

Asia Pacific Biometrics Market

The New Wave of Biometrics

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F R O S T & S U L L I V A N

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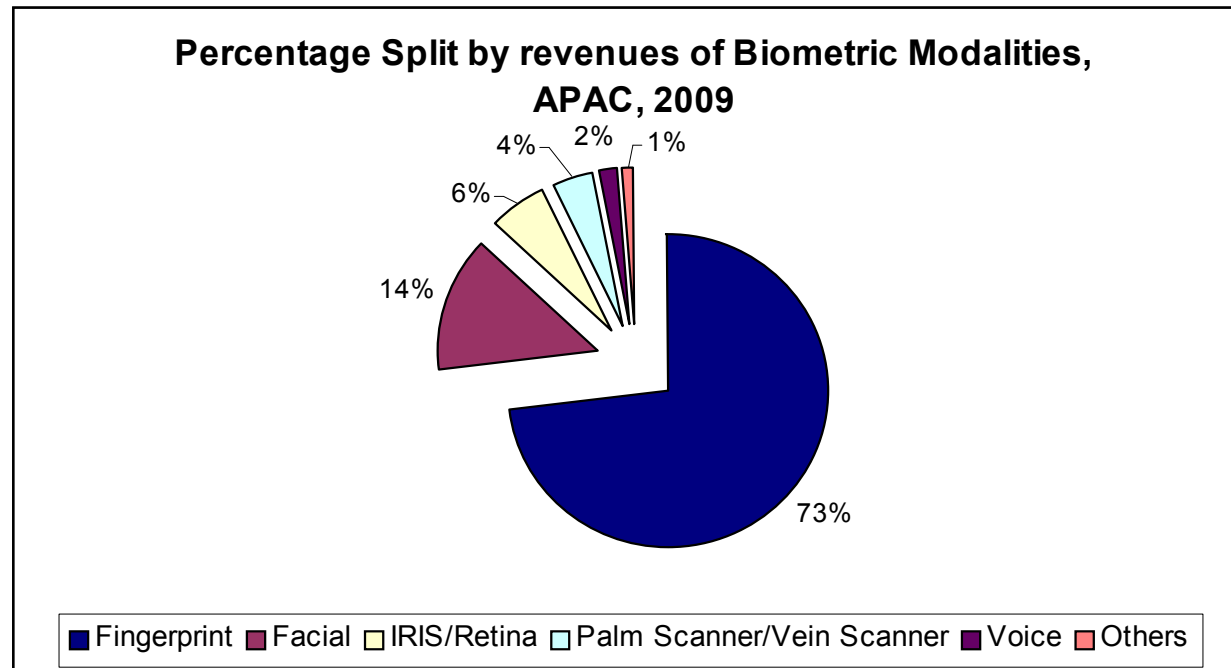
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Overview of the Asia Pacific Biometrics Market



Source : Frost & Sullivan

Fingerprint continues to be the most dominant modality in biometrics.

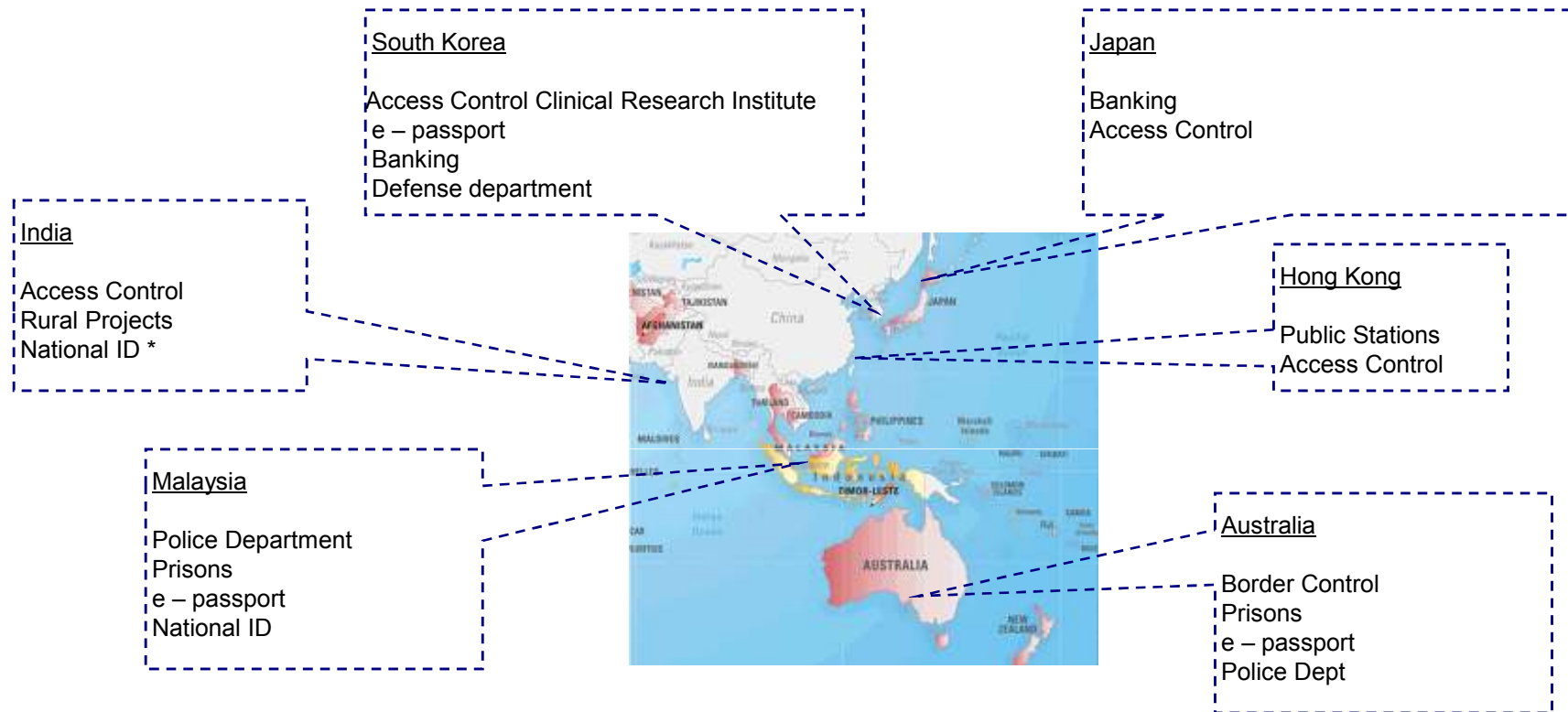
Ergonomics of device playing a decisive role.

Fingerprint continues to be the most dominant modality in biometrics.

Development in IP technology aiding growth of biometrics.

Development in data and voice lines aiding growth of voice biometrics.

Projects Providing Growth



Government projects have been the most stable especially during the peak of the economic recession.

Various nations are in the stages of implementing a national ID project.

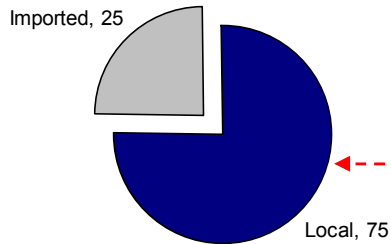
With heightened security threats, border control is also becoming essential.

With IP technology now becoming prevalent, facial recognition software is being used considerably.

Source : Frost & Sullivan

Getting to the Market

Local Vs Imported Units Split APAC, 2009



- Own Algorithms
- Customized Designs
- More Cost Effective
- On par with international standards

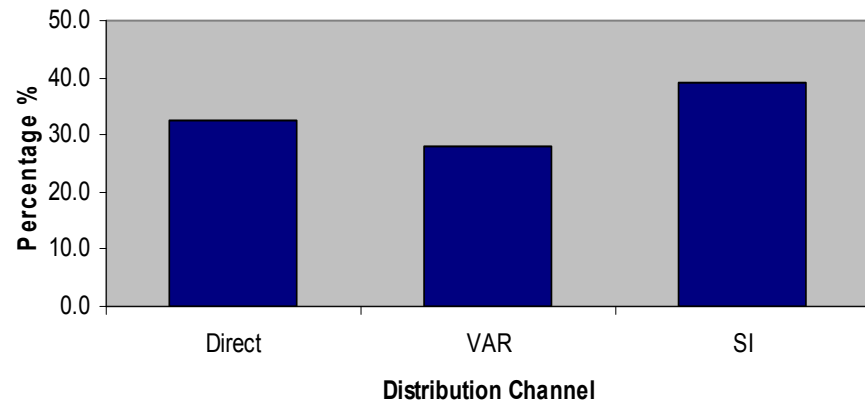
Top local biometric vendors in the market employ 3 main channels of distribution i.e Direct, VAR and SI.

65 – 70 percent of the top biometric vendors rely significantly on the SI channel of distribution.

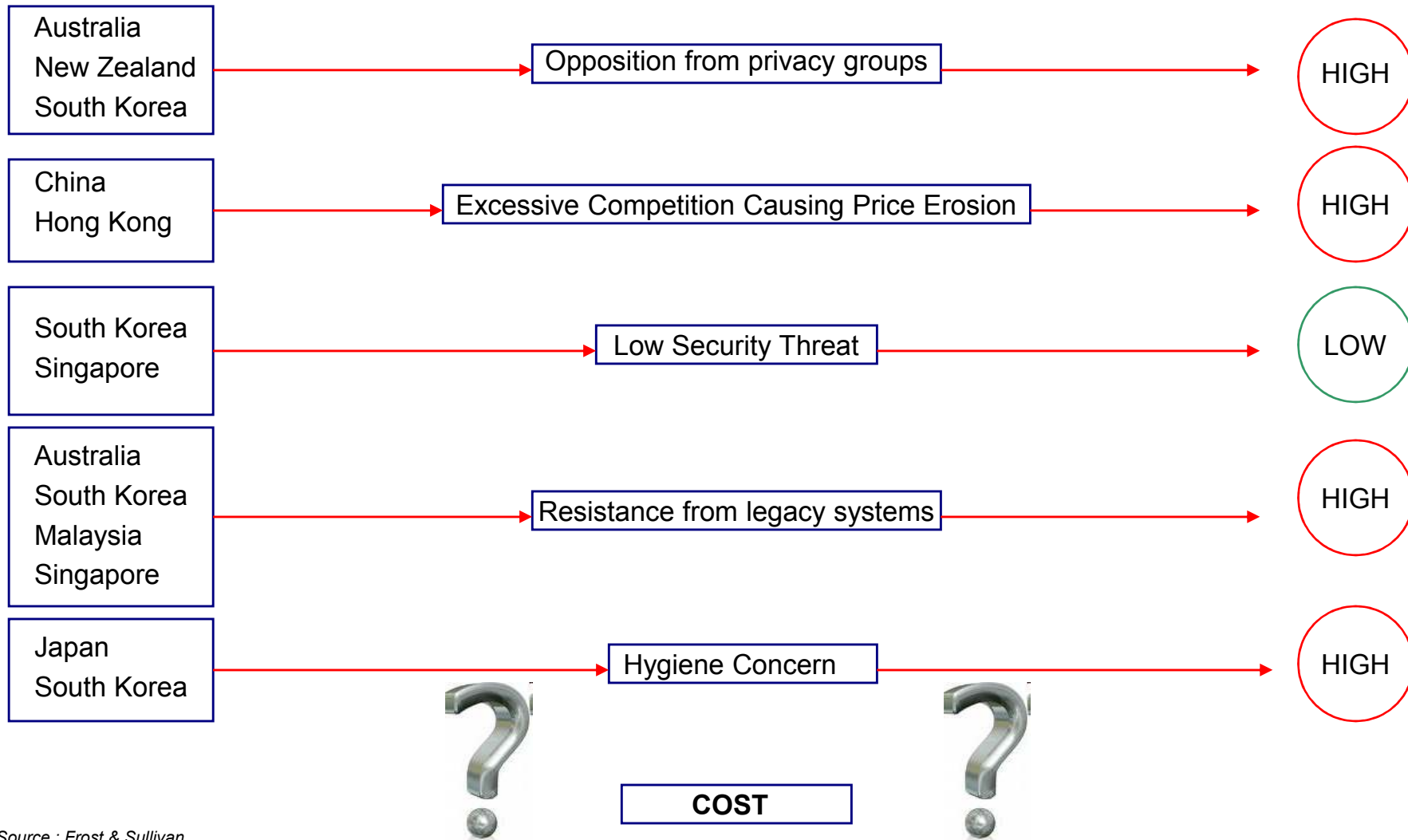
On an average, less than 25 percent of market participants employ more than 20 percent of their distribution channels for direct distribution.

Source : Frost & Sullivan

Average Percentage of Distribution Channel for Company X APAC, 2009

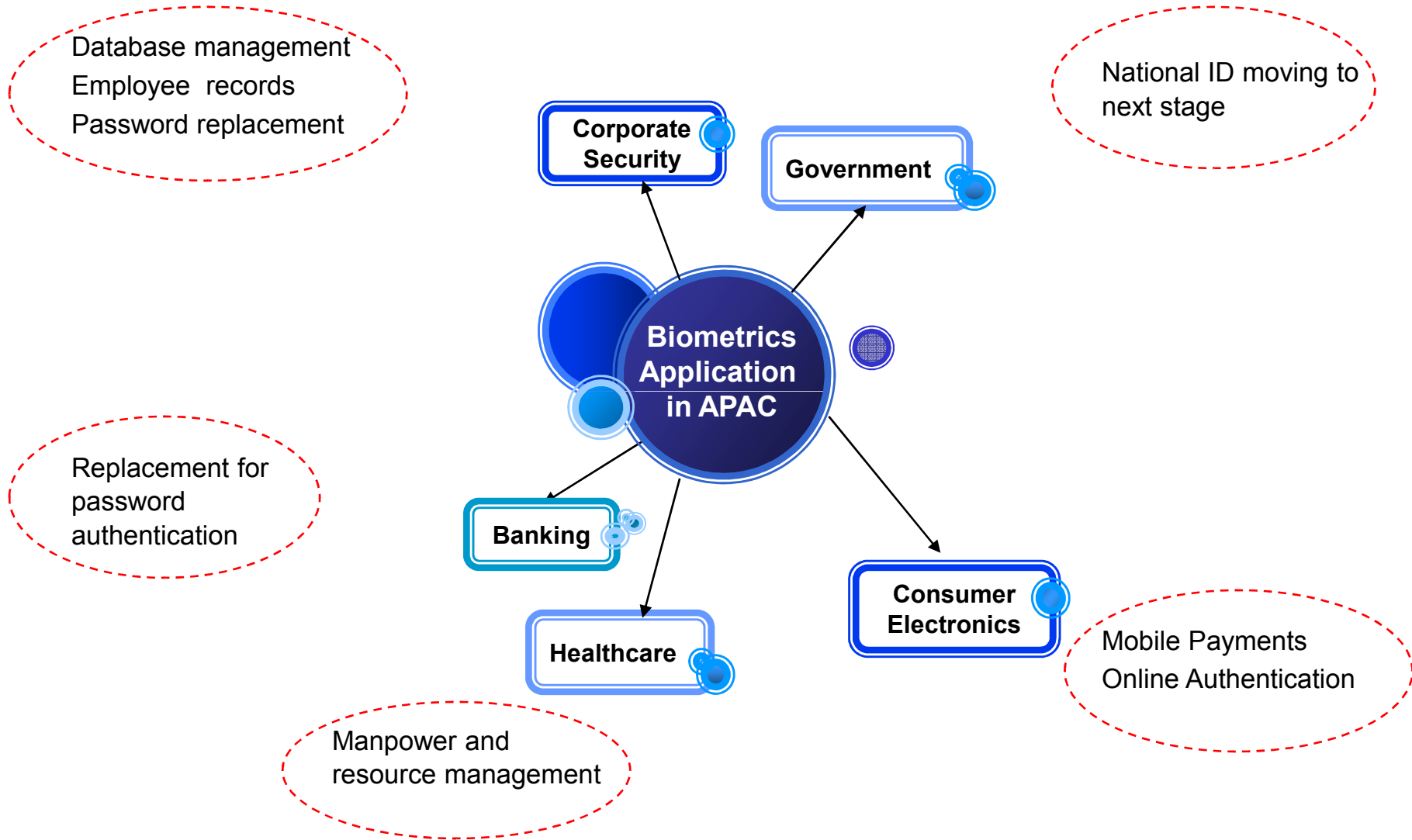


Challenges



Source : Frost & Sullivan

What Next?



Best Practices

Large number of markets still untapped

Vast area of APAC is not hindered by privacy concerns



Technology can be coupled with smart cards

Continue penetrating through SI s



Success stories in government vertical
Will translate to other verticals

Cost no longer the absolute factor

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Data provided	Markets analyzed
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Unit Shipment & Revenue Forecasts	Finger-scan
Product Forecasts	Hand and finger geometry
Regional Forecasts	Iris recognition
Pricing Trends and Analysis	Retina recognition
Value Chain Analysis	Voice recognition
Market and Technology Trends	Face recognition
Competitive Analysis	Signature verification
Competitor Market Share	Total biometrics
Strategic Recommendations	Other Auto ID & Security technologies

Biometrics Institute Subscription Services (cont)

The reports have been researched and written by biometrics analysts at international market consulting company, Frost & Sullivan (www.frost.com).

Founded in 1961, Frost & Sullivan has around a 1,700 consultants across 36 offices around the globe. The company monitors, reports and consults across a variety of industry sectors.

Active participants of the Biometrics Institute who sign-up to the subscription will be provided 24x7 access to a web portal that contains the entire database of biometrics market research reports from Frost & Sullivan.

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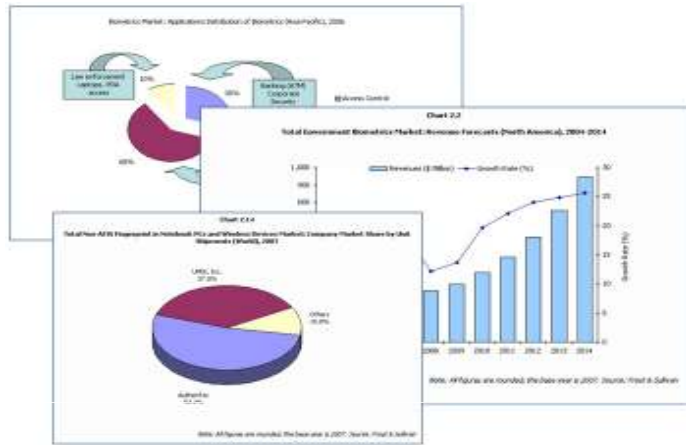
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A\$2,995 plus GST for large companies (greater than 10 employees worldwide).

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Sample Data



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- European Biometrics Market
- World RFID Middleware Market
- European Video Surveillance Camera Markets
- World RFID Middleware Market
- North American Intrusion and Perimeter Protection Markets
- Eastern European Security Market - Russia Specific
- Asia Pacific RTLS Market
- APAC Biometrics Market
- APAC Video Surveillance Market
- South East Asia and ANZ RFID
- Mass Serialisation in the European Pharmaceutical Industry
- Physical Security for Transportation and Mass Transit Markets
- 360 Degree CEO Perspective of the Global Security Industry

Recent Existing Reports

- South African Market for Access Control: Analysis by Technology Market Sep 09
- Opportunities in the World Mobile Video Surveillance Market Sep 09
- South African Security Systems and Services Market: An Analysis of the Top Five Vertical Industries Sep 09
- European Security Convergence Market Jul 09
- Indian Surveillance and Screening Market Jul 09
- EMEA Biometrics Market Jul 09
- North American RFID Market Jun 09
- Profiles of Local Companies in the RFID Value Chain in Selected APAC Countries Jun 09
- Asia Pacific RFID Market Jun 09
- Asia Pacific Electronic Access Control Systems Market Apr 09
- Biometrics Market - Surviving the Global Recession Mar 09
- Technology Analysis of Global Biometrics & Identity Management Solutions (Technical Insights) Dec 08
- North American Government Biometrics Markets Dec 08
- Electronic Physical Security in Banking and Financial Institutions Nov 08
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- World Video Content Analytics (VCA) Markets Sep 08
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- Standardization and Technology Optimization Trigger Growth in the Asia Pacific RFID Inlays Market Jul 08
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- World Dynamic Signature Verification Markets Mar 08
- Asia Pacific Active Tags Markets Jan 08
- Convergence of Physical Security with IP in the European Markets Dec 07

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