

# Access Control Products



September 2007 US\$495

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# ACCESS CONTROL PRODUCTS

## *Supplier capability in China*

### EXECUTIVE SUMMARY

Mainland China's access control products export industry continues to grow steadily as more foreign buyers discover the country's competitive pricing and more suppliers upgrade their products.

Encouraged by rising global demand for security solutions, makers of biometric and non-biometric access control products are enhancing their offerings, increasing overseas shipments and tapping new export markets.

With the US and the EU as key export destinations, mainland suppliers are confident that export sales will increase by more than 20 percent through 2008.

Proximity cards and readers remain the most popular non-biometric access control products in the mainland while fingerprint recognition devices form the bulk of its biometric access control production.

Mainland China's access control products industry is still considered small in terms of production capacity, with most makers focusing on the low-end and midrange markets to maintain price competitiveness.

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

- Most makers project their export sales will increase by about 20 percent in the next 12 months. North America and the EU are the most important export destinations with Asia, Africa and the Middle East identified as emerging markets. OEM/ODM buyers will remain the chief export revenue source.

- Capacity expansion ranks high on makers' 2008 agenda, with most of them planning to increase output by 20 percent to 50 percent. While some will build new factories to expand production, others will upgrade their existing facilities and equipment.

- Product prices are expected to increase by 5 percent to 15 percent due to rising production costs and appreciation of the Renminbi.

- Production and exports of combination access control products that use both biometric and non-biometric access modes will increase in the coming months.

- Makers of biometric access control products are enhancing network connectivity and developing new algorithms for greater accuracy and efficiency, and faster processing time. Adoption of wireless technology is another industry priority.

This report covers the two types of mainstream access control products available in China. These include non-biometric devices such as proximity cards, smart cards and readers; and biometric devices such as fingerprint recognition systems. This report does not cover IT access control.

The Industry Overview section discusses the current state of mainland China's access control industry, highlighting its strengths and weaknesses. It also details the various types of access control makers in the region and their manufacturing capabilities. A discussion on the main production hub is also included.

Key components used in access control products and how they affect product prices are detailed in the Products & Prices section. It also compares low-end, midrange and high-end products based on components used and unique features.

The Outlook section presents future industry trends based on a survey of makers profiled in this report.

Shenzhen in Guangdong province is the primary manufacturing hub for access control products. It accounts for about half of the mainland's output of access control products. The city is home to industry leaders, small-and mid-sized makers as well as subcontractors, and solution and component suppliers. To represent the industry accurately, close to half of the makers in this report are from Guangdong.

### In this report

- 15 in-depth company profiles
- 10 short company profiles
- 89 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics and 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.

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

For in-depth profiles, our research teams visited the manufacturing facilities of each company and interviewed senior executives who discussed their recent performance and provided forecasts for the next 12 months. All other companies in this report were either visited or contacted by phone.

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

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges confronting the industry in the next 12 months.

The survey was carried out during phone interviews and in-person factory visits. 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

Mainland China's exports of access control products in 2006 were valued at about \$300 million, with makers exporting an estimated 1 million units of access control products.

In 2007, export volume is expected to grow to 1.15 million units with export revenue seen to reach \$350 million. Non-biometric products including proximity cards and biometric devices such as fingerprint access control products make up the bulk of exports.

Production growth of China's biometric access control industry is driven not only by exports, but also by demand from within China. Domestic sales of biometric products have been growing at an average rate of 40 percent to 60 percent per year, with fingerprint products registering the biggest annual sales increase.

Fingerprint readers currently dominate the biometrics manufacturing industry by virtue of their lower technological threshold and higher user acceptance. Other biometric access control products offered include fingerprint access control devices, fingerprint identification modules, fingerprint mouse and USB disks.

Major product applications include government, military, financial institutions, telecommunications, computers, manufacturing and education.

The fingerprint access control industry is said to have reached its maturity technology-wise. Some makers in China, however, believe that there is still room for growth and innovation, given new developments in sensor technology and algorithms, and the lack of a standard format for cross-device application. This perception is encouraging makers from other product lines to venture into the industry. More suppliers are also pushing for minutiae-only technology as a universal format in view of its ability to speed up transactions, which

is considered a critical performance parameter in the access control line.

Unlike the biometric access control industry, the non-biometric segment is a more developed, older and larger manufacturing industry in China. Although export data for this product line is not available, global demand for products such as card-based access control systems is projected to increase by about 8.3 percent per year, according to Freedonia.

The research firm predicts that the global market will be worth \$2.5 billion by 2010. Market growth will be driven by increased use of access control systems based on smart card technology.

Even though many China access control product companies cater to both the domestic and foreign markets, there are a lot that focus on the latter. The majority of interviewed makers in this report are generally export-oriented, with most of the large-scale makers shipping the bulk of their output to their respective niche markets.

In 2006, interviewed makers generated export sales revenues of \$100,000 to about \$10 million. Some makers, such as DIT Digital and China Vision shipped their entire access control product output last year. Other makers, such as Sebury and Shenzhen

### Supplier summary

Suppliers surveyed	25
Export sales	\$128.7mn
Export ratio	57%
OEM business	45%
Capacity utilized	67%
Annual R&D spending	\$32.9mn
Full-time employees	9,209

Data: All surveyed suppliers

KET exported over half of their total production.

Encouraged by higher profit margins and government incentives, more and more makers are training their sights on overseas markets this year. All interviewed makers forecast that exports will increase by more than 20 percent this year.

The EU and North America are the major export destinations of China's access control products. While some regard Asia as an emerging market, most makers still consider the US and the EU as their most important markets in the coming months.

Although Europe claims to be the biggest user of smart cards, industry experts insist that the US is the technology's fastest growing market. According to IMS Research, the US access control market will be worth \$739.1 million, while that of Canada will be worth \$91.6 million by 2011.

### OEM/ODM/OBM partners

Anviz	Chia Tai Group (Thailand)
DIT	Wal-Mart, Brico Depot, Fry's Electronics, Costco, Inspektor
Guangzhou Comet	Acroprint (US), Longstar (US)
ISvision	IN-SENSE Technologies (Singapore)
Miaxis	Chia Tai Group
Polymath	ArtGuard Security (Netherlands), Birkegaarden Denmark A/S (Denmark)
Sebury	Prastel SPA (Italy)
Shanghai Wiseteam	Charmpa (Turkey)
Tianjin Novan	Beijing Safety Fair
Top Soft	Hanwang
Xiamen Genway Security	Multitek (Turkey), Daninal Co (Iran), PJM (Australia)

Data: All surveyed suppliers

### Anviz Biometric Tech. Co. Ltd

Anviz Biometric Tech. Co. Ltd started out as a manufacturer of biometric access control products in 2001. Today, the company specializes in fingerprint identification products, as well as standalone access control systems and time and attendance systems, access control readers, locks, safes, identification modules, and related accessories and management software. It also provides some proximity card readers for access control applications.

Anviz registered total sales of \$10 million in 2006, \$8 million of which came from sales of access control products. Fingerprint access control devices accounted for 90 percent of its sales of access control products.

The company exports 60 percent of its production. North America and Asian countries are considered its major overseas markets, representing 30 percent of its total export volume. OEM and ODM orders account for 80 percent of its total sales. It counts Thailand's Chia Tai Group as one of its top OEM/ODM clients. Anviz officials predict a year-on-year export growth of more than 20 percent in 2007.

Anviz handles almost all production processes in its 50,000sqm factory in Shanghai. It has also set up a 50-member team to handle quality control in-house. The facility has a monthly production capacity of 10,000 units of access control products, with actual monthly output pegged at 9,500 units as of mid-2007. The company plans to build a new factory to expand its capacity by at least 50 percent in the next 12 months. Most of its export models are FCC- and CE- certified.

Allocating 10 percent of its annual revenue to R&D, the company is currently focusing its efforts on wireless networking. Its R&D team can develop a new model in three months, while it can deliver customized samples based on current products in three to 15 days.

#### Capability

##### Production checklist

Assembly lines	6
R&D/design staff	300
QC staff	50
Sensor production in-house	Yes
SMT in-house	No
PCB sub-assembly in-house	Yes
Cosmetic design in-house	Yes
R&D in-house	Yes

##### Exports by product

Fingerprint access control devices	90%
Proximity card readers	10%
Smart card readers	—
Other biometric ACPs	—
Other non-biometric ACPs	—

##### Exports by market

United States	30%
European Union	20%
Europe (non-EU)	10%
Middle East/Africa	5%
Asia	30%
Other	5%

#### Outlook

- **Export prices**  
Increase up to 5%
- **Export sales**  
Increase more than 20%
- **Production capacity**  
Increase more than 50%
- **Expansion plan**  
Build or move to new or additional factory
- **Main target market**  
United States
- **Hot product trend**  
Wireless
- **Major challenge**  
Design copying/piracy
- **Efficiency improvement**  
Upgrade management systems
- **Capability improvement**  
Widen product range

#### Profile

##### Company facts

Year established	2001
Head office location	Shanghai
Business type	Manufacturer: Direct exporter
Ownership	Other
Factory location(s)	Shanghai
Total factory area	50,000sqm
Full-time employees	500
Total annual sales (all products)	\$10.0mn
Annual R&D spending	\$1.00mn
ISO certified	Pending

##### Sales & output: Access control products

Annual sales	\$8.0mn
Share of total sales	80%
Annual export sales	\$6.0mn
Total monthly capacity	10,000 units
Average monthly output	9,500 units
Capacity utilized	95%
Average monthly exports	5,700 units
Export ratio	60%
OEM % of exports	70%
ODM % of exports	10%
OBM % of exports	20%
Major OEM/ODM/OBM customers	Chia Tai Group (Thailand)

**Products**

Anviz's standalone access control systems, time and attendance systems, and related readers are equipped with its very own optical sensor. They boast 500dpi resolution, less than 1s identification time, and multi-identification modes such as fingerprint, password, proximity card, and combinations of these modes. Anviz has also developed related software for access control and time and attendance management.

QA200 is an access control product with time and attendance function. It has an optional built-in EM card reader, 2,000 to 5,000 fingerprint storage capacity, 50,000 to 150,000 event records capacity, a 128x64 dot blue LCD, customizable voice prompt, 16 customizable time attendance statuses, and RS-232, RS-485, Wiegand26 and optional TCP/IP output.

T8-MiFare is a Mifare card and fingerprint reader that can be connected with access control panels via Wiegand26 port. It also offers expandable fingerprint storage capacity, support for two fingerprints per user and alarm fingerprint, tamper and door-opening alarm functions, and RS-485, TTL and optional TCP/IP output. Its business trip mode allows users to store fingerprint information in Mifare cards, but not in the local control panel or computer.

<p><b>Contact details</b></p> <p><b>Business contact</b>                  RUAN Clark  <b>Phone</b>                  (86-21) 6764-8680  <b>Fax</b>                  (86-21) 6764-8059  <b>E-mail</b>                  clark@anzibiometric.com,                  clarkruan@yahoo.com  <b>URL</b>                  www.anzibiometric.com  <b>Address</b>                  159 Shenguang Rd, Songjiang Dist,                  Shanghai, China</p>
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**Popular export models**



<b>Finger access control device</b>	
Model	QA200
Minimum order	1 unit
Packaging type	Carton
Delivery time	1 day
Indicated price	•

**Description:** Image scan time/verification speed: 1s; access modes: fingerprint, card, card+fingerprint, ID+password, ID+fingerprint, card+password; 2,000 fingerprint capacity, 50,000 events record capacity; TCP/IP support



<b>Finger access control device</b>	
Model	T8-Mifare
Minimum order	1 unit
Packaging type	Carton
Delivery time	1 day
Indicated price	•

**Description:** Access modes: proximity card, fingerprint, proximity card+fingerprint; Mifare card module; optical sensor; 1,760 fingerprint capacity, 2 fingerprints per user; RS-485 and Wiegand26 interface



<b>Finger access control device</b>	
Model	T60
Minimum order	1 unit
Packaging type	Carton
Delivery time	1 day
Indicated price	•

**Description:** Image scan time/verification speed: 1s; multiple output: dry contact, lock control; Wiegand 26 TCP/IP, Mini USB and RS-485 interface; 512/1,000 fingerprint capacity, 30,000/50,000 events record capacity; power supply: 12V DC

• Information not disclosed

## PRODUCT GALLERY

### Fingerprint access control devices



**Anviz**  
(profile page 24)  
**Model:** OA200  
**Minimum order:** 1 unit  
**Packaging type:** Carton  
**Delivery time:** 1 day  
**Indicated price:** •  
**Description:** 1s image scan time/verification speed; fingerprint, card, card+fingerprint, ID+password, ID+fingerprint, card+password access modes; 2,000 fingerprint capacity, 50,000 event record capacity



**Anviz**  
(profile page 24)  
**Model:** T8-Mifare  
**Minimum order:** 1 unit  
**Packaging type:** Carton  
**Delivery time:** 1 day  
**Indicated price:** •  
**Description:** Proximity card, fingerprint, proximity card+fingerprint access modes; Mifare card module; Anviz optical sensor; 1,760 fingerprint capacity, 2 fingerprints per user



**Anviz**  
(profile page 24)  
**Model:** T60  
**Minimum order:** 1 unit  
**Packaging type:** Carton  
**Delivery time:** 1 day  
**Indicated price:** •  
**Description:** 1s image scan time/verification speed; dry contact, lock control, Wiegand 26 outputs; TCP/IP, Mini USB and RS-485 interface; 512/1,000 fingerprint capacity, 30,000/50,000 event record capacity



**Anviz**  
(profile page 24)  
**Model:** T8-ID  
**Minimum order:** 1 unit  
**Packaging type:** Carton  
**Delivery time:** 1 day  
**Indicated price:** •  
**Description:** Proximity card, fingerprint, proximity card+fingerprint access modes; RFID card module; Anviz optical sensor; 512 fingerprint capacity, 3 fingerprints per user; RS-485 and Wiegand 26 interface; 12V DC power supply; 60x110x40mm



**Beijing IDworld**  
(profile page 26)  
**Model:** A365  
**Minimum order:** 1 unit  
**Packaging type:** Carton  
**Delivery time:** 7 day  
**Indicated price:** \$250.00  
**Description:** Verified by more than one fingerprint; supports Wiegand 26 and RS-485 interface



**DIT**  
(profile page 30)  
**Model:** F-104L  
**Minimum order:** 200 units  
**Packaging type:** Gift box  
**Delivery time:** 12 days  
**Indicated price:** \$190.00  
**Description:** Win 98/2000/XP OS; 1,000 to 1,500 fingerprint capacity; RS-232, RS-485, RJ-45 and flash disk ports; 1.5s identification speed; 80,000 matching data capacity

• Information not disclosed

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