

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	2
SCOPE OF REPORT	2
INTENDED AUDIENCE.....	3
METHODOLOGY AND INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC REPORTS	4
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
CHAPTER TWO: SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL VALUE FOR FIBER OPTIC SENSORS BY</i> <i>TYPE, THROUGH 2017 (\$ MILLIONS)</i>	5
<i>SUMMARY FIGURE GLOBAL VALUE FOR FIBER OPTIC SENSORS</i> <i>BY TYPE, 2010-2017 (\$ MILLIONS)</i>	6
CHAPTER THREE: OVERVIEW	7
DEFINITION OF THE INDUSTRY	7
EXTRINSIC OR INTRINSIC SENSORS.....	7
POINT AND DISTRIBUTED SENSORS.....	7
<i>TABLE 1 TYPES OF FIBER OPTIC SENSORS APPLIED</i>	8
IMPORTANCE OF THE INDUSTRY	9
CONCEPTS IN THE INDUSTRY	9
PRODUCT LIFE CYCLE.....	10
TECHNOLOGY LIFE CYCLE	10
HISTORY	10
<i>TABLE 2 BRIEF HISTORY OF FIBER OPTIC SENSORS</i>	11
FIBER OPTIC GYROSCOPES	11
TELECOMMUNICATIONS LEGACY	12
DEFENSE APPLICATIONS SPUR RESEARCH.....	12
EXTENDING DRILLERS REACH.....	13
SURGICAL MINIATURIZATION.....	13
GOVERNMENT REGULATIONS	14
FORESEEABLE FUTURE DEVELOPMENTS	14
EXISTING MARKETS.....	14
Energy.....	14
Defense.....	15
Medical.....	15
Security.....	15
Structural.....	15
Industrial	16
Transportation.....	16
NEW MARKETS	16

CHAPTER FOUR: TECHNOLOGY.....	17
TYPES OF SENSORS.....	17
<i>TABLE 3 TYPES OF SENSORS COVERED IN THIS REPORT</i>	17
FABRY-PEROT INTERFEROMETERS	17
FIBER OPTIC GYRO	18
FIBER BRAGG GRATING	18
BRILLOUIN	19
COATED FIBER SENSORS.....	20
ADVANTAGES OF FIBER OPTIC SENSORS	21
<i>TABLE 4 CHARACTERISTICS OF FOS</i>	21
NO ELECTROMAGNETIC INTERFERENCE	21
SMALL SENSING ELEMENTS.....	21
ENVIRONMENTAL RUGGEDNESS	22
MULTIPLEXING OF SIGNALS	22
SECURITY	22
DISADVANTAGES OF FIBER OPTIC SENSORS	22
<i>TABLE 5 DISADVANTAGES OF FOS</i>	22
WEIGHT CONSIDERATIONS.....	23
COST.....	23
ENVIRONMENTAL SENSITIVITY	23
PATENT ANALYSIS	24
PATENTS BY ASSIGNEE.....	24
<i>TABLE 6 PATENTS BY COMPANY, THROUGH JULY 2011 (PATENTS)</i>	24
PATENTS BY SENSOR TYPE.....	25
<i>TABLE 7 PATENTS BY SENSOR TYPE, 2008-JULY 2011 (PATENTS)</i>	25
Patents by Sensor Type (Continued)	26
PATENT APPLICATIONS BY SENSOR TYPE	27
<i>TABLE 8 PATENT APPLICATIONS BY SENSOR TYPE, 2008-JULY</i> <i>2011 (APPLICATIONS)</i>	27
Patent Applications by Sensor Type (Continued)	28
CHAPTER FIVE: MARKET BY SENSOR TYPE.....	29
FORECAST OF ASSUMPTIONS.....	29
PRICES.....	29
PRICING TRENDS	29
<i>TABLE 9 GLOBAL VALUE OF FOS MARKET BY SENSOR TYPE,</i> <i>THROUGH 2017 (\$ MILLIONS)</i>	30
<i>FIGURE 1 GLOBAL VALUE OF FOS MARKET BY SENSOR TYPE,</i> <i>2010-2107 (\$ MILLIONS)</i>	31
EXTRINSIC.....	31
<i>TABLE 10 GLOBAL SIZE OF EXTRINSIC FOS MARKET, THROUGH</i> <i>2017 (UNITS AS NOTED)</i>	32
<i>TABLE 11 GLOBAL MARKET VALUE FOR EXTRINSIC FOS, BY</i> <i>SEGMENT, THROUGH 2017 (\$ MILLIONS)</i>	32
COATED FIBERS	33

<i>FIGURE 2 GLOBAL MARKET VALUE FOR COATED FIBER SENSORS, 2010-2017 (\$ MILLIONS)</i>	33
Growth Drivers	34
Growth Inhibitors	34
FABRY-PEROT	34
<i>FIGURE 3 GLOBAL MARKET VALUE FOR FABRY-PEROT SENSORS, 2010-2017 (\$ MILLIONS)</i>	35
Growth Drivers	35
Growth Inhibitors	35
OTHER SENSORS	36
<i>FIGURE 4 GLOBAL MARKET VALUE FOR OTHER SENSORS, THROUGH 2017 (\$ MILLIONS)</i>	36
Growth Drivers	37
Growth Inhibitors	37
INTRINSIC	37
<i>TABLE 12 GLOBAL SIZE OF INTRINSIC FOS MARKET, THROUGH 2017 (UNITS AS NOTED)</i>	37
<i>TABLE 13 GLOBAL MARKET VALUE FOR INTRINSIC FOS, BY SEGMENT, THROUGH 2017 (\$ MILLIONS)</i>	38
FIBER OPTIC GYROSCOPES	38
<i>FIGURE 5 GLOBAL VALUE OF FOG SENSORS, 2010-2017 (\$ MILLIONS)</i>	39
Growth Drivers	39
Growth Inhibitors	39
FIBER BRAGG GRATINGS	40
<i>FIGURE 6 GLOBAL VALUE FOR FBG SENSORS, 2010-2017 (\$ MILLIONS)</i>	41
Growth Drivers	41
Growth Inhibitors	42
BRILLOUIN	42
<i>FIGURE 7 GLOBAL VALUE FOR BRILLOUIN BASED SENSORS, 2010-2017 (\$ MILLIONS)</i>	43
Growth Drivers	43
Growth Inhibitors	44
MARKET BY SENSOR DESIGN	44
<i>TABLE 14 GLOBAL VALUE OF FOS MARKET BY DESIGN, THROUGH 2017 (\$ MILLIONS)</i>	44
<i>FIGURE 8 GLOBAL MARKET VALUE BY SENSOR DESIGN, 2010-2017 (\$ MILLIONS)</i>	45
POINT SENSORS	45
<i>TABLE 15 GLOBAL MARKET VALUE FOR POINT FOS, BY CATEGORY, THROUGH 2017 (\$ MILLIONS)</i>	46
Fiber Optic Gyroscope	46
Coated Fiber Sensors	46

Fabry-Perot Sensors	46
Other Sensors	47
DISTRIBUTED SENSORS	47
TABLE 16 GLOBAL MARKET VALUE FOR DISTRIBUTED FOS, BY CATEGORY, THROUGH 2017 (\$ MILLIONS)	47
Fiber Bragg Grating Sensors	47
Brillouin Sensors	48
CHAPTER SIX: MARKETS BY APPLICATION	49
MARKETS BY APPLICATION	49
TABLE 17 GLOBAL VALUE OF FIBER OPTIC SENSOR MARKET BY APPLICATION, THROUGH 2017 (\$ MILLIONS)	50
FIGURE 9 MARKET SHARE OF GLOBAL VALUE BY APPLICATION, 2011 AND 2017 (%)	51
ENERGY	52
TABLE 18 GLOBAL MARKET FORECAST FOR ENERGY, THROUGH 2017 (\$ MILLIONS)	52
OIL AND GAS	53
TABLE 19 GLOBAL MARKET VALUE FOR OIL AND GAS BY SEGMENT, THROUGH 2017 (\$ MILLIONS)	53
Growth Drivers	54
Growth Inhibitors	55
Down-Hole Model Assumptions	55
Number of Worldwide Wells	55
TABLE 20 NUMBER OF WELLS WORLDWIDE THROUGH 2017 (WELLS)	56
Americas	57
EMEA	57
Asia	58
Global Value Model	58
TABLE 21 GLOBAL VALUE MODEL FOR FOS IN THE DOWN-HOLE SEGMENT, THROUGH 2017 (UNITS AS NOTED)	58
Global Value ... (Continued)	59
FIGURE 10 GLOBAL VALUE FOR FOS IN THE DOWN-HOLE SEGMENT, 2010-2017 (\$ MILLIONS)	60
Seismic	60
Growth Drivers	61
Growth Inhibitors	61
Model Assumptions	61
TABLE 22 GLOBAL VALUE FOR SEISMIC FOS, THROUGH 2017 (UNITS AS NOTED)	62
FIGURE 11 GLOBAL VALUE FOR SEISMIC FOS, 2010-2017 (\$ MILLIONS)	63
WIND ENERGY	63
Growth Drivers	64

Growth Inhibitors	64
Model Assumptions	65
<i>TABLE 23 VALUE MODEL FOR WIND ENERGY FOS, THROUGH 2017</i> <i>(UNITS AS NOTED).....</i>	<i>65</i>
<i>FIGURE 12 GLOBAL VALUE FOR FOS IN WIND ENERGY, 2010-2017</i> <i>(\$ MILLIONS).....</i>	<i>66</i>
ELECTRIC POWER TURBINES	66
Growth Drivers	67
Growth Inhibitors	67
DEFENSE	67
<i>TABLE 24 GLOBAL VALUE FOR DEFENSE MARKETS BY SEGMENT,</i> <i>THROUGH 2017 (\$ MILLIONS).....</i>	<i>67</i>
<i>FIGURE 13 GLOBAL VALUE FOR DEFENSE MARKETS, 2010-2017 (\$</i> <i>MILLIONS).....</i>	<i>68</i>
GROWTH DRIVERS	68
GROWTH INHIBITORS.....	69
AIRCRAFT.....	69
Growth Drivers	69
Growth Inhibitors	69
Model Assumptions	70
<i>TABLE 25 GLOBAL VALUE FOR AIRCRAFT MARKETS BY SEGMENT,</i> <i>THROUGH 2017 (\$ MILLIONS).....</i>	<i>70</i>
Manned Aircraft.....	70
Helicopters	71
Average FOG Price	72
<i>FIGURE 14 GLOBAL VALUE FOR AIRCRAFT MARKETS, 2010-2017</i> <i>(\$ MILLIONS).....</i>	<i>73</i>
MUNITIONS	73
Growth Drivers	73
Growth Inhibitors.....	74
Model Assumptions	74
<i>TABLE 26 GLOBAL VALUE FOR MUNITIONS MARKET THROUGH,</i> <i>2017 (UNITS AS NOTED).....</i>	<i>74</i>
Missiles.....	74
Torpedoes	75
Weapon Mounts	75
Average FOG Price	76
<i>FIGURE 15 GLOBAL VALUE FOR MUNITIONS MARKET, 2010-2017</i> <i>(\$ MILLIONS).....</i>	<i>76</i>
HYDROPHONES, SECURITY, AND RESEARCH	77
<i>TABLE 27 GLOBAL VALUE FOR OTHER MILITARY MARKETS,</i> <i>THROUGH 2017 (\$ MILLIONS).....</i>	<i>77</i>
<i>FIGURE 16 GLOBAL VALUE FOR OTHER MILITARY MARKETS,</i> <i>2010-2017 (\$ MILLIONS).....</i>	<i>78</i>

Hydrophones	78
Growth Drivers	79
Growth Inhibitors	79
<i>FIGURE 17 GLOBAL VALUE FOR FOS IN HYDROPHONES, 2010-2017</i> <i>(\$ MILLIONS)</i>	79
Perimeter Security.....	80
Growth Drivers	80
Growth Inhibitors	80
<i>FIGURE 18 GLOBAL VALUE FOR DEFENSE PERIMETER SECURITY</i> <i>MARKET, 2010-2017 (\$ MILLIONS)</i>	81
Research and Development.....	81
Growth Drivers	82
Growth Inhibitors	82
<i>FIGURE 19 GLOBAL VALUE FOR RESEARCH AND DEVELOPMENT</i> <i>MARKET, 2010-2017 (\$ MILLIONS)</i>	82
<i>FIGURE 19 (CONTINUED)</i>	83
MEDICAL.....	83
<i>TABLE 28 GLOBAL VALUE FOR MEDICAL MARKET BY SEGMENT,</i> <i>THROUGH 2017 (\$ MILLIONS)</i>	84
GROWTH DRIVERS	84
GROWTH INHIBITORS.....	85
<i>FIGURE 20 GLOBAL VALUE FOR MEDICAL MARKET, THROUGH</i> <i>2017 (\$ MILLIONS)</i>	86
BLOOD ANALYZERS.....	87
<i>TABLE 29 BLOOD ANALYZER MARKET MODEL, THROUGH 2017</i> <i>(UNITS AS NOTED)</i>	87
<i>FIGURE 21 GLOBAL VALUE FOR FOS BLOOD ANALYZERS, 2010-</i> <i>2017 (\$ MILLIONS)</i>	88
PRESSURE SENSORS.....	88
Growth Drivers	89
Growth Inhibitors.....	89
<i>TABLE 30 GLOBAL CARDIAC CATHETERIZATIONS BY REGION,</i> <i>THROUGH 2017 (MILLIONS)</i>	90
<i>TABLE 31 GLOBAL VALUE FOR CATHETER FOS MARKET,</i> <i>THROUGH 2017 (UNITS AS NOTED)</i>	91
<i>FIGURE 22 GLOBAL VALUE FOR CATHETER FOS, THROUGH 2017</i> <i>(\$ MILLIONS)</i>	92
STRUCTURAL.....	92
<i>TABLE 32 STRUCTURAL SENSOR MARKET MODEL, THROUGH 2017</i> <i>(UNITS AS NOTED)</i>	92
GROWTH DRIVERS.....	93
GROWTH INHIBITORS.....	93
<i>FIGURE 23 GLOBAL VALUE FOR STRUCTURAL SENSOR MARKET,</i> <i>2010-2017 (\$ MILLIONS)</i>	93

<i>FIGURE 23 (CONTINUED)</i>	94
SECURITY	94
<i>TABLE 33 SECURITY MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	95
GROWTH DRIVERS	95
GROWTH INHIBITORS.....	96
<i>FIGURE 24 SECURITY MARKET MODEL, 2010-2017 (\$ MILLIONS)</i>	96
<i>FIGURE 24 (CONTINUED)</i>	97
INDUSTRIAL.....	97
<i>TABLE 34 INDUSTRIAL MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	97
GROWTH DRIVERS	97
GROWTH INHIBITORS	98
MODEL ASSUMPTIONS	98
<i>FIGURE 25 GLOBAL VALUE FOR INDUSTRIAL MARKET, 2010-2017 (\$ MILLIONS)</i>	99
TRANSPORTATION	99
<i>TABLE 35 GLOBAL COMMERCIAL TRANSPORTATION MARKET VALUE BY CATEGORY, THROUGH 2017 (\$ MILLIONS)</i>	100
<i>FIGURE 26 GLOBAL COMMERCIAL TRANSPORTATION MARKET VALUE, 2010-2017 (\$ MILLIONS)</i>	100
<i>FIGURE 26 (CONTINUED)</i>	101
COMMERCIAL AIR.....	101
<i>TABLE 36 AIR TRANSPORT MARKET VALUE BY CATEGORY, THROUGH 2017 (\$ MILLIONS)</i>	101
Fixed Wing	102
Growth Drivers	102
Growth Inhibitors	102
Model Assumptions	102
<i>TABLE 37 FIXED WING AIRCRAFT MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	103
<i>FIGURE 27 GLOBAL VALUE FIXED WING AIRCRAFT MARKET, 2010-2017 (\$ MILLIONS)</i>	103
<i>FIGURE 27 (CONTINUED)</i>	104
Helicopters	104
Growth Drivers	104
Growth Inhibitors	104
Model Assumptions.....	104
<i>TABLE 38 HELICOPTER MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	105
<i>FIGURE 28 GLOBAL VALUE OF THE HELICOPTER MARKET, 2010-2017 (\$ MILLIONS)</i>	105
<i>FIGURE 28 (CONTINUED)</i>	106
Satellites	106

<i>TABLE 39 GLOBAL VALUE FOR THE SATELLITE MARKET, THROUGH 2017 (\$ MILLIONS)</i>	106
<i>FIGURE 29 GLOBAL VALUE FOR THE SATELLITE MARKET, 2010-2017 (\$ MILLIONS)</i>	107
MARINE	107
<i>TABLE 40 GLOBAL VALUE FOR THE MARINE MARKET BY CATEGORY, THROUGH 2017 (\$ MILLIONS)</i>	107
<i>FIGURE 30 GLOBAL VALUE FOR COMMERCIAL MARINE TRANSPORTATION MARKET BY CATEGORY, 2010-2017 (\$ MILLIONS)</i>	108
Commercial Market.....	108
<i>TABLE 41 COMMERCIAL SHIPPING MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	109
<i>FIGURE 31 COMMERCIAL BOATING GLOBAL VALUE, 2010-2017 (\$ MILLIONS)</i>	110
Recreational Boating Market.....	110
<i>TABLE 42 RECREATIONAL BOATING MARKET MODEL, THROUGH 2017 (UNITS AS NOTED)</i>	111
<i>FIGURE 32 RECREATIONAL BOATING GLOBAL VALUE, 2010-2017 (\$ MILLIONS)</i>	112
CHAPTER SEVEN: INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS.....	113
DRIVING FORCES.....	113
STRATEGIES FOR STAYING COMPETITIVE.....	113
Joint Ventures	113
Purchase or License Technology	114
Lower Processing Costs.....	114
IMPORTANT SHIFTS.....	114
LARGER COMPANIES DOMINATE	115
VENTURE CAPITAL UNINTERESTED.....	115
ATTRIBUTES LIMITS PENETRATION.....	115
COMPETING TECHNOLOGIES.....	115
MARKET SEGMENTATION	116
CHAPTER EIGHT: INTERNATIONAL ASPECTS	117
GLOBAL MARKET BY REGION	117
<i>TABLE 43 APPARENT FOS CONSUMPTION BY REGION, THROUGH 2017 (\$ MILLIONS)</i>	117
AMERICAS.....	117
Growth Drivers	117
Growth Inhibitors	118
<i>FIGURE 33 APPARENT FOS CONSUMPTION IN THE AMERICAS, 2010-2017 (\$ MILLIONS)</i>	119
EMEA.....	119

Growth Drivers	119
Growth Inhibitors	120
<i>FIGURE 34 APPARENT FOS CONSUMPTION IN THE EMEA REGION, 2010-2017 (\$ MILLIONS)</i>	<i>120</i>
ASIA	121
Growth Drivers	121
Growth Inhibitors	121
<i>FIGURE 35 APPARENT FOS CONSUMPTION IN ASIA, 2010-2017 (\$ MILLIONS)</i>	<i>122</i>
FOG MARKET BY REGION	122
<i>TABLE 44 APPARENT FOG CONSUMPTION BY REGION, THROUGH 2017 (\$ MILLIONS)</i>	<i>122</i>
AMERICAS	123
EMEA	123
ASIA	123
FBG MARKET BY REGION	123
<i>TABLE 45 APPARENT CONSUMPTION OF FBG BY REGION, THROUGH 2017 (\$ MILLIONS)</i>	<i>124</i>
AMERICAS	124
EMEA	124
ASIA	124
POINT SENSORS BY REGION	124
<i>TABLE 46 APPARENT CONSUMPTION OF POINT SENSORS BY REGION, THROUGH 2017 (\$ MILLIONS)</i>	<i>125</i>
AMERICAS	125
EMEA	125
ASIA	125
CHAPTER NINE: COMPANY PROFILES	126
<i>TABLE 47 SUPPLIERS BY REGION</i>	<i>126</i>
<i>TABLE 47 (CONTINUED)</i>	<i>127</i>
ACORN ENERGY	127
U.S. SEISMIC SYSTEMS (USSS)	127
AITHER ENGINEERING	128
AVANTES BV	128
AVANTES USA	128
AVANTES CHINA	128
AVENSYS	129
BAKER HUGHES	129
CONTRINEX SA	130
DAVIDSON INSTRUMENTS	130
MAQUET CARDIOVASCULAR LLC	131
DICON FIBEROPTICS	131
GLOBAL FIBEROPTICS INC.	131
ENDOSENSE SA	132

FIBERPRO GROUP.....	132
FIBERSENSING.....	132
FORTEBIO.....	133
FIBER OPTIC SYSTEMS TECHNOLOGY, INC. (FOX-TEK)	133
HALLIBURTON	134
SENSORTRAN.....	134
WELL DYNAMICS	134
HALMA GROUP	135
OCEAN OPTICS	135
LABSPHERE.....	135
HITACHI CABLE, LTD.....	135
HONEYWELL SENSING AND CONTROL.....	136
INTELLIGENT FIBER OPTIC SYSTEMS (IFOS)	136
IXBLUE.....	136
IXSEA	137
KEYENCE.....	137
KVH TECHNOLOGIES.....	137
LIOS TECHNOLOGY.....	138
LUMASENSE.....	138
LUNA INNOVATIONS.....	138
LXDATA	139
MICRON OPTICS.....	139
NEOPTIX	139
NORTHROP GRUMMAN NAVIGATION SYSTEMS DIVISION.....	140
NORTHROP GRUMMAN LITEF GMBH.....	140
ALSTOM GRID CURRENT TRANSFORMER.....	141
O/E LAND	141
OMRON.....	142
OPSENS	142
OPTELLIOS.....	143
OPTI MEDICAL.....	143
OZ OPTICS.....	144
PRIME PHOTONICS.....	144
ROCTEST GROUP	144
FISO TECHNOLOGIES SUBSIDIARY	144
SMARTEC SA SUBSIDIARY	145
SABEUS SENSOR SYSTEMS	145
SAMBA SENSOR SYSTEMS	145
SCHLUMBERGER	146
SENSORNET LTD.....	146
SENSOTEC GMBH	147
SHANGHAI LANBAO SENSOR CO, LTD.....	147
SILICANN TECHNOLOGIES	147
SMARTER SECURITY SYSTEM	147

WEATHERFORD INTERNATIONAL LTD 148
WENZHOU STORD ELECTRIC CO., LTD..... 148
YOKOGAWA ELECTRIC 149
ZIEBEL AS 149