

INTRODUCTION	XVI
STUDY GOALS AND OBJECTIVES.....	XVI
REASONS FOR DOING THE STUDY	XVI
CONTRIBUTIONS OF THE STUDY AND FOR WHOM.....	XVI
SCOPE AND FORMAT	XVII
METHODOLOGY	XVII
ANALYST'S CREDENTIALS.....	XVII
RELATED BCC REPORTS	XVIII
BCC ONLINE SERVICES.....	XVIII
DISCLAIMER	XVIII
EXECUTIVE SUMMARY	XIX
<i>SUMMARY TABLE FORECAST: GLOBAL PHOTONIC CRYSTALS</i>	
<i>MARKET BY APPLICATION AREA THROUGH 2013 (\$ MILLIONS)</i>	XX
<i>SUMMARY FIGURE GLOBAL PHOTONIC CRYSTALS MARKET</i>	
<i>SHARE BY APPLICATION AREA, 2013 (%)</i>	XX
OVERVIEW OF PHOTONIC CRYSTALS.....	1
PHOTONIC CRYSTALS.....	1
<i>TABLE 1 IMPORTANT BENEFITS OF THE PHOTONIC BAND GAP IN</i>	
<i>PHOTONIC CRYSTAL STRUCTURES</i>	2
EFFECTS ON THE ECONOMY AND SOCIETY	2
HISTORICAL ORIGINS.....	3
<i>TABLE 2 TIMELINE FOR IMPORTANT EARLY DEVELOPMENTS</i>	
<i>FOR PHOTONIC CRYSTALS</i>	3
APPLICATION AREAS	4
<i>TABLE 3 APPLICATION AREAS FOR PHOTONIC CRYSTALS</i>	4
CONTINUING DEVELOPMENT	5
INDUSTRY STRUCTURE	6
COMPANY SIZE AND STRUCTURE.....	6
Small Start-ups.....	6
Large Companies	7
TECHNOLOGY TRANSFER FROM RESEARCH	
LABORATORIES	7
<i>TABLE 4 RESEARCH CENTERS WITH EXTENSIVE TECH</i>	
<i>TRANSFER IN PHOTONIC CRYSTALS</i>	8
MIT.....	8
Luminus Devices.....	8
OmniGuide	9
Star Solar	9
Danish Technical University COM Center	10
Alight Technologies.....	10
Crystal Fibre	10
KOHERAS.....	11

PHOTONIC CRYSTAL TECHNOLOGY	12
INTRODUCTION	12
THE PHOTONIC BAND GAP	12
VARIETIES OF PHOTONIC CRYSTALS	13
<i>TABLE 5 TYPES OF PHOTONIC CRYSTAL STRUCTURES</i>	13
PHOTONIC CRYSTAL FIBERS	13
TYPES.....	14
Index Guiding	14
Effective Index PCF	14
Air Clad PCF	14
Band Gap Guiding	15
PROPERTIES.....	15
<i>TABLE 6 IMPORTANT FEATURES OF PHOTONIC CRYSTAL FIBERS</i>	15
Properties of Index Guiding Fibers.....	16
Dispersion.....	16
Birefringence	16
Low Birefringence	17
Large Birefringence	17
Nonlinear Properties	17
Low Nonlinearity	17
Large Nonlinearity.....	17
Properties of Band Gap Guiding Fibers	18
MATERIALS AND FABRICATION	18
From Tubes and Rods.....	18
From Disks.....	19
Post Processing	20
INTEGRATION AND PACKAGING.....	20
COMMERCIALIZATION.....	20
Commercialization Issues	20
Manufacturers	21
<i>TABLE 7 KEY PRODUCERS OF PHOTONIC CRYSTAL FIBERS</i>	21
MULTIDIMENSIONAL PHOTONIC CRYSTALS	22
PROPERTIES.....	22
<i>TABLE 8 IMPORTANT FEATURES OF PLANAR AND VOLUME</i> <i>PHOTONIC CRYSTAL STRUCTURES</i>	22
Designed Defects.....	23
Point Defects	23
Linear Defects	23
Superprism Effect.....	23
MATERIALS.....	24
TOP-DOWN SYNTHESIS	24
Photolithography	24
Electron Beam Lithography	25
Interference Lithography	26

Imprint Lithography	26
Autocloning	27
SELF-ASSEMBLY	28
COMMERCIALIZATION ISSUES	29
<i>TABLE 9 KEY DEVELOPERS OF MULTIDIMENSIONAL PHOTONIC</i>	
<i>CRYSTAL PRODUCTS</i>	29
<i>TABLE 9 (CONTINUED)</i>	30
CURRENT RESEARCH	30
Expanding Materials Choices	30
Tunable Photonic Crystals	31
Voltage Tuning.....	31
Temperature Tuning.....	32
PATENT EVALUATION.....	33
PATENT LANDSCAPE	33
<i>TABLE 10 U.S. PATENTS ISSUED FOR PHOTONIC CRYSTALS, 1998-</i>	
<i>2006 (PATENTS)</i>	33
<i>FIGURE 1 PATENTS BY PHOTONIC CRYSTAL TYPE, 1998-2006</i>	
<i>(NUMBER OF PATENTS)</i>	33
<i>FIGURE 2 TOTAL PATENTS BY TYPE OF PHOTONIC CRYSTAL</i>	
<i>STRUCTURE, 1998-2007 (%)</i>	34
PHOTONIC CRYSTAL FIBERS	34
INDUSTRY VERSUS ACADEMIA	35
<i>FIGURE 3 TOTAL U.S. PATENTS FOR PHOTONIC CRYSTAL FIBERS</i>	
<i>BY ORGANIZATION TYPE, 2005-2007 (%)</i>	35
NOTE: NUMBERS DO NOT ADD TO 100% DUE TO	
ROUNDING	35
PATENTS BY ASSIGNEE.....	36
<i>TABLE 11 PHOTONIC CRYSTAL FIBER PATENTS BY ASSIGNEE,</i>	
<i>JANUARY 2005 THROUGH JUNE 2007 (NUMBER OF PATENTS)</i>	36
Crystal Fibre	36
OmniGuide	37
Corning, Inc.	37
PATENTS BY REGION	37
<i>TABLE 12 U.S. PATENTS FOR PHOTONIC CRYSTAL FIBERS BY</i>	
<i>COUNTRY, 2005-2007 (NUMBER OF PATENTS)</i>	38
<i>FIGURE 4 TOTAL U.S. PATENTS BY REGION FOR PHOTONIC</i>	
<i>CRYSTAL FIBERS, 2005-2007 (%)</i>	38
MULTIDIMENSIONAL PHOTONIC CRYSTALS.....	39
INDUSTRY VERSUS ACADEMIA	39
<i>FIGURE 5 TOTAL U.S. PATENTS FOR MULTIDIMENSIONAL</i>	
<i>PHOTONIC CRYSTALS BY ORGANIZATION TYPE, 2005-2007 (%)</i>	39
PATENTS BY ASSIGNEE.....	40

<i>TABLE 13 MULTIDIMENSIONAL PHOTONIC CRYSTAL PATENTS BY ASSIGNEE, JANUARY 2005 THROUGH JUNE 2007 (NUMBER OF PATENTS)</i>	40
Canon	40
PATENTS BY REGION	41
<i>TABLE 14 U.S. PATENTS FOR MULTIDIMENSIONAL PHOTONIC CRYSTALS BY COUNTRY, 2005—2007 (NUMBER OF PATENTS)</i>	41
<i>FIGURE 6 TOTAL U.S. PATENTS BY REGION FOR MULTIDIMENSIONAL PHOTONIC CRYSTALS, 2005-2007 (%)</i>	42
REPRESENTATIVE ABSTRACTS.....	42
<i>TABLE 15 REPRESENTATIVE PATENTS</i>	42
FABRICATION OF PHOTONIC CRYSTAL FIBERS	43
PUMPING OF FIBER LASERS	44
PHOTONIC BAND GAP FIBERS	45
PHOTONIC CRYSTAL ENHANCED LEDS	46
PHOTONIC INPUT/OUTPUT PORT.....	47
DISPLAY AND PROJECTION ELEMENTS.....	48
NEGATIVE INDEX MATERIALS	48
Negative Index Materials (Continued)	49
MARKET ANALYSIS BY APPLICATION	50
OVERVIEW.....	50
<i>TABLE 16 HORIZONTAL MARKETS FOR PHOTONIC CRYSTAL TECHNOLOGY</i>	50
<i>TABLE 17 FORECAST: GLOBAL PHOTONIC CRYSTALS MARKET BY APPLICATION AREA, THROUGH 2013 (\$ MILLIONS)</i>	51
<i>FIGURE 7 GLOBAL PHOTONIC CRYSTALS MARKET SHARE BY APPLICATION AREA, 2008 AND 2013 (%)</i>	51
<i>FIGURE 7 (CONTINUED)</i>	52
NOTE: NUMBERS DO NOT ADD TO 100% DUE TO ROUNDING	52
LIGHT EMISSION	53
PHOTONIC CRYSTAL TECHNOLOGY IN LEDS	54
High Brightness LED Applications	54
<i>TABLE 18 APPLICATIONS FOR HIGH BRIGHTNESS LEDS</i>	54
<i>TABLE 18 (CONTINUED)</i>	55
DISPLAYS	55
Technology and Applications	55
High Definition Television.....	55
Electronic Paper.....	56
SWOT Summary.....	56
<i>TABLE 19 SWOT ANALYSIS FOR PHOTONIC CRYSTAL LEDS FOR LIGHTING AND DISPLAY APPLICATIONS</i>	57
SOLID STATE LIGHTING.....	57
Technology and Applications	57

SWOT Summary.....	58
<i>TABLE 20 SWOT ANALYSIS FOR PHOTONIC CRYSTAL LEDS FOR SOLID STATE LIGHTING APPLICATIONS</i>	58
MARKET ASSESSMENT	58
Displays Growth Potential	58
Lighting Growth Potential	59
Solid State Lighting Roadmap	59
Growth Factors	60
Projectors Growth Potential.....	61
Market Projections	61
<i>TABLE 21 FORECAST: GLOBAL PHOTONIC CRYSTAL MARKET IN LIGHT EMISSION BY PRODUCT TYPE THROUGH 2013 (\$ MILLIONS)</i>	62
INFORMATION TECHNOLOGY	63
MATERIALS PLATFORMS	63
III-V-based Semiconductors	63
Silicon-based Photonics	63
Multimaterial Platforms	64
TRANSCIVERS	64
LASER SOURCES	65
OTHER COMPONENTS	66
<i>TABLE 22 OTHER INFORMATION TECHNOLOGY COMPONENTS BASED ON PHOTONIC CRYSTALS</i>	66
Polarizers	66
Planar Polarizers	67
Fiber Polarizers.....	67
Dispersion Compensation.....	68
Multiplexers	68
Modulators	69
SWOT Analysis.....	70
<i>TABLE 23 SWOT ANALYSIS FOR PHOTONIC CRYSTAL STRUCTURES IN OTHER INFORMATION TECHNOLOGY COMPONENTS</i>	70
MARKET ASSESSMENT	70
Market Assessment (Continued).....	71
Transceivers Market Potential	72
Laser Source Market Potential	72
Components Market Potential.....	73
Polarizers	73
Demultiplexers.....	73
Modulators	73
Compensators.....	74
Market Projections	74

<i>TABLE 24 FORECAST: GLOBAL PHOTONIC CRYSTAL MARKET IN INFORMATION TECHNOLOGY BY PRODUCT TYPE THROUGH 2013 (\$ MILLIONS)</i>	74
ENERGY CONVERSION	75
SOLAR CELLS	76
THERMOPHOTOVOLTAICS (TPV)	76
Technology	76
Applications	77
SWOT ANALYSIS.....	78
<i>TABLE 25 SWOT ANALYSIS FOR PHOTONIC CRYSTAL ENERGY CONVERSION DEVICES</i>	78
MARKET ASSESSMENT	78
Solar Cells Growth Potential	78
Thermophotovoltaic Growth Potential	79
Market Projections	79
<i>TABLE 26 FORECAST: GLOBAL PHOTONIC CRYSTAL ENERGY CONVERSION MARKET THROUGH 2013 (\$ MILLIONS)</i>	80
OPTICAL ENERGY DELIVERY	80
SUPERCONTINUUM LIGHT SOURCES.....	81
Technology and Applications	81
SWOT Analysis.....	82
<i>TABLE 27 SWOT ANALYSIS FOR PHOTONIC CRYSTAL-BASED WHITE LIGHT SOURCES</i>	82
HOLLOW FIBER DELIVERY	82
Technology	82
Application Areas	83
Medical Surgery	84
Industrial Processing.....	84
SWOT Analysis.....	84
<i>TABLE 28 SWOT ANALYSIS FOR HOLLOW PHOTONIC BAND GAP FIBERS IN ENERGY DELIVERY APPLICATIONS</i>	84
FIBER LASERS	84
Technology	85
Applications	85
Ultrastable Fiber Lasers	86
High Power Fiber Lasers.....	86
SWOT Analysis.....	87
<i>TABLE 29 SWOT ANALYSIS FOR PHOTONIC CRYSTAL FIBER LASERS</i>	87
MARKET ASSESSMENT	87
Fiber Laser Growth Potential	87
Supercontinuum Source Growth Potential.....	87
Hollow Fiber Delivery Growth Potential.....	88
Market Projections	88

<i>TABLE 30 FORECAST: GLOBAL PHOTONIC CRYSTAL MARKET IN ENERGY DELIVERY BY PRODUCT CLASS THROUGH 2013 (\$ MILLIONS)</i>	89
OPTICAL SENSING.....	89
OVERVIEW	89
<i>TABLE 31 CATEGORIES OF PHOTONIC CRYSTAL OPTICAL SENSORS</i>	90
SUBSTRATE-BASED SENSORS.....	90
Lab-on-a-chip Sensors	91
Chemical Sensors.....	92
SWOT Analysis.....	93
<i>TABLE 32 SWOT ANALYSIS FOR PLANAR PHOTONIC CRYSTAL SENSORS</i>	93
FIBER-BASED SENSORS.....	93
SWOT Analysis	94
<i>TABLE 33 SWOT ANALYSIS FOR PHOTONIC CRYSTAL FIBERS IN OPTICAL SENSOR APPLICATIONS</i>	94
MARKET ASSESSMENT	94
Substrate-based Sensor Growth Potential	95
<i>TABLE 34 FORECAST: GLOBAL SUBSTRATE-BASED PHOTONIC CRYSTAL SENSOR MARKET BY APPLICATION AREA THROUGH 2013 (\$ MILLIONS)</i>	96
Fiber-based Sensor Growth Potential.....	97
Market Projections	97
<i>TABLE 35 FORECAST: GLOBAL PHOTONIC CRYSTAL MARKET IN OPTICAL SENSING BY PRODUCT CLASS THROUGH 2013 (\$ MILLIONS)</i>	97
OTHER APPLICATIONS	98
PASTES, INKS, AND COATINGS.....	98
Anticounterfeiting Measures	98
Market Potential.....	99
IMAGING COMPONENTS	99
MARKET PROJECTIONS.....	100
<i>TABLE 36 FORECAST: GLOBAL MARKET FOR OTHER PHOTONIC CRYSTAL APPLICATIONS THROUGH 2013 (\$ MILLIONS)</i>	100
MARKET ANALYSIS BY PHOTONIC CRYSTAL TYPE	101
OVERVIEW.....	101
<i>TABLE 37 FORECAST: GLOBAL MARKET FOR PHOTONIC CRYSTALS BY TYPE THROUGH 2013 (\$ MILLIONS)</i>	101
<i>FIGURE 8 PHOTONIC CRYSTAL MARKET SHARE BY DIMENSIONALITY (%)</i>	102
MULTIDIMENSIONAL PHOTONIC CRYSTALS.....	103
OUTLOOK.....	103
Technology Trends.....	103

Companies.....	103
MARKET ASSESSMENT	103
Breakdown by Application Areas.....	103
<i>TABLE 38 FORECAST: MULTIDIMENSIONAL PHOTONIC CRYSTAL</i>	
<i>MARKET BY APPLICATION AREA THROUGH 2013 (\$ MILLIONS)</i>	104
<i>FIGURE 9 GLOBAL MULTIDIMENSIONAL PHOTONIC CRYSTAL</i>	
<i>MARKET SHARE BY APPLICATION AREA, 2008 AND 2013 (%)</i>	104
<i>FIGURE 9 (CONTINUED)</i>	105
2013.....	105
PHOTONIC CRYSTAL FIBERS	106
OUTLOOK.....	106
Technology Trends.....	106
Intellectual Property Trends.....	107
MARKET ASSESSMENT	107
Breakdown by Guiding Mechanism.....	107
<i>TABLE 39 FORECAST: PHOTONIC CRYSTAL FIBER MARKET BY</i>	
<i>GUIDING MECHANISM THROUGH 2013 (\$ MILLIONS)</i>	107
<i>FIGURE 10 PHOTONIC CRYSTAL MARKET SHARE BY GUIDING</i>	
<i>MECHANISM (\$MILLIONS)</i>	108
Breakdown by Application Areas.....	108
<i>TABLE 40 FORECAST: PHOTONIC CRYSTAL FIBER MARKET BY</i>	
<i>APPLICATION AREA THROUGH 2013 (\$ MILLIONS)</i>	108
<i>FIGURE 11 PHOTONIC CRYSTAL MARKET SHARE BY</i>	
<i>APPLICATION AREA (\$ MILLIONS)</i>	109
INTERNATIONAL ASPECTS	110
INDUSTRY ASSOCIATIONS	110
GOVERNMENT SPONSORED PROJECTS	111
UNITED STATES	111
SMALL BUSINESS FUNDING	111
<i>TABLE 41 SBIR AND STTR AWARDS INVOLVING PHOTONIC</i>	
<i>CRYSTALS BY THE DEPARTMENT OF DEFENSE, Q1 2006 TO Q3</i>	
2007	112
<i>TABLE 41 (CONTINUED)</i>	113
EUROPEAN UNION	113
<i>TABLE 42 EUROPEAN UNION PROJECTS IN PHOTONIC CRYSTAL</i>	
<i>DEVELOPMENT</i>	114
Cost P11	114
Funfox	115
MONA	116
NextGenPCF.....	116
OPERA 2015	117
PHAT.....	117
PhOREMOST.....	118
Project Newton.....	118

MARKETS BY GEOGRAPHIC REGION	119
<i>TABLE 43 FORECAST: GLOBAL PRODUCTION OF PHOTONIC CRYSTALS BY REGION THROUGH 2013 (\$MILLIONS)</i>	119
<i>FIGURE 12 PROJECTED PRODUCTION BY REGION FOR PHOTONIC CRYSTALLINE MATERIALS, 2013 (%)</i>	120
COMPANY PROFILES	121
ALCATEL – LUCENT	121
ALIGHT TECHNOLOGIES	121
BUSSAN NANOTECH RESEARCH INSTITUTE (XNRI)	122
CANON.....	122
CORNING, INC.	123
CRYSTAL FIBRE A/S.....	123
FIANIUM	124
ICX PHOTONICS	124
KOHERAS.....	125
LUMINUS DEVICES INC	125
LUXTERA, INC.....	126
MESOPHOTONICS, LTD.	126
OMNIGUIDE, INC.	127
OPALUX, INC.....	128
PANORAMA LABS.....	128
PHILIPS LUMILEDS	129
PHOTEON TECHNOLOGIES GMBH	129
PHOTONIC LATTICE, INC.....	129
PHOXTAL COMMUNICATIONS	130
STAR SOLAR.....	131
APPENDIX I: RESEARCH GROUPS AND PROGRAMS	132
NORTH AMERICA	132
NORTH AMERICA (CONTINUED).....	133
NORTH AMERICA (CONTINUED).....	134
EUROPE.....	135
UNITED KINGDOM.....	135
NETHERLANDS.....	136
GREECE.....	136
DENMARK	136
ASIA.....	137
REST OF THE WORLD	137
APPENDIX II: INDUSTRY ASSOCIATIONS.....	138
NORTH AMERICA	138
<i>TABLE 44 NORTH AMERICAN PHOTONICS INDUSTRY ASSOCIATIONS</i>	138
INTERNATIONAL	139

*TABLE 45 INTERNATIONAL PHOTONICS AND RELATED
INDUSTRY ASSOCIATIONS..... 139*