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# Industrial Computers



February 2010    US\$495

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# INDUSTRIAL COMPUTERS

## *Supplier capability in China*

### EXECUTIVE SUMMARY

China's industrial computer industry will continue to expand steadily as suppliers match widening applications in the retail, gaming and banking sectors. Rising adoption in other segments, including telecom, medical and education, is likewise creating opportunities for makers to broaden reach and boost export sales.

Overseas shipments are projected to increase, especially in the kiosk and POS product lines, where orders are starting to rebound. In addition to the positive outlook spurred by stabilizing economies worldwide, potential growth in emerging markets is generating momentum. The renewed confidence is reflected in the growing number of companies that are shifting focus from domestic to international business.

But even with export ratios climbing, most suppliers have moderate production targets. This is because many expect demand growth to slow down due to a sluggish replacement sector. Industrial computers are designed to last longer than PCs and withstand harsh environments, so orders for upgrades and substitutes will not likely be high.

Still, some makers, particularly in the POS system and accessories industry, are looking to raise output this year. Several accessory specialists see a 15 to 20 percent increase.

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

- Prices have largely remained steady in recent months. In some product categories, climbing costs have compelled makers to raise quotes.
- Increasing emphasis on overseas business is prompting companies to improve production efficiency. Toward this end, a number of players are setting up new factories or manufacturing lines.
- Suppliers are broadening selections under efforts to widen

both application and user base. Manufacturers specializing in industrial computers, for example, are offering models for expressway, medical, telecom, financial, computer telephony integration, network control, and even IPTV and HDTV setups.

- Strengthening customization capability continues to top makers' agenda but boosting R&D on feature upgrades independent of buyer specifications will be given attention as well. Most innovations will revolve around enhancing display quality and security functions. Some will focus on developing new cosmetic designs.

- Companies riding the "green" trend are highlighting low power consumption in their latest releases.

- The EU remains the primary export destination. Many makers will also be expanding their reach in North America and non-EU countries.

- Price competition, strict overseas standards and fluctuating exchange rates are the biggest hurdles for suppliers in China.

This report covers the major types of industrial computers, POS products and accessories manufactured in China. The products are discussed in separate sections that detail common features and functions found in mainstream models. Price and R&D trends are also included.

The Industry Overview discusses developments in this line in China, including growth opportunities in coming months. It identifies the factors shaping the segment.

The majority of China's more than 200 manufacturers are based in Guangdong province, where makers leverage an established supply chain for components, materials and third-party service providers. Smaller concentrations of companies can be found in the provinces of Jiangsu, Hubei and Zhejiang, and Beijing and Shanghai.

### In this report

- 17 in-depth company profiles
- 74 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. 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

Broadening applications worldwide are fueling growth in China's industrial computer industry. In addition to the retail, gaming and banking sectors, products are establishing a foothold in the medical, telecom and education fields.

The increasingly diversified user base is encouraging makers to continue investing in upgrades even though many anticipate the upswing will be slower than initially projected. This will nevertheless enable them to widen market reach, which can then help in establishing brand recognition internationally and boost sales.

The last in particular is aligned with most companies' target of expanding overseas business. Many suppliers of industrial computers are looking to raise export ratio from 15 to 20 percent. Those specializing in POS products and accessories are likewise bolstering outbound shipments to take advantage of climbing demand in emerging markets and escape tightening competition in the domestic field.

Export targets are geared to match the anticipated upswing in orders, especially as economies recover from

the recent global downturn. In the kiosk industry, for example, worldwide adoption is projected to grow at a 15 percent CAGR, according to Summit Research. In terms of volume, this translates to 2.6 million installations this year from 1.7 million in 2007.

Among various types available, it is interactive units that are experiencing a steady upturn, which is expected to continue through 2013. The most notable development in the past five years has been in retail applications. Their forecast share is 42 percent of total kiosks used between 2004 and 2014, according to Kiosk Marketplace.

The export boost and resulting heightened R&D will generate momentum for the line amid moderate output projections. The pace of demand growth is expected to slow down a bit due to a weakened replacement market. This is because industrial computers are generally built to last longer than desktop or notebook PCs. They are designed to withstand harsh environments and configurations such as ATMs and kiosks are equipped to run nonstop.

In anticipation of reduced orders in

### Supplier summary

Suppliers surveyed	17
Export sales	\$69.6mn
Export ratio	56%
OEM business	41%
Capacity utilized	56%
Annual R&D spending	\$30.6mn
Full-time employees	7,548

Data: All surveyed suppliers

some key markets where installations are still in top condition, many manufacturers redefined production targets. Several intend to retain current volume levels to avert a glut. It is mostly POS device and accessory suppliers that are eyeing a higher turnout. A few from the latter segment are setting their sights on a 15 to 20 percent climb this year.

For many companies, the emphasis is on improving production capability and efficiency rather than increasing output. To achieve this objective, several are investing in new factories or adding manufacturing lines. A number are seeking additional subcontracting partners under efforts to manage orders and overhead better.

Some makers of self-service kiosks maintain separate R&D, sales

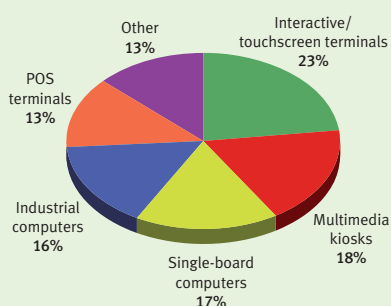
### Global Sources online metrics

#### Industrial computer systems

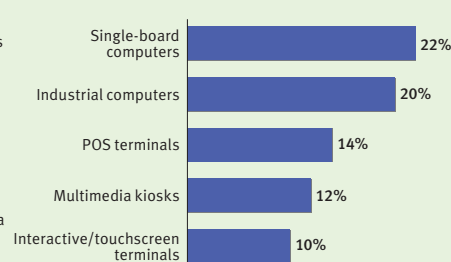
Online metrics are taken from buyer and supplier activity in the featured product group on www.globalsources.com in the month preceding publication of this update.

- **Buyer requests** track total inquiries from our worldwide community of more than 850,000 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.

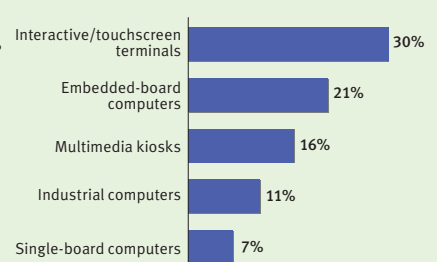
#### Top buyer requests



#### Top product profiles



#### Top new product postings



Percent of all online activity for this product group

### Citaq Co. Ltd

Citaq specializes in POS products and accessories, which account for 100 percent of its business. Last year, sales reached \$9 million, with \$3.3 million coming from exports. The major overseas destinations are the EU and the Asia-Pacific region. Shipments also go to South Africa, North America, non-EU countries and the Middle East.

With the EU as the primary market, sales from foreign trade are projected to increase by more than 20 percent in the next 12 months.

Manufacture is conducted in a 5,000sqm factory in Shantou,

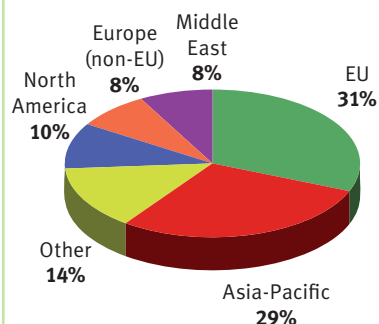
Guangdong province. The facility can turn out 4,000 sets of POS products and accessories every month. One-third is actually produced, 36 percent of which is shipped abroad.

Cosmetic design, software development and shock/vibration testing are conducted in-house. The supplier designs its own molds but mold making is done by partner companies. PCB assembly, SMT and plastic injection molding are also subcontracted.

Citaq won various iF Product Design Awards from 2005 to 2009, one of which is for its thermal printer.

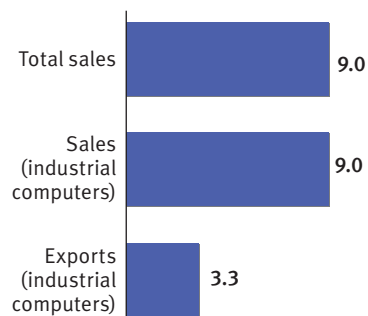
#### Profile

##### Export markets



##### Sales

\$mn/yr



##### Contact details

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###### Address

13F Chuangye Building, 6 Keji Middle Road, Hi-Tech Zone, Shantou, Guangdong, China

#### Company facts

Year established	1996
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shantou (Guangdong)
Number of factories	1
Factory location(s)	Shantou (Guangdong)
Total factory area	5,000sqm
No. of full-time employees	150
No. of R&D/design staff	25
No. of QC staff	12
Annual sales (all products)	\$9.0mn
Annual R&D spending	\$900,000
ISO certification	Yes

#### Sales & output: Industrial computers

Annual sales	\$9.0mn
Share of total sales	100%
Annual export sales	\$3.3mn
Total monthly capacity	4,000 sets
Average monthly output	1,300 sets
Capacity utilized	33%
Average monthly exports	470 sets
Export ratio	36%
OEM % of exports	—
ODM % of exports	20%
OEM % of exports	80%

### Capability

#### In-house processes

Cosmetic design	Yes
PCB assembly	No
Mold making	No
Plastic injection	No
SMT	No
Shock/vibration testing	Yes
Software development	Yes

#### Exports by product

Industrial computer systems	—
Industrial computer accessories	—
POS products	80%
POS accessories	20%

#### Exports by market

North America	10%
European Union	31%
Europe (non-EU)	8%
Asia-Pacific	29%
Middle East	8%
Other	14%

### Survey

- **Export prices**  
Stayed the same
- **Export sales**  
Increase more than 20%
- **Target market**  
European Union
- **Capital expenditure**  
Increase up to 50%
- **Major challenge**  
Stricter overseas standards
- **Export capability**  
Increase staff training
- **R&D focus**  
Improve security

### Popular export models



#### POS product

Model	Opoz8000
MOQ	10 sets
Packaging	Carton
Delivery	7 days
Price	\$785

**Description:** Touchscreen POS terminal; Intel Celeron M 1.5GHz CPU; 2.5in 160GB SATA HDD, 1GB DDR2 onboard memory; 15in TFT LCD, 1024x768-pixel resolution; 5-wire resistive touchscreen; 10/100Mbps Ethernet LAN; four serial, one parallel, three USB 2.0, one PS/2, one VGA, one LVDs ports; CCC, CE, FCC



#### POS product

Model	Opoz5000
MOQ	10 sets
Packaging	Carton
Delivery	7 days
Price	\$643

**Description:** Touchscreen POS terminal; Intel Celeron M 1.5GHz CPU; 2.5in 160GB SATA HDD, 1GB DDR2 onboard memory; 15in TFT LCD, 1024x768-pixel resolution; 5-wire resistive touchscreen; 10/100Mbps Ethernet LAN; two serial, one parallel, three USB 2.0, one PS/2, one VGA, one LVDs ports; CCC, CE, FCC



#### POS product

Model	Opoz3000
MOQ	10 sets
Packaging	Carton
Delivery	7 days
Price	\$780

**Description:** All-in-one POS terminal; Intel Celeron M 1.5GHz CPU; 3.5in 160GB SATA HDD, 1GB DDR2 onboard memory; 10.4in TFT LCD, 800x600-pixel resolution; VFD customer display; 100-key QWERTY keyboard, 64 programmable keys; 80mm high-speed thermal printer; 10/100Mbps Ethernet LAN; CCC, CE, FCC

## PRODUCT GALLERY

### Industrial computer accessories



**Evoc**  
(profile page 34)  
**Model:** CPC-8403  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 25 days  
**Price:** •  
**Description:** 19in CompactPCI rack-mount 4U chassis; 6U 5-slot H.110 CPCI backplane; one SAS/SATA HDD bay, one 5.25in CD-ROM bay, three 3.5in drives; ATX power supply; 0 to 50 C operating, -20 to 60 C storage temperatures; CE, RoHS



**Key Technology**  
(profile page 38)  
**Model:** K-Tek-M410TB-KP-FN  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 12 days  
**Price:** •  
**Description:** Industrial membrane keyboard with trackball; 108 keys; metal dome key switch technology; 0.45mm key travel; 3 million keystrokes; 10 million trackball presses; 1N actuation force; PS/2, optional USB ports; -20 to 50 C operating temperature



**Key Technology**  
(profile page 38)  
**Model:** K-Tek-B107R-OTB  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 12 days  
**Price:** •  
**Description:** Stainless steel optical trackball; three mouse keys; 2mm key travel; 38mm epoxy resin ball; 10 million key switch life span; 10 million trackball revolutions; PS/2, optional USB ports; 5VDC power supply; top panel mounting; IP68 rating



**Key Technology**  
(profile page 38)  
**Model:** K-Tek-M380TB  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 12 days  
**Price:** •  
**Description:** Stainless steel keyboard; 71 keys; carbon-on-gold key switch technology; protuberant rectangular keys; 2mm key travel; 10 million actuations; polymer actuator/key material; PS/2, optional USB ports; 5VDC power supply; 380x108mm front panel



**Key Technology**  
(profile page 38)  
**Model:** K-Tek-B392TB-KP  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 12 days  
**Price:** •  
**Description:** Stainless steel keyboard; 81 keys; gold-on-gold key switch technology; plain/nonprotuberant rectangular keys; laser-engraved, etched and Braille keys available; 5 million keystrokes; 2N actuation force; PS/2, optional USB ports; 5VDC power supply



**Key Technology**  
(profile page 38)  
**Model:** K-Tek-A361TB  
**MOQ:** 1 unit  
**Packaging:** Box  
**Delivery:** 12 days  
**Price:** •  
**Description:** Stainless steel keyboard; 66 keys; carbon-on-gold key switch technology; protuberant rectangular keys; 2mm key travel; laser-engraved, etched and Braille keys available; 10 million keystrokes; 6N actuation force; PS/2, optional USB ports

• Information not disclosed

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