INTRODUCTION XVIII
STUDY OBJECTIVES XVIII
SCOPE AND FORMAT XVIII
METHODOLOGY XIX
CONTRIBUTION OF THE STUDY XIX
ANALYSTS CREDENTIALS XX
RELATED PUBLICATIONS XX
BCC ONLINE SERVICES XX
DISCLAIMER XXI

SUMMARY XXII
SUMMARY TABLE U.S. DEMAND FOR EMI/RFI SHIELDING OPTIONS BY TYPE, THROUGH 2008 (MILLIONS) ..... *XXII*
SUMMARY FIGURE U.S. DEMAND FOR EMI/RFI SHIELDING OPTIONS BY TYPE, 2002, 2003, AND 2008 ($ MILLIONS) ..... *XXIII*

PRINCIPLES OF ELECTROMAGNETISM 1
SYMBOLS AND TERMINOLOGY 1
TABLE 1 SI UNITS AND THEIR SYMBOLS *1*
TABLE 2 SI PREFIXES AND THEIR SYMBOLS *2*
ELECTROMAGNETIC ENERGY 2
RADIATION 3
CONDUCTION 3
IMPEDANCE 3
ELECTROSTATIC DISCHARGE 4
ELECTROMAGNETIC FIELDS 5
TABLE 3 FREQUENCY LEVELS AND BAND NAMES *5*
ELECTROMAGNETIC INTERFERENCE AND RADIO FREQUENCY INTERFERENCE 5
TABLE 4 EMI TRANSMITTERS AND RECEIVERS *6*
SOME DEFINITIONS 6

MECHANISMS OF SHIELDING 7
BACKGROUND 7
OVERVIEW OF EMI SHIELDING 7
SHIELDING EFFECTIVENESS 7
TABLE 5 GENERAL RATINGS OF SHIELDING EFFECTIVENESS *8*
ATTENUATION 8
ELECTROMAGNETIC COMPATIBILITY 8
EMC CONTROL 9
SHIELDING PERFORMANCE 10
OVERVIEW 10
ABSORPTION 10
REFLECTANCE 11
PERMEABILITY 11
TABLE 6 TYPICAL MATERIALS FOR LOW FREQUENCY MAGNETIC SHIELDING *12*

GALVANIC CORROSION AND METALS COMPATIBILITY 12
TABLE 7 ANODIC INDICES FOR METALS 13
RELATIONSHIP BETWEEN CONDUCTIVITY AND RESISTIVITY 14
EFFECTS OF EMI, RFI AND STATIC ELECTRICITY 14
BACKGROUND 14
THE IMPORTANCE OF SHIELDING 15
CONTROLLING EMI/RFI 15
Background 15
Technical Overview 16
Use of Thermoplastics 17
EMI Shielding Compounds Versus Coatings 18
TABLE 8 COMPARISON BETWEEN EMI SHIELDING COMPOUNDS AND CONDUCTIVE COATINGS 18

SHIELDING TECHNOLOGIES AND MATERIALS 19
COST AND PERFORMANCE CHARACTERISTICS OF THE SHIELDING OPTIONS 19
COST COMPARISONS 19
TABLE 9 TOTAL RAW MATERIAL AND LABOR COSTS ASSOCIATED WITH THE MAJOR SHIELDING OPTIONS ($/SQ. FT.) 20
PERFORMANCE COMPARISONS 20
TABLE 10 SUMMARY OF STRENGTHS AND WEAKNESSES OF EMI SHIELDING OPTIONS 21
TABLE 11 QUALITATIVE RATINGS OF THE MAJOR SHIELDING OPTIONS 22
CONDUCTIVE PLASTICS 22
BACKGROUND 22
FUNCTIONS 23
RECENT DEVELOPMENTS 23
CONDUCTIVE ADDITIVE SELECTION 23
TABLE 12 SURFACE RESISTIVITY FOR ELECTRONIC DEVICE SUBSTRATES (OHMS/SQ.) 24
CONDUCTIVITY TESTS 24
ADVANTAGES AND DISADVANTAGES 25
COMPOUNDING CONDUCTIVE PLASTICS 26
INHERENTLY CONDUCTIVE POLYMERS 26
Inherently Conductive Polymers (Continued) 27
INHERENTLY DISSIPATIVE POLYMERS 28
COMMERCIAL PRODUCTS EMPLOYING ICPs AND IDPs 28
RTP Co./Panipol 28
Noveon 29
LNP Engineering Plastics, Inc. 29
Others 29
CONDUCTIVE FILMS 29
CARBON FIBERS AND POWDERS 30
OVERVIEW 30
CARBON NANOTUBES—A RECENT DEVELOPMENT 30

COMPUTER APPLICATIONS 31
POTENTIAL AUTOMOTIVE APPLICATIONS 32
SUPPLIERS 32
OTHER NEW PRODUCTS 32
RTP Co. 32
LNP Plastics Engineering, Inc. 33
Ticona 33
Conoco Cevolution 33
Cabot Corp. 33
Bayer AG 34
GE Plastics 34
METAL FIBERS 34
OVERVIEW 34
ADVANTAGES 34
METAL FIBER CONDUCTIVITY 35
METALLIZED GLASS FIBERS 35
NICKEL-COATED GRAPHITE FIBERS 36
Background 36
Advantages 36
STAINLESS STEEL FIBERS 37
Overview 37
Technology 37
Effect on Processing 38
Fiber Forms 38
Advantages and Disadvantages 39
TABLE 13 ADVANTAGES AND DISADVANTAGES OF STAINLESS STEEL FIBERS 39
LNP New Products 40
COPPER FIBERS 40
METALLIZED FOIL LAMINATES AND TAPES 40
OVERVIEW 40
FLEXIBLE FOIL LAMINATES 41
ADHESIVE METAL TAPES 41
FABRIC TAPES 42
CONDUCTIVE ELASTOMERS 43
TABLE 14 SHIELDING EFFECTIVENESS OF CONDUCTIVE ELASTOMERS (SHIELDING EFFECTIVENESS, IN DB) 44
TABLE 15 COMPARATIVE TESTING OF CONDUCTIVE ELASTOMERS FOR GALVANIC CORROSION 44
CONDUCTIVE COATINGS 45
BACKGROUND 45
OVERVIEW 45
PERFORMANCE OF ALTERNATE CONDUCTIVE COATINGS 46
ADVANTAGES AND DISADVANTAGES 46
TABLE 16 ADVANTAGES AND DISADVANTAGES OF CONDUCTIVE COATINGS FOR EMI SHIELDING 46
COATING BINDERS 47

SOLVENT-BASED VERSUS WATERBORNE CONDUCTIVE COATINGS 47
COPPER AND NICKEL 48
Advantages of Copper vs. Nickel 48
Advantages of Nickel vs. Copper 48
Silver 49
ELECTROLESS PLATING 49
Overview 49
Advantages and Disadvantages 50
TABLE 17 ADVANTAGES AND DISADVANTAGES OF ELECTROLESS PLATING FOR EMI SHIELDING 50
Applications 50
TABLE 18 SELECTED APPLICATIONS USING ELECTROLESS PLATING FOR EMI SHIELDING 51
Multilayers 51
TABLE 19 SEQUENCE OF STEPS FOR ELECTROLESS PLATING OF PLASTICS 51
TABLE 19 (CONTINUED) 52
Measuring Shielding Effectiveness 52
TABLE 20 RELATIVE CONDUCTIVITY OF SHIELDING METALS 53
Direct Plate 54
VACUUM METALLIZATION 54
Background 54
Technology 55
Advantages and Disadvantages 55
TABLE 21 ADVANTAGES AND DISADVANTAGES OF VACUUM METALLIZATION FOR EMI SHIELDING 56
Vacuum Metallization Processes 56
Direct Thermal Evaporation 56
Electron Beam Coatings 57
Cathode Sputtering 57
CONDUCTIVE PAINTS 57
Overview 57
Conductive Paint Cost Comparisons 58
Recent Developments Related to Conductive Coatings 59
THERMAL (ARC) SPRAY 60
OVERVIEW 60
ADVANTAGES AND DISADVANTAGES 60
TABLE 22 ADVANTAGES AND DISADVANTAGES OF ZINC ARC SPRAY FOR EMI SHIELDING 61
IMPROVEMENTS IN TECHNOLOGY 61
SOFT FERRITES 62
BACKGROUND 62
PROPERTIES 63
CHOOSING FERRITES FOR EMI SUPPRESSION 63
TABLE 23 PARAMETERS FOR FERRITE SELECTION 64
TYPES OF FERRITE SHAPES AND APPLICATIONS 64
TABLE 24 SHAPE OF FERRITE APPLICATIONS 65

SHIELDING COMPONENTS 66
GASKETS 66
BACKGROUND 66
PROPERTIES 66
SELECTING GASKET TYPES 67
GASKET TYPES BY MATERIAL 67
Background 67
Fabric-Clad Foam Gaskets 67
Stamped and Formed Metal Gaskets 68
Wire Mesh Gaskets 68
Some Technical and Commercial Considerations 69
INSTALLATION COST 69
SHIELDING GASKETS FOR HIGHER FREQUENCIES 69
NEW PRODUCTS 70
Leader-Tech Offers New EMI Shielding Gaskets 70
New Chomerics Gaskets 70
Vanguard Products 70
TESTING 71
FILTERS 71
OVERVIEW 71
Low-pass Filter Networks 72
NEW PRODUCTS 72
CONNECTORS AND CABLES 73
WINDOWS 73
BACKGROUND 73
SHIELDING PERFORMANCE 74
MATERIAL ADVANTAGES AND DISADVANTAGES 74
TABLE 25 COMPARISON OF WINDOW SHIELDING MATERIALS 74
MAINTENANCE AND PERFORMANCE ISSUES 74
ENCLOSURES 75
BACKGROUND 75
AESTHETICS 76
EMI LEAKAGE 77
COST CONSIDERATIONS 78
Raw Materials 78
Shielding 78
TABLE 26 RELATIVE COST STRUCTURE OF VARIOUS SHIELDING OPTIONS 79
METAL CABINETS 79
BACKGROUND 79
ADVANTAGES AND DISADVANTAGES 80
TABLE 27 ADVANTAGES AND DISADVANTAGES OF METAL CABINETS FOR EMI SHIELDING 81
CABINET DESIGN 81
SHIELDING OF APERTURES 82
ARCHITECTURAL SHIELDING 82

BACKGROUND 82
Background (Continued) 83
MAGNETIC SHIELDING VERSUS EMI/RFI SHIELDING 84
SHIELDED ROOM CONSTRUCTION TYPES 84
COMPONENTS 85
OTHER SHIELDING COMPONENTS 86
BRAIDS 86
ADHESIVES 86

ELECTROSTATIC DISSIPATION 87
INTRODUCTION 87
STATIC ELECTRICITY CREATES CHARGE 87
TECHNOLOGY ASPECTS 87
TABLE 28 TRIBOELECTRIC SERIES FOR SELECTED MATERIALS 88
DEVICE FAILURES DUE TO ESD DAMAGE 88
HOW MUCH STATIC PROTECTION IS NEEDED? 89
SUMMING UP THE ESD SCENARIO 89
ESD CONTROLS 89
BACKGROUND 89
CONDUCTIVE MATERIALS FOR ESD CONTROL 90
Background 90
Chemical Additives 90
Technology 91
Conductive Fillers 91
Coated Sheets 92
Inherently Conductive Polymers 92
Inherently Dissipative Polymers 93
IDP Alloys 93
NEW DEVELOPMENTS 93
Permanent Antistats 93
Carbon Nanotubes for Static Dissipation 94
More Automotive Products for ESD Protection 94
DuPont 94
GE Plastics 94
Nova Chemicals 94
RTP Co. 95
Ticona 95

EMI SHIELDING MARKETS 96
BACKGROUND 96
SHIELDING TYPE OVERVIEW 96
REDESIGNING CIRCUITRY 97
EMI SHIELDING TECHNOLOGY MARKET OVERVIEW 98
QUANTITATIVE EMI MARKET ASPECTS 99

TABLE 29 U.S. VALUE OF EMI/RFI SHIELDING MARKET, BY METHOD, THROUGH 2008 ($ MILLIONS) *100*
TABLE 30 U.S. VALUE OF CONDUCTIVE COATING EMI/RFI SHIELDING MARKET, THROUGH 2008 ($ MILLIONS) *101*
FIGURE 1 U.S. VALUE OF CONDUCTIVE COATING EMI/RFI SHIELDING MARKET, 2002, 2003, AND 2008 ($ MILLIONS) *101*
TABLE 31 MARKET SHARES OF SHIELDING OPTIONS BASED ON VALUE, 2002, 2003 AND 2008 (%) *102*
TABLE 32 MARKET SHARES OF CONDUCTIVE COATING SHIELDING OPTIONS BASED ON VALUE, 2002, 2003 AND 2008 (%) *102*
TABLE 33 VOLUME OF THE EMI/RFI SHIELDING MARKET, BY METHOD, THROUGH 2008 (MILLION SQUARE FEET) *103*
TABLE 34 VOLUME OF THE CONDUCTIVE COATING EMI/RFI SHIELDING MARKET, THROUGH 2008 (MILLION SQUARE FEET) *103*
TABLE 35 SHARES OF SHIELDING OPTIONS BASED ON VOLUME, 2002, 2003 AND 2008 (%) *104*
TABLE 36 SHARES OF CONDUCTIVE COATING SHIELDING OPTIONS BASED ON VOLUME, 2002, 2003 AND 2008 (%) *104*
METAL CABINETS 104
TABLE 37 U.S. DEMAND FOR METAL CABINETS IN EMI/RFI SHIELDING, THROUGH 2008 (MILLIONS) *105*
FIGURE 2 U.S. DEMAND FOR METAL CABINETS IN EMI/RFI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *106*
CONDUCTIVE COATINGS 106
TABLE 38 U.S. DEMAND FOR CONDUCTIVE COATINGS IN EMI SHIELDING, THROUGH 2008 (MILLIONS) *107*
ELECTROLESS PLATING 108
TABLE 39 U.S. DEMAND FOR ELECTROLESS PLATING IN EMI SHIELDING, THROUGH 2008 (MILLIONS) *108*
VACUUM METALLIZATION 108
TABLE 40 U.S. DEMAND FOR VACUUM METALLIZATION IN EMI SHIELDING, THROUGH 2008 (MILLIONS) *109*
FIGURE 3 U.S. DEMAND FOR VACUUM METALLIZATION IN EMI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *110*
CONDUCTIVE PAINTS 110
TABLE 41 U.S. DEMAND FOR CONDUCTIVE PAINTS IN EMI SHIELDING, THROUGH 2008 (MILLIONS) *110*
FIGURE 4 U.S. DEMAND FOR CONDUCTIVE PAINTS IN EMI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *111*
LAMINATES AND TAPES 111
TABLE 42 U.S. DEMAND FOR LAMINATES AND TAPES IN EMI SHIELDING, THROUGH 2008 (MILLIONS) *112*
FIGURE 5 U.S. DEMAND FOR LAMINATES AND TAPES IN EMI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *112*
CONDUCTIVE PLASTICS AND ELASTOMERS 113
TABLE 43 U.S. DEMAND FOR CONDUCTIVE PLASTICS AND ELASTOMERS IN EMI/RFI SHIELDING, THROUGH 2008 (MILLIONS) *114*
FIGURE 6 U.S. DEMAND FOR CONDUCTIVE PLASTICS AND ELASTOMERS IN EMI/RFI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *114*
ARC SPRAY 114
MISCELLANEOUS SHIELDING 115

TABLE 44 U.S. DEMAND FOR MISCELLANEOUS EMI/RFI SHIELDING, THROUGH 2008 (MILLIONS) *116*
FIGURE 7 U.S. DEMAND FOR MISCELLANEOUS EMI/RFI SHIELDING, 2002, 2003, AND 2008 ($ MILLIONS) *116*

INDUSTRY/EMI SHIELDING INTERFACE 117
ELECTRONICS INDUSTRY 117
OVERVIEW 117
TABLE 45 TYPICAL FIELD LEVELS AND FREQUENCIES *117*
TABLE 46 SOURCES OF EMI *118*
TABLE 47 EXAMPLES OF COMPONENTS WITH EMI/RFI AND ESD PROBLEMS AND INDUSTRIES INVOLVED *118*
GENERAL ELECTRONICS INDUSTRY GROWTH 119
Trends 119
Components 120
Computers and EMI 120
Cellular Phones 121
Pagers 121
TV Receivers 121
Cable TV 122
VCRs 123
Stereo Components 123
New Developments 123
Owens Corning's New Shielding System 123
New RTP Product 124
Cabot Develops Conductive Tapes 124
Recent ESD Activities in the Electronics Industry 124
Background 124
Protecting PCBs from ESD 125
TRANSPORTATION INDUSTRY 125
OVERVIEW 125
AUTOS 125
Background 125
Future Possibilities 126
AIRCRAFT 127
HEALTHCARE INDUSTRY 128
OVERVIEW 128
WIRELESS ELECTRONIC EQUIPMENT EFFECTS IN HOSPITALS 129
Background 129
Wireless Phones and Hearing Aids 129
Wireless Phones and Cardiac Pacemakers 129
Wireless Phones and ICDs 130
MANAGING HOSPITAL EMC 130
NEW EMC STANDARDS FOR MEDICAL DEVICES 131
USE OF CONDUCTIVE POLYMERS IN HEALTHCARE 131

Conductive Plastics 131
Conductive Films 132
USE OF CONDUCTIVE POLYURETHANES IN MEDICAL APPLICATIONS—A RECENT DEVELOPMENT 132

OTHER TECHNOLOGIES IMPACTING EMI/RFI MARKETS 133
FIBER OPTICS 133
OVERVIEW 133
TECHNOLOGY 133
PERFORMANCE 134
TABLE 48 COMPARATIVE CHARACTERISTICS OF LAN MEDIA 135
MARKETS 136
Overview 136
Telephone-Based 136
Cable TV 136
Internet 136
Lighting 136
Automotive 136
Aircraft 137
MARKET SIZE 137
BLUETOOTH TECHNOLOGY 137
OVERVIEW 137
MEDICAL APPLICATIONS 138
ABSORPTIVE EMI TECHNOLOGIES 138
OVERVIEW 138
MARKETS 139
Markets (Continued) 140

RECENT PATENTS 141
PATENT SEARCH RESULTS 141
EMI SHIELDING—MATERIALS, FIBERS & METHOD OF PREPARATION 141
EMI SHIELDING AND ESD DEGRADABLE POLYMERS 141
CORROSION-RESISTANT EMI SHIELDING 142
FABRICATION OF CONDUCTIVE ELASTOMERS 142
EMI SHIELDING STRUCTURE FOR NOTEBOOK COMPUTERS 142
EMI SHIELDING FABRICS 142
EMI SHIELDING 142
SUPERPLASTIC ALLOY-CONTAINING CONDUCTIVE PLASTIC PART FOR EMI SHIELDING 143
GEL STRUCTURE FOR COMBINED EMI SHIELDING 143
PROCESS AND APPARATUS FOR MAKING ALUMINUM FOIL-FILLED PLASTIC PELLETS FOR EMI SHIELDING 143

MANUFACTURE OF FLAME-RETARDANT EMI SHIELDING MATERIALS 143
MULTI-WALLED ELECTROMAGNETIC INTERFERENCE SHIELD 144
EMI/RFI PROTECTION OF AIRBORNE MISSLE ELECTRONICS USING CONDUCTIVE PLASTICS 144
EMI GASKET 144
PTFE SEAL WITH EMI SHIELDING 144
FLAME RETARDANT EMI SHIELDING GASKET 145
INTUMESCENT, FLAME RETARDANT PRESSURE SENSITIVE COMPOSITION FOR EMI SHIELDING APPLICATIONS 145

ELECTROMAGNETIC COMPLIANCE (EMC) STANDARDS 146
BACKGROUND 146
SOME BASIC CONCEPTS 146
UNITED STATES REQUIREMENTS 146
OVERVIEW 146
FCC PART 15 UPDATES 147
SUBASSEMBLIES 148
WHAT MAY BE UPCOMING 148
FOOD AND DRUG ADMINISTRATION 148
TABLE 49 ELECTRONIC PRODUCTS SUBJECT TO THE RADIATION CONTROL FOR HEALTH AND SAFETY ACT OF 1968 149
AMERICAN NATIONAL STANDARDS INSTITUTE 150
MILITARY SPECIFICATIONS 150
INTERNATIONAL REGULATIONS 151
OVERVIEW 151
EU REQUIREMENTS 152
Overview 152
Details on EEC Directive 152
COMPARISON BETWEEN U.S. AND EU EMC REGULATIONS 152
TABLE 50 COMPARISON OF FCC AND EU EMC REGULATIONS 153
THE CONCEPT OF EMC STANDARDS 153
TABLE 51 ELECTROMAGNETIC CONTROLS IN SELECTED ENVIRONMENTAL AREAS 154
LEGAL AND REGULATORY SITES 154
MEDICAL EMC: A SPECIAL CASE 155

COMPANY PROFILES 156
COMPANIES INVOLVED IN EMI SHIELDING 156
TABLE 52 SELECTED MAJOR COMPANIES INVOLVED IN EMI/RFI SHIELDING 156
TABLE 52 (CONTINUED) 157
TABLE 52 (CONTINUED) 158
A.K. STAMPING COMPANY 158

ALCO TECHNOLOGIES 158
AMPHENOL CANADA 159
ADVANCED PERFORMANCE MATERIALS 159
AVX CORPORATION 159
BMI, INC. 160
CHOMERICS (DIVISION OF PARKER HANNIFIN CORPORATION) 160
COILCRAFT, INC. 161
COMPOSITE MATERIALS LLC. 161
CYBERSHIELD, INC. 161
DEXTER CORPORATION 162
ENTHONE-OMI, INC. 162
ETS-LINDGREN 162
FERRISHIELD, INC. 162
FERRONICS, INC. 163
FUJIPOLY AMERICA CORPORATION 163
GREENE RUBBER COMPANY 163
LAIRD TECHNOLOGIES 164
MAGNETIC SHIELD CORPORATION 164
THE MuSHIELD COMPANY 165
NEXTECH, INTERNATIONAL 165
OMEGA SHIELDING PRODUCTS, INC. 165
ORION INDUSTRIES, INC. 165
PANASHIELD, INC. 166
PRESSCUT INDUSTRIES 166
RTP, INC. 167
SCHAFFNER EMC, INC. 167
SCHLEGEL CORPORATION 167
SILVER CLOUD MANUFACTURING COMPANY 168
SPECTRUM CONTROL 168
STEWARD, INC. 168
STOCKWELL RUBBER COMPANY, INC. 169
TDK CORPORATION OF AMERICA 169
TECH-ETCH, INC. 170
TECKNIT, INC. 170
3M ELECTRICAL SPECIALTIES DIVISION 171
TUSONIX, INC. 172
VANGUARD PRODUCTS CORPORATION 172
VTI VACUUM TECHNOLOGIES 172
ZIPPERTUBING COMPANY, INC. 173

APPENDIX 174
MAJOR PROFESSIONAL SOCIETIES 174
IEEE EMC SOCIETY 174
SOCIETY OF AUTOMOTIVE ENGINEERS 175

GLOSSARY OF TERMS 175
GLOSSARY OF TERMS (CONTINUED) 176
GLOSSARY OF TERMS (CONTINUED) 177
GLOSSARY OF TERMS (CONTINUED) 178
GLOSSARY OF TERMS (CONTINUED) 179
GLOSSARY OF TERMS (CONTINUED) 180