FOREWORD ..... **XVI**

THE FRICTION PRODUCTS & MATERIALS MARKET **1**

INTRODUCTION 2
STUDY GOALS AND OBJECTIVES 2
REASONS FOR DOING THE STUDY 2
INTENDED AUDIENCE 2
SCOPE OF REPORT 3
INFORMATION SOURCES 4
AUTHOR'S CREDENTIALS 4
RELATED BCC PUBLICATIONS 5
BCC ONLINE SERVICES 5
DISCLAIMER 6

SUMMARY 7
SUMMARY (CONTINUED) 8
SUMMARY (CONTINUED) 9
TABLE 1 KEY END-USE MARKETS FOR GLOBAL FRICTION PRODUCTS ($ MILLIONS) *10*
FIGURE 1 KEY END-USE MARKETS FOR GLOBAL FRICTION PRODUCTS ($ MILLIONS) *10*

TECHNOLOGICAL, ECONOMIC, AND REGULATORY ENVIRONMENT 11
OVERVIEW 11
HISTORY OF FRICTION PRODUCTS AND MATERIALS 11
TABLE 2 REASONS WHY THE FRICTION MATERIALS INDUSTRY SHOWED LITTLE CHANGE BEFORE THE MID-1960S *12*
TABLE 3 REASONS WHY THE FRICTION MATERIALS INDUSTRY CHANGED IN THE MID-1960S *13*
WHAT IS A FRICTION MATERIAL? 14
THE SCIENCE OF FRICTION 14
THE SCIENCE OF FRICTION (CONTINUED) 15
TEMPERATURE VARIATION OF THE FRICTIONAL COEFFICIENT 16
TESTING 17
PRODUCTION OF FRICTION MATERIALS 17
SOFT BATCH 17
MOLDING 18
TRUCK BLOCK 18
CURING 18
BONDING 18
INTEGRALLY MOLDED BRAKES 19
BRAKE INGREDIENTS 19

FIBERS IN COMPOSITES 19
THE EMPHASIS ON REDUCING COSTS 20
EMERGING TECHNOLOGIES 21
REGULATORY CONSIDERATIONS 22
HEALTH EFFECTS OF ASBESTOS 22
Health Effects of Asbestos (Continued) 23
HISTORY OF ASBESTOS LEGISLATION 24
TABLE 4 PRODUCTS THAT CANNOT CONTAIN ASBESTOS AFTER 1996 25
TABLE 5 LIST OF PRODUCTS THAT CAN STILL CONTAIN ASBESTOS 26
THE USE OF ASBESTOS IN MATERIALS 26
The Use of Asbestos in Materials (Continued) 27
REGULATIONS DEALING WITH THE ENVIRONMENT 28
Regulations Dealing With the … (Continued) 29
REGULATIONS CONCERNING THE TRANSPORTATION INDUSTRIES 30
Increased Calls for Regulation of the Automotive Aftermarket 31
The Threat of Litigation 31
ROLE OF ASSOCIATIONS 32
Friction Materials Standards Institute 32
Brake Manufacturers Council 33
ASBESTOS LITIGATION AND LIABILITY 34

FRICTION MATERIALS 35
OVERVIEW 35
TABLE 6 GLOBAL FRICTION MATERIALS MARKET, THROUGH 2012 (SELECTED RAW MATERIALS) ($ MILLIONS) 35
TABLE 7 GLOBAL FRICTION MATERIALS MARKET, THROUGH 2012 (SELECTED RAW MATERIALS) (MILLIONS OF POUNDS) 36
FRICTION PRODUCTS CONSTRUCTION 37
DRY FRICTION PRODUCTS 37

ADVANCED MATERIALS AND DEVICES FOR RENEWABLE ENERGY SYSTEMS 38

INTRODUCTION 39
STUDY BACKGROUND 39
STUDY GOALS AND OBJECTIVES 39
INTENDED AUDIENCE 39
SCOPE AND FORMAT 40
INFORMATION SOURCES AND METHODOLOGY 41
ANALYST CREDENTIALS 41
RELATED BCC RESEARCH REPORTS 41

RELATED BCC RESEARCH REPORTS (CONTINUED) 42

EXECUTIVE SUMMARY 43
TABLE 8 GLOBAL MARKET FOR ADVANCED MATERIALS AND DEVICES FOR RENEWABLE ENERGY SYSTEMS, THROUGH 2011 ($ BILLION) *43*
TABLE 9 RENEWABLE ENERGY CONSUMPTION OF ADVANCED MATERIALS AND DEVICES BY TYPE, 2005-2011 ($ BILLIONS) *44*
FIGURE 2 RENEWABLE ENERGY CONSUMPTION OF ADVANCED MATERIALS AND DEVICES BY TYPE, 2005-2011 ($ BILLIONS) *44*

OVERVIEW 45
GENERAL DESCRIPTION 45
DEFINITIONS 45
Renewable Energy 45
Renewable Energy Systems 45
Advanced Materials and Devices 45
OVERALL MARKET SIZE AND SEGMENTATION 46
TABLE 10 GLOBAL MARKET FOR ADVANCED MATERIALS AND DEVICES BY RENEWABLE ENERGY TECHNOLOGY, THROUGH 2011 ($ BILLIONS) *46*
FIGURE 3 RENEWABLE ENERGY TECHNOLOGIES' SHARE OF ADVANCED MATERIALS AND DEVICES MARKET, 2005 VS. 2011 (% OF TOTAL DEMAND) *47*
FIGURE 3 (CONTINUED) *48*
PATENT ANALYSIS 48
FIGURE 4 U.S. PATENTS AND PATENT APPLICATIONS RELATING TO RE ADVANCED MATERIALS AND DEVICES BY TYPE OF RE TECHNOLOGY (%) *49*

POWDER METALLURGY 50

INTRODUCTION 51
STUDY GOAL AND OBJECTIVES 51
REASONS FOR DOING THE STUDY 51
INTENDED AUDIENCE 51
SCOPE AND FORMAT 52
METHODOLOGY 52
INFORMATION SOURCES 52
ANALYST CREDENTIALS 53
RELATED BCC RESEARCH WORK CREDENTIALS 53

SUMMARY 54

TABLE 11 GLOBAL POWDERS AND PARTS SHIPMENTS, THROUGH 2011 (MILLIONS) *55*
FIGURE 5 GLOBAL POWDERS AND PARTS SHIPMENTS, 2006 AND 2011 (MILLION LBS.) *55*
FIGURE 6 GLOBAL POWDERS AND PARTS SHIPMENTS, 2006 AND 2011 ($ MILLIONS) *56*

PM MARKET OVERVIEW 57
MARKET PERSPECTIVE 57
POWDER MATERIALS 57
TABLE 12 ESTIMATED GLOBAL POWDER METAL SHIPMENTS AND MARKET SHARE BY TYPE OF MATERIAL, 2006 (SHORT TONS AND % SHARE) *57*
FIGURE 7 GLOBAL POWDER METAL SHIPMENTS, BY TYPE OF MATERIAL, 2006 (SHORT TONS) *58*
FIGURE 8 GLOBAL POWDER METAL MARKET SHARE BY TYPE OF MATERIAL, 2006 (%) *58*
COMPONENT MARKETS 59
TABLE 13 GLOBAL PM COMPONENT MARKETS, 2006 (% SHARE AND $ MILLIONS) *59*
FIGURE 9 GLOBAL PM COMPONENT MARKETS, 2006 ($ MILLIONS) *60*
FIGURE 10 GLOBAL PM COMPONENT MARKETS, 2006 (%) *61*
MEASUREMENT OBJECTIVES 61
Measurement Objectives (Continued) 62

ADVANCED PROTECTIVE GEAR AND ARMOR 63

INTRODUCTION 64
STUDY GOALS AND OBJECTIVES 64
REASONS FOR THIS STUDY 64
INTENDED AUDIENCE AND CONTRIBUTION OF STUDY 65
SCOPE OF REPORT 66
INFORMATION SOURCES 67
ANALYST'S CREDENTIALS 67
RELATED BCC RESEARCH PUBLICATIONS 68

SUMMARY 69
SUMMARY 69
SUMMARY (CONTINUED) 70
TABLE 14 U.S. VALUE OF ADVANCED PROTECTIVE GEAR AND ARMOR, THROUGH 2012 ($ MILLIONS) *71*
FIGURE 11 U.S. VALUE OF ADVANCED PROTECTIVE GEAR AND ARMOR, 2001-2012 ($ MILLIONS) *71*
SUMMARY (CONTINUED) 72

BALLISTIC BODY AND VEHICLE ARMOR 73
HISTORICAL EVOLUTION 73
BODY ARMOR 74
BODY ARMOR CONSTRUCTION 74
NON-MILITARY USE OF BODY ARMOR 75
BODY ARMOR AND POLICE DEATHS 75
TABLE 15 LAW ENFORCEMENT OFFICERS FELONIOUSLY KILLED WITH FIREARMS, POINT OF ENTRY FOR TORSO WOUNDS AND WEARING BODY ARMOR, 1996-2005 76
BODY ARMOR STANDARDS 77
AUTHORITY 77
DEVELOPMENT OF BODY ARMOR 77
MANUFACTURE OF BODY ARMOR 78
TABLE 16 SUMMARY NATIONAL INSTITUTE OF JUSTICE BODY ARMOR STANDARDS 78
2007 REVISIONS TO NIJ STANDARDS 79
NIJ Requirements 79
BODY ARMOR ACQUISITION PROCESS 79
BODY ARMOR TESTING 80
CIVILIAN LAW ENFORCEMENT AGENCY ARMOR 80
CIVILIAN LAW ENFORCEMENT ARMORED VEHICLES 81
MILITARY PROTECTIVE BODY AND VEHICLE ARMOR 81
CONSIDERATIONS IN MILITARY BODY ARMOR DESIGN 81
TABLE 17 KEY CONSIDERATIONS FOR MILITARY BODY ARMOR DESIGN 81
PERSONAL ARMOR SYSTEM FOR GROUND TROOPS (PASGT) 81
RANGER BODY ARMOR (RBA) 82
DESIGN EFFECT OF INSURGENT CAMPAIGN 83
INTERCEPTOR BODY ARMOR SYSTEM 84
Description 84
IMPROVED INTERCEPTOR OTV (IOTV) 85
FIGURE 12 IMPROVED OUTER TACTICAL VEST 86
COMBAT HELMET 86
Personnel Armor System Ground Troops (PASGT) Helmet 87
Advanced Combat Helmet (ACH) 88
COMBAT EYE PROTECTION 88
NEW STANDARD DESIGN ANSI Z87.1-2003 89
COMBAT GLOVES 90
MILITARY BODY ARMOR INVENTORY 91
TABLE 18 ARMY BODY ARMOR REQUIREMENTS AS OF FEBRUARY 2007 91
REMAINING PROTECTIVE ISSUES 91
FUTURE BODY ARMOR 92

VEHICLE ARMOR 92
EVOLUTION OF THE ARMORED HMMWV 93
TABLE 19 M1114 HMMWV SPECIFICATIONS 94
TABLE 19 (CONTINUED) 95
M1114 Variations 95
M1114 Armor Improvements: The Frag-5 Kit 95
FACTORS DRIVING ARMORED HUMVEE PROCUREMENT 96
THE STRYKER COMBAT VEHICLE 97
Specifications 97
Production History 98
Design 98
Power Pack and Mechanical Features 98
Command, Control, and Targeting 99
Protective Features 99
Slat Armor 99
Mobility Features 100
Variants 100
Combat Performance 100
Performance Criticism 101
THE MINE RESISTANT AMBUSH-PROTECTED (MRAP) VEHICLE 102
Effectiveness 103
LIMITS OF ARMOR 103
LIMITS OF ARMOR (CONTINUED) 104

LIGHTWEIGHT MATERIALS IN TRANSPORTATION 105

INTRODUCTION 106
BACKGROUND 106
STUDY GOALS AND OBJECTIVES 106
INTENDED AUDIENCE 107
SCOPE OF REPORT 107
INFORMATON SOURCES AND METHODOLOGY 108
ANALYST CREDENTIALS 109
RELATED BCC REPORTS 109

EXECUTIVE SUMMARY 110
TABLE 20 GLOBAL MARKET FOR LIGHTWEIGHT MATERIALS IN TRANSPORTATION, THROUGH 2011 110
FIGURE 13 TRENDS IN GLOBAL MARKET FOR LIGHTWEIGHT MATERIALS USED IN TRANSPORTATION EQUIPMENT, 2005-2011 (MILLION TONS/$ BILLIONS) 110
EXECUTIVE SUMMARY (CONTINUED) 111

OVERVIEW 112

DEFINITIONS 112
LIGHTWEIGHT MATERIALS 112
TRANSPORTATION EQUIPMENT 112
IMPORTANCE OF LIGHTWEIGHT MATERIALS 112
FUEL CONSUMPTION IN THE TRANSPORT SECTOR 112
FIGURE 14 TRANSPORTATION SECTOR SHARE OF GLOBAL OIL CONSUMPTION, 2003 AND 2010 (%) 113
FIGURE 15 GLOBAL FUEL CONSUMPTION BY TRANSPORT MODE, 2005 (%) 114
TRANSPORT SECTOR CONTRIBUTION TO GREENHOUSE GAS AND OTHER EMISSIONS 115
Greenhouse Gases 115
FIGURE 16 GLOBAL TRANSPORT SECTOR CONTRIBUTION TO GREENHOUSE GAS EMISSIONS (%) 115
FIGURE 16 (CONTINUED) 116
Other Pollutants 116
ROLE OF LIGHTWEIGHT MATERIALS IN REDUCING TRANSPORT ENERGY CONSUMPTION AND EMISSIONS 117
TRADEOFFS 117
Safety Aspects of Lightweight Materials 117
Cost 118
FIGURE 17 COMPARATIVE COST/STRENGTH OF STEEL VS. LIGHTWEIGHT MATERIALS FOR VEHICLE PRIMARY STRUCTURES ($/LB AND GPA) 119
FIGURE 18 CFRP FABRICATION COSTS USING DIFFERENT FABRICATION METHODS ($/LB) 120
Durability/Reliability 121
Recyclability 122
Conservatism 123
END-USER SEGMENTS 124
TABLE 21 TRANSPORTATION EQUIPMENT MATERIALS CONSUMPTION, THROUGH 2011 (TONS) 124
FIGURE 19 TRENDS IN TRANSPORTATION EQUIPMENT MATERIALS CONSUMPTION, 2005-2011 (TONS) 125
FIGURE 20 MAJOR END-USER SHARES OF TRANSPORTATION EQUIPMENT MATERIALS CONSUMPTION, 2005 VS. 2011 (%) 126
MOTOR VEHICLES 126
Historical Production 126
FIGURE 21 GLOBAL PRODUCTION OF MOTOR VEHICLES BY TYPE, 2005 (%) 127
TABLE 22 GLOBAL MOTOR VEHICLE PRODUCTION BY TYPE, THROUGH 2005 (MILLION UNITS) 128
FIGURE 22 TRENDS IN GLOBAL MOTOR VEHICLE PRODUCTION BY TYPE, 1998-2005 (MILLION UNITS) 128

Future Production 129
FIGURE 23 FUTURE TRENDS IN PRODUCTION OF MOTOR VEHICLES BY TYPE, 2005-2011 (MILLION UNITS) *129*
TABLE 23 PROJECTED MOTOR VEHICLE PRODUCTION BY TYPE, THROUGH 2011 (MILLION UNITS) *130*
Vehicle Weight and Materials Use 130
FIGURE 24 AVERAGE VEHICLE WEIGHTS BY CLASS, 2005 (POUNDS) *130*
FIGURE 24 (CONTINUED) *131*
FIGURE 25 TOTAL MOTOR VEHICLE MATERIAL USAGE (MILLION TONS) *131*
FIGURE 25 (CONTINUED) *132*
RAILWAY LOCOMOTIVES AND ROLLING STOCK 132
Historical Production 132
TABLE 24 GLOBAL SHIPMENTS OF RAILWAY LOCOMOTIVES AND ROLLING STOCK, 2005 (UNITS) *132*
Future Shipments 133
TABLE 25 PROJECTED SHIPMENTS OF RAILWAY LOCOMOTIVES AND ROLLING STOCK, THROUGH 2011 (UNITS) *133*
Weight and Materials Requirements 133
TABLE 26 AVERAGE WEIGHT OF RAILWAY LOCOMOTIVES AND ROLLING STOCK (TONS PER UNIT) *133*
TABLE 26 (CONTINUED) *134*
FIGURE 26 TOTAL RAILWAY LOCOMOTIVE AND ROLLING STOCK MATERIAL USAGE (MILLION TONS) *134*
SHIPS 135
Historical Deliveries 135
FIGURE 27 TRENDS IN WORLD SHIP DELIVERIES, 2001-2005 (MILLION GROSS TONS) *135*
TABLE 27 WORLD SHIP DELIVERIES, THROUGH 2005 (MILLION TONS) *136*
Future Deliveries 136
TABLE 28 WORLD SHIP DELIVERIES, THROUGH 2011 (MILLION GROSS TONS) *136*
FIGURE 28 PROJECTED SHIP DELIVERIES, 2005-2011 (MILLION GROSS TONS) *136*
Weight and Materials Use 137
FIGURE 29 STEELWEIGHT OF PROJECTED SHIP DELIVERIES, 2005-2011 (MILLION TONS) *137*
AIRCRAFT 138
Historical Aircraft Deliveries 138
FIGURE 30 GLOBAL CIVIL AIRCRAFT DELIVERIES, 2005 (%) *138*
Future Deliveries 139

TABLE 29 GLOBAL DELIVERIES OF CIVILIAN AIRCRAFT, THROUGH 2011 (UNITS/$ BILLIONS) *139*
FIGURE 31 TRENDS IN GLOBAL DELIVERIES OF CIVILIAN AIRCRAFT, 2005-2011 (UNITS) *139*
Weight and Materials Requirements 140
FIGURE 32 TOTAL CIVILIAN AIRCRAFT MATERIALS USAGE, 2005-2011 (MILLION TONS) *140*
FIGURE 32 (CONTINUED) *141*
TABLE 30 CIVILIAN AIRCRAFT AVERAGE UNLOADED WEIGHT, BY TYPE OF AIRCRAFT, 2005 (POUNDS) *141*
Weight and Materials … (Continued) 142

EMI/RFI: MATERIALS AND TECHNOLOGIES 143

INTRODUCTION 144
STUDY OBJECTIVES 144
SCOPE AND FORMAT 144
METHODOLOGY 145
CONTRIBUTION OF THE STUDY 145
ABOUT THE AUTHOR 146
RELATED BCC REPORTS 146

SUMMARY 147
TABLE 31 EMI/RFI SHIELDING OPTIONS BY TYPE, THROUGH 2012 ($ MILLIONS) *147*
FIGURE 33 EMI/RFI SHIELDING OPTIONS BY TYPE, 2006-2012 ($ MILLIONS) *148*
SUMMARY (CONTINUED) 149

SHIELDING TECHNOLOGIES AND MATERIALS 150
COST AND PERFORMANCE CHARACTERISTICS OF THE SHIELDING OPTIONS 150
COST COMPARISONS 150
TABLE 32 TOTAL RAW MATERIAL AND LABOR COSTS ASSOCIATED WITH THE MAJOR SHIELDING OPTIONS, 2007 ($/SQ.FT) *151*
TABLE 33 RELATIVE COST STRUCTURE OF VARIOUS SHIELDING OPTIONS, 2007 ($/SQ.FT) *151*
PERFORMANCE COMPARISONS 152
TABLE 34 SUMMARY OF STRENGTHS AND WEAKNESSES OF EMI SHIELDING OPTIONS *152*
TABLE 35 QUALITATIVE RATINGS OF THE MAJOR SHIELDING OPTIONS *153*
METALLIZATION PROCESSES 153
Background 153

Overview 154
Metallization Materials 154
TABLE 36 METALLIZATION MATERIALS: FUNCTIONAL COATINGS 154
TABLE 37 PLATEABLE RESINS 155
SHIELDING EFFECTIVENESS OVERVIEW BY TYPE OF COATING 155
TABLE 38 SHIELDING EFFECTIVENESS OF KEY COATINGS (DB ATTENUATION) 155
CONDUCTIVE PLASTICS 155
OVERVIEW 155
BACKGROUND 156
DIELECTRIC PROPERTIES OF PLASTICS 156
TABLE 39 DIELECTRIC CONSTANTS FOR SELECTED MATERIALS 157
TECHNIQUES FOR MAKING PLASTICS CONDUCTIVE 157
Overview 157
TABLE 40 METHODS OF MAKING PLASTICS CONDUCTIVE 158
Types of Conductive Materials 158
TABLE 41 SURFACE RESISTIVITY FOR ELECTRONIC DEVICE SUBSTRATES 158
TABLE 42 RESISTANCE SPECTRUM FOR METHODS OF MAKING PLASTICS CONDUCTIVE (OHMS/SQ) 159
FUNCTIONS 160
CONDUCTIVE ADDITIVE SELECTION 160
CONDUCTIVITY TESTS 160
ADVANTAGES AND DISADVANTAGES 160
COMPOUNDING CONDUCTIVE PLASTICS 161
CONDUCTIVE PLASTIC ADDITIVES 162
Overview 162
Background 163
Fibers and Powders 163
Silver-Coatings 163
Carbon Fibers and Powders 164
Overview 164
Carbon Fibers 164
Carbon Blacks 164
Metal Fibers 165
Overview 165
Advantages 166
Metal Fiber Conductivity 166
Metallized Glass Fibers 167
Nickel-Coated Graphite Fibers 167
Background 167
Advantages 168
Stainless Steel Fibers 169

Overview 169
Technology 169
Effect on Processing 170
Fiber Forms 170
Advantages and Disadvantages 171
TABLE 43 ADVANTAGES AND DISADVANTAGES OF STAINLESS STEEL FIBERS 171
TABLE 43 (CONTINUED) 172

SMART AND INTERACTIVE TEXTILES 173

INTRODUCTION 174
STUDY GOALS AND OBJECTIVES 174
REASONS FOR DOING THE STUDY 174
INTENDED AUDIENCE 174
SCOPE OF REPORT 175
METHODOLOGY AND INFORMATION SOURCES 175
ESTIMATING THE MARKET FOR DEVELOPMENTAL TECHNOLOGIES 175
ESTIMATING THE MARKET FOR SMART TEXTILE APPLICATIONS 176
ANALYST CREDENTIALS 176
RELATED MATERIALS FROM BCC RESEARCH 176
RELATED MATERIALS FROM BCC …(CONTINUED) 177

SUMMARY 178
TABLE 44 U.S. SMART AND TEXTILE MARKETS, THROUGH 2012 ($ MILLIONS) 178
FIGURE 34 U.S. SMART AND TEXTILE MARKETS, 2006-2012 ($ MILLIONS) 179

SMART TEXTILES OVERVIEW 180
GENERAL DESCRIPTION 180
DEFINITIONS 180
What Is a Textile? 180
Textiles and Polymers 180
Smart Textiles 181
Integrated vs. Embedded Sensors 181
Basic Technologies, Intermediate Products and Final Applications 181
FIGURE 35 PHASE CHANGE TEXTILES: BASIC TECHNOLOGIES, INTERMEDIATE PRODUCTS, AND FINAL APPLICATIONS 182
Established, Emergent, and Developmental Applications 182
HISTORY OF SMART TEXTILES 183
TECHNOLOGIES 184

PHASE CHANGE MATERIALS 184
Applications 184
Technology 185
PCM Microcapsules 185
PCM Coatings 186
PCM Fibers 186
Patents Issued 186
TABLE 45 U.S. PHASE CHANGE TEXTILE PATENTS ISSUED THROUGH JUNE 15, 2007 ..... *187*
TABLE 45 (CONTINUED) *188*
FIGURE 36 U.S. PHASE-CHANGE TEXTILE PATENT HOLDERS (% OF TOTAL U.S. PATENTS ISSUED THROUGH JUNE 15, 2007) *189*
Manufacturers 189
TABLE 46 PHASE CHANGE MATERIALS MANUFACTURERS *190*
SHAPE MEMORY MATERIALS 190
Applications 190
Clothing Applications 190
Medical Applications 191
Technology 192
Shape Memory Alloys 192
TABLE 47 SHAPE MEMORY ALLOYS *193*
Nitinol 193
Cuprous-zinc SMAs 194
Shape Memory Polymers 195
Diaplex 196
Polyurethane Films 196
Bi-material Film Laminates 196
Encapsulated Bi-gels 196
Other SMPs 197
Patents Issued 197
FIGURE 37 SHAPE MEMORY TEXTILE PATENTS AS A PERCENTAGE OF ALL U.S. SHAPE MEMORY MATERIAL PATENTS ISSUED THROUGH JUNE 15, 2007 (%) *197*
FIGURE 37 (CONTINUED) *198*
TABLE 48 SHAPE MEMORY FABRIC PATENTS *198*
TABLE 48 (CONTINUED) *199*
Manufacturers 199
TABLE 49 SHAPE MEMORY FABRIC MANUFACTURERS *200*
CHROMIC MATERIALS 200
Applications 200
Technology 200
Photochromic Textiles 201
Thermochromic Textiles 201
Liquid Crystal Dyes 202

Molecular Rearrangement Dyes 202
Electrochromic Textiles 202
Solvatechromic Textiles 203
Patents Issued 203
FIGURE 38 U.S. CHROMIC TEXTILE FABRIC PATENTS ISSUED THROUGH JUNE 15, 2007 (%) *204*
TABLE 50 CHROMIC FABRIC PATENTS AND PATENT APPLICATIONS *204*
TABLE 50 (CONTINUED) *205*
Manufacturers 205
TABLE 51 CHROMIC FABRIC PRODUCT MANUFACTURERS *205*
CONDUCTIVE MATERIALS 206
Description 206
Applications 206
Technology 207
Conductive Coated Yarns 207
Carbon Nanotube-based Fibers and Yarns 208
Dry Spinning 208
Aqueous Spinning 208
Direct Spinning 209
Patents Issued 209