

INTRODUCTION	XV
STUDY GOALS AND OBJECTIVES.....	XV
REASONS FOR DOING THIS STUDY	XV
CONTRIBUTIONS TO THE STUDY AND FOR WHOM.....	XV
SCOPE AND FORMAT	XV
METHODOLOGY	XVI
INFORMATION SOURCES.....	XVI
ANALYST CREDENTIALS.....	XVI
RELATED BCC WORK CREDENTIALS	XVII
BCC ONLINE SERVICES.....	XVII
DISCLAIMER	XVII
SUMMARY.....	XVIII
<i>SUMMARY TABLE GLOBAL AUTOMOTIVE SENSORS MARKET AND FORECASTS BY MAJOR APPLICATION GROUPS, THROUGH 2012 (\$ MILLIONS)</i>	XVIII
<i>SUMMARY FIGURE GLOBAL AUTOMOTIVE SENSORS MARKET AND FORECASTS BY MAJOR APPLICATION GROUPS, 2005-2012 (\$ MILLIONS)</i>	XIX
OVERVIEW	1
AUTOMOTIVE SENSOR TECHNOLOGIES AND APPLICATIONS	2
INTRODUCTION	2
MAJOR APPLICATIONS OF AUTOMOBILE SENSORS	2
POWER TRAIN.....	2
CHASSIS	2
BODY.....	2
KEY CONCEPTS IN UNDERSTANDING THE MARKET.....	3
KEY TERMS IN UNDERSTANDING SENSOR TECHNOLOGY	4
KEY TERMS IN UNDERSTANDING ... (CONTINUED)	5
MAJOR TYPES OF AUTOMOTIVE SENSOR TECHNOLOGY	6
ROTATIONAL MOTION SENSORS.....	6
Hall Effect.....	7
Wiegand Effect.....	7
Magnetoresistor	8
Anisotropic Magnetoresistive Sensors (AMR).....	8
GMR Magnetoresistive Sensors.....	8
Variable Reluctance (VR) Sensors	9
Applications for Rotational Motion Sensors.....	9
Market Forecasts Through 2012.....	10
Market Forecasts Through 2012 (Continued)	11
<i>TABLE 1 GLOBAL MARKET AND FORECAST FOR ROTATIONAL MOTION SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	12

OXYGEN SENSORS	12
Unheated Thimble	12
Heated Thimble	13
Heated Planar	13
Wideband	13
Applications for Oxygen Sensors	14
Market Forecasts Through 2012	14
<i>TABLE 2 GLOBAL MARKET AND FORECASTS FOR OXYGEN SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	15
<i>FIGURE 1 GLOBAL MARKET AND FORECASTS FOR OXYGEN SENSORS BY TECHNOLOGY, 2005-2012 (\$ MILLIONS)</i>	16
ANGULAR AND LINEAR POSITION SENSORS	16
Potentiometric	16
Hall Effect	17
AMR Anisotropic Magnetoresistive	17
Optical Encoder	17
Magnetostrictive Pulse Transit Time	18
Applications for Angular and Position Sensors.....	18
Market Forecasts Through 2012.....	19
<i>TABLE 3 GLOBAL MARKET AND FORECASTS FOR ANGULAR AND LINEAR POSITION SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	20
<i>FIGURE 2 GLOBAL MARKET AND FORECASTS FOR ANGULAR AND LINEAR POSITION SENSORS BY TECHNOLOGY, 2005-2012 (\$ MILLIONS)</i>	20
MASS AIRFLOW (MAF) SENSORS	21
Vane Meter Sensor	21
Hot Wire Mass Airflow Sensor.....	21
Hot-Film Mass Airflow Sensor.....	22
Applications for Mass Airflow Sensors	23
Market Forecasts Through 2012.....	23
<i>TABLE 4 GLOBAL MARKET AND FORECASTS FOR MASS AIRFLOW SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	24
LINEAR ACCELERATION SENSORS.....	24
Piezoresistive MEMS.....	25
Capacitive MEMS.....	25
Resonant-Beam MEMS	25
Discrete Ceramic	25
Applications for Linear Acceleration Sensors	25
Market Forecasts Through 2012.....	26
<i>TABLE 5 GLOBAL MARKET AND FORECASTS FOR LINEAR ACCELERATION SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	27
PRESSURE SENSORS	27

Piezoresistive Micromachined.....	27
Capacitive Touch-mode Micromachined.....	28
Capacitive Ceramic Module	28
Piezoresistive Polysilicon-on-Steel.....	29
Applications for Pressure Sensors	29
Market Forecasts Through 2012.....	29
TABLE 6 GLOBAL MARKET AND FORECASTS FOR PRESSURE	
SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)	30
GYROSCOPES	31
MEMS GYROSCOPE TECHNOLOGY	31
Tuning Fork Gyroscopes.....	32
Vibrating Wheel Gyroscopes	32
Wineglass Resonator Gyroscopes.....	32
Applications for Gyroscope Sensors	33
Market Forecasts Through 2012.....	33
TABLE 7 GLOBAL MARKET AND FORECASTS FOR MEMS	
AUTOMOTIVE GYROSCOPE SENSORS BY TECHNOLOGY,	
THROUGH 2012 (\$ MILLIONS)	34
FIGURE 3 GLOBAL MARKET AND FORECASTS FOR MEMS	
AUTOMOTIVE GYROSCOPE SENSORS BY TECHNOLOGY, 2005-	
2012 (\$ MILLIONS)	34
TEMPERATURE SENSORS	35
Silicon Integrated Circuit.....	35
Thermistor	35
Resistive Temperature Detector (RTD)	35
Applications for Temperature Sensors	36
Market Forecast Through 2012	36
TABLE 8 GLOBAL MARKET AND FORECASTS FOR AUTOMOTIVE	
TEMPERATURE SENSORS BY TECHNOLOGY, THROUGH 2012	
(\$ MILLIONS)	37
OTHER TASK SPECIFIC SENSOR TECHNOLOGIES.....	37
Engine Knock.....	37
Solar, Twilight, and Glare Optical Detectors	37
Moisture/Rain	38
Near-Distance Obstacle Detection.....	38
Far-Distance Obstacle Detection	38
Far-Distance Obstacle Detection (Continued).....	39
Market Forecasts Through 2012.....	40
TABLE 9	41
GLOBAL MARKET AND FORECASTS FOR OTHER TASK SPECIFIC	
SENSOR TECHNOLOGIES BY TECHNOLOGY, THROUGH 2012	41
(\$ MILLIONS)	41

<i>FIGURE 4 GLOBAL MARKET AND FORECASTS FOR OTHER TASK SPECIFIC SENSOR TECHNOLOGIES BY TECHNOLOGY, 2005-2012 (\$ MILLIONS)</i>	41
GLOBAL MARKET FORECASTS THROUGH 2012	42
Global Market Forecasts by Technology Through 2012	42
<i>TABLE 10 GLOBAL AUTOMOTIVE SENSORS MARKET AND FORECASTS BY TECHNOLOGY THROUGH 2012 (\$ MILLIONS)</i>	43
Global Market Forecasts by Application Through 2012	43
<i>TABLE 11 GLOBAL MARKET AND FORECASTS FOR AUTOMOTIVE SENSORS BY MAJOR APPLICATION GROUPS, THROUGH 2012 (\$ MILLIONS)</i>	44
MICRO ELECTRO-MECHANICAL SYSTEMS	44
INTRODUCTION.....	44
KEY CONCEPTS IN AUTOMOTIVE MEMS.....	45
MEMS MATERIALS	46
Silicon.....	46
Polymers.....	47
Metals.....	47
METHODOLOGIES FOR MEMS FABRICATION	47
Deposition Processes	47
Photolithography	47
Etching Processes	47
Wet Etching	48
Reactive Ion Etching	48
Deep Reactive Ion Etching	48
Bulk Micromachining	49
Surface Micromachining	49
MEMS TECHNOLOGIES AND APPLICATIONS	49
MEMS PRESSURE SENSORS	49
Absolute Pressure Sensor.....	50
Gauge Pressure Sensor	50
Vacuum Pressure Sensor	50
Differential Pressure Sensor.....	50
Market Forecasts Through 2012.....	50
Market Forecasts Through 2012 (Continued)	51
<i>TABLE 12 GLOBAL MARKET AND FORECASTS FOR MEMS AUTOMOTIVE PRESSURE SENSORS BY APPLICATION, THROUGH 2012 (\$ MILLIONS)</i>	52
MEMS GYROSCOPES.....	52
Tuning Fork Gyroscopes.....	53
Oscillating Wheel Gyroscopes	53
Wineglass Resonator Gyroscopes.....	53
Market Forecasts Through 2012.....	53

<i>TABLE 13 GLOBAL MARKET AND FORECASTS FOR MEMS AUTOMOTIVE GYROSCOPE SENSORS BY APPLICATION, THROUGH 2012 (\$ MILLIONS)</i>	54
MEMS ACCELEROMETERS.....	54
Market Forecasts Through 2012.....	55
<i>TABLE 14 GLOBAL MARKET AND FORECASTS FOR MEMS AUTOMOTIVE ACCELEROMETER SENSORS BY APPLICATION, THROUGH 2012 (\$ MILLIONS)</i>	56
MEMS AIRFLOW SENSORS.....	57
Hot-Film Mass Airflow	57
HVAC Control.....	58
Market Forecasts Through 2012.....	58
<i>TABLE 15 GLOBAL MARKET AND FORECASTS FOR MEMS AUTOMOTIVE AIRFLOW SENSORS BY APPLICATION, THROUGH 2012 (\$ MILLIONS)</i>	59
GLOBAL MEMS MARKET FORECAST THROUGH 2012	59
<i>TABLE 16 GLOBAL MARKET FORECAST FOR AUTOMOTIVE MEMS BY APPLICATION THROUGH 2012 (\$ MILLIONS)</i>	60
THE GROWTH AND MIGRATION TOWARD MEMS	60
The Growth and Migration Toward MEMS (Continued).....	61
GROWTH OPPORTUNITIES IN AUTOMOTIVE SENSORS	62
TIRE PRESSURE MONITORING SYSTEMS	62
THE TREAD ACT	63
DIRECT SYSTEMS.....	63
The Battery Issues and Opportunities	64
INDIRECT SYSTEMS	65
MARKET FORECASTS FOR TPMS SENSORS	66
<i>TABLE 17 GLOBAL MARKET AND FORECASTS FOR TIRE PRESSURE MONITORING SENSORS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	66
ENERGY HARVESTING—SPIN-OFF OPPORTUNITIES?.....	67
Energy Harvesting—Spin-off Opportunities? (Continued).....	68
ELECTRONIC STABILITY CONTROL	69
U.S. ESC REGULATIONS.....	69
ESC TECHNOLOGY.....	69
MARKET FORECASTS FOR ESC SENSORS	70
Market Forecasts for ESC Sensors (Continued)	71
Market Forecasts for ESC Sensors (Continued)	72
<i>TABLE 18 GLOBAL MARKET AND FORECASTS OF NEW SENSOR GROWTH FOR ESC SYSTEMS BY TECHNOLOGY, THROUGH 2012 (\$ MILLIONS)</i>	73
HYBRID VEHICLES	73
EMERGING HYBRID MARKETS AND ACTIVITY	74
Wal-Mart Moves Toward Hybrids	74

Google Goes Hybrid	74
EPRI Hybrid Assessment Report—2007	75
Toronto Launches Hybrid Pilot Project	75
Toyota Prius Sets Record Sales of Hybrid Vehicles	76
General Motors Accelerates Hybrid Development	76
Hybridfest 2007	77
HYBRID POWER TRAINS	77
Hybrid Power Train Design and Management	77
Hybrid Power Train Design ... (Continued)	78
Plug-in Hybrid Electric Vehicles	79
Vehicle to Grid Technology	79
THE ROLE OF SENSORS IN HYBRID VEHICLES	80
HYBRID VEHICLES AND SENSOR DEMAND	81
MARKET FORECASTS FOR HYBRID VEHICLE SENSORS	82
<i>TABLE 19 NEW SENSOR GROWTH FOR HYBRID VEHICLES</i>	
<i>MARKET AND FORECASTS BY TECHNOLOGY GROUPS</i>	
<i>THROUGH 2012 (\$ MILLIONS).....</i>	<i>83</i>
INDUSTRY STRUCTURE	84
INDUSTRY DEVELOPMENT	84
KEY CONCEPTS IN UNDERSTANDING THE SENSOR INDUSTRY	85
<i>TABLE 20 AUTOMOTIVE SENSOR COMPANY PROFILES.....</i>	<i>86</i>
ANALOG DEVICES, INC.....	87
ANALOG DEVICES, INC.....	87
AUTOLIV	88
AUTOLIV, INC.—CORPORATE HEADQUARTERS	89
BOSCH	89
BOSCH (CONTINUED).....	90
BOSCH GMBH.....	91
CONTINENTAL AG AUTO SYSTEMS	91
CONTINENTAL AG AUTO SYSTEMS (CONTINUED).....	92
CONTINENTAL AG	93
DELPHI CORP.....	93
DELPHI CORP.....	94
DENSO CORPORATION	94
DENSO CORPORATION (CONTINUED).....	95
DENSO CORPORATION.....	96
FREESCALE SEMICONDUCTOR, INC.	96
FREESCALE SEMICONDUCTOR, INC. (CONTINUED).....	97
FREESCALE SEMICONDUCTOR, INC. (CONTINUED).....	98
FREESCALE SEMICONDUCTOR, INC. (CONTINUED).....	99
FREESCALE SEMICONDUCTOR, INC. (CONTINUED).....	100
FREESCALE SEMICONDUCTOR, INC. (CONTINUED).....	101
FREESCALE SEMICONDUCTOR HEADQUARTERS.....	102
HONEYWELL SENSOTEC	102

HONEYWELL SENSOTEC	103
INFINEON TECHNOLOGIES AG	103
INFINEON TECHNOLOGIES AG (CONTINUED)	104
INFINEON TECHNOLOGIES AG IFX	105
KAVLICO	105
KAVLICO (CONTINUED)	106
KAVLICO CORPORATION, USA	107
MEASUREMENT SPECIALTIES, INC. (MSI)	107
MEASUREMENT SPECIALTIES, INC.	108
MELEXIS	108
MELEXIS NV HEADQUARTERS.....	109
SCHRADER ELECTRONICS, LTD.	109
SCHRADER ELECTRONICS, LTD.	110
SIEMENS VDO	110
SIEMENS VDO (CONTINUED)	111
SIEMENS VDO AUTOMOTIVE AG	112
SILICON SENSING SYSTEMS, LTD.	112
SILICON SENSING SYSTEMS JAPAN, LTD.	113
ST MICROELECTRONICS	113
ST MICROELECTRONICS (CONTINUED).....	114
ST MICROELECTRONICS (CONTINUED).....	115
STMICROELECTRONICS NV HEADQUARTERS	116
SYSTRON DONNER AUTOMOTIVE DIVISION.....	116
SYSTRON DONNER AUTOMOTIVE DIVISION	
(CONTINUED).....	117
SYSTRON DONNER AUTOMOTIVE DIVISION	118
VTI TECHNOLOGIES.....	118
VTI TECHNOLOGIES (CONTINUED)	119
VTI TECHNOLOGIES.....	120
SENSOR RESEARCH AND DEVELOPMENT ORGANIZATIONS	121
<i>TABLE 21 SENSOR RESEARCH AND DEVELOPMENT</i>	
<i>ORGANIZATIONS</i>	<i>121</i>
ARGONNE NATIONAL LABORATORY.....	121
ARGONNE NATIONAL LABORATORY	122
AUTOMOTIVE RESEARCH AND DEVELOPMENT CENTRE.....	122
AUTOMOTIVE RESEARCH AND DEVELOPMENT CENTRE	123
AUTOMOTIVE RESEARCH CENTER (ARC)	123
AUTOMOTIVE RESEARCH CENTER.....	124
BERKELEY SENSOR AND ACTUATOR CENTER (BSAC)	125
BERKELEY SENSOR AND ACTUATOR CENTER	125
BOSCH RESEARCH AND TECHNOLOGY CENTER	125
ROBERT BOSCH, LLC.....	126
CENTER FOR AUTOMOTIVE RESEARCH (CAR)	126
CENTER FOR AUTOMOTIVE ... (CONTINUED)	127

CENTER FOR AUTOMOTIVE RESEARCH.....	128
ENGINEERING RESEARCH CENTER FOR WIRELESS INTEGRATED MICROSYSTEMS (WIMS ERC)	128
ENGINEERING RESEARCH CENTER FOR WIRELESS...(CONTINUED)	129
ENGINEERING RESEARCH CENTER FOR WIRELESS...(CONTINUED)	130
CENTER FOR WIRELESS INTEGRATED MICROSYSTEMS	131
LOS ALAMOS NATIONAL LABORATORY	131
LOS ALAMOS NATIONAL LABORATORY.....	132
PHEV RESEARCH CENTER.....	132
PHEV RESEARCH CENTER.....	133
TOYOTA CENTRAL RESEARCH AND DEVELOPMENT LABS (TCRDL)	133
TOYOTA CENTRAL R&D LABS, INC.	134
 PATENT ANALYSIS	 135
PATENT ANALYSIS BY SENSOR TYPE	135
<i>TABLE 22 U.S. PATENT APPLICATIONS FOR SENSORS BY SENSOR TYPE, 2004-2006.....</i>	<i>135</i>
<i>FIGURE 5 U.S. PATENT APPLICATIONS FOR SENSORS BY SENSOR TYPE 2004-2006 (%).....</i>	<i>136</i>
PERSPECTIVE ON PATENTS	136
PATENT ANALYSIS METHODOLOGY	137
<i>TABLE 23 U.S. PATENT APPLICATIONS FOR POSITION SENSORS, 2004-2006</i>	<i>137</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>138</i>
<i>TABLE 24 U.S. PATENT APPLICATIONS FOR PRESSURE SENSORS, 2004-2006</i>	<i>138</i>
<i>TABLE 24 (CONTINUED).....</i>	<i>139</i>
<i>TABLE 24 (CONTINUED).....</i>	<i>140</i>
<i>TABLE 25 U.S. PATENT APPLICATIONS FOR TEMPERATURE SENSORS, 2004-2006</i>	<i>141</i>
<i>TABLE 26 U.S. PATENT APPLICATIONS FOR ACCELEROMETERS, 2004-2006</i>	<i>142</i>
<i>TABLE 27 U.S. PATENT APPLICATIONS FOR GYROSCOPES 2004- 2006</i>	<i>142</i>
<i>TABLE 27 (CONTINUED).....</i>	<i>143</i>
 AUTOMOTIVE INDUSTRY OVERVIEW	 144
<i>TABLE 28 GLOBAL AUTOMOTIVE MARKET PRODUCTION BY COMPANY, 2006 (VEHICLE UNITS).....</i>	<i>144</i>
<i>TABLE 28 (CONTINUED).....</i>	<i>145</i>
<i>TABLE 29 GLOBAL AUTOMOTIVE PRODUCTION BY COUNTRY, 2005-2006 (VEHICLE UNITS).....</i>	<i>145</i>

<i>TABLE 29 (CONTINUED)</i>	146
AUTOMOTIVE INDUSTRY TRENDS	146
SENSOR MARKET—SUMMARY, CONCLUSIONS, AND FORECASTS	147
SENSOR DEMAND	147
MICRO ELECTRO-MECHANICAL SYSTEMS	147
SAFETY SYSTEMS	147
TIRE PRESSURE MONITORING SYSTEMS	147
ELECTRONIC STABILITY CONTROL	148
HYBRID TECHNOLOGY	148
WIRELESS NETWORKING	148
COMPETITION	149
RESEARCH AND DEVELOPMENT	149
GLOBALIZATION	149
GOLDEN PONY AWARDS	150
<i>TABLE 30 AUTOMOTIVE ORGANIZATIONS</i>	151
ALLIANCE OF AUTOMOBILE MANUFACTURERS	151
ALLIANCE OF AUTOMOBILE MANUFACTURERS.....	152
AUTOMOTIVE ELECTRONICS COUNCIL (AEC).....	152
AUTOMOTIVE ELECTRONICS COUNCIL	152
AUTOMOTIVE INDUSTRY ACTION GROUP (AIAG).....	152
AIAG HEADQUARTERS.....	153
FÉDÉRATION INTERNATIONALE DES SOCIÉTÉS D'INGÉNIEURS DES TECHNIQUES DE L'AUTOMOBILE (FISITA)	154
FISITA	154
INTERNATIONAL ORGANIZATION OF MOTOR VEHICLE MANUFACTURERS.....	154
INTERNATIONAL ORGANIZATION OF MOTOR VEHICLE MANUFACTURERS.....	155
MOTOR AND EQUIPMENT MANUFACTURERS ASSOCIATION (MEMA).....	155
MOTOR AND EQUIPMENT MANUFACTURERS ASSOCIATION	156
SOCIETY OF AUTOMOTIVE ENGINEERS (SAE)	156
SAE AUTOMOTIVE HEADQUARTERS	157
SOCIETY OF AUTOMOTIVE ENGINEERS OF JAPAN (JSAE).....	157
SOCIETY OF AUTOMOTIVE ENGINEERS OF JAPAN	158
VERBAND DER AUTOMOBILINDUSTRIE (VDA)	158
VERBAND DER AUTOMOBILINDUSTRIE.....	158
AUTOMOTIVE SENSOR GLOSSARY	159
AUTOMOTIVE SENSOR GLOSSARY	159
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	160
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	161
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	162

AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	163
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	164
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	165
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	166
AUTOMOTIVE SENSOR GLOSSARY (CONTINUED).....	167
AUTOMOTIVE SENSOR REFERENCES	168
AUTOMOTIVE SENSOR REFERENCES.....	168