

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
INTENDED AUDIENCE.....	2
SCOPE OF REPORT.....	3
METHODOLOGY AND INFORMATION SOURCES.....	4
RELATED BCC RESEARCH STUDIES.....	5
ANALYST CREDENTIALS.....	6
BCC ONLINE SERVICES.....	7
DISCLAIMER.....	7
 CHAPTER TWO: SUMMARY.....	 8
SUMMARY.....	8
<i>SUMMARY TABLE GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES, THROUGH 2015 (\$ MILLIONS)</i>	 9
<i>SUMMARY FIGURE GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES, 2008-2015 (\$ MILLIONS)</i>	 9
 CHAPTER THREE: OVERVIEW.....	 10
INTRODUCTION.....	10
MONOLITHIC AND COMPOSITE CERAMICS.....	10
THE COMPOSITE MATERIAL INDUSTRY.....	11
<i>TABLE 1 THE COMPOSITE MATERIAL INDUSTRY</i>	 11
<i>FIGURE 1 THE COMPOSITE MATERIAL INDUSTRY: GLOBAL MARKET SHARE BY MATERIAL, 2009 (%)</i>	 12
REVIEW OF THE HISTORY OF CERAMIC MATRIX COMPOSITES AND RECENT EVENTS.....	13
<i>TABLE 2 CERAMIC MATRIX COMPOSITES—TECHNOLOGICAL MILESTONES</i>	 13
<i>FIGURE 2 CERAMIC MATRIX COMPOSITES—WORLDWIDE PATENT APPLICATIONS AND PATENTS ISSUED, 1980–2009</i>	 14
CURRENT AND EMERGING APPLICATIONS FOR CERAMIC MATRIX COMPOSITES.....	15
MECHANICAL/CHEMICAL.....	15
Established Applications.....	15
Emerging Applications.....	15
<i>TABLE 3 CMC APPLICATIONS IN THE MECHANICAL/CHEMICAL SECTOR, 2010</i>	 16
ENERGY AND ENVIRONMENTAL.....	16
Established Applications.....	16
Emerging Applications.....	17
<i>TABLE 4 CMC APPLICATIONS IN THE ENERGY AND ENVIRONMENTAL SECTOR, 2010</i>	 17
AEROSPACE AND DEFENSE.....	18
Established Applications.....	18

Emerging Applications	18
<i>TABLE 5 CMC APPLICATIONS IN THE AEROSPACE AND DEFENSE</i>	
<i>SECTOR, 2010</i>	18
<i>TABLE 5 (CONTINUED)</i>	19
TRANSPORTATION	19
Established Applications	19
Emerging Applications	19
<i>TABLE 6 CMC APPLICATIONS IN THE AUTOMOTIVE SECTOR, 2010</i>	20
ELECTRONICS.....	20
Established Applications	20
Emerging Applications	20
<i>TABLE 7 CMC APPLICATIONS IN THE ELECTRONICS SECTOR, 2010</i>	21
MEDICAL AND DENTAL	21
Established Applications	21
Emerging Applications	21
<i>TABLE 8 CMC APPLICATIONS IN THE MEDICAL AND DENTAL</i>	
<i>SECTOR, 2010</i>	21
OTHER APPLICATIONS	22
Established Applications	22
Emerging Applications	22
<i>TABLE 9 CMC APPLICATIONS IN OTHER SECTORS, 2010</i>	22
CHAPTER FOUR: CERAMIC MATRIX COMPOSITE TECHNOLOGY.....	23
INTRODUCTION	23
CMC MATERIALS.....	23
MATRIX MATERIALS.....	23
<i>TABLE 10 MATRIX MATERIALS, 2010</i>	24
SECONDARY PHASE MATERIALS	24
CMC TYPES AND APPLICATIONS	25
DISCONTINUOUSLY REINFORCED COMPOSITES	25
Particles	25
<i>TABLE 11 REINFORCING PHASE: PARTICLES, 2010</i>	26
Platelets	26
<i>TABLE 12 REINFORCING PHASE: PLATELETS, 2010</i>	26
Whiskers and Chopped Fibers	27
Whiskers.....	27
Chopped Fibers	27
<i>TABLE 13 REINFORCING PHASE: WHISKERS AND CHOPPED</i>	
<i>FIBERS, 2010</i>	28
DRC Materials and Applications	28
<i>TABLE 14 MATERIALS AND APPLICATIONS FOR DRCS, 2010</i>	28
<i>TABLE 14 (CONTINUED)</i>	29
CONTINUOUSLY REINFORCED COMPOSITES	29
Reinforcing Phase.....	30
<i>TABLE 15 REINFORCING PHASE: CONTINUOUS FIBERS, 2010</i>	30

CRC Materials and Applications	30
<i>TABLE 16 MATERIALS AND APPLICATIONS FOR CRCS</i>	31
<i>TABLE 16 (CONTINUED)</i>	32
LAMINATED COMPOSITES.....	32
<i>TABLE 17 MATERIALS AND APPLICATIONS FOR LAMINATED</i> <i>CERAMIC COMPOSITES</i>	33
FUNCTIONALLY GRADED CERAMIC COMPOSITES	33
NANOSTRUCTURED COMPOSITE COATINGS	34
SUPERPLASTIC CERAMIC COMPOSITES	35
LATEST TECHNOLOGICAL DEVELOPMENTS, 2007 TO PRESENT.....	36
Fluorescent Lamp with Ceramic-Glass Composite Electrode.....	36
Luminescent Ceramic Composite Converter.....	36
CMC for Steam Turbine	37
Ceramic Fiber/Mullite-Alumina Composite	37
PRODUCTION METHODS.....	38
<i>TABLE 18 DRC—TRADITIONAL FABRICATION METHODS</i>	39
<i>TABLE 19 CRC—TRADITIONAL FABRICATION METHODS</i>	39
<i>TABLE 19 (CONTINUED)</i>	40
<i>TABLE 20 LAMINATED COMPOSITES—TRADITIONAL</i> <i>FABRICATION METHODS</i>	40
LATEST TECHNOLOGICAL DEVELOPMENTS, 2007 TO PRESENT.....	40
Processes for Complex and Near-Net Shapes Manufacturing.....	40
Processes for Fabrication of Nanocomposites.....	41
Nanocomposite Coatings	41
Synthesis of Hydroxyapatite/Alumina Nanocomposites	41
Others.....	42
Large-Scale Process for CRC Fabrication.....	42
Multilayered Ceramic Matrix Composites	43
Liquid Feed Flame Spray Pyrolysis.....	43
Sol-gel Process for CRC Fabrication	44
Sol-gel Process for CRC Fabrication (Continued).....	45
CHAPTER FIVE: GLOBAL MARKET	46
ANALYSIS OUTLINE.....	46
GLOBAL MARKET SUMMARY	46
<i>TABLE 21 GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES,</i> <i>THROUGH 2015 (\$ MILLIONS)</i>	47
<i>FIGURE 3 GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES,</i> <i>2008-2015 (\$ MILLIONS)</i>	48
CURRENT MARKET STATUS.....	48

CURRENT MARKET SUMMARY	48
TABLE 22 GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES, THROUGH 2010 (\$ MILLIONS).....	49
FIGURE 4 GLOBAL MARKET FOR CERAMIC MATRIX COMPOSITES, 2008–2010 (\$ MILLIONS)	49
Revenues by Matrix Type.....	49
TABLE 23 CERAMIC MATRIX COMPOSITES: GLOBAL REVENUES BY MATRIX TYPE, THROUGH 2010 (\$ MILLIONS).....	50
FIGURE 5 CERAMIC MATRIX COMPOSITES: MARKET SHARE BY MATRIX TYPE, 2010 (%)	51
Revenues by Application	51
Revenues by Application (Continued).....	52
TABLE 24 CERAMIC MATRIX COMPOSITES: GLOBAL REVENUES BY APPLICATION, THROUGH 2010 (\$ MILLIONS).....	53
FIGURE 6 CERAMIC MATRIX COMPOSITES: MARKET SHARE BY APPLICATION, 2010 (%)	53
FIGURE 6 (CONTINUED)	54
Revenues by Region	54
TABLE 25 CERAMIC MATRIX COMPOSITES: REVENUES BY REGION, THROUGH 2010 (\$MILLIONS)	55
FIGURE 7 CERAMIC MATRIX COMPOSITES: MARKET SHARE BY REGION, 2010 (%).....	55
FIGURE 7 (CONTINUED)	56
MARKET GROWTH TRENDS.....	56
INDUSTRY GROWTH.....	56
Mechanical/Chemical	56
TABLE 26 FORECAST—CUTTING TOOLS AND WEAR-RESISTANT PARTS: GLOBAL REVENUES, THROUGH 2015 (\$ BILLIONS)	57
Energy and Environmental.....	57
TABLE 27 FORECAST—HIGH-TEMPERATURE APPLICATIONS AND POWER GENERATION: GLOBAL REVENUES, THROUGH 2015 (\$ BILLIONS).....	58
Aerospace and Defense.....	58
Transportation.....	58
TABLE 28 FORECAST—LIGHTWEIGHT MATERIALS, COMPOSITES, FRICTION PRODUCTS, AND EXHAUST FILTERS FOR TRANSPORTATION: GLOBAL REVENUES, THROUGH 2015 (\$ BILLIONS).....	59
Medical and Dental	59
Electronics.....	59
TABLE 29 FORECAST—SEMICONDUCTORS: REVENUES BY REGION, THROUGH 2015 (\$ BILLIONS).....	60
Other Industry Sectors.....	60
TECHNOLOGICAL TRENDS	61

REGIONAL TRENDS	61
PROJECTED CERAMIC COMPOSITE MARKET	62
KEY OBSERVATIONS	62
TABLE 30 FACTORS AFFECTING SALES OF CERAMIC MATRIX COMPOSITES, 2015	62
MARKET FORECAST	63
Revenues by Application	63
Revenues by Application (Continued).....	64
TABLE 31 FORECAST—CERAMIC MATRIX COMPOSITES: GLOBAL REVENUES BY APPLICATION, THROUGH 2015 (\$ MILLIONS).....	65
FIGURE 8 FORECAST—CERAMIC MATRIX COMPOSITES: MARKET SHARE BY APPLICATION, 2015 (%)	65
FIGURE 8 (CONTINUED)	66
Revenues by Matrix Type.....	66
TABLE 32 FORECAST—CERAMIC MATRIX COMPOSITES: GLOBAL REVENUES BY MATRIX TYPE, THROUGH 2015 (\$ MILLIONS).....	67
FIGURE 9 FORECAST—CERAMIC MATRIX COMPOSITES: GLOBAL MARKET SHARE BY MATRIX TYPE, 2015 (%).....	67
FIGURE 9 (CONTINUED)	68
Revenues by Region	68
TABLE 33 FORECAST—CERAMIC MATRIX COMPOSITES: REVENUES BY REGION, THROUGH 2015 (\$ MILLIONS)	69
FIGURE 10 FORECAST—CERAMIC MATRIX COMPOSITES: MARKET SHARE BY REGION, 2015 (%).....	69
CHAPTER SIX: GLOBAL INDUSTRY STRUCTURE	70
GLOBAL INDUSTRY STRUCTURE.....	70
MANUFACTURERS OF CERAMIC MATRIX COMPOSITES	71
TABLE 34 MANUFACTURERS OF CERAMIC MATRIX COMPOSITES.....	71
TABLE 34 (CONTINUED).....	72
TABLE 34 (CONTINUED).....	73
TABLE 34 (CONTINUED).....	74
FIGURE 11 MANUFACTURERS OF CERAMIC MATRIX COMPOSITES: DISTRIBUTION BY SIZE (NUMBER OF COMPANIES)	75
TABLE 35 CMC MANUFACTURERS: DISTRIBUTION BY REGION, 2000 AND 2010 (NUMBER OF COMPANIES).....	76
FIGURE 12 HISTORICAL GROWTH OF CMC MANUFACTURERS (NUMBER OF COMPANIES).....	77
CMC PRODUCTION BY REGION	77
TABLE 36 CERAMIC MATRIX COMPOSITES: MANUFACTURING BY REGION, 2008–2015 (PERCENT OF SALES).....	78
CMC CONSUMPTION BY REGION	78
TABLE 37 CERAMIC MATRIX COMPOSITES: CONSUMPTION BY REGION, 2008–2015 (PERCENT OF SALES).....	79

COMPANY PROFILES	79
3M	80
ARMOR USA	81
ASTRO MET	81
BAE SYSTEMS	82
CERADYNE.....	83
Ceradyne (Continued)	84
COI CERAMICS	85
COORSTEK.....	86
EADS ASTRIUM.....	87
GE CERAMIC COMPOSITE PRODUCTS	88
Company History	88
Current Activities	89
Current Activities (Continued).....	90
GOODRICH AIRCRAFT WHEELS AND BRAKES	91
HITACHI CHEMICAL.....	91
INTEGRA ORTHOBIOLOGICS	92
KENNAMETAL.....	93
KYOCERA	94
NANOGRAPHITE MATERIALS.....	95
PORSCHÉ AUTOMOBIL HOLDING	95
PRATT & WHITNEY	96
SANDVIK TOOLING	97
SCHUNK KOHLENSTOFFTECHNIK.....	97
UBE INDUSTRIES	98
UBE Industries (Continued)	99
CHAPTER SEVEN: INDUSTRY COMPETITIVENESS	100
CMC DEVELOPMENT ACTIVITIES	100
<i>TABLE 38 ORGANIZATIONS INVOLVED IN CMC RESEARCH,</i>	
<i>WORLDWIDE</i>	<i>100</i>
<i>TABLE 38 (CONTINUED).....</i>	<i>101</i>
<i>TABLE 38 (CONTINUED).....</i>	<i>102</i>
<i>TABLE 38 (CONTINUED).....</i>	<i>103</i>
<i>TABLE 38 (CONTINUED).....</i>	<i>104</i>
UNITED STATES	105
Argonne National Laboratory	105
<i>TABLE 39 ARGONNE NATIONAL LABORATORY RESEARCH.....</i>	<i>106</i>
Missouri University of Science and Technology.....	106
<i>TABLE 40 MISSOURI S&T RESEARCH</i>	<i>107</i>
Oak Ridge National Laboratory.....	108
<i>TABLE 41 ORNL RESEARCH.....</i>	<i>109</i>
University of Illinois at Urbana-Champaign	109
<i>TABLE 42 UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN</i>	
<i>RESEARCH.....</i>	<i>110</i>

EUROPE.....	110
Centre National de la Recherche Scientifique	110
<i>TABLE 43 CNRS/LCTS RESEARCH.....</i>	<i>111</i>
EMPA – Materials Science and Technology	112
<i>TABLE 44 EMPA RESEARCH.....</i>	<i>112</i>
Fraunhofer-Gesellschaft Institutes	113
<i>TABLE 45 FRAUNHOFER ISC RESEARCH</i>	<i>113</i>
Imperial College.....	113
<i>TABLE 46 IMPERIAL COLLEGE RESEARCH.....</i>	<i>114</i>
German Aerospace Center	115
<i>TABLE 47 DRL RESEARCH.....</i>	<i>115</i>
ASIA-PACIFIC	116
National Institute of Advanced Industrial Science and Technology	116
<i>TABLE 48 AIST RESEARCH.....</i>	<i>116</i>
University of Tokyo	116
<i>TABLE 49 UNIVERSITY OF TOKYO RESEARCH</i>	<i>117</i>
Shanghai Institute of Ceramics	117
<i>TABLE 50 SHANGHAI INSTITUTE OF CERAMICS RESEARCH.....</i>	<i>118</i>
SUMMARY OF GLOBAL R&D ACTIVITIES IN CMC TECHNOLOGY.....	118
<i>FIGURE 13 CURRENT GLOBAL CMC RESEARCH AND DEVELOPMENT BY SUBJECT (%).....</i>	<i>119</i>
<i>FIGURE 13 (CONTINUED)</i>	<i>120</i>
Industry Initiatives	120
<i>TABLE 51 PRIVATE ORGANIZATIONS INVOLVED IN CMC RESEARCH.....</i>	<i>120</i>
<i>TABLE 51 (CONTINUED).....</i>	<i>121</i>
OTHER CONSIDERATIONS.....	121
COST FACTOR	121
QUALITY FACTOR	121
TECHNOLOGY FACTOR.....	122
MANUFACTURING CAPABILITY	122
KEY GROWTH MARKETS	123
<i>TABLE 52 GLOBAL GROWTH FORECAST FOR CURRENT AND POTENTIAL CMC APPLICATIONS, THROUGH 2015</i>	<i>123</i>
Mechanical/Chemical	124
Energy and environmental.....	124
Aerospace and Defense.....	124
Transportation.....	124
Electronics.....	124
Medical/Dental.....	124
Sensors and Instrumentation	125

DRIVING FORCES AND THEIR IMPACT ON MARKET GROWTH	125
TABLE 53 PERCENTAGE IMPACT OF MAJOR COMPETITIVE FACTORS ON THE GROWTH OF THE CMC MARKET, 2010–2015.....	126
CHAPTER EIGHT: U.S. PATENT ANALYSIS.....	127
INTRODUCTION	127
SUMMARY OF PATENTS AWARDED DURING THE PERIOD 2007 THROUGH 2010.....	127
TABLE 54 CERAMIC MATRIX COMPOSITES—U.S. PATENTS, 2010	128
TABLE 54 (CONTINUED).....	129
TABLE 54 (CONTINUED).....	130
TABLE 54 (CONTINUED).....	131
TABLE 55 CERAMIC MATRIX COMPOSITES—U.S. PATENTS, 2009.....	132
TABLE 55 (CONTINUED).....	133
TABLE 55 (CONTINUED).....	134
TABLE 55 (CONTINUED).....	135
TABLE 55 (CONTINUED).....	136
TABLE 56 CERAMIC MATRIX COMPOSITES—U.S. PATENTS, 2008.....	136
TABLE 56 (CONTINUED).....	137
TABLE 56 (CONTINUED).....	138
TABLE 56 (CONTINUED).....	139
TABLE 57 CERAMIC MATRIX COMPOSITES—U.S. PATENTS, 2007.....	139
TABLE 57 (CONTINUED).....	140
TABLE 57 (CONTINUED).....	141
TABLE 57 (CONTINUED).....	142
TABLE 57 (CONTINUED).....	143
TABLE 57 (CONTINUED).....	144
GENERAL TRENDS.....	144
TABLE 58 CERAMIC MATRIX COMPOSITES: U.S. PATENT TRENDS, 2007–2010.....	145
FIGURE 14 CERAMIC MATRIX COMPOSITES: U.S. PATENT TRENDS, 2007–2010 (NUMBER OF PATENTS).....	145
TRENDS BY COUNTRY AND REGION.....	146
FIGURE 15 SHARES OF U.S. PATENTS RELATED TO CERAMIC MATRIX COMPOSITE BY REGION, 2007–2010 (%).....	146
FIGURE 16 CERAMIC MATRIX COMPOSITES: PATENTS BY COUNTRY, 2007–2010 (NUMBER OF PATENTS).....	147
TRENDS BY ASSIGNEE	148
TABLE 59 ASSIGNEES OF U.S. PATENTS RELATED TO CERAMIC MATRIX COMPOSITES, 2007–2010.....	149
FIGURE 17 CERAMIC MATRIX COMPOSITES: SHARES OF U.S. PATENTS BY ORGANIZATION TYPE, 2007–2010 (%)	150
TRENDS BY PATENT CATEGORY	151

<i>FIGURE 18 CERAMIC MATRIX COMPOSITES: SHARES OF U.S.</i>	
<i>PATENTS BY CATEGORY, 2007–2010 (%)</i>	152
TRENDS BY APPLICATION	152
TRENDS BY APPLICATION (CONTINUED).....	153
<i>FIGURE 19 CERAMIC MATRIX COMPOSITES: SHARES OF U.S.</i>	
<i>PATENTS BY APPLICATION, 2007–2010 (%)</i>	154
TRENDS BY MATRIX TYPE	154
<i>FIGURE 20 CERAMIC MATRIX COMPOSITES: SHARES OF U.S.</i>	
<i>PATENTS BY MATRIX TYPE, 2007–2010 (%)</i>	155