

CCTV & Surveillance Products



May 2010

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CCTV & SURVEILLANCE PRODUCTS

Supplier capability in China

EXECUTIVE SUMMARY

China's CCTV and surveillance industry is back on a growth track following a slowdown last year.

Driven by recovering export markets, new and alternative sales strategies and enhanced product lineups, shipments are estimated to grow 10 percent this year to as much as \$4.1 billion.

Optimistic suppliers have resumed investing in R&D and capacity buildup, and are gearing up for intensified marketing in tough target destinations such as the EU.

The general movement is toward high-growth product lines, which are seeing better traction and rapid market uptake.

Cameras, DVRs and integrated systems are leading product expansions and upgrades, emphasizing the segment's gradual shift to digital and adoption of advanced technologies such as IP communication.

The following are the key trends in China's CCTV and surveillance industry:

- Advancements in digital systems, networking, intelligent analysis, high-definition image capture and display are keeping the line dynamic. Makers are launching diverse selections with various add-ons and at all price points to reach a broader client base.

- The improvement of IC designs is enabling more enterprises, including small and midsize makers, to pursue R&D. The development is fueling sales of IP surveillance devices and expanding the supplier base.

- Increasingly available SoC solutions are likewise propelling product development in both front- and back-end systems such as surveillance servers.

- Continuing infrared enhancements are boosting the previously limited night/low-light surveillance section, ushering in a fresh set of makers and releases.

- Enhanced software functionality is paving the way for more total-solution devices in 2010. Many models now feature dual-compression MPEG-4 and H.264, suited to low-bandwidth transmission.

- The government initiated a revitalization of China's overseas business amid the slumping global financial situation by subsidizing manufacturers' marketing efforts abroad. It also stimulated domestic sales by investing in reinforced infrastructure and security installations around the country.

- Suppliers are addressing several setbacks, including the yuan appreciation and rising labor costs. Many are reevaluating their operating efficiency and streamlining processes to enhance export capability and translate savings to additional profit.

This report covers security cameras, DVRs, monitors and other surveillance products.

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

Separate sections on cameras, DVRs and other products expound on current R&D trends and price movements in coming months. Each module details the differences among low-end, midrange and upscale models, and presents comprehensive price guides.

Guangdong province boasts the largest concentration of CCTV and surveillance vendors in the country. The city of Shenzhen, in particular, is a large source of cameras, transmission and switching products, DVRs and monitors.

Other manufacturing bases include the provinces of Zhejiang, Hubei and Jiangsu, and the Beijing-Tianjin area.

In this report

- 32 in-depth company profiles
- 28 additional suppliers
- 125 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 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.

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.

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INDUSTRY OVERVIEW

China's CCTV and surveillance industry is consolidating again after going through a tough 2009. Overseas shipments are estimated to grow about 10 percent this year to between \$3.8 billion and \$4.1 billion. A healthier export climate, makers' aggressive sales efforts and more attractive selections will be the main catalysts.

Companies predict better export performance as conventional key markets regain momentum and new and emerging ones stay robust. To boost foreign trade, suppliers will strengthen their presence in Russia, South America and Southeast Asia while still treating the US and Europe as major destinations.

Purchasing power in some countries stays restricted, even with recovery at hand. A number of makers have therefore revised marketing strategies in some product segments to attract new buyers and retain old customers. Companies in the digital video recorder line, for example, have devised easy payment schemes, giving special rates or shortening delivery time.

Further, companies are focusing on high-growth lines. More advanced products rather than traditional devices will drive growth in the segment in coming months. IP-based security systems, for instance, have picked up speed over the past two years, gaining traction during the recession as other CCTV segments declined.

Likewise, sales of IP surveillance devices are expanding, as is the supplier base. The main reason cited for this is the improvement in IC designs, enabling even small enterprises to pursue short-term low-budget R&D in the line. The segment's share in the total output of CCTV cameras in China remains small but it reflects the global security sector's gradual shift to digital systems.

To support the move to digital, China suppliers are following foreign providers' IC development strategies.

Makers of back-end systems such as surveillance servers are likewise using SoC solutions that are seeping rapidly into the mainstream market as these spur product development in the front end.

Companies predict that progress in digital systems, networking, intelligent analysis, high-definition image capture and display will fuel exports and sales in coming months.

Increased infrastructure investment, especially for China's safe-city project, is also expanding security system installations, thereby fueling the adoption of surveillance in the domestic market.

For maturing sectors such as transmission and switching devices, manufacturers are compelled to explore different approaches to stand out in the burgeoning supplier base. Aside from cutting prices, makers are looking for ways to distinguish their products. A few began offering total solutions.

IR specialists that provide illuminators to IR cameras capitalize on their solid manufacturing and R&D experience to create innovative equipment. Some hold patents for proprietary models and blueprints.

Surviving the crisis

Last year, CCTV and surveillance product exports grew by a meager 5 percent, from over 15 percent in 2008. Revenue was estimated at \$3.5 billion to \$3.7 billion.

CCTV cameras had the largest share, generating \$1.4 billion. Transmission and switching products came second with \$1 billion, followed by monitors with \$500 million, and digital video recorders and servers with \$400 million.

Demand for analog cameras and monitors declined slightly as shipments of PTZ and speed dome models rose 5 percent.

The DVR and DVS segments were still strong but growth rates slid to less than 10 percent.

Supplier summary

Suppliers surveyed	32
Export sales	\$173.4mn
Export ratio	60%
OEM business	56%
Capacity utilized	56%
Annual R&D spending	\$36.5mn
Full-time employees	6,317

Data: All surveyed suppliers

The China government helped revive the export business during the financial slack by subsidizing manufacturers' overseas campaigns to promote their products. The Ministry of Commerce also posted made-in-China ads in major international channels to draw buyers to the country.

The domestic buyer base, stimulated by the local government and makers' intense marketing programs, grew alongside international business.

Yuan appreciation and rising labor costs are still the main challenges for China suppliers. In addition, the country experienced increasing labor shortage when the financial slowdown began to lift in the latter part of 2009. Low manpower resource was most-felt in Guangdong and Zhejiang provinces in early 2010 as a result of the development of other economic zones.

Suppliers are addressing the problem by increasing employees' salaries and benefits, and improving working and living conditions to attract newcomers. Unfortunately, such solutions are also bringing up operational outlay, squeezing some low-profit companies out of the line.

IP drives camera segment

IP surveillance is now the key driver of developments in China's surveillance camera industry. Suppliers expect sales of IP-based units to jump, with CAGR in 2010 reaching 50 percent. The line accounted for nearly 10 percent of all CCTV cameras exported from the country in 2009.

Improvements in IC solutions, which lowered the financial threshold,

Anposi Products Ltd



Established in 1999, the ISO 9001:2000-certified supplier offers various CCTV and surveillance products, including cameras, DVRs and monitors.

Mainland China-owned Anposi operates a 5,000sqm factory in Shenzhen, Guangdong province at 67 percent capacity utilization. It turns out a monthly average of 10,000 units, 75 percent of which are shipped overseas.

Products are sent to Europe, the Americas, the Asia-Pacific region, Africa and the Middle East. ODM orders make up half of exports, with the

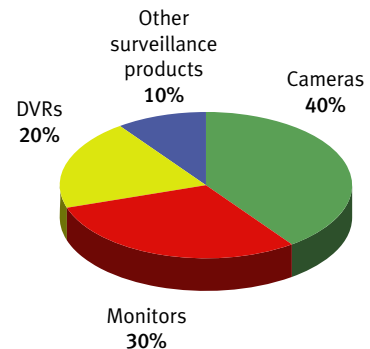
balance comprising OEM, 30 percent and OBM, 20 percent.

The supplier plans to boost outbound sales by 10 to 20 percent in the next 12 months, with the EU as target destination. It will also raise annual capital expenditure by up to 50 percent in the same period.

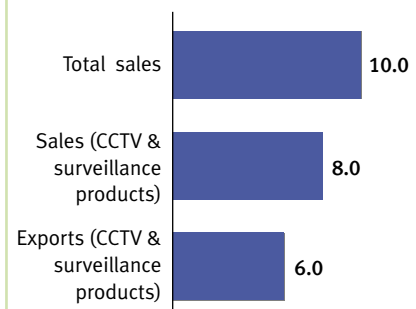
Anposi's workforce totals 250, including 10 QC inspection and testing staff. A 30-member team handles R&D, to which the company devotes 5 percent of annual sales. The maker reinvested \$500,000 in product development last year.

Profile

Products exported



Sales \$mn/yr



Contact details

Business contact

HONG Zhihui

Phone

(86-755) 8202-6098

Fax

(86-755) 8202-6028

E-mail

sales@anposi.com

anposi@globalsources.com

URL

www.anposi.com

www.globalsources.com/anposi.co

Address

2F East of Zhong He Lou, 28 Yitian Garden, Fuqiang Road, Shenzhen, Guangdong, China

Company facts

Year established	1999
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Number of factories	1
Factory location(s)	Shenzhen (Guangdong)
Total factory area	5,000sqm
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: CCTV & surveillance products

Annual sales	\$8.0mn
Share of total sales	80%
Annual export sales	\$6.0mn
Total monthly capacity	15,000 units
Average monthly output	10,000 units
Capacity utilized	67%
Average monthly exports	7,500 units
Export ratio	75%
OEM % of exports	30%
ODM % of exports	50%
OBM % of exports	20%
Other products made	Video door phones; car rear monitors; cameras

Capability

In-house processes

SMT	Yes
PCB assembly	Yes
Cosmetic design	Yes
Software design	Yes
Mold making	Yes
Plastic injection	No
Silk-screen/offset printing	Yes
Reliability tests	Yes
RoHS line	Yes

Exports by product

Cameras	40%
DVRs	20%
Monitors	30%
Other surveillance products	10%

Exports by market

North America	20%
European Union	20%
Europe (non-EU)	30%
Asia-Pacific	10%
Middle East	10%
Other	10%

Survey

- **Export prices**
Increased
- **Export price increase**
5-10%
- **Export sales**
Increase 10-20%
- **Target market**
European Union
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Price competition
- **Export capability**
Improve operating efficiency
- **R&D focus**
Adopt IP communication

Popular export models



Camera

Model	AN380
MOQ	200 units
Packaging	Color box
Delivery	15 days
Price	•

Description: 1/4in Sharp/Sony CCD image sensor; 420 TVL, 500x582, 510x492-pixel resolution; NTSC/PAL; 2:1 interlace scanning system; 1.0Vp-p 75ohm video output; 0.45 gamma; >48dB S/N ratio; 1/50 to 1/1,000s auto-shutter speed; 110/220VAC power



Monitor

Model	CM704
MOQ	200 units
Packaging	Color box
Delivery	15 days
Price	•

Description: 7in 480x240-pixel resolution CCTV monitor; 12VDC input; auto/manual switch; three maximum A/V channels; adjustable switching time, brightness, contrast, color, volume; cable/power supply

• Information not disclosed

PRODUCT GALLERY

Cameras



Anposi
(profile page 34)
Model: AN380
MOQ: 200 units
Packaging: Color box
Delivery: 15 days
Price: •
Description: 1/4in Sharp/Sony CCD image sensor; 420 TVL, 500x582, 510x492-pixel resolution; NTSC/PAL; 2:1 interlace scanning system; 1.0Vp-p 75ohm video output; 0.45 gamma; >48dB S/N ratio; 1/50 to 1/1,000s auto-shutter speed; 110/220VAC power



Ansjer
(profile page 36)
Model: C121118
MOQ: 1 unit
Packaging: White box
Delivery: 10 days
Price: \$30
Description: 1/3 or 1/4in Sony CCD sensor; 420 TVL, 500x582, 510x492-pixel resolution; NTSC/PAL; 24 LEDs, >15m IR distance; 6mm lens; 1/50 to 1/100,000s shutter speed; 1.0Vp-p 75ohm video output; 12VDC, 300mA power supply; ≤3W consumption



Ansjer
(profile page 36)
Model: C211118
MOQ: 1 unit
Packaging: White box
Delivery: 10 days
Price: •
Description: 1/3in Sony Super HAD CCD sensor; 540 TVL, 795x596, 811x508-pixel resolution; NTSC/PAL; 5 to 50mm manual varifocal lens; 0.05lux illumination; >52dB S/N ratio; 1/50 to 1/100,000s shutter speed



Ansjer
(profile page 36)
Model: C214
MOQ: 1 unit
Packaging: White box
Delivery: 15 days
Price: \$46
Description: 1/3in Sony Super HAD CCD sensor; 540 TVL, 752x582, 768x494-pixel resolution; NTSC/PAL; >52dB S/N ratio; 2.5x manual zoom, 3.5 to 8mm lens; 245x110mm, 950g



Ansjer
(profile page 36)
Model: C217
MOQ: 1 unit
Packaging: White box
Delivery: 10 days
Price: \$40
Description: 1/3in Sony Super HAD CCD sensor; 540 TVL, 752x582, 768x494-pixel resolution; NTSC/PAL; >52dB S/N ratio; 5x manual zoom, 2.8 to 12mm auto-aperture lens



Boscom
(profile page 38)
Model: BS-360L
MOQ: 1 unit
Packaging: Color box
Delivery: 3 days
Price: \$92
Description: 1/3in Sony Super HAD CCD sensor; 600 TVL color, 650 TVL b/w resolution; 8 to 22mm varifocal lens; NTSC/PAL; >50dB S/N ratio; motion detection; privacy zones; OSD

• Information not disclosed

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