

Access control systems	10%
Biometric access control	80%
RFID access control	10%
Video door phones	—

Exports by market

North America	25%
European Union	25%
Europe (non-EU)	5%
Asia-Pacific	15%
Middle East	5%
South, Central America, Africa	25%

Outlook

- **Export prices**
Increase
- **Export price increase**
More than 15%
- **Export sales**
Increase more than 20%
- **Target market**
European Union
- **Capital expenditure**
Increase more than 50%
- **Major challenge**
Design copying/piracy
- **Export capability**
Shorten design/development time
- **R&D focus**
Technology integration

Popular export models



Biometric access control

Model	T50
Minimum order	1 unit
Packaging type	Carton
Delivery time	•
Indicated price	•

Description: Fingerprint access control; fingerprint, password, card identification modes; 22x18mm optical sensor; TI processor; 0.001/0.00001% FAR/FRR; 512 users, 32,000 records capacity; NAND flash memory; RS-232, RS-485, LAN, dry contact, Wiegand ports; RS-232, RS-485, TCP/IP, Wiegand protocols



Biometric access control

Model	T60
Minimum order	1 unit
Packaging type	Carton
Delivery time	•
Indicated price	•

Description: Fingerprint T/A recorder/access control; fingerprint, password, RFID/Mifare/HD card identification modes; 22x18mm optical sensor; TI processor; 10cm effective reading distance; 0.001/0.00001% FAR/FRR; NAND flash memory; 512 users, 32,000 records capacity



Biometric access control

Model	T5
Minimum order	1 unit
Packaging type	Carton
Delivery time	•
Indicated price	•

Description: Fingerprint access control; fingerprint, RFID/Mifare/HID card identification modes; 22x18mm optical sensor; TI processor; 10cm reading distance; 0.001/0.00001% FAR/FRR; 512 users, 32,000 records capacity

• Information not disclosed

PRODUCT GALLERY

Access control systems



China-Vision
(profile page 30)
Model: CV8600(S)-ZX/EL600-X
Minimum order: 1 unit
Packaging type: Box
Delivery time: 3 to 5 days
Indicated price: •
Description: Card, PIN, card+PIN identification modes; PIN access mode; 32-bit ARM7 CPU; 8-bit MCU; 13.56MHz, 125kHz; 6cm effective reading distance; 2MB flash memory expandable up to 8MB; 32KB EEPROM; capacity: 2,000 users, 100,000 records; TCP/IP protocol; -20 to 60 C operating temperature



China-Vision
(profile page 30)
Model: CV5XXX-X-2B+EL500-X-2B
Minimum order: 1 unit
Packaging type: Box
Delivery time: 3 to 5 days
Indicated price: •
Description: Card, PIN, card+PIN identification modes; card, PIN access modes; 32-bit ARM7 CPU; 13.56MHz, 125 KHz; 5 to 10cm effective reading distance; 2MB flash memory expandable to 8MB; 2,000 users expandable to 5,000, 100,000 records capacity; RS-232, RS-485, TCP/IP ports



China-Vision
(profile page 30)
Model: CV9600(S)-X-1C+EL500(T)-X-1C
Minimum order: 1 unit
Packaging type: Paper box
Delivery time: 3 to 5 days
Indicated price: •
Description: Card, PIN, card+PIN identification modes; card, PIN access modes; 13.56MHz, 125 KHz frequency; 5cm effective reading distance; 32KB EEPROM; TCP/IP protocol; RS-232, RS-485, TCP/IP ports; operating temperature of -20 to 60 C; 10 to 95% humidity



China-Vision
(profile page 30)
Model: CV9600(T)(S)-X-1F+EL500(T)-X-1F
Minimum order: 1 unit
Packaging type: Paper box
Delivery time: 3 to 5 days
Indicated price: •
Description: Card, PIN, card+PIN identification modes; 32KB EEPROM; 13.56MHz, 125KHz; 5cm effective reading distance; 512 cards, including one master card, 1,999 records with real-time clock capacity; RS-232, RS-485, TCP/IP ports; -20 to 60 C operating temperature



Shenzhen General
(profile page 48)
Model: XYTX020
Minimum order: 1 unit
Packaging type: Carton
Delivery time: Negotiable
Indicated price: •
Description: Turnstile; 10 to 40 people/minute flow rate depending on reader; 115/230VAC at 50/60Hz; 12VDC pulse signal; >10mA driving current; >100ms pulse width; RS-485 serial port; ≤1,200m communication port



Shenzhen General
(profile page 48)
Model: GS080
Minimum order: 1 unit
Packaging type: Carton
Delivery time: Negotiable
Indicated price: •
Description: Traffic barrier; 3 or 5s opening/closing time; ≥5 million opening/closing cycles; ≤60dB operating noise; 2.25m standard boom length; ≤3.5m boom clearance; 900mm center barrier height; MAG-20 performance index; 230VAC at 50/60Hz; 80W; 30rpm; 12Nm torque

• Information not disclosed

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