

# CCTV & Surveillance Products



March 2009 US\$495



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# CCTV & SURVEILLANCE PRODUCTS

## Supplier capability in China

### EXECUTIVE SUMMARY

China accounts for about 35 percent of the global supply of surveillance cameras, and 40 percent of the worldwide DVR market. As production and export volumes rise to match the strong demand, makers expect the country to remain a major manufacturing base for CCTV cameras and systems.

The output of China-made cameras alone is projected to increase to 23 million units in 2009. Production of DVRs will climb by about 20 percent to 1.5 million. Rising demand for 24hr surveillance will boost the infrared day/night camera line, which is currently dominating the CCTV camera segment. The output reached about 10 million units in 2008, nearly half of the total supply of CCTV cameras. It is expected to continue expanding as suppliers release other types, including standard box, dome, speed dome, pan-tilt-zoom or PTZ and IP models.

Makers of DVRs are optimistic about domestic and overseas sales, with more than 60 percent projecting at least 30 percent export growth. In addition to lowering prices to boost margins, suppliers are developing new software and adding value through enhanced functions and features. Companies offering stand-alone and portable DVRs said the shift to digital surveillance will sustain growth in the next few years.

Makers of CCTV systems are emphasizing high resolution and realtime recording. Many companies are increasing the number of channels and video compression technologies supported.

The following are some of the key trends we see in China's CCTV and surveillance industry:

- The intensifying competition and thinning margins are prompting more companies to reduce prices in coming months to stimulate sales.

- The rising cost of production and the yuan revaluation are forcing many makers to increase prices.

- Since most makers concentrate on OEM and ODM business, complying with international standards is a priority. Companies secure UL listing and CE, FCC and RoHS approval.

- The EU will continue to be the main export destination for China's CCTV cameras and systems. To offset slumping sales in some areas, many suppliers will also be exploring emerging markets in Europe, North America, the Middle East, South Africa, South America and the Asia-Pacific region.

- Makers' product development initiatives will focus on improving the network transmission solutions and image resolution. Many companies will also be innovating on external designs and integrating wireless connectivity. A few suppliers are looking to enhance the video compression algorithms.

This report covers CCTV cameras and systems. The CCTV cameras encompass wireless, IP, IR day/night, speed dome and miniature or pinhole models. The CCTV systems include stand-alone and portable DVRs, monitors, DIY surveillance kits, receivers and transmitters, and digital video servers or DVS. The supplier survey was conducted on manufacturers and traders of these products. The Industry Overview section discusses developments in China's supply market and makers' strategies to survive the economic slowdown. Trends in the different categories are tackled in the product modules.

The majority of suppliers are based in the provinces of Guangdong, Jiangsu and Zhejiang, and in the cities of Tianjin and Beijing. Shenzhen and Guangzhou are the main manufacturing centers in Guangdong, while the city of Hangzhou leads production in Zhejiang.

### In this report

- 23 in-depth company profiles
- 51 additional suppliers
- 65 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.

### CONTENTS

<b>INDUSTRY OVERVIEW</b> .....	<b>7</b>
Supplier summary	
Major customers	
Global Sources online metrics	
Export statistics	
Main production center	
Suppliers by location	
<b>CCTV cameras</b> .....	<b>12</b>
<b>CCTV systems</b> .....	<b>18</b>
<b>Supplier survey</b> .....	<b>22</b>
Export prices, export capability, price increase, export sales, challenges, target markets, R&D focus, capital expenditure	
<b>SUPPLIER PROFILES</b> .....	<b>25</b>
Supplier locations	
Industry composition	
Top 20 exporters	
Supplier matrix	
Production checklist	
Supplier profiles	
<b>PRODUCT GALLERY</b> .....	<b>81</b>
Top-selling export products	
<b>CONTACT DETAILS</b> .....	<b>95</b>
<b>ADDITIONAL SUPPLIERS</b> .....	<b>98</b>
Key products, contact details	

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## INDUSTRY OVERVIEW

China remains a major supplier of CCTV cameras and systems with a 35 and 40 percent share of the global surveillance camera and DVR markets, respectively. Makers estimate the country's total camera output reached 21 million units in 2008 and that of DVRs was about 1.3 million. CCTV camera production is expected to rise to 23 million units, equivalent to a 9 percent increase. The output of DVRs will climb by about 20 percent to 1.5 million.

Strong demand for enhanced security and the broadening application range will continue to spur China's supply market even as sales weaken in some key export areas. In the infrared day/night camera line, which is currently dominating the country's CCTV camera segment, the need for 24hr surveillance is expected to boost sales. The output of this sector reached about 10 million units in 2008, nearly half of the total production of CCTV cameras. It is projected to continue expanding as suppliers release other types, including standard box, dome, speed dome, pan-tilt-zoom or PTZ and IP models.

The supply of speed dome cameras has been rising as well despite earlier setbacks caused by the high technology cost. Because of rising demand, more suppliers, including DVR makers, have been joining the line. Total production in 2008 reached 4 million units, representing 15 to 20 percent of China's CCTV camera output. Many companies are revising their market projections in light of the economic crisis, but remain confident that sales will rise steadily.

China-made speed dome cameras are now widely used in airports, expressways, railways and stadiums. Since most makers concentrate on OEM and ODM business, complying with international standards is a priority. Companies secure UL listing and CE, FCC and RoHS approval.

Mini and pinhole cameras currently

account for only about 10 percent of China's CCTV camera production. IP and wireless units are seen as future trends, but their adoption has remained slow due to the high technology threshold and small demand. Wired analog CCTV cameras continue to dominate supply. Makers estimate the output of wireless versions in 2008 represented less than 3 percent of the total CCTV camera supply at 400,000 to 500,000 sets. These include mostly analog and IP models. To boost the line, companies are improving system reliability and stability. Many are reducing the signal interference while extending the transmission range.

IP cameras currently make up only a small percentage of production, most of which goes to the domestic sector. Suppliers are hoping rising demand overseas for IP-based products will spur the line in China. Projections from the IDC estimate that global IP camera market growth will exceed 40 percent in 2009-10, which translates into 5.13 million units or \$1.93 billion. The research and consulting firm Frost & Sullivan predicts that IP models will overtake CCTV cameras by 2010 to account for about 70 percent of global sales.

In response to slumping sales, especially in the US, suppliers in China are boosting their domestic business while exploring new export destinations. Makers of speed dome cameras, for instance, are targeting Eastern Europe, Southeast Asia, South America and the Middle East. Companies supplying IP cameras are tapping developed markets with an

### Supplier summary

Suppliers surveyed	23
Export sales	\$193.0mn
Export ratio	66%
OEM business	56%
Capacity utilized	63%
Annual R&D spending	\$58.3mn
Full-time employees	5,095

Data: All surveyed suppliers

established broadband infrastructure such as Japan and the EU.

Makers of DVRs are optimistic about domestic and overseas sales because of strong demand. More than 60 percent of companies project at least 30 percent export growth. To stimulate the market, suppliers plan to reduce prices by about 10 percent. They will also develop new software and enhance product functions and features to offer greater value.

Suppliers of both stand-alone and portable DVRs said the shift to the digital surveillance system will sustain growth in China's DVR sector in the next few years. The former is expected to continue leading the mainstream supply despite rising production of hybrid DVRs and network video recorders.

The global NVR market is projected to grow by an average of 36 percent annually for 2006-10, faster than the expansion of the DVR industry. The latter will post 25 percent annual growth for the same period to reach \$2.96 billion by 2010, according to projections from J.P. Freeman.

To boost competitiveness, DVR suppliers are strengthening product development and introducing special applications such as ATM and

### Major customers

#### Company

Beijing Fibridge	Siemens (Germany); Alcatel-Lucent (France); BSNL (India)
E-Tecs	GTN (South Korea); Zaapa (Spain)
YHT	RadioShack (US); Swann (Australia); Maplin (UK)

Data: All surveyed suppliers

## Beijing Fibridge Co. Ltd

Beijing Fibridge has been producing CCTV cameras, CCTV DVRs and CCTV systems since it was established in 1995. The mainland China-owned company exports CCTV and surveillance products to North America, Eastern Europe, South Africa, the EU, the Asia-Pacific region and the Middle East. It plans to increase shipments to Brazil and South Africa in coming months.

CCTV and surveillance products constitute 60 percent of the company's total sales, which reached \$20

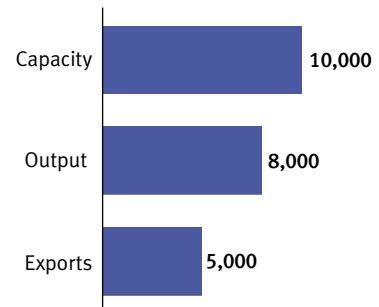
million in 2008. Revenue from exports reached \$8 million and is expected to increase by 10 to 20 percent this year.

Beijing Fibridge makes an average of 8,000 units every month, although it can produce up to 10,000 units monthly. Of the output, 63 percent or 5,000 are exported. OEM orders make up 15 percent of shipments, ODM 5 percent and OBM 80 percent.

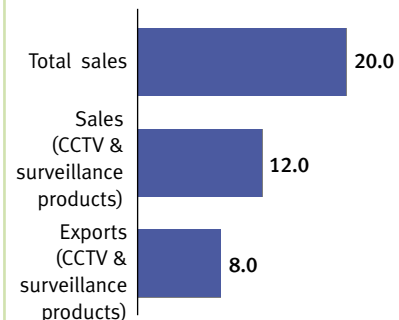
Among its 100 workers are 40 engineers. The company invests 20 percent or \$4 million of its sales in R&D every year.

### Profile

#### Production units/mth



#### Sales \$mn/yr



### Contact details

#### Business contact

GUO Peggy

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#### URL

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www.globalsources.com/fibrbridge.co

#### Address

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Beijing, China

### Company facts

Year established	1995
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Beijing
Number of factories	3
Factory location(s)	Beijing
Total factory area	5,000sqm
No. of full-time employees	100
No. of R&D/design staff	40
No. of QC staff	10
Annual sales (all products)	\$20.0mn
Annual R&D spending	\$4.0mn
ISO certification	Yes

### Sales & output: CCTV & surveillance products

Annual sales	\$12.0mn
Share of total sales	60%
Annual export sales	\$8.0mn
Total monthly capacity	10,000 units
Average monthly output	8,000 units
Capacity utilized	80%
Average monthly exports	5,000 units
Export ratio	63%
OEM % of exports	15%
ODM % of exports	5%
OBM % of exports	80%
Major customers	Siemens (Germany); Alcatel-Lucent (France); BSNL (India)
Other products made	DSL modems, DWDM/WDM/CWDM products, E1/T1 equipment, fiber-optic transmission products and systems

Capability

Production checklist

Cosmetic design	Yes
Mold making	Yes
PCB making/design/ subassembly	Yes
SMT	Yes
Plastic injection	No
Software design	Yes
Silkscreen/offset printing	No
Final assembly	Yes
QC/QA testing	Yes

Exports by product

CCTV cameras	30%
CCTV DVRs	10%
CCTV monitors	—
CCTV systems	60%

Exports by market

North America	5%
European Union	20%
Europe (non-EU)	15%
Asia-Pacific	35%
Middle East	5%
Other	20%

Outlook

- **Export prices**  
Stay the same
- **Export sales**  
Increase 10-20%
- **Target market**  
Brazil, South Africa
- **Capital expenditure**  
No increase
- **Major challenge**  
Price competition
- **Export capability**  
Widen product range
- **R&D focus**  
Network transmission solutions

Popular export models



CCTV camera

Model	F8-CH63
Minimum order	1 unit
Packaging type	Carton
Delivery time	10 days
Indicated price	•

**Description:** 1/3in Super HAD CCD, C/CS lens; 480 TVL, 720x576, 720x288, 352x288-pixel resolution, 25/30fps image rate; H.264, G.726 compression; 64Kbps to 3Mbps; 8Kbps, 16-bit/sample; brightness, contrast, hue, saturation adjustment; 1 video output, 1 alarm input



CCTV system

Model	DVP V.30
Minimum order	1 unit
Packaging type	Carton
Delivery time	10 days
Indicated price	•

**Description:** Synchronous multichannel video; virtual matrix, entire network popedom attempet; transmission storage, realtime surveillance, synchronous backup



CCTV system

Model	FBVAD1000
Minimum order	1 unit
Packaging type	Carton
Delivery time	10 days
Indicated price	•

**Description:** 3 video outputs, 3 video inputs; >15dB return loss; 800mV signal level; 900ps jitter rise/drop time; 75ohm BNC connector

• Information not disclosed

## PRODUCT GALLERY

### CCTV cameras



**Beijing Fibridge**

(profile page 32)

**Model:** F8-CH63

**Minimum order:** 1 unit

**Packaging type:** Carton

**Delivery time:** 10 days

**Indicated price:** •

**Description:** 1/3in Super HAD CCD, C/CS lens; 480 TVL, 720x576, 720x288, 352x288-pixel resolution, 25/30fps image rate; H.264, G.726 compression; 64 to 3,000Kbps; 8Kbps, 16-bit/sample; brightness, contrast, hue, saturation adjustment; 1 video output, 1 alarm input



**Changzhou Minking**

(profile page 34)

**Model:** MG-OF II

**Minimum order:** 10 units

**Packaging type:** Carton

**Delivery time:** 15 days

**Indicated price:** •

**Description:** 1/4in CCD; 480 TVL, 752x582-pixel resolution; 0.7, 0.01lux minimum illumination; 50dB S/N ratio; 0 to 300deg/s pan, 0 to 120deg/s tilt; 360-degree continuous pan, 90-degree tilt; internal or extrinsic synchronization; 1.0Vp-p 75ohm output



**Changzhou Minking**

(profile page 34)

**Model:** MG-TC26I

**Minimum order:** 10 units

**Packaging type:** Carton

**Delivery time:** 15 days

**Indicated price:** •

**Description:** 1/4in CCD, auto/manual focus, auto/manual iris lens; 480 TVL; 0lux minimum illumination; 100m IR range; 100deg/s preset pan, 60deg/s preset tilt; 360-degree continuous pan, 90 to -90-degree tilt



**Changzhou Minking**

(profile page 34)

**Model:** MG-TK35

**Minimum order:** 10 units

**Packaging type:** Carton

**Delivery time:** 15 days

**Indicated price:** •

**Description:** 1/4in CCD, auto/manual focus, auto/manual iris lens; 480 TVL; 0lux illumination; 50dB S/N ratio; 15.625kHz horizontal, 50Hz vertical scanning frequencies; 100deg/s pan, 30deg/s tilt preset speed



**Etong**

(profile page 38)

**Model:** 908G

**Minimum order:** 100 sets

**Packaging type:** Gift box

**Delivery time:** 15 days

**Indicated price:** •

**Description:** Sony CCD, 3.6mm lens; 30 super high-power IR illuminators; 45-degree viewing angle, 430 LOR viewing, 46m range in low light, day/night function; up to 500m transmission range; built-in microphone, USB receiver



**Etong**

(profile page 38)

**Model:** 928G

**Minimum order:** 100 sets

**Packaging type:** Gift box

**Delivery time:** 15 days

**Indicated price:** •

**Description:** 3.6mm lens; 400 TVL color, 430 TVL b/w; 0.5lux color, 0.05lux b/w, 0.0003lux b/w low-light illumination; 30 super high-power IR illuminators; 98-degree viewing angle, night/day function; AGC, auto-BLC

• Information not disclosed

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