

WINTERGREEN RESEARCH, INC.

**RFID Middleware Market Opportunities, Strategies, and  
Forecasts, 2005 to 2010**

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**RFID Middleware**

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*Picture by Susie Eustis*

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**WinterGreen Research, Inc.  
Lexington, Massachusetts**

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**CHECK OUT THESE KEY TOPICS**

*RFID MIDDLEWARE MARKET SHARES*

*RFID MIDDLEWARE MARKET FORECASTS*

**RFID Middleware Market Driving Forces**

**RFID Middleware Market Definition**

**RFID Middleware Integration Services**

Technical Challenges

*RFID MIDDLEWARE USES*

**WIRELESS NETWORKING**

**RFID STANDARDS**

**TARGET MARKETS**

**CUSTOMER BASE**

**ROADBLOCKS**

**SOFTWARE AND PLATFORM INTEROPERABILITY**

*RFID DEPLOYMENT OF MIDDLEWARE*

*FIREWALL RFID MIDDLEWARE PRODUCTS*

*EXCHANGING INFORMATION*

**OPPORTUNITY ABOUNDS**

**WinterGreen Research, Inc.**

**Lexington, Massachusetts**

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## **RFID Middleware Market Opportunities, Strategies, and Forecasts, 2005 to 2010**

Middleware, also known as RFID manager software, enables the rapid development and deployment of RFID systems. The middleware absorbs differences in various RFID tags from multiple suppliers and integrates that data, making it possible to build flexible and scalable RFID solutions. The middleware also includes tools to monitor and maintain RFID systems.

Middleware needs to filter non-essential RFID data as close to the source as possible. It is invisible to applications and will not overwhelm the system. The transition from deployments to networks capable of handling this increased load will require a solution that is scalable as the deployment grows. RFID traffic is like other Middleware applications or data types like voice and video.

Correct middleware infrastructure helps to ensure the investment protection of RFID networks. As RFID deployments transition from serial to IP and proprietary, closed Networks to standards-based open Networks, interoperability with equipment made by multiple device manufacturers is required.

IBM was the market leader in the broader RFID market for interconnecting the edge servers to applications in distributed and centralized IT locations. Tibco and WebMethods also had measurable market shares in this segment.

IBM was the market leader in RFID middleware with a market presence in enterprise application integration middleware and edge middleware. IBM had shipments of \$30 million in 2004 for RFID middleware, representing 25% market share.

The RFID Edge Middleware market is forecasted to grow enormously in the next few years. By 2010 the market is projected as growing to 769.5 million, up just 47 million in 2004. Just one year later in 2011 the market is going double from 2010 reaching 1,557.5 million.

## Companies Profiled

### Market Leaders

IBM  
ConneTerra  
GlobeRanger  
Oat Systems  
Manhattan Associates

### Market Participants

Alien	Avicon
BEA Systems	Checkpoint Systems
Ember	EPCglobal
ESYNC	Fujitsu
Hewlett-Packard (HP)	i2
International Paper	Mark IV Industries
Microsoft	Oracle
Radianse	REDmedic
Red Prairie	RF Code
Roper Industries/TransCore	Royal Philips Electronics
SafeTzone Technologies	SAMSys Technologies
Savi Technology	Seeburger
Shuffle Master	SIRIT
Sundex	Symbol Technologies
Tagsys	Texas Instruments
Tibco Software	TransCore Toll Collection Systems
Tyco/ADT Security	Unova/Intermec Technology
UPM RAFSEC	webMethods
Zebra Technologies	

## **RFID Network Equipment Strategies and Forecasts, 2005-2010**

### **REPORT METHODOLOGY**

THIS IS THE *TWO-HUNDRED AND THIRTY-NINTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

**YOU MUST HAVE THIS STUDY**

# RFID Middleware Market Opportunities, Strategies, and Forecasts, 2005 to 2010

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