

## **“RFID Forecasts, Players and Opportunities: 2009-2019”**

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## Summation of extensive research

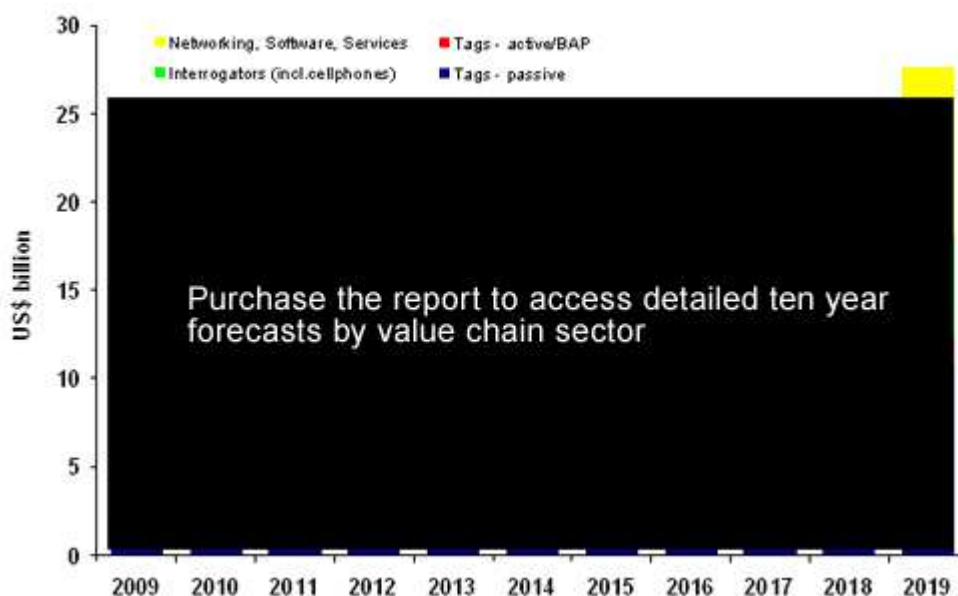
This report is the summation of extensive research including interviews with RFID adopters and solution providers in the various applicational RFID markets, giving an unprecedented level of insight into the total RFID industry and what is really happening.

Purchasers receive an electronic PDF and (optional) printed copy of this report, a separate functional spreadsheet of the forecasts, and access to report updates throughout the year.

In 2009 the value of the entire RFID market will be \$5.56 billion, up from \$5.25 billion in 2008. This includes tags, readers and software/services for RFID cards, labels, fobs and all other form factors. By far the biggest segment of this is RFID cards, and \$2.57 billion of the total \$5.56 billion being spent on all other forms of RFID - from RFID labels to active tags.

The tagging of pallets and cases as demanded by retailers (mostly in the US) will use approximately 225 million RFID labels in 2009, but we see take off in retail outside mandates, such as from Marks & Spencer and American Apparel, where 200 million tags will be used on apparel in 2009. RFID in the form of tickets used for transit will demand 350 million tags in 2009. The tagging of animals (such as pigs and sheep) is now substantial as it becomes a legal requirement in many more territories, with 105 million tags being used for this sector in 2009. This is happening in regions such as China and Australasia. In total, 2.35 billion tags will be sold in 2009 versus 1.97 billion in 2008.

### Total RFID Market Projections \$Bn by RFID value chain sector 2009-2019





## **Full analysis by each market**

Full analysis by each market is given in great detail including in-depth historic data. Over 200 companies are profiled in this report. We give detailed ten year forecasts of the volumes of tags required, their value and the total market value for the following market segments:

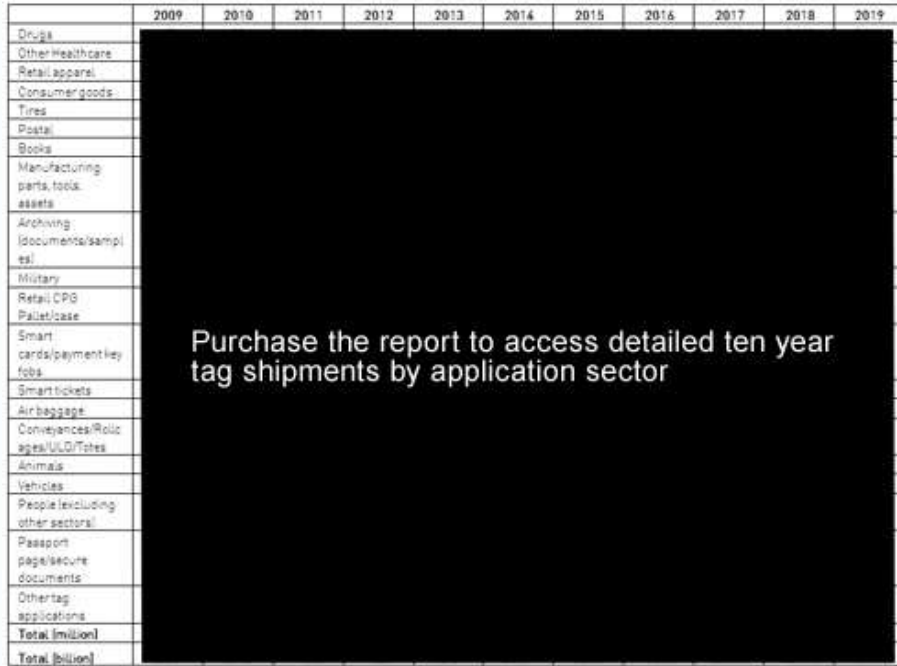
### *Passive RFID*

- Drugs
- Other Healthcare
- Retail apparel
- Consumer goods
- Tires
- Postal
- Books
- Manufacturing parts, tools
- Archiving (documents/samples)
- Military
- Retail CPG Pallet/case
- Smart cards/payment key fobs
- Smart tickets
- Air baggage
- Conveyances/Rollcages/ULD/Totes
- Animals
- Vehicles
- People (excluding other sectors)
- Passport page/secure documents
- Other tag applications

### *Active RFID / battery-assisted*

- Pharma/Healthcare
- Cold retail supply chain
- Consumer goods
- Postal
- Manufacturing parts, tools
- Archiving (samples)
- Military
- Retail CPG Pallet/case
- Shelf Edge Labels
- Conveyances/Rollcages/ULD/Totes
- Vehicles
- People (excluding other sectors)
- Car clickers
- Other tag applications

*RFID tag numbers by application type 2005 to 2019, given separately for active and passive tags*



Source: IDTechEx

*RFID revenues by application type 2005 to 2019, given separately for active and passive tags*

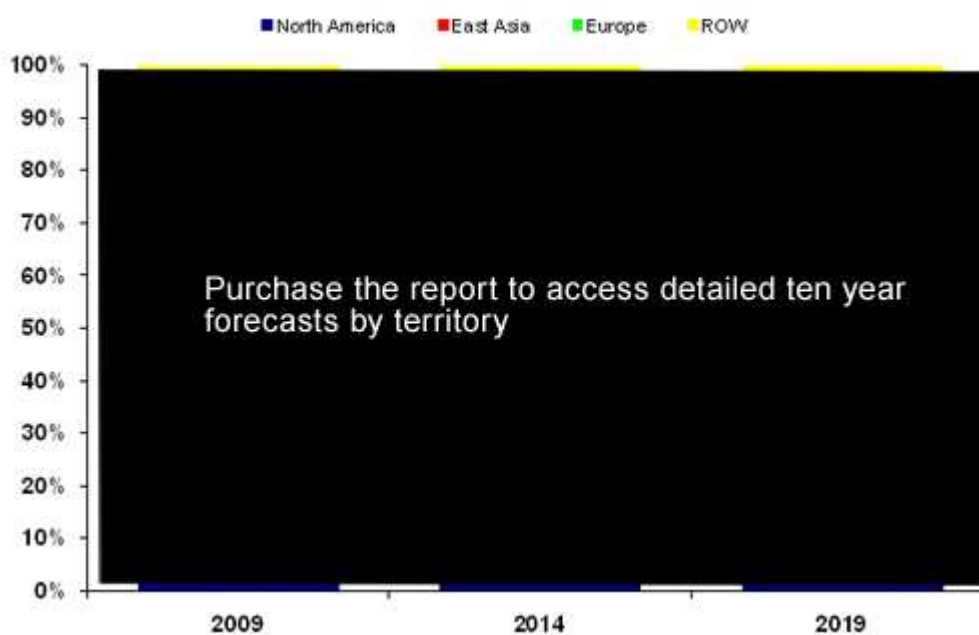


Source: IDTechEx

## Market analysis by a huge number of parameters

Using new, unique information researched globally by IDTechEx technical experts, we analyse the RFID market in many different ways, with over 180 tables and figures. They include detailed ten year projections for EPC vs non-EPC, high value niche markets, active vs passive, readers, standards, markets by frequency, markets by geographical region, label vs non label, chip vs chipless, markets by application, tag format and tag location. Cumulative sales of RFID are analyzed as are the major players and unmet opportunities. It covers the emergence of new products, legal and demand pressures and impediments for the years to come.

### *Total RFID Market by Territory 2009-2019*



Source: IDTechEx

Which sectors are booming and which are under performing? This report examines each sector in turn. Those doing well in numbers sold are sometimes much less impressive in dollars taken and vice versa.

## Passive versus Active RFID 2009-2019



Source: IDTechEx

### Highly profitable 'niche' markets analysed

Major players now and in the future in the various parts of the value chain are identified and the big orders and milestones now and in the future are analysed. Of course, not everyone will want to serve the severely price constrained, highest volume markets. For them, we examine many niches of at least one billion dollars potential that are emerging and many smaller opportunities where there is even less competition. They include:

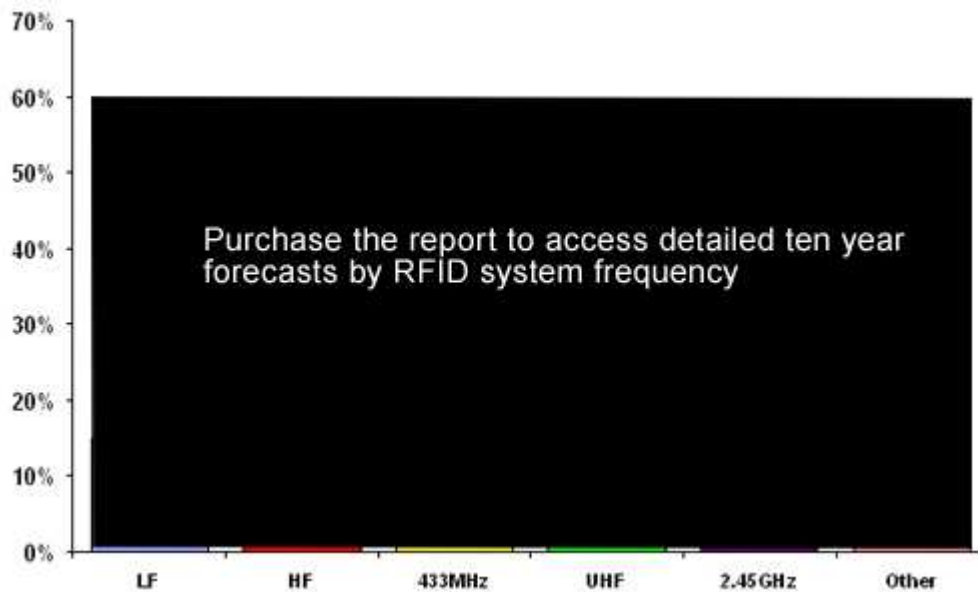
- Passports in the face of new terrorism resulting in new laws
- Livestock and food traceability in the face of new laws, bioterrorism, avian flu, BSE, fraud with subsidies etc.
- Intermodal containers (Smart and Secure Tradelanes and other initiatives)
- Healthcare
- Those in prison and on parole
- Ubiquitous Sensor Networks (USN), for warning of natural disasters, military and other purposes

Our forecasts have taken into account the global economic slow down. Looking at the range of applications, the biggest projects, which tend to be government led and are usually profitable for suppliers involved, are unlikely to reverse. For example, governments will not stop tagging passports or cattle to save money.

Governments do not need a fast return on investment. In industry, RFID is being applied where it can demonstrate a fairly rapid return on investment.

We expect the smaller funds available to companies will result in some projects being delayed, but some companies will use this to their advantage and adopt RFID where the paybacks are compelling for competitive advantage and to increase sales.

*RFID by Frequency Used*



Source: IDTechEx



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