

Industrial Computers



June 2009 US\$495

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INDUSTRIAL COMPUTERS

Supplier capability in China

EXECUTIVE SUMMARY

China's young industrial computer market is expanding steadily. Although it remains smaller than the mainstream PC segment in terms of output and number of suppliers, rising adoption in the retail, gaming, banking, education and medical sectors is expected to fuel growth in coming years.

Makers are boosting R&D and expanding the application range in preparation for an increase in demand. The selection now includes interactive touchscreen terminals, kiosks, POS systems, and accessories.

In fact, interactive touchscreen terminals, kiosks and POS devices are leading the supply in China and will continue to drive production in the next few years. Their penetration of the retail industry is expected to help spur demand. Worldwide revenue from interactive multimedia kiosks alone is forecast to reach \$2.67 billion by 2013, according to Frost & Sullivan. The number of installed units will total 2.6 million next year at a CAGR of 15 percent.

To grab a larger share of the market, makers in China are leveraging their price advantage. Many are also acquiring the latest technology to catch up with their overseas competitors. Further, they are sharpening in-house capability and cooperating with software developers.

Companies offer turnkey solutions but are also capable of customization services. The bulk of output is exported. High-end products are shipped to the US and Europe, and those in the midrange and entry level go to Asia, South America, the Middle East and Africa. To offset slowing sales in key markets such as the US, several makers are exploring new areas while strengthening their domestic presence.

The following are some of the key trends observed in China's industrial computer industry:

- Prices are expected to make a

downturn under suppliers' efforts to enhance competitiveness and stimulate demand.

- Product development efforts are leaning toward larger displays with touchscreen capability to improve user experience.

- Designs emphasize durability as more industrial computers target outdoor applications.

- Built-in security is enhanced through the integration of encryption, biometrics or other access-control technologies.

- Wired transmission is the mainstream. For certain product lines, wireless connectivity through Bluetooth, infrared or WLAN is being tapped for enhanced connectivity. Access through GSM, CDMA and 3G is also supported.

- In addition to price competition, the high technology threshold and manufacturing costs are makers' biggest challenges this year.

- To reduce outlay, more companies are using locally sourced solutions. Some are developing their own touchscreens.

This report covers industrial computer systems and POS devices. The former includes interactive touchscreen terminals, industrial computers and kiosks, and accessories such as rack mounts and ATM/kiosk keyboards. The POS line consists of integrated systems, handheld terminals, and a range of thermal printers and bar-code scanners.

The Supplier Survey was conducted on manufacturers of these devices. The Industry Overview discusses developments in China's market and makers' strategies to broaden the young line. Trends in the different categories are discussed in the product modules.

Suppliers are based in the provinces of Guangdong, Jiangsu, Hubei and Zhejiang, and the cities of Beijing and Shanghai. These include local players and Taiwan-invested companies.

In this report

- 15 in-depth company profiles
- 8 additional suppliers
- 47 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

Compared with the mainstream PC market, China's industrial computer industry is small and young, with most suppliers joining only in recent years. Many do not expect a major upswing in demand and sales in the months ahead primarily because of the high price. The broadening product and application range, however, indicates that technology is improving and R&D work is gaining steam.

The interactive touchscreen terminal, kiosk and POS segments, in particular, are making significant headway. Global shipments of touchscreen operator terminals will exceed 2 million units by 2012, more than double the volume in 2006, according to IMS Research. Trends will move toward larger displays in line with efforts to enhance user's viewing and interacting experience. With this in mind, makers in China see continued growth, buoyed by maturing technology and expanding applications.

Kiosks' penetration of the retail industry bodes well for the sector. Companies in China are raising their R&D investment in preparation for a demand surge. Projections by Frost & Sullivan place global revenue from interactive multimedia kiosks at \$2.67

billion by 2013. In terms of volume, Summit Research estimated that the number of kiosks installed around the world will hit 2.6 million units next year at a CAGR of 15 percent.

The rising adoption of easy-payment systems is fueling demand for POS products, which are now widely used in the retail industry. They have also started penetrating the gaming, banking, education and medical segments. Makers said business benefits on the user side resulting from increased efficiency and control over operations will further spur interest in POS equipment, including systems and handheld versions. In China's domestic market alone, data from China UnionPay indicates there were more than 1.6 million financial POS machines, 150,000 ATMs and over 1 million merchants accepting UnionPay cards as of end-September 2008.

Rising demand overseas will also fuel production expansion in the industrial computer and POS accessories segments. Makers of the former project a 5 percent increase in output this year. Many are optimistic their price advantage will help them

Supplier summary

Suppliers surveyed	15
Export sales	\$46.4mn
Export ratio	64%
OEM business	41%
Capacity utilized	51%
Annual R&D spending	\$7.0mn
Full-time employees	4,166

Data: All surveyed suppliers

grab a larger slice of the export market. Companies offering POS accessories see supply rising by at least 10 percent in 2009.

The bulk of China's output is shipped overseas. High-end touchscreen terminals, industrial computers, multimedia kiosks, embedded-board computers and POS systems are shipped to the US and Europe. For most midrange and all entry-level POS products and kiosk keyboards, the destinations are Asia, South America, the Middle East and Africa.

Growing pains

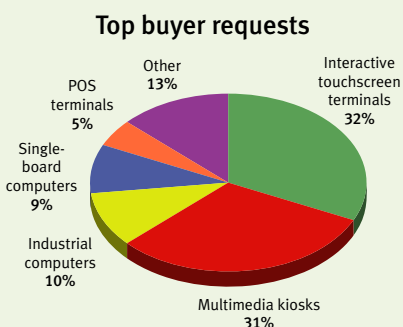
The main hurdles for makers in China are the high technology threshold and manufacturing costs. Suppliers admit they have yet to match the advances of their overseas rivals, particularly

Global Sources online metrics

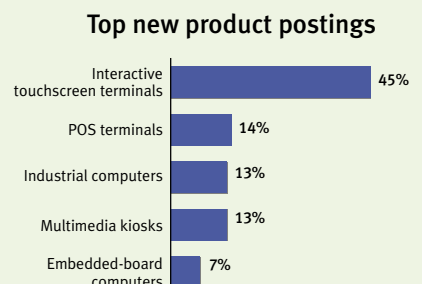
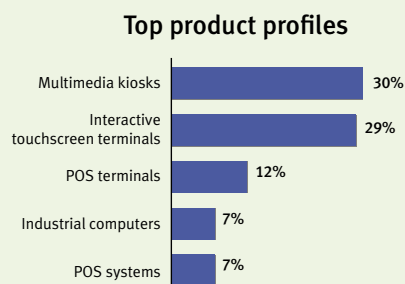
Industrial computer systems

Online metrics are taken from buyer and supplier activity in the featured product group on www.globalsources.com in the month preceding publication of this update.

- **Buyer requests** track total inquiries from our worldwide community of more than 750,000 buyers.
- **Product profiles** represent the total number of unique products available from suppliers in our online catalogs.
- **New product postings** indicate the number of new product profiles added by suppliers during the period.



Percent of all online activity for this product group



Beijing Spirit Technology Development Co. Ltd

POS accessories account for nearly half of Beijing Spirit's total annual sales. Revenue from the line reached \$12.5 million in 2008, with \$2.2 million coming from exports.

The company can manufacture up to 12,000 POS accessories in its factory in Beijing, but only 11,500 units are actually produced. Seventeen percent of the output is sent to North America, the EU, non-EU countries, the Asia-Pacific region and the Middle East.

Accessories carrying the company's SPRT brand account for the bulk of

shipments with a 65 percent share. OEM orders make up 30 percent of exports, while ODM take up the rest.

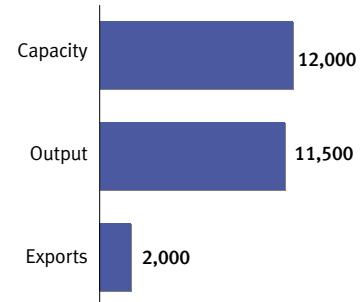
About 160 employees run operations at Beijing Spirit. A team of 16 is in charge of product development. About 2 percent of total sales, or \$430,000, is allocated for R&D projects every year.

Beijing Spirit plans to increase its annual capital expenditure by up to 50 percent. Export sales are also expected to rise by more than 20 percent, with the Asia-Pacific as the target market.

Profile

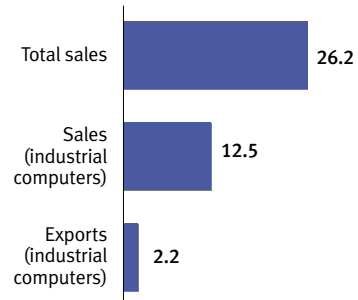
Production

units/mth



Sales

\$mn/yr



Contact details

Business contact

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Address

26 Avenue 4, Chuangye Middle Road, Shangdi Information Industry Park, Beijing, China

Company facts

Year established	1999
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Beijing
Number of factories	1
Factory location(s)	Beijing
Total factory area	1,400sqm
No. of full-time employees	160
No. of R&D/design staff	16
No. of QC staff	18
Annual sales (all products)	\$26.2mn
Annual R&D spending	\$430,000
ISO certification	Yes

Sales & output: Industrial computers

Annual sales	\$12.5mn
Share of total sales	48%
Annual export sales	\$2.2mn
Total monthly capacity	12,000 units
Average monthly output	11,500 units
Capacity utilized	96%
Average monthly exports	2,000 units
Export ratio	17%
OEM % of exports	30%
ODM % of exports	5%
OBM % of exports	65%
Other products made	Printers, LCD modules

Capability

Production checklist

Cosmetic design	Yes
PCB making/design/ subassembly	Yes
Mold making	No
Plastic injection	No
SMT	No
QC/QA testing	Yes

Exports by product

Industrial computer systems	—
POS products	—
Industrial computer accessories	—
POS accessories	100%

Exports by market

North America	20%
European Union	3%
Europe (non-EU)	2%
Asia-Pacific	60%
Middle East	10%
Other	5%

Survey

- **Export prices**
Decreased
- **Export price decrease**
More than 15%
- **Export sales**
Increase more than 20%
- **Target market**
Asia-Pacific
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Price competition
- **Export capability**
Reduce production costs
- **R&D focus**
Improve cosmetic design

Popular export models



POS accessory

Model	POS90
Minimum order	50 units
Packaging type	Carton
Delivery time	3 days
Indicated price	\$180

Description: Thermal printer; 250mm/s printing speed; 8 dots/mm or 576 dots/line resolution; 72mm print width, 79.5mm paper width, 0.06 to 0.07mm thickness; ANK, GB18030 character sets; 12x24 ANK, 24x24 Chinese font sizes; ESC/POS emulation; Windows 98, 2000, NT, XP



POS accessory

Model	POS58
Minimum order	100 units
Packaging type	Carton
Delivery time	5 days
Indicated price	\$50

Description: Thermal printer; 70mm/s or 20 lines/s printing speed; 8 dots/mm or 384 dots/line resolution; 48mm print width, 57.5mm paper width, 0.06 to 0.07mm thickness; IBM character set II, GB2312-80 character sets; 12x24 ANK, 24x24 Chinese font sizes; 32 characters



POS accessory

Model	POS88IV
Minimum order	100 units
Packaging type	Carton
Delivery time	5 days
Indicated price	\$125

Description: Thermal printer; 250mm/s printing speed; 8 dots/mm or 576 dots/line resolution; 72mm print width, 79.5mm paper width, 0.06 to 0.07mm thickness; ANK, GB18030 character sets; 12x24 ANK, 24x24 Chinese font sizes; 42 characters per line; ESC/POS emulation

PRODUCT GALLERY

Industrial computer accessories



Foshan Zhongchang

(profile page 32)

Model: 4UC

Minimum order: 100 units

Packaging type: Carton

Delivery time: 14 days

Indicated price: •

Description: 19in rack-mount 4U chassis; 3.5in floppy disk drive, 3 5.25in, 7 3.5in HDD bays; 7 expansion slots; full-size ATX motherboard; 2 8cm fans; 2 optional USB 2.2 ports; removable/washable air filter; 1 to 1.2mm-thick SECC steel black housing



Foshan Zhongchang

(profile page 32)

Model: 2U646B

Minimum order: 100 units

Packaging type: Carton

Delivery time: 14 days

Indicated price: •

Description: 19in rack-mount 2U chassis; 5.25in and 3.5in floppy disk drive, 6 3.5in HDD bays; 5 expansion slots; full-size ATX motherboard; 4 8cm fans; optional USB 2.2 port; 2U standard power supply; black or white 1 to 1.2mm-thick steel housing



Foshan Zhongchang

(profile page 32)

Model: A-5

Minimum order: 100 units

Packaging type: Carton

Delivery time: 14 days

Indicated price: •

Description: Computer case; 5 3.5in HDD bays; 11 5.25 and 3.5in drive frames; 7 PCI expansion slots; 12x9.6in motherboard; 0 to 50 C operating temperature, 5 to 95 percent humidity; power/reset system; light indicators; 0.4W loud hailer input



Key Technology

(profile page 36)

Model: K-TEK-M390TP-KP-FN-DT

Minimum order: 1 unit

Packaging type: Neutral packaging

Delivery time: 15 days

Indicated price: •

Description: Kiosk keyboard; 108 protruding keys, 12x13mm normal keys, 23.4x13mm enter key, 68x13mm space bar; >10 million key hits, maximum 1016m/s tracking speed, 0.8±0.1N actuation force for normal keys, 1.6±0.1N for enter key; PS/2 or USB port



Key Technology

(profile page 36)

Model: K-TEK-A343TB-DT

Minimum order: 1 unit

Packaging type: Neutral packaging

Delivery time: 15 days

Indicated price: •

Description: Kiosk keyboard; 66 protruding keys, 38mm stainless steel or hardened resin ball, 14x14mm normal keys, 14x28mm enter key, 14x100mm space bar; braille keys available; >10 million key hits, 0.6±0.1N actuation force for normal keys



Key Technology

(profile page 36)

Model: K-TEK-A361TP

Minimum order: 1 unit

Packaging type: Neutral packaging

Delivery time: 15 days

Indicated price: •

Description: Kiosk keyboard; 66 protruding keys; braille keys available; >10 million key hits, maximum 1016m/s tracking speed, 0.6±0.1N actuation force for normal keys, 1.2±0.1N for enter key; PS/2 or USB port

• Information not disclosed

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