

RTLS Market

2015/05/26

Revision 1.00

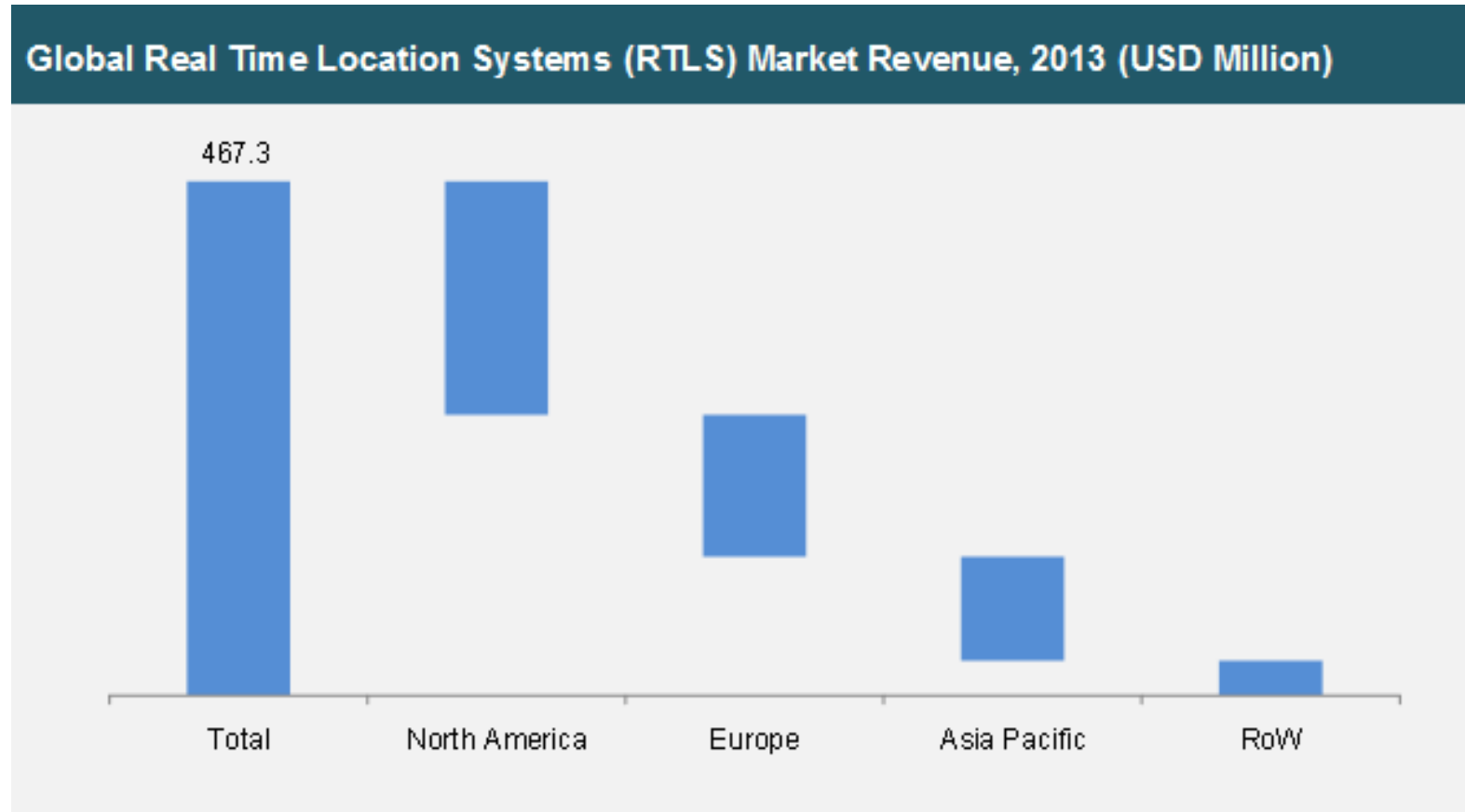
Javdan@Kara

RTLS Market size

- Market for RTLS reached \$720.5 million in 2014 reaching a YOY growth rate of %30 over previous year.
- Expected growth to 2020 is \$3923.6 million
- The expected categories are
 - Health care
 - Industrial manufacturing and process industries
 - Transportation and logistics
 - Retail industries

The full detailed report has a price of \$4650 !!!!

RTLS Market Revenue on 2013



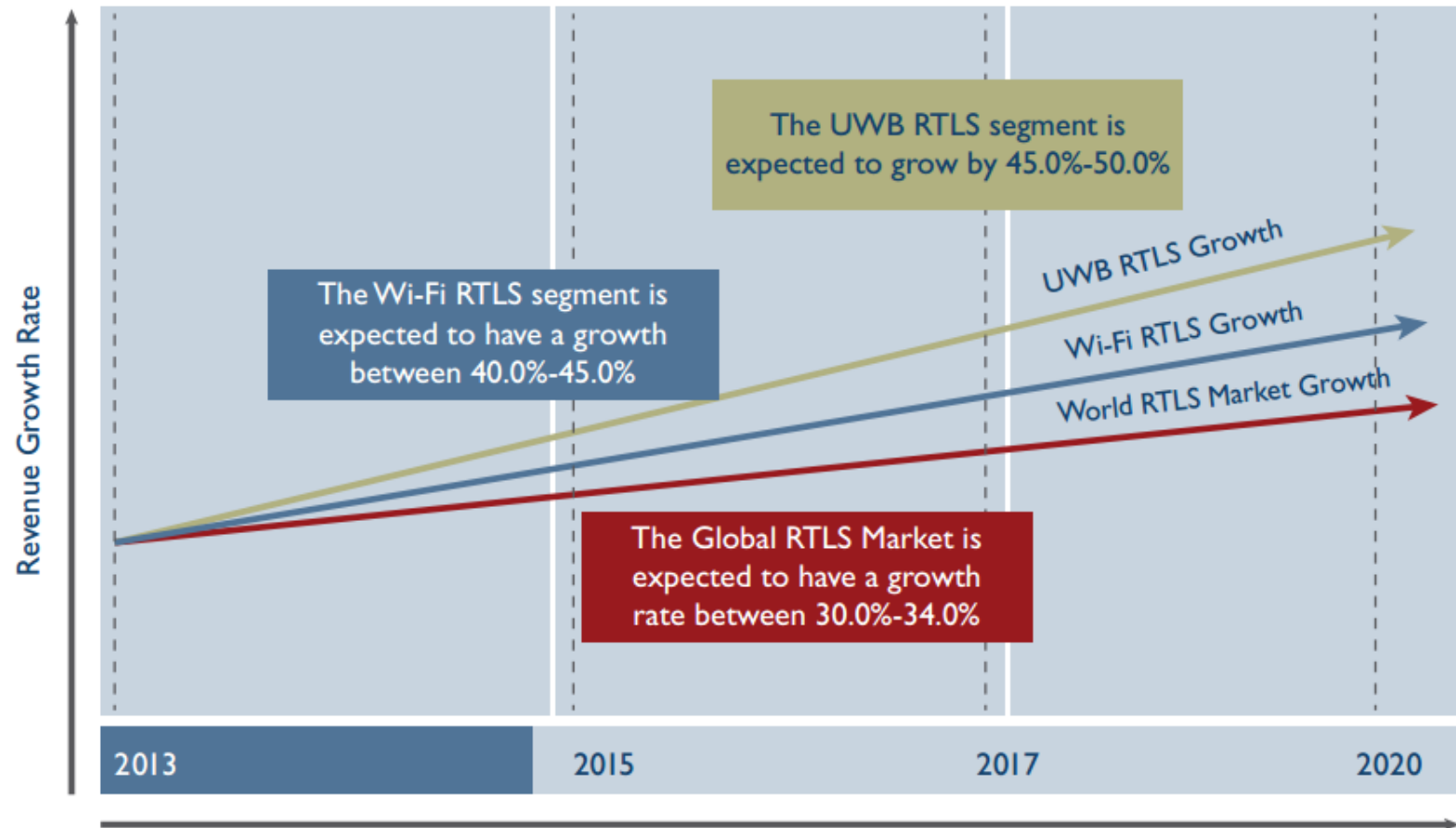
Source: KOL opinions, Journals, White Papers, TMR Analysis

The major companies

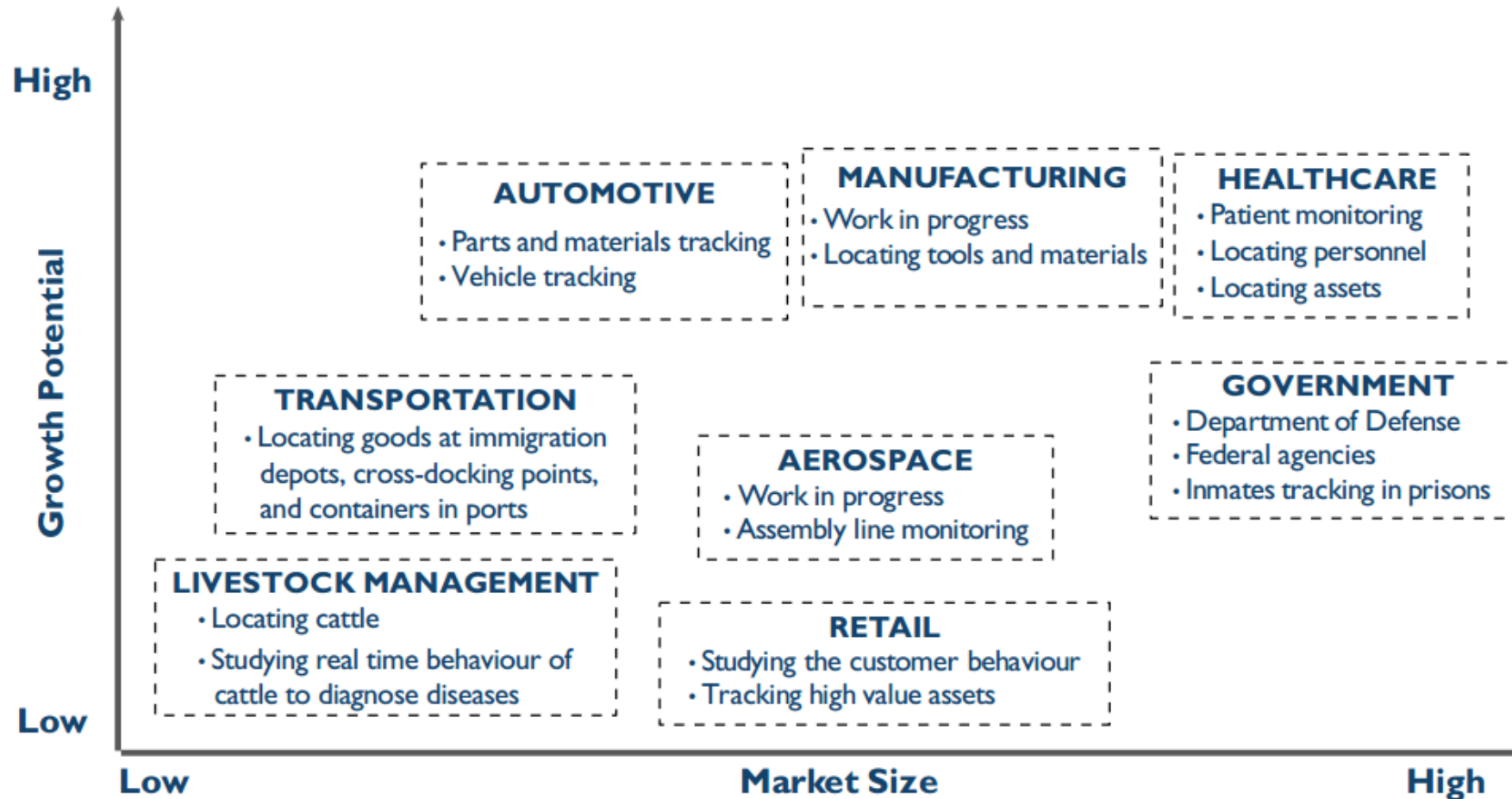
- Zebra Technologies Corporation (U.S.)
- AeroScout, Inc. (U.S.)
- Savi Technology, Inc. (U.S.)
- TeleTracking Technologies, Inc. (U.S.)
- Ubisense Group Plc (U.K.)
- Ekahau, Inc. (U.S.)
- Identec Group AG (Liechtenstein)
- CenTrak, Inc. (U.S.)
- Awarepoint Corporation (U.S.)
- Versus Technology, Inc. (U.S.)

UWB Growth Rate

Ultra Wideband (UWB) and Wi-Fi technologies have made a mark in recent years and are expected to have exponential growth in the short and long terms.



RTLS Market Applications

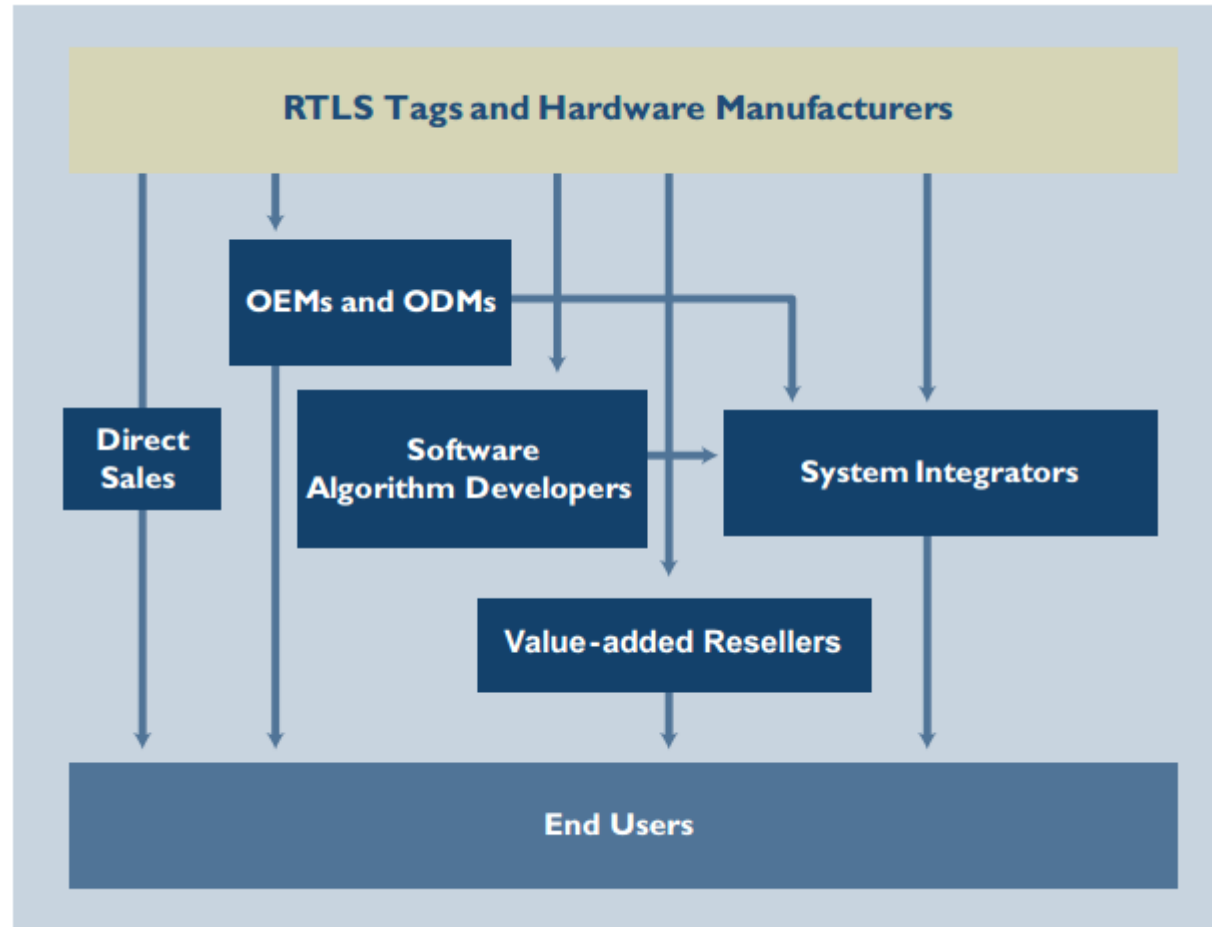


Performance comparison of technologies

	UWB RTLS	WhereNet RTLS	Wi-Fi RTLS	Zigbee RTLS
Standard	IEEE 802.15.4.f	ISO/IEC 24730-2	IEEE 802.11	IEEE 802.15.4
Frequency	3.1 GHz - 10.6 GHz	2.4-2.483 GHz	2.4/5 GHz	2.4 GHz
Accuracy	≈ 30 centimeters	≤ 3 meters	1-3 meters, < 1 meter in some cases	≤ 1.5 meters
Range	Up to 200 meters	280-1750 meters	Up to 150 meters	Up to 100 meters
Battery Life	Up to 7 years	Up to 5 years	Up to 5 years	Up to 7 years
Best fit for	Indoor and outdoor applications across all industries.	Indoor and outdoor applications across all industries.	Indoor and outdoor applications across all industries.	Indoor applications primarily in hospitals.

- The leading solution providers today include Zebra Technologies Corporation, Ubisense, Ekahau, Inc. and AeroScout Inc.
- While Ekahau and AeroScout provide Wi-Fi RTLS tags compatible to IEEE 802.11 standard, Awarepoint offers a Zigbee standards-based software solution and Ubisense provides UWB RTLS tags. Zebra Technologies is the only vendor that manufactures multiple RTLS tags based on WhereNet, Wi-Fi and UWB technologies.

RTLS market distribution structure



How RTLS save money

The study, conducted by Indiana University-Purdue University Indianapolis (IUPUI), analyzed the use of RadarFind's RTLS system at the Lumberton, N.C. hospital. According to the results, soon to be published in the *Journal of Clinical Engineering*, the technology, used to track mobile medical equipment, saved the hospital nearly \$750,000 in indirect costs, as well as reducing the time spent by staff in searching for medical equipment by 96 percent.

In technologies like rfid we will have competitors

In high accuracy applications we have the technology