

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND .....	1
GOALS AND OBJECTIVES.....	2
INTENDED AUDIENCE.....	2
SCOPE OF REPORT .....	2
METHODOLOGY AND INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	4
RELATED BCC RESEARCH .....	4
BCC ONLINE SERVICES.....	5
DISCLAIMER .....	5
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 6
<i>SUMMARY TABLE GLOBAL MICROSENSOR MARKET</i> <i>PROJECTIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	 6
<i>SUMMARY FIGURE GLOBAL MICROSENSOR MARKET</i> <i>PROJECTIONS, 2010–2016 (\$ MILLIONS)</i> .....	 7
 CHAPTER THREE: MICROSENSORS OVERVIEW.....	 8
GENERAL DESCRIPTION .....	8
DEFINITIONS .....	8
Sensors .....	8
Microsensors .....	9
MEMS.....	9
Biochips.....	9
Nanosensors.....	10
HISTORICAL PERSPECTIVE.....	10
MICROSENSOR TECHNOLOGIES AND APPLICATIONS .....	11
<i>TABLE 1 MAJOR MICROSENSOR TECHNOLOGIES AND</i> <i>APPLICATIONS</i> .....	 11
<i>TABLE 1 (CONTINUED)</i> .....	12
ACCELEROMETERS .....	12
GYROSCOPES .....	13
PRESSURE MICROSENSORS .....	13
CHEMICAL AND GAS MICROSENSORS .....	14
THERMAL MICROSENSORS .....	14
BIOCHIPS .....	14
NANO-CHEMICAL SENSORS .....	15
NANO-BIOSENSORS .....	16
NANO-RADIATION SENSORS .....	16
NANO-THERMAL SENSORS.....	17
MICROSENSOR MARKETS.....	17
<i>TABLE 2 GLOBAL MICROSENSOR MARKET PROJECTIONS,</i> <i>THROUGH 2016 (\$ MILLIONS)</i> .....	 17
<i>TABLE 2 (CONTINUED)</i> .....	18

<i>FIGURE 1 PROJECTED GLOBAL MICRO MARKET TRENDS, 2010–2016 (\$ MILLIONS)</i> .....	18
<i>TABLE 3 PROJECTED RANKING OF THE LARGEST SELLING TYPES OF MICROSENSORS, 2010 VS. 2016</i> .....	19
<i>TABLE 4 GLOBAL MARKET PROJECTIONS FOR MICROSENSORS BY END USE, THROUGH 2016 (\$ MILLIONS)</i> .....	19
<i>FIGURE 2 PROJECTED TRENDS IN THE GLOBAL MICROSENSOR MARKET BY END-USER SEGMENT, 2010–2016 (PERCENT OF TOTAL SALES)</i> .....	20
CHAPTER FOUR: ENABLING TECHNOLOGIES FOR MICROSENSORS.....	21
MATERIALS TECHNOLOGIES.....	21
<i>FIGURE 3 GLOBAL MARKET SHARE PROJECTIONS FOR MICROSENSOR MATERIALS TECHNOLOGIES BY TYPE, 2010 AND 2016 (PERCENT OF TOTAL MEMS SHIPMENTS)</i> .....	21
<i>FIGURE 3 (CONTINUED)</i> .....	22
SILICON.....	22
POLYMERS.....	22
METALS.....	23
NANOMATERIALS.....	23
Nanoparticles.....	23
Carbon Nanotubes.....	23
Graphene.....	24
Nanoribbons.....	24
Nanowires.....	25
Nanoceramics.....	26
Other Nanostructured Materials.....	26
MANUFACTURING TECHNOLOGIES.....	26
MICROMACHINING.....	27
Surface Micromachining.....	27
<i>FIGURE 4 SACRIFICIAL LAYER ETCHING</i> .....	28
Bulk Micromachining.....	29
LIGA.....	29
<i>FIGURE 5 LIGA PROCESS DIAGRAM</i> .....	30
Wafer Bonding.....	30
Anodic Bonding.....	31
Intermediate-Layer Assisted Bonding.....	31
Direct Bonding.....	31
Flip-Chip Bonding.....	31
ETCHING.....	32
Wet Anisotropic Etching.....	32
<i>FIGURE 6 ISOTROPIC VS. ANISOTROPIC ETCHING</i> .....	32
Dry Etching.....	32
Reactive Ion Etching.....	32
Deep Reactive Ion Etching.....	33

LASER MICROFABRICATION .....	33
Laser Micromachining.....	34
Laser-Assisted Chemical Etching.....	35
Laser Assisted Deposition .....	35
Stereolithography .....	35
Laser Surface Modification .....	36
Laser-Assisted Manipulation and Assembly .....	36
Laser Microbending .....	36
Physical Manipulation of Parts.....	36
Laser Joining.....	37
NANOPATTERNING.....	37
Nanoimprint Lithography .....	38
Hot Embossing Lithography.....	38
Ultraviolet Nanoimprint Lithography .....	39
Microcontact Printing .....	40
Dip Pen Nanolithography.....	40
Dip Pen Nanolithography (Continued) .....	41
Laser-Based Particle Deposition.....	42
Other Technologies .....	43
Powderblasting .....	43
Micromolding .....	43
CHAPTER FIVE: ACCELEROMETERS.....	44
TECHNOLOGIES .....	44
OPERATING MECHANISM .....	44
<i>TABLE 5 MAJOR MEMS ACCELEROMETER TECHNOLOGIES</i> .....	45
Capacitive .....	45
Electromagnetic .....	46
Piezoelectric .....	46
Piezoresistive .....	47
Optical.....	48
Tunneling.....	48
Thermal.....	49
AXES OF MEASUREMENT .....	49
LOW-G ACCELEROMETERS.....	50
APPLICATIONS .....	50
<i>TABLE 6 COMMERCIAL ACCELEROMETER APPLICATIONS</i> .....	50
AUTOMOTIVE APPLICATIONS.....	51
Airbag Actuation.....	51
Stability Systems.....	51
Vehicle Navigation .....	51
LIFE SCIENCES.....	52
Rate-Responsive Heart Pacemakers.....	52
Actigraphs.....	52
ENERGY.....	52

Oil and Gas Exploration .....	53
MILITARY/AEROSPACE .....	53
INFORMATION TECHNOLOGY .....	54
Hard Disk Drop Protection .....	54
CONSUMER PRODUCTS .....	54
“Smart” Sporting Goods .....	54
Personal Electronics .....	55
MISCELLANEOUS APPLICATIONS.....	56
ACCELEROMETER MARKET .....	56
SUMMARY .....	56
<i>TABLE 7 GLOBAL MARKET PROJECTIONS FOR MEMS</i>	
<i>ACCELEROMETERS, THROUGH 2016 (\$ MILLIONS)</i> .....	57
<i>FIGURE 7 GLOBAL MEMS ACCLEROMETER MARKET SHARE</i>	
<i>PROJECTIONS BY APPLICATION SEGMENT, 2010–2016</i>	
<i>(PERCENT OF TOTAL SHIPMENTS)</i> .....	57
<i>FIGURE 7 (CONTINUED)</i> .....	58
AUTOMOTIVE APPLICATIONS.....	58
<i>TABLE 8 GLOBAL MARKET PROJECTIONS FOR ESTABLISHED</i>	
<i>AUTOMOTIVE ACCELEROMETER APPLICATIONS, THROUGH</i>	
<i>2016 (\$ MILLIONS)</i> .....	58
Airbag Sensors .....	59
<i>TABLE 9 PROJECTED GLOBAL SHIPMENTS OF AIRBAG MODULES,</i>	
<i>THROUGH 2016 (MILLION UNITS)</i> .....	59
<i>FIGURE 8 PROJECTED TRENDS IN GLOBAL SHIPMENTS OF</i>	
<i>AIRBAG MODULES, 2010–2016 (MILLION UNITS)</i> .....	60
<i>TABLE 10 GLOBAL MARKET PROJECTIONS FOR AIRBAG SENSORS</i>	
<i>IN MOTOR VEHICLES, THROUGH 2016 (MILLION UNITS/\$</i>	
<i>MILLIONS)</i> .....	61
Vehicle Stability Control Systems .....	61
<i>TABLE 11 PROJECTED GLOBAL PRODUCTION OF VEHICLES</i>	
<i>EQUIPPED WITH STABILITY CONTROL SYSTEMS, THROUGH</i>	
<i>2016 (MILLION VEHICLES)</i> .....	61
<i>FIGURE 9 PROJECTED TRENDS IN GLOBAL SALES OF LIGHT</i>	
<i>VEHICLES WITH STABILITY CONTROL SYSTEMS, 2010–2016</i>	
<i>(MILLION VEHICLES)</i> .....	62
<i>TABLE 12 GLOBAL MARKET FOR LOW-G ACCELEROMETERS USED</i>	
<i>IN VEHICLE STABILITY CONTROL SYSTEMS, THROUGH 2016</i>	
<i>(MILLION UNITS/\$ MILLIONS)</i> .....	63
Navigation Systems.....	63
<i>TABLE 13 PROJECTED GLOBAL SHIPMENTS OF VEHICLE IN-DASH</i>	
<i>NAVIGATION SYSTEMS WITH INTEGRATED INS, THROUGH 2016</i>	
<i>(MILLION VEHICLES)</i> .....	63

<i>FIGURE 10 PROJECTED TRENDS IN GLOBAL SHIPMENTS OF VEHICLE IN-DASH NAVIGATION SYSTEMS, 2010–2016 (MILLION SYSTEMS SHIPPED)</i> .....	64
<i>TABLE 14 GLOBAL MARKET PROJECTIONS FOR MEMS ACCELEROMETERS USED IN VEHICLE NAVIGATION SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	65
LIFE SCIENCES APPLICATIONS.....	65
<i>TABLE 15 GLOBAL MARKET FOR ESTABLISHED ACCELEROMETER APPLICATIONS IN THE LIFE SCIENCES, THROUGH 2016 (\$ MILLIONS)</i> .....	65
Rate-Responsive Heart Pacemakers.....	65
<i>TABLE 16 GLOBAL SALES PROJECTIONS FOR CARDIAC PACEMAKERS, THROUGH 2016 (THOUSANDS OF PACEMAKERS)</i> .....	66
<i>FIGURE 11 PROJECTED TRENDS IN GLOBAL SALES OF CARDIAC PACEMAKERS, 2010–2016 (THOUSAND UNITS)</i> .....	66
<i>TABLE 17 GLOBAL MARKET PROJECTIONS FOR ACCELEROMETERS USED IN RATE RESPONSIVE HEART PACEMAKERS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	67
Activity Monitoring Systems.....	67
<i>TABLE 18 GLOBAL MARKET PROJECTIONS FOR ACCELEROMETERS USED IN ACTIGRAPHS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	68
ENERGY.....	68
Seismic Detection Systems.....	68
<i>TABLE 19 GLOBAL MARKET PROJECTIONS FOR ACCELEROMETERS USED IN SEISMIC DETECTION EQUIPMENT, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	69
MILITARY/AEROSPACE .....	69
<i>TABLE 20 PROJECTED GLOBAL SALES OF GPS SYSTEMS FOR MILITARY/AEROSPACE APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	69
<i>FIGURE 12 PROJECTED TRENDS IN GLOBAL MILITARY/AEROSPACE MARKET FOR GPS SYSTEMS, 2010–2016 (\$ MILLIONS)</i> .....	70
<i>TABLE 21 GLOBAL MARKET PROJECTIONS FOR ACCELEROMETERS USED IN MILITARY/AEROSPACE APPLICATIONS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	70
INFORMATION TECHNOLOGY .....	71
<i>TABLE 22 GLOBAL MARKET PROJECTIONS FOR MEMS ACCELEROMETERS IN CONSUMER PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i> .....	71
Hard Disk Drive Drop Protection .....	71

<i>TABLE 23 GLOBAL MARKET PROJECTIONS FOR HARD DRIVE-EQUIPPED LAPTOP COMPUTERS, THROUGH 2016 (MILLION UNITS)</i> .....	72
<i>FIGURE 13 PROJECTED GLOBAL TRENDS IN SALES OF HARD DRIVE-EQUIPPED LAPTOP COMPUTERS, 2010–2016 (MILLION DEVICES)</i> .....	72
<i>TABLE 24 GLOBAL MARKET PROJECTIONS FOR LAPTOP COMPUTER HARD DRIVE DISK PROTECTION APPLICATIONS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	73
Hard Disk Read/Write Head Tracking Mechanism .....	73
<i>TABLE 25 GLOBAL MARKET FOR MEMS ACCLEROMETERS IN HARD DISK READ/WRITE HEAD TRACKING SYSTEMS, 2010–2016 (MILLION UNITS/MILLION \$)</i> .....	74
CONSUMER PRODUCTS .....	74
<i>TABLE 26 GLOBAL MARKET PROJECTIONS FOR MEMS ACCELEROMETERS IN CONSUMER PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i> .....	74
Mobile Phone User Interface.....	75
<i>TABLE 27 GLOBAL MARKET PROJECTIONS FOR MOBILE PHONE HANDSETS, THROUGH 2016 (MILLIONS OF HANDSETS)</i> .....	75
<i>FIGURE 14 PROJECTED TRENDS IN GLOBAL SALES OF MOBILE PHONE HANDSETS, 2010–2016 (MILLIONS OF HANDSETS)</i> .....	75
<i>TABLE 28 GLOBAL MARKET PROJECTIONS FOR MEMS ACCELEROMETERS IN MOBILE PHONE HANDSETS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	76
Electronic Gaming User Interface .....	76
<i>TABLE 29 GLOBAL MARKET PROJECTIONS FOR MEMS ACCELEROMETERS IN HANDHELD GAMING DEVICES, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	77
Digital Camera Image-stabilization Systems.....	77
<i>TABLE 30 PROJECTED GLOBAL DIGITAL CAMERA SALES, THROUGH 2016 (MILLION CAMERAS)</i> .....	77
<i>FIGURE 15 PROJECTED GLOBAL UNIT SALES OF DIGITAL CAMERAS, 2010–2016 (MILLION UNITS)</i> .....	78
<i>TABLE 31 GLOBAL MARKET PROJECTIONS FOR MEMS ACCLEROMETERS IN DIGITAL CAMERA IMAGE-STABILIZATION SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	78
“Smart” Sporting Goods .....	79
<i>TABLE 32 GLOBAL MARKET PROJECTIONS FOR MEMS ACCLEROMETERS IN “SMART” SPORTING GOODS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	79
OTHER APPLICATIONS .....	79

<i>TABLE 33 GLOBAL MARKET PROJECTIONS FOR ACCELEROMETERS USED IN OTHER NON-MILITARY APPLICATIONS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	80
CHAPTER SIX: GYROSCOPES .....	81
TECHNOLOGIES .....	81
<i>TABLE 34 MAJOR MEMS GYROSCOPE TECHNOLOGIES</i> .....	82
TUNING FORK GYROSCOPE.....	82
WINE GLASS RESONATOR GYROSCOPES .....	83
RING RESONATOR GYROSCOPES .....	83
VIBRATING WHEEL .....	83
SPINNING WHEEL GYROSCOPE .....	84
MICRO-OPTICAL-ELECTROMECHANICAL SYSTEMS (MOEMS) GYROS.....	84
Interferometric MOEMS Gyroscope .....	84
APPLICATIONS .....	84
<i>TABLE 35 GYROSCOPIC MEMS APPLICATIONS</i> .....	85
AUTOMOTIVE.....	85
Vehicle Stabilization Systems.....	85
Rollover Detection .....	86
Vehicle Navigation Systems.....	86
LIFE SCIENCES.....	86
CONSUMER PRODUCTS .....	87
Digital Camera Image-stabilization Systems.....	87
Personal Transportation Devices.....	87
Robotic Toys .....	87
Household Robots .....	88
MILITARY/AEROSPACE .....	88
OTHER APPLICATIONS .....	88
Mobile Industrial/Service Robots.....	88
GYROSCOPE MARKET .....	89
SUMMARY .....	89
<i>TABLE 36 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES, THROUGH 2016 (\$ MILLIONS)</i> .....	89
<i>FIGURE 16 GLOBAL MEMS ACCELEROMETER MARKET SHARE PROJECTIONS BY APPLICATION SEGMENT, 2010–2016 (% OF TOTAL SHIPMENTS)</i> .....	90
AUTOMOTIVE.....	90
<i>TABLE 37 GLOBAL MARKET PROJECTIONS FOR GYROSCOPIC MEMS IN AUTOMOTIVE APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	91
Stability Control .....	91
<i>TABLE 38 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES USED IN VEHICLE STABILITY CONTROL SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	91

Rollover Detection .....	92
<i>FIGURE 17 PROJECTED TRENDS IN GLOBAL SALES OF VEHICLES WITH ROLLOVER DETECTION SYSTEMS, 2010–2016 (MILLION UNITS)</i> .....	92
<i>TABLE 39 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES USED IN VEHICLE ROLLOVER DETECTION SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	93
Navigation Systems.....	93
<i>TABLE 40 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES USED IN VEHICLE NAVIGATION SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	94
CONSUMER PRODUCTS .....	94
<i>TABLE 41 GLOBAL MARKET PROJECTIONS FOR GYROSCOPIC MEMS IN CONSUMER PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i> .....	94
Digital Camera Image-stabilization Systems.....	94
<i>TABLE 42 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES IN DIGITAL CAMERA IMAGE-STABILIZATION SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	95
Personal Transportation Devices.....	95
<i>FIGURE 18 PROJECTED GLOBAL SALES OF SEGWAY HUMAN TRANSPORTERS, 2010–2016 (UNITS)</i> .....	96
<i>TABLE 43 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES IN SEGWAY HUMAN TRANSPORTERS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	97
MILITARY/AEROSPACE .....	97
<i>TABLE 44 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES USED IN MILITARY/AEROSPACE APPLICATIONS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	97
OTHER APPLICATIONS .....	97
Mobile Industrial/Service Robots.....	98
<i>FIGURE 19 PROJECTED TRENDS IN GLOBAL SHIPMENTS OF MOBILE INDUSTRIAL/SERVICE ROBOTS, 2010–2016 (UNITS)</i> .....	98
<i>TABLE 45 GLOBAL MARKET PROJECTIONS FOR MEMS GYROSCOPES IN MOBILE INDUSTRIAL/SERVICE ROBOTS, THROUGH 2016 (UNITS/\$ MILLIONS)</i> .....	99
CHAPTER SEVEN: PRESSURE SENSORS .....	100
TECHNOLOGY.....	100
APPLICATIONS .....	100
<i>TABLE 46 ESTABLISHED PRESSURE SENSING MEMS APPLICATIONS, 2010</i> .....	100
AUTOMOTIVE APPLICATIONS.....	100
Manifold Absolute Pressure (Map) Sensors .....	101
Tire Pressure Sensors.....	101
LIFE SCIENCES APPLICATIONS.....	101



Blood Pressure Monitors .....	101
CONSUMER PRODUCTS .....	101
Appliance Pressure Sensors .....	102
OTHER APPLICATIONS .....	102
PRESSURE SENSOR MARKET .....	102
SUMMARY .....	102
<i>TABLE 47 GLOBAL MARKET PROJECTIONS FOR MEMS PRESSURE SENSOR APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	102
<i>FIGURE 20 PROJECTED GLOBAL MEMS PRESSURE SENSOR MARKET SHARES BY APPLICATION SEGMENT, 2010–2016 (PERCENT OF TOTAL SHIPMENTS)</i> .....	103
AUTOMOTIVE.....	103
<i>TABLE 48 GLOBAL MARKET FOR ESTABLISHED AUTOMOTIVE MEMS PRESSURE SENSOR APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	104
Manifold Absolute Pressure Sensors .....	104
<i>TABLE 49 GLOBAL MARKET PROJECTIONS FOR MEMS MANIFOLD ABSOLUTE PRESSURE SENSORS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	104
Tire Pressure Sensors.....	105
<i>TABLE 50 GLOBAL MARKET PROJECTIONS FOR MEMS TIRE PRESSURE MONITORING SYSTEMS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	105
LIFE SCIENCES.....	106
Blood Pressure Monitors .....	106
<i>TABLE 51 GLOBAL MARKET PROJECTIONS FOR MEMS BLOOD PRESSURE SENSORS, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	106
CONSUMER PRODUCTS .....	106
Appliance Pressure Sensors .....	106
<i>TABLE 52 GLOBAL MARKET PROJECTIONS FOR MEMS PRESSURE SENSORS IN HOME APPLIANCES, THROUGH 2016 (MILLION UNITS/\$ MILLIONS)</i> .....	107
CHAPTER EIGHT: CHEMICAL AND GAS SENSORS .....	108
TECHNOLOGIES .....	108
ELECTROCHEMICAL SENSORS.....	108
MASS SENSORS.....	108
Optical Sensors .....	109
APPLICATIONS .....	109
<i>TABLE 53 MEMS CHEMICAL AND GAS SENSOR APPLICATIONS</i> .....	110
AUTOMOTIVE.....	110
Exhaust and Cabin Air Quality Sensors .....	110
LIFE SCIENCES.....	110
Blood Gas Monitors .....	110

ENVIRONMENTAL PROTECTION .....	110
Portable/Personal Air Quality Detectors .....	110
MILITARY/PUBLIC SAFETY .....	111
Chemical Agent Detectors .....	111
OTHER APPLICATIONS .....	111
Industrial Leak Detection and Process Control .....	111
MARKETS .....	111
<i>TABLE 54 GLOBAL MEMS CHEMICAL AND GAS SENSOR MARKET PROJECTIONS BY APPLICATION SEGMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	112
<i>FIGURE 21 GLOBAL MEMS CHEMICAL AND GAS SENSOR MARKET SHARE PROJECTIONS BY APPLICATION SEGMENT, 2010–2016 (PERCENT OF TOTAL SHIPMENTS)</i> .....	112
<i>FIGURE 21 (CONTINUED)</i> .....	113
AUTOMOTIVE .....	113
<i>TABLE 55 GLOBAL MARKET PROJECTIONS FOR MEMS GAS SENSORS USED IN AUTOMOTIVE APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	113
Exhaust Gas and Cabin Air Quality Sensors .....	114
<i>TABLE 56 PROJECTED NUMBER OF CATALYTIC CONVERTER- EQUIPPED VEHICLES PRODUCED WORLDWIDE, THROUGH 2016 (MILLION UNITS)</i> .....	114
<i>FIGURE 22 PROJECTED GLOBAL PRODUCTION OF VEHICLES EQUIPPED WITH CATALYTIC CONVERTERS, 2010–2016 (MILLION VEHICLES)</i> .....	115
LIFE SCIENCES .....	116
Blood Gas Monitors .....	116
<i>TABLE 57 PROJECTED GLOBAL SALES OF BLOOD GAS MONITORS, THROUGH 2016 (UNITS)</i> .....	116
<i>FIGURE 23 PROJECTED TRENDS IN GLOBAL SALES OF BLOOD GAS MONITORS, 2010–2016 (UNITS)</i> .....	116
<i>TABLE 58 GLOBAL MARKET PROJECTIONS FOR MEMS BLOOD GAS SENSORS, THROUGH 2016 (UNITS/\$ MILLIONS)</i> .....	117
ENVIRONMENTAL PROTECTION .....	117
Air Quality Monitoring .....	117
<i>TABLE 59 GLOBAL SALES OF AIR POLLUTION MONITORING EQUIPMENT, THROUGH 2016 (\$ BILLIONS)</i> .....	118
<i>FIGURE 24 PROJECTED GLOBAL AIR POLLUTION MONITORING AND SENSING EQUIPMENT MARKET TRENDS, 2010–2015 (\$ BILLIONS)</i> .....	118
<i>TABLE 60 GLOBAL MARKET PROJECTIONS FOR MEMS USED IN PORTABLE/PERSONAL AIR QUALITY MONITORS, THROUGH 2016 (UNITS/\$ MILLIONS)</i> .....	119
MILITARY/PUBLIC SAFETY .....	119

Chemical Agent Detectors.....	119
<i>TABLE 61 GLOBAL MARKET PROJECTIONS FOR MEMS USED IN PORTABLE CW AGENT DETECTORS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	120
PROCESS INDUSTRIES.....	120
Industrial Process Control and Leak Detection .....	120
<i>TABLE 62 GLOBAL MARKET PROJECTIONS FOR OTHER TYPES OF MEMS INDUSTRIAL CHEMICAL AND GAS SENSORS, THROUGH 2016 (\$ MILLIONS)</i> .....	121
CHAPTER NINE: THERMAL SENSORS.....	122
TECHNOLOGIES .....	122
THERMOCOUPLES .....	122
THERMORESISTORS .....	122
MICROBOLOMETERS.....	123
MICROCANTILEVERS .....	123
OTHER TECHNOLOGIES .....	124
APPLICATIONS .....	124
AUTOMOTIVE.....	124
MILITARY/PUBLIC SAFETY .....	125
OTHER .....	125
MARKETS.....	126
<i>TABLE 63 GLOBAL MARKET PROJECTIONS FOR OPTICAL MEMS IN INFRARED SENSORS BY APPLICATION SEGMENT, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	126
<i>FIGURE 25 GLOBAL MEMS IR SENSOR MARKET SHARE PROJECTIONS BY APPLICATION SEGMENT, 2010–2016 (% OF TOTAL SHIPMENTS)</i> .....	127
MILITARY/PUBLIC SAFETY .....	127
<i>TABLE 64 GLOBAL MILITARY/PUBLIC SAFETY MARKET FOR INFRARED MEMS SENSORS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	128
AUTOMOTIVE.....	128
Night Vision Systems .....	128
<i>TABLE 65 GLOBAL AUTOMOTIVE MARKET PROJECTIONS FOR INFRARED MEMS SENSORS, THROUGH 2016 (THOUSAND UNITS/\$ MILLIONS)</i> .....	129
OTHER APPLICATIONS .....	129
<i>TABLE 66 GLOBAL MARKET FOR INFRARED MEMS SENSORS IN OTHER APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i> .....	130
CHAPTER TEN: BIOCHIPS.....	131
TECHNOLOGIES .....	131
SAMPLE MANIPULATION TECHNOLOGIES.....	131
Microchannels.....	131

Micropumps .....	132
Mechanical Micropumps .....	132
Piezoelectric Pumps .....	132
Pneumatic Pumps .....	133
Thermopneumatic Pumps .....	133
Electrostatic Pumps .....	133
Non-Mechanical Pumps .....	133
Capillary Pumps .....	133
Electrohydrodynamic Pumps .....	134
Electrokinetic Pumps.....	134
Magneto-Hydrodynamic Pumps .....	134
Phase Difference Pumps.....	134
Micronozzles.....	135
Microvalves .....	135
Passive Microvalves .....	135
Active Microvalves .....	136
Micromixers .....	136
Active Mixers .....	136
SAW Mixers.....	136
Magneto-Hydrodynamic Mixers .....	136
Passive Mixers .....	136
Microreactors .....	137
SENSING MEDIATOR .....	137
Enzyme Biochips.....	137
Affinity Biochips .....	138
TRANSDUCER.....	138
APPLICATIONS .....	138
<i>TABLE 67 BIOCHIP APPLICATIONS.....</i>	<i>139</i>
LIFE SCIENCES.....	139
MILITARY/PUBLIC SAFETY .....	139
Chemical and Biological Agent Detectors .....	140
PROCESS INDUSTRIES.....	140
Food Quality Testing .....	140
MARKETS.....	141
<i>TABLE 68 GLOBAL BIOCHIP MARKET PROJECTIONS BY</i>	
<i>APPLICATION SEGMENT, THROUGH 2016 (\$ MILLIONS).....</i>	<i>141</i>
<i>FIGURE 26 GLOBAL BIOCHIP MARKET SHARE PROJECTIONS BY</i>	
<i>APPLICATION SEGMENT, 2010–2016 (% OF TOTAL SHIPMENTS).....</i>	<i>142</i>
LIFE SCIENCES.....	142
<i>TABLE 69 GLOBAL MARKET PROJECTIONS FOR BIOCHIPS IN THE</i>	
<i>LIFE SCIENCES BY APPLICATION, THROUGH 2016 (\$ MILLIONS).....</i>	<i>143</i>
Life Sciences Research .....	143

<i>TABLE 70 GLOBAL MARKET PROJECTIONS FOR BIOCHIPS USED     IN LIFE SCIENCE RESEARCH APPLICATIONS, THROUGH 2016 (\$     MILLIONS)</i> .....	143
Diagnostic Biochips .....	143
<i>TABLE 71 GLOBAL MARKET PROJECTIONS FOR BIOCHIPS IN LOC     DIAGNOSTIC DEVICES, THROUGH 2016 (\$ MILLIONS)</i> .....	144
MILITARY/PUBLIC SAFETY .....	144
<i>TABLE 72 GLOBAL MARKET PROJECTIONS FOR MICROFLUIDIC     BIOCHIPS USED IN CBW SENSORS, THROUGH 2016 (\$     MILLIONS)</i> .....	145
PROCESS INDUSTRIES.....	145
Food Testing .....	145
<i>TABLE 73 GLOBAL MARKET PROJECTIONS FOR BIOCHIPS USED     IN FOOD TESTING APPLICATIONS, THROUGH 2016 (\$     MILLIONS)</i> .....	145
CHAPTER ELEVEN: NANO-CHEMICAL SENSORS.....	146
TECHNOLOGIES .....	146
<i>TABLE 74 NANO-CHEMICAL SENSOR TECHNOLOGIES</i> .....	146
NANOTUBES.....	147
Carbon Nanotubes .....	147
Other Types of Nanotubes.....	148
NANORIBBONS .....	149
NANOWIRES .....	149
NANO-CANTILEVERS .....	150
NANO-PARTICLES .....	151
NANOCERAMICS.....	152
APPLICATIONS .....	153
<i>TABLE 75 NANO-CHEMICAL SENSOR APPLICATIONS</i> .....	153
LIFE SCIENCES.....	154
Respiratory Monitoring.....	154
PROCESS INDUSTRIES.....	154
Leak Detection.....	155
MARKET .....	155
<i>TABLE 76 GLOBAL SALES PROJECTIONS OF NANOCHEMICAL     SENSORS BY APPLICATION SEGMENT, THROUGH 2016 (\$     MILLIONS)</i> .....	155
CHAPTER TWELVE: NANO-BIOSENSORS .....	156
TECHNOLOGIES .....	156
<i>TABLE 77 NANO-BIOSENSOR TECHNOLOGIES</i> .....	156
SILICON NANOWIRES .....	157
NANO-CANTILEVERS .....	157
FIBER OPTIC.....	158
NANOTUBES.....	158

NANOSTRUCTURED MEMBRANE .....	159
PHOSPHOLIPIDS .....	159
DNA-SENSITIZED GRAPHENE VAPOR SENSORS.....	160
NANOGAP SENSOR ARRAY.....	161
APPLICATIONS .....	161
TABLE 78 NANO-BIOSENSOR APPLICATIONS .....	161
LIFE SCIENCES.....	162
Molecular Diagnostics .....	162
Blood Analysis .....	162
MARKETS.....	163
LIFE SCIENCES.....	163
TABLE 79 PROJECTED GLOBAL SALES OF NANO-BIOSENSORS TO THE LIFE SCIENCES MARKET, THROUGH 2016 (\$ MILLIONS).....	163
Molecular Diagnostics .....	163
FIGURE 27 GLOBAL MARKET SHARE PROJECTIONS FOR IN VITRO MOLECULAR DIAGNOSTIC EQUIPMENT VS. CONSUMABLES, 2010 (%).....	164
TABLE 80 GLOBAL MARKET PROJECTIONS FOR NANO- BIOSENSOR POINT- OF-CARE MOLECULAR DIAGNOSTIC EQUIPMENT, THROUGH 2016 (\$ MILLIONS).....	165
Glucose Monitoring.....	165
CHAPTER THIRTEEN: NANO-RADIATION SENSORS.....	166
TECHNOLOGIES .....	166
NANOCANTILEVER SENSORS .....	166
GRAPHENE SENSORS.....	167
APPLICATIONS .....	167
TABLE 81 NANO-RADIATION SENSOR APPLICATIONS.....	167
MARKET .....	168
CHAPTER FOURTEEN: NANO-THERMAL SENSORS .....	169
TECHNOLOGIES .....	169
NANOPOWDER-BASED SENSORS .....	169
MARKETS.....	169
APPLICATIONS .....	170
TABLE 82 NANO-THERMAL SENSOR APPLICATIONS .....	170
CHAPTER FIFTEEN: INDUSTRY CHARACTERISTICS.....	171
NUMBER/SIZE OF FIRMS.....	171
FIGURE 28 GLOBAL MICROSENSOR INDUSTRY CONCENTRATION, 2009 (PERCENT OF TOTAL MICROSENSOR SHIPMENTS).....	171
FIGURE 28 (CONTINUED) .....	172
MARKET SHARES.....	172

<i>FIGURE 29 OVERALL GLOBAL MICROSENSOR MARKET SHARES BY COMPANY, 2009 (PERCENT OF TOTAL MICROSENSOR SHIPMENTS)</i> .....	173
<i>FIGURE 29 (CONTINUED)</i> .....	174

APPENDIX I: COMPANY PROFILES .....	175
AFFYMETRIX, INC.....	175
ANALOG DEVICES, INC.....	175
ARCHANGEL SYSTEMS, INC.....	176
ROBERT BOSCH GMBH .....	176
BOSTON MICROSYSTEMS, INC. ....	177
CALIPER LIFE SCIENCES.....	177
CEPHEID THERAPEUTICS .....	178
COLYBRYNS SA .....	178
COMBIMATRIX CORP. ....	178
CONTINENTAL AG .....	179
CUSTOM SENSORS AND TECHNOLOGIES.....	180
DELPHI AUTOMOTIVE, LLP.....	180
ENDEVCO CORP. ....	180
ENZO LIFE SCIENCES .....	181
EUROGENTEC.....	181
FEBIT AG.....	181
FLIR SYSTEMS, INC.....	182
FREESCALE SEMICONDUCTOR, INC. ....	182
GE SENSING.....	182
GENETIX, LTD.....	183
GMA INDUSTRIES, INC. ....	183
ICX PHOTONICS .....	184
INTEGRATED NANO-TECHNOLOGIES, LLC .....	184
I-STAT CORP.....	184
KIONIX, INC.....	185
KNOWLES ELECTRONICS .....	185
LOCKHEED MARTIN CORP. ....	185
MATSUSHITA ELECTRIC INDUSTRIAL CO., LTD.....	186
M-BIOTECH, INC.....	186
MEASUREMENT SPECIALTIES, INC. ....	187
MEMSIC, INC.....	187
MICROCHEMICAL SYSTEMS SA.....	187
MOLECULAR NANOSYSTEMS, INC.....	188
MURATA MANUFACTURING CO., LTD.....	188
NANOMIX, INC.....	189
NIPPON DENSO CORP.....	189
OMRON CORP.....	190
ROCHE NIMBLEGEN, INC. ....	190
SENSOROR AS.....	190

SILICON DESIGNS, INC.....	191
SILICON SENSING SYSTEMS.....	191
SONY CORP.....	191
SPHERE MEDICAL, LTD.....	192
STMICROELECTRONICS.....	192
SYNKERA TECHNOLOGIES, INC.....	192
TOSHIBA CORP.....	193
ULIS.....	193
VTI TECHNOLOGIES OY.....	194
XEOTRON CORP.....	194
APPENDIX II: PATENT ANALYSIS.....	195
PATENTS BY TYPE OF MEMS.....	195
<i>FIGURE 30 RECENT U.S. MICROSENSOR-RELATED PATENTS BY</i>	
<i>TYPE OF SENSOR (PERCENT OF PATENTS ISSUED SINCE</i>	
<i>JANUARY 1, 2005).....</i>	<i>195</i>
<i>FIGURE 30 (CONTINUED).....</i>	<i>196</i>
MEMS PATENT ASSIGNEES.....	196
LARGEST PATENT HOLDERS.....	196
<i>TABLE 83 LARGEST U.S. MICROSENSOR HOLDERS (NUMBER OF</i>	
<i>PATENTS ISSUED BETWEEN 1/1/2005 AND 1/15/2011).....</i>	<i>196</i>
PATENT HOLDERS BY NATIONALITY.....	197
<i>FIGURE 31 U.S. MICROSENSOR PATENTS BY NATIONALITY OF</i>	
<i>MICROSENSOR ASSIGNEE (PERCENT OF PATENTS ISSUED</i>	
<i>BETWEEN 1/1/2005 AND 1/15/2011).....</i>	<i>197</i>