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Show Report: 2009 RFID Journal Live! – Orlando, FL.

Natick, Massachusetts – May 6, 2009 – As an analyst that has not only attended but also presented at this show for the past four years, I've seen this show evolve from a product showcase to an exhibition of applications, installations, and most importantly, solutions to end-user problems.   Supported by a diversity of case studies, end-user representatives, relevant lectures, and panels that focused on experiences with RFID (as opposed to hopes for it), this show provided more value to the end user than ever before, and from what I was hearing from the exhibitors … much higher quality leads.

There were a few themes whose 'buzz' fueled much of the banter at the show, including Read on metal technologies, Retail floor applications, Low-Cost Active solutions, and Test & Measurement, amongst others.

Read on metal solutions were not only exhibited by a diversity of established and up and coming firms, but was also the topic of discussion by a panel of industry leading experts (moderated by yours truly). The panel, one of the highest attended pre-conference events, cleared the air about the technology's performance and pricing, provided experiential insight on current and emerging applications, and discussed commercialization and integration approaches and issues.

These solutions were somewhat pervasive throughout the show, with products demonstrated not only from hardware suppliers, but also systems integrators and value-added resellers who are ever-increasingly focusing on the solution. Read on metal transponder suppliers such as Omni-ID and Confidex exhibited the products that have created and continue to drive this market, while emerging suppliers such as Emerson & Cuming and Sontec showcased their innovations surrounding tag form factors, flexibility, and footprint.

Many vendors co-exhibited their infrastructure, software, and packaged offerings for retail floor applications with partners and customers, providing another level of realism to these increasingly impressive solutions. Users walking the show floor were treated to a diversity of retail applications, ranging from supply chain in back end and warehouse environments, inventory management on the floor, and various tracking and monitoring solutions – all of which were complemented with a rich set of analytics packages that squarely address the number one barrier to ROI: context-sensitive application of the data generated by the solution.

The retail theme was culminated in a key note address from Charles Voegele, Switzerland's largest clothing retailer. RFID is being used throughout the store's value chain (albeit in staged rollouts – something that we at VDC Research are proponents of), from the factory to the retail floor, providing tremendous operational benefits (I hear double-digit improvements in several key metrics) and improving their customer shopping experience. Checkpoint, a supplier partner on the project, developed and installed most of the infrastructure and is expected leverage this experience as it continues to grow its RFID retail business.

Personally, I felt that this was one of the biggest announcements at the show, not only demonstrating a more complete picture of an end-to-end solution by a major retailer, but also by providing more validity to RFID value proposition in a handful of very specific retail applications and installation environments. Low-cost active solutions have hit the RFID market with tremendous force, shaking up moderately penetrated application markets and helping to lower ROI barriers in a number of new application opportunities. Active transponders with an integrated temperature sensor at a fraction of the price of a traditional (active) tag … more bang for fewer bucks, just what the industry needed. At these price/performance levels, active solutions are expected to become an attractive alternative for projects that traditionally would not consider the technology (due to price). Of note, was the SandLinks/GE project for trailer tracking and monitoring, an application that has provided GE with significant benefits and visibility, as well as broadened their vision of what RFID can do for their enterprise.

Sidebar from Rafiki on the GE Opportunity: In order to understand the true value and impact of this solution, one needs to know a bit about GE's trailer-leasing business. It is the largest supplier in the world of trailer storage by any unit of measure. The business is, as you might imagine, very sophisticated. But there are layers to it that you might not imagine.

GE looks at multiple sources of revenue from its trailer-leasing business:

- *leasing (of course),*

- *re-sale of depreciated/ refurbished trailers,*

- *interest on the financing for customers to acquire the used trailers,*

- *maintenance on trailers, and*

- *now with this new solution, active/ real-time tracking and monitoring of these trailers.*

In our view, this represents one of the highest value ROI implementation ideas as it improves asset management, operations supporting the asset, and rolls out a new source of revenue.

Test and measurement equipment and services typically reside outside of the media spotlight, but the solution's role in the RFID industry is changing as the market matures. Test and measurement equipment is not just about ensuring that every tag is functional, but is also about measuring and understanding the performance of the solution 'in-the-field' and being used in real world applications. We are not just talking about equipment for verification, but also for system design, configuration, product specification, and process development – for virtually any installation environment. Tools such as Voyantic's 'tagformance' have taken test and measurement to the next level, offering a robust suite of functionality that is more aligned with the increasing needs of the market.

Also of note was Korea's presence at the show. The only country to have and fund its own pavilion, Korea is on its way to becoming the next transponder manufacturing Mecca. Several firms represented the country, demonstrating highly innovative and competitive products, most at a very attractive price level. Amongst the Korean suppliers exhibiting, standouts included:

- Sontec – Small form factors, ROM, Poker chips, retail tags, custom/specialty transponders

- Bitek – Retail displays, field switch-able UHF/HF printer encoders, and High Security Smart Cabinets

- ETRI – Open platform edgeware for all AIDC technologies anywhere within the value chain

Other noteworthy announcements at the show included:

- SandLinks & GE collaborate to develop a dynamic solution for locating, tracking, and monitoring in-transit assets (http://www.ge.com/research/grc_7_1_52.html)

- Intermec integrated Infratab's battery-assisted-passive sensor tag into its UHF readers and rugged mobile computers, providing a more complete sensing/monitoring solution for tracking perishable goods (http://www.intermec.com/about_us/newsroom/pr_detail.aspx?c=107429&p=irol-newsArticle&ID=1281272&highlight=)

- Motorola introduced its new line of readers. These devices are robust, smaller, more functional and have been developed to provide an enhanced 'out-of-box' experience (http://mediacenter.motorola.com/content/Detail.aspx?ReleaseID=11215&NewsAreaID=2)

- Zebra, Impinj and UPM Raflatac announced their collaboration on providing a complete hardware suite of EPC UHF products designed for item-level tracking applications, including tags, readers, and printer/encoders (http://www.zebra.com/id/zebra/na/en/documentlibrary/pressreleases/2009/Zebra_Technologies_Impinj_and_UPM_Raflatac_collaborate_to_deliver_Item_Level_UHF_Gen_2_RFID_solution.File.tmp/Item_Level_Tagging.pdf)

- In a move to broaden its support of a wider-base of applications, Avery Dennison announced that it will be adding HF solutions to its RFID product portfolio (http://www.rfid.averydennison.com/us/news_pr.php?id=120)

- Ekahau announced that its WiFi location tracking software will be integrated into NavSync's GPS receivers, creating a global tracking solution for virtually any environment (http://www.ekahau.com/news/readallnews/press-releases/160-ekahau-and-navsync-expand-location-tracking-capabilities-with-combined-wi-fi-and-gps-tag.html)

- Alien, Bechtel Jacobs, and Globe Ranger worked together to create a rugged mobile RFID solution designed to ensure safe, traceable, and efficient waste clean-up (http://finance.yahoo.com/news/Alien-Technologyreg-Bechtel-bw-15050468.html?.v=1)

- Tego announced the availability of its high memory solution (TEGOXM RFID Launch Kit), a solution that provides a asset management over the ENTIRE life of the asset (http://www.tegoinc.com/doc/TegoKitAnnouncement.pdf)

- Time Domain announced the global availability of its long range, high-performing UWB PLUS RTLS solution (http://www.timedomain.com/news/worldwide.php)

- Mojix and InSync formed a partnership to provide a complete portfolio for passive UHF solutions in a diversity of installation environments and applications (http://www.mojix.com/news/2009/pressrel_insync_042709.php)

- Charles Voegele, the largest retailer in Switzerland, implements a comprehensive end-to-end application of RFID in retail, from the manufacturing facility through the retail floor (http://www.rfidjournal.com/article/view/4836/)

- ODIN introduced its self-inventorying Smart container, a device capable of not only providing Real-Time tracking, but also in-container visibility and condition (http://www.odintechnologies.com/news/39-newsblog/181-odins-self-inventorying-smart-container-breaks-new-ground-in-automated-rfid-tracking)

In my book, this show continues to be the premiere RFID event, not only because it is the largest exhibition/gathering in the industry and an effective stage for showcasing new solutions and innovations, but also because it is able to stay aligned with the needs of this rapidly evolving, and changing.

To view Drew's presentation from this year's show, go to:
http://www.vdcresearch.com/misc/VDC Presentation 2009 RFID Journal Live.ppt

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