

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND .....	1
STUDY GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	2
SCOPE AND FORMAT .....	2
METHODOLOGY AND INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC RESEARCH REPORTS.....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER .....	4
CHAPTER TWO: EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE PROJECTED GLOBAL MEMS MARKET,</i> <i>THROUGH 2014 (\$ MILLIONS)</i> .....	5
<i>SUMMARY FIGURE PROJECTED GLOBAL MEMS MARKET, 2008–</i> <i>2014 (\$ MILLIONS)</i> .....	5
EXECUTIVE SUMMARY (CONTINUED).....	6
CHAPTER THREE: MEMS OVERVIEW.....	7
GENERAL DESCRIPTION.....	7
DEFINITIONS.....	7
MEMS .....	7
HISTORICAL NOTE.....	7
MEMS TECHNOLOGIES .....	8
MATERIALS TECHNOLOGIES .....	8
<i>FIGURE 1 PROJECTED MEMS MATERIALS TECHNOLOGIES</i> <i>SHIPMENTS, 2008 AND 2014 (%)</i> .....	9
Silicon.....	9
Polymers.....	10
Metals.....	10
MANUFACTURING TECHNOLOGIES.....	10
Micromachining .....	10
<i>FIGURE 2 PROJECTED MEMS FABRICATION TECHNOLOGY</i> <i>SHIPMENTS, 2008 AND 2014 (%)</i> .....	11
<i>FIGURE 2 (CONTINUED)</i> .....	12
Surface Micromachining.....	12
<i>FIGURE 3 SACRIFICIAL LAYER ETCHING</i> .....	13
Bulk Micromachining .....	14
LIGA.....	14
<i>FIGURE 4 LIGA PROCESS DIAGRAM</i> .....	15
Wafer Bonding .....	16
Anodic Bonding .....	16
Intermediate Layer Assisted Bonding .....	16
Direct Bonding .....	16
Flip-Chip Bonding.....	16

Etching .....	17
Wet Anisotropic Etching .....	17
<i>FIGURE 5 ISOTROPIC VERSUS ANISOTROPIC ETCHING</i> .....	17
Dry Etching .....	18
Reactive Ion Etching .....	18
Deep Reactive Ion Etching .....	18
Laser Microfabrication .....	19
Laser Micromachining .....	19
LACE .....	20
Laser Assisted Deposition .....	20
Stereolithography .....	20
Laser Surface Modification.....	21
Laser-Assisted Manipulation and Assembly .....	21
Laser Microbending .....	21
Physical Manipulation of Parts .....	22
Laser Joining .....	22
Other Technologies .....	22
Powderblasting .....	22
Micromolding .....	23
Hot Embossing Lithography.....	23
Ultraviolet Nanoimprint Lithography .....	23
Dip Pen Nanolithography.....	24
MEMS TECHNOLOGIES AND APPLICATIONS .....	24
<i>TABLE 1 MAJOR MEMS TECHNOLOGIES AND APPLICATIONS</i> .....	24
<i>TABLE 1 (CONTINUED)</i> .....	25
ACCELEROMETERS .....	25
Technologies.....	25
Operating Mechanism .....	26
<i>TABLE 2 MAJOR MEMS ACCELEROMETER TECHNOLOGIES</i> .....	26
Capacitive .....	27
Electromagnetic .....	27
Piezoelectric .....	28
Piezoresistive.....	28
Optical.....	29
Tunneling.....	30
Thermal.....	30
Axes of Measurement .....	31
Low-g Accelerometers .....	31
Applications .....	31
Established Applications .....	31
<i>TABLE 3 ESTABLISHED COMMERCIAL ACCELEROMETER</i> <i>APPLICATIONS</i> .....	32
Automotive Applications .....	32
Airbag Actuation.....	32

	Stability Systems .....	32
	Vehicle Navigation.....	33
	Life Sciences .....	33
	Rate Responsive Heart Pacemakers .....	33
	Actigraphs .....	33
	Energy and Environment.....	34
	Oil and Gas Exploration.....	34
	Military/Public Safety.....	34
	Consumer Electronics.....	35
	Personal Electronics .....	35
	“Smart” Sporting Goods .....	36
	Information Technology.....	36
	Hard Disk Drop Protection Systems.....	36
	Miscellaneous Applications .....	37
	Developmental Applications.....	37
	Information Technology.....	37
	Hard Disk Read/Write Head Tracking Mechanism.....	37
	GYROSCOPES .....	38
	Technologies.....	38
<i>TABLE 4 MAJOR MEMS GYROSCOPE TECHNOLOGIES</i> .....		<i>39</i>
	Tuning Fork Gyroscope .....	39
	Wine Glass Resonator Gyroscopes .....	40
	Ring Resonator Gyroscopes .....	40
	Vibrating Wheel.....	40
	Spinning Wheel Gyroscope.....	41
	Micro-Optical-Electromechanical Systems (MOEMS) Gyros .....	41
	Interferometric MOEMS Gyroscope.....	41
	Applications .....	41
	Established Applications .....	41
<i>TABLE 5 ESTABLISHED GYROSCOPIC MEMS APPLICATIONS</i> .....		<i>42</i>
	Automotive.....	42
	Vehicle Stabilization Systems .....	42
	Rollover Detection.....	43
	Vehicle Navigation Systems .....	43
	Military/Public Safety.....	43
	Consumer Products.....	43
	Digital Camera Image Stabilization Systems .....	43
	Personal Transportation Devices .....	44
	Developmental .....	44
<i>TABLE 6 DEVELOPMENTAL GYROSCOPIC MEMS APPLICATIONS</i> .....		<i>44</i>
	Life Sciences .....	44

"Smart Wheelchairs.....	44
Consumer Products.....	45
Household Robots .....	45
Robotic Toys .....	45
Other Developmental Applications .....	45
Mobile Industrial/Service Robots .....	45
PRESSURE SENSORS .....	46
Technologies.....	46
Piezoelectric .....	46
Applications .....	46
Established Applications .....	46
<i>TABLE 7 ESTABLISHED PRESSURE SENSING MEMS</i>	
<i>APPLICATIONS</i> .....	46
Automotive Applications .....	47
MAP Sensors .....	47
Tire Pressure Sensors.....	47
Life Sciences Applications .....	47
Blood Pressure Monitors .....	47
Other Applications .....	47
Developmental Applications.....	48
Consumer Products.....	48
Appliance Pressure Sensors.....	48
CHEMICAL AND GAS SENSORS.....	48
Technologies.....	48
Electrochemical Sensors .....	49
Mass Sensors.....	49
Optical Sensors .....	50
Applications .....	50
Established Applications .....	50
Industrial Leak Detection and Process Control .....	50
Developmental Applications.....	50
<i>TABLE 8 DEVELOPMENTAL MEMS CHEMICAL AND GAS SENSOR</i>	
<i>APPLICATIONS</i> .....	51
Automotive.....	51
Exhaust and Cabin Air Quality Sensors .....	51
Life Sciences .....	51
Blood Gas Monitors .....	51
Energy and Environment.....	51
Portable/Personal Air Quality Detectors .....	51
Military/Public Safety.....	52
Chemical Agent Detectors.....	52
THERMAL MEMS .....	52
Technologies.....	52
Thermocouples .....	52

Thermoresistors .....	53
Applications .....	53
Developmental Applications.....	53
OPTICAL MEMS.....	53
Technologies.....	54
Micromirrors .....	54
Diffractive MEMS .....	54
MEMS Interferometers.....	54
Actuating Mechanisms .....	55
Applications .....	55
Established Applications .....	55
<i>TABLE 9 ESTABLISHED OPTICAL MEMS APPLICATIONS.....</i>	<i>55</i>
Telecommunications .....	56
Optical Switches .....	56
Information Technology.....	57
Maskless Lithography .....	57
<i>FIGURE 6 MASKLESS OPTICAL LITHOGRAPHY SYSTEM.....</i>	<i>57</i>
CTP Printing Equipment.....	58
Consumer Products.....	58
DLP Systems.....	58
Other .....	59
Laser MEMS Barcode Scanners.....	59
Developmental Applications.....	59
Automotive.....	60
Optical MEMS Infrared Imaging	
Sensor.....	60
Other .....	60
MEMS Infrared Spectrometers .....	60
RF MEMS .....	61
Technologies.....	61
Applications .....	61
Established Applications .....	62
Telecommunications .....	62
Acoustic Wave Resonator.....	62
MEMS RF Switches.....	62
On-Chip Inductors and Capacitors.....	63
Developmental Applications.....	63
On-Chip Antennas and Other MEMS Devices.....	63
MICROFLUIDIC AND BIO-MEMS .....	63
Technologies.....	64
Microchannels .....	64
Micropumps.....	64
Mechanical Micropumps .....	65
Piezoelectric Pumps.....	65

	Pneumatic Pumps.....	65
	Thermopneumatic Pumps.....	65
	Electrostatic Pumps.....	65
	Non-Mechanical Pumps.....	66
	Capillary Pumps .....	66
	Electrohydrodynamic Pumps.....	66
	Electrokinetic Pumps .....	66
	Magneto-Hydrodynamic Pumps.....	67
	Phase Difference Pumps .....	67
	Micronozzles.....	67
	Microvalves .....	68
	Passive Microvalves .....	68
	Active Microvalves .....	68
	Micromixers.....	68
	Active Mixers.....	69
	SAW Mixers .....	69
	Magneto-Hydrodynamic Mixers .....	69
	Passive Mixers.....	69
	Microreactors .....	69
	Applications .....	70
	Established Applications .....	70
<i>TABLE 10 ESTABLISHED MICROFLUIDIC MEMS APPLICATIONS.....</i>		<i>70</i>
	Life Sciences .....	70
	“Labs-on-a Chip” .....	70
	Microarray Printers.....	71
	Information Technology.....	72
	Inkjet Printer Cartridges .....	72
	Developmental Applications.....	73
<i>TABLE 11 DEVELOPMENTAL MICROFLUIDIC MEMS APPLICATIONS .....</i>		<i>73</i>
	Life Sciences .....	73
	Implantable Drug Pumps .....	73
	Information Technology.....	73
	Printed Electronics .....	73
	Military/Public Safety.....	74
	Chemical and Biological Agent Detectors .....	74
	Other .....	75
	Food Quality Testing.....	75
OTHER MEMS TYPES.....		76
Established Technologies .....		76
MEMS Microphones.....		76
Developmental Technologies.....		76
MEMS Fuel Cells.....		76

MEMS Technology-Based Fuel Cells .....	77
MEMS Fuel Cells On a Chip .....	77
CHAPTER FOUR: PATENT ANALYSIS .....	78
PATENTS BY TYPE OF MEMS .....	78
<i>FIGURE 7 U.S. MEMS-RELATED PATENTS ISSUED THROUGH NOV.</i>	
<i>15, 2009 (%).....</i>	78
<i>FIGURE 7 (CONTINUED) .....</i>	79
MEMS PATENT TRENDS OVER TIME .....	79
<i>FIGURE 8 TRENDS IN MEMS-RELATED U.S. PATENTS ISSUED</i>	
<i>ANNUALLY, FROM BEFORE 2003-2009 (NO. OF PATENTS</i>	
<i>GRANTED EACH YEAR).....</i>	79
<i>FIGURE 8 (CONTINUED) .....</i>	80
MEMS PATENT ASSIGNEES .....	80
LARGEST PATENT HOLDERS.....	80
<i>TABLE 12 LARGEST NUMBER OF U.S. MEMS PATENTS, ISSUED</i>	
<i>THROUGH NOV. 15, 2009 (NUMBER OF PATENTS).....</i>	80
PATENT HOLDERS BY COUNTRY .....	81
<i>FIGURE 9 U.S. MEMS PATENT AND PATENT APPLICATION</i>	
<i>HOLDERS BY COUNTRY, ISSUED THROUGH NOV. 15, 2009</i>	
<i>(NUMBER).....</i>	81
CHAPTER FIVE: GLOBAL MARKET FOR MEMS, 2008–2014 .....	82
OVERALL MARKET SIZE AND SEGMENTATION.....	82
MARKET SIZE.....	82
<i>FIGURE 10 PROJECTED GLOBAL MEMS SALES TRENDS, 2008–2014</i>	
<i>(\$ BILLIONS).....</i>	82
MARKET SEGMENTATION .....	82
MEMS Types.....	82
<i>TABLE 13 PROJECTED GLOBAL MEMS MARKET BY TYPE OF MEM,</i>	
<i>THROUGH 2014 (\$ MILLIONS).....</i>	83
<i>FIGURE 11 PROJECTED GLOBAL MEMS MARKET BY TYPE OF</i>	
<i>MEM, 2008 AND 2010 (PERCENT OF TOTAL).....</i>	84
MEMS Application Segments .....	85
<i>FIGURE 12 PROJECTED MEMS MARKET BY APPLICATION</i>	
<i>SEGMENT, 2008 AND 2014 (PERCENT OF TOTAL MEMS SALES) .....</i>	85
<i>FIGURE 12 (CONTINUED) .....</i>	86
DETAILED MARKET PROJECTIONS .....	86
ACCELEROMETERS .....	87
Summary.....	87
<i>TABLE 14 PROJECTED GLOBAL MEMS ACCELEROMETER</i>	
<i>MARKET, THROUGH 2014 (\$ MILLIONS) .....</i>	87
<i>FIGURE 13 PROJECTED GLOBAL MEMS ACCLEROMETER SALES</i>	
<i>BY APPLICATION SEGMENT, 2008 AND 2014 (PERCENT OF</i>	
<i>TOTAL SHIPMENTS).....</i>	88

<i>FIGURE 13 (CONTINUED)</i> .....	89
Established Accelerometer Applications .....	89
<i>TABLE 15 PROJECTED GLOBAL MARKET FOR ESTABLISHED ACCELEROMETER APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	89
Automotive Applications .....	90
<i>TABLE 16 PROJECTED GLOBAL MARKET FOR ESTABLISHED AUTOMOTIVE ACCELEROMETER APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	90
Airbag Sensors .....	90
<i>TABLE 17 PROJECTED GLOBAL SHIPMENTS OF AIRBAG MODULES, THROUGH 2014 (MILLION UNITS)</i> .....	91
<i>FIGURE 14 PROJECTED TRENDS IN GLOBAL SHIPMENTS OF AIRBAG MODULES, 2008-2014 (MILLION UNITS)</i> .....	91
<i>TABLE 18 PROJECTED GLOBAL MARKET FOR AIRBAG SENSORS IN MOTOR VEHICLES, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	92
VSC Systems .....	92
<i>TABLE 19 PROJECTED GLOBAL PRODUCTION OF VEHICLES EQUIPPED WITH STABILITY CONTROL SYSTEMS, THROUGH 2014 (MILLION VEHICLES)</i> .....	93
<i>FIGURE 15 PROJECTED GLOBAL TRENDS IN SALES OF CARS WITH STABILITY CONTROL SYSTEMS, 2008-2014 (MILLION VEHICLES)</i> .....	93
<i>TABLE 20 PROJECTED GLOBAL MARKET FOR LOW-G ACCELEROMETERS USED IN VSC SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	94
Navigation Systems .....	94
<i>TABLE 21 PROJECTED GLOBAL SHIPMENTS OF IN-DASH VEHICLE NAVIGATION SYSTEMS WITH INTEGRATED INS, THROUGH 2014 (MILLION SYSTEMS)</i> .....	95
<i>TABLE 22 PROJECTED GLOBAL MARKET MEMS ACCELEROMETERS USED IN VEHICLE NAVIGATION SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	95
<i>TABLE 23 PROJECTED GLOBAL MARKET FOR ESTABLISHED ACCELEROMETER APPLICATIONS IN THE LIFE SCIENCES, THROUGH 2014 (\$ MILLIONS)</i> .....	95
<i>FIGURE 16 PROJECTED GLOBAL TRENDS IN SHIPMENTS OF VEHICLE NAVIGATION SYSTEMS, 2008-2014 (MILLION SYSTEMS SHIPPED)</i> .....	96
Life Sciences Applications .....	96
Rate Responsive Heart Pacemakers .....	96
<i>TABLE 24 PROJECTED GLOBAL SALES OF CARDIAC PACEMAKERS, THROUGH 2014 (THOUSANDS)</i> .....	97



<i>FIGURE 17 PROJECTED GLOBAL TRENDS IN SALES OF CARDIAC PACEMAKERS, 2008–2014 (THOUSAND UNITS)</i> .....	97
<i>TABLE 25 PROJECTED GLOBAL MARKET FOR ACCELEROMETERS USED IN RATE REPSONSIVE HEART PACEMAKERS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	98
Activity Monitoring Systems.....	98
<i>TABLE 26 PROJECTED GLOBAL MARKET FOR ACCELEROMETERS USED IN ACTIGRAPHS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	99
Energy .....	99
Seismic Detection Systems.....	99
<i>TABLE 27 PROJECTED GLOBAL MARKET FOR ACCELEROMETERS USED IN SEISMIC DETECTION EQUIPMENT, THROUGH 2014 (UNITS/\$ MILLIONS)</i> .....	100
Military/Aerospace.....	100
<i>TABLE 28 PROJECTED GLOBAL SALES OF GPS SYSTEMS FOR MILITARY/AEROSPACE APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	101
<i>FIGURE 18 PROJECTED TRENDS IN MILITARY/AEROSPACE MARKET FOR GPS SYSTEMS, 2008–2014 (\$ MILLIONS)</i> .....	101
<i>TABLE 29 PROJECTED GLOBAL MARKET FOR ACCELEROMETERS USED IN MILITARY/AEROSPACE APPLICATIONS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	102
Consumer Products.....	102
<i>TABLE 30 GLOBAL MARKET FOR ESTABLISHED ACCELEROMETER APPLICATIONS IN CONSUMER PRODUCTS, THROUGH 2014 (\$ MILLIONS)</i> .....	102
Mobile Phone User Interface.....	103
<i>TABLE 31 GLOBAL SALES OF MOBILE PHONE HANDSETS, THROUGH 2014 (MILLIONS)</i> .....	103
<i>FIGURE 19 GLOBAL TRENDS IN SALES OF MOBILE PHONE HANDSETS, 2008–2014 (MILLIONS)</i> .....	103
<i>TABLE 32 GLOBAL MARKET FOR MEMS ACCELEROMETERS IN MOBILE PHONE HANDSETS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	104
Electronic Gaming User Interface.....	104
<i>TABLE 33 GLOBAL MARKET FOR MEMS ACCLEROMETERS IN HANDHELD GAMING DEVICES, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	105
“Smart” Sporting Goods.....	105
<i>TABLE 34 GLOBAL MARKET FOR MEMS ACCLEROMETERS IN “SMART” SPORTING GOODS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	106
Information Technology.....	106

Hard Disk Drive Drop Protection.....	106
<i>TABLE 35 GLOBAL SHIPMENTS OF LAPTOP COMPUTERS, THROUGH 2014 (MILLION UNITS).....</i>	<i>107</i>
<i>FIGURE 20 GLOBAL TRENDS IN SHIPMENTS OF LAPTOP COMPUTERS, 2008–2014 (MILLION UNITS).....</i>	<i>107</i>
<i>TABLE 36 GLOBAL MARKET FOR MEMS ACCLEROMETERS USED IN LAPTOP COMPUTER DROP PROTECTION SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>108</i>
Other Established Applications .....	108
<i>TABLE 37 PROJECTED GLOBAL MARKET FOR ACCELEROMETERS USED IN OTHER ESTABLISHED NON-MILITARY APPLICATIONS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>108</i>
Developmental Applications .....	109
Information Technology.....	109
Hard Disk Read/Write Head Tracking Mechanism.....	109
<i>TABLE 38 PROJECTED GLOBAL MARKET FOR MEMS ACCLEROMETERS IN HARD DISK READ/WRITE HEAD TRACKING SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>109</i>
GYROSCOPES .....	110
Summary.....	110
<i>TABLE 39 PROJECTED GLOBAL MEMS GYROSCOPE MARKET, THROUGH 2014 (\$ MILLIONS).....</i>	<i>110</i>
<i>FIGURE 21 PROJECTED GLOBAL MEMS GYROSCOPE SALES BY APPLICATION SEGMENT, 2008 AND 2014 (PERCENT OF TOTAL SHIPMENTS) .....</i>	<i>111</i>
Established Applications.....	112
<i>TABLE 40 PROJECTED GLOBAL MARKET FOR ESTABLISHED GYROSCOPIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>112</i>
Automotive Applications .....	112
<i>TABLE 41 PROJECTED GLOBAL MARKET FOR ESTABLISHED AUTOMOTIVE GYROSCOPIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>112</i>
Stability Control.....	113
<i>TABLE 42 PROJECTED GLOBAL MARKET FOR MEMS GYROSOCPEES USED IN VSC SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>113</i>
Rollover Detection.....	113
<i>FIGURE 22 PROJECTED GLOBAL TRENDS IN SALES OF VEHICLES WITH ROLLOVER DETECTION SYSTEMS, 2008–2014 (MILLION VEHICLES).....</i>	<i>114</i>

<i>TABLE 43 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES USED IN VEHICLE ROLLOVER DETECTION SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>114</i>
Navigation Systems .....	115
<i>TABLE 44 PROJECTED GLOBAL MARKET MEMS GYROSCOPES USED IN VEHICLE NAVIGATION SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>115</i>
Military/Public Safety.....	115
<i>TABLE 45 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES USED IN MILITARY/APPLICATIONS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>116</i>
Consumer Products.....	116
<i>TABLE 46 PROJECTED GLOBAL MARKET FOR ESTABLISHED CONSUMER PRODUCT GYROSCOPIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>116</i>
Digital Camera Image Stabilization Systems .....	117
<i>TABLE 47 PROJECTED GLOBAL DIGITAL CAMERA SHIPMENTS, THROUGH 2014 (MILLION CAMERAS) .....</i>	<i>117</i>
<i>FIGURE 23 GLOBAL UNIT SALES OF DIGITAL CAMERAS, 2008–2014 (MILLION UNITS) .....</i>	<i>118</i>
<i>TABLE 48 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN DIGITAL CAMERA IMAGE STABILIZATION SYSTEMS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS).....</i>	<i>118</i>
Personal Transportation Devices .....	118
<i>FIGURE 24 PROJECTED GLOBAL SALES OF SEGWAY HUMAN TRANSPORTERS, 2008–2014 (UNITS).....</i>	<i>119</i>
<i>TABLE 49 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN SEGWAY HUMAN TRANSPORTERS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS).....</i>	<i>120</i>
Developmental Applications .....	120
<i>TABLE 50 PROJECTED GLOBAL MARKET FOR DEVELOPMENTAL GYROSCOPIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>120</i>
Life Sciences.....	121
“Smart: Wheelchairs .....	121
<i>TABLE 51 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN “SMART” WHEELCHAIRS, THROUGH 2014 (UNITS/\$ MILLIONS).....</i>	<i>122</i>
Consumer Products.....	122
<i>TABLE 52 GLOBAL MARKET FOR DEVELOPMENTAL CONSUMER PRODUCT GYROSCOPIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>123</i>
Robotic Toys.....	123

<i>FIGURE 25 PROJECTED GLOBAL SHIPMENTS OF ROBOTIC TOYS, 2008–2014 (MILLION UNITS)</i> .....	123
<i>TABLE 53 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN ROBOTIC TOYS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	124
Household Functional Robots .....	124
<i>FIGURE 26 PROJECTED GLOBAL TRENDS IN SALES OF HOUSEHOLD FUNCTIONAL ROBOTS, 2008-2014 (UNITS)</i> .....	125
<i>TABLE 54 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN HOUSEHOLD FUNCTIONAL ROBOTS, THROUGH 2014 (UNITS/\$ MILLIONS)</i> .....	126
Other Developmental Applications .....	126
Mobile Industrial/Service Robots.....	126
<i>FIGURE 27 PROJECTED GLOBAL TRENDS IN SHIPMENTS OF MOBILE INDUSTRIAL/SERVICE ROBOTS, 2008-2014 (THOUSAND UNITS)</i> .....	126
<i>TABLE 55 PROJECTED GLOBAL MARKET FOR MEMS GYROSCOPES IN MOBILE INDUSTRIAL/SERVICE ROBOTS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	127
OPTICAL MEMS.....	127
Summary.....	127
<i>TABLE 56 PROJECTED GLOBAL OPTICAL MEMS MARKET, THROUGH 2014 (\$ MILLIONS)</i> .....	127
<i>FIGURE 28 PROJECTED GLOBAL OPTICAL MEMS SALES BY APPLICATION SEGMENT, 2008 AND 2014 (\$ MILLIONS/PERCENT OF TOTAL SHIPMENTS)</i> .....	128
<i>FIGURE 28 (CONTINUED)</i> .....	129
Established Applications.....	129
<i>TABLE 57 PROJECTED GLOBAL MARKET FOR ESTABLISHED OPTICAL MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	129
Telecommunications .....	130
MEMS Optical Switches.....	130
<i>TABLE 58 PROJECTED GLOBAL OPTICAL SWITCH SALES, THROUGH 2014 (\$ MILLIONS)</i> .....	130
<i>FIGURE 29 PROJECTED GLOBAL OPTICAL SWITCH MARKET TRENDS, 2008–2014 (\$ MILLIONS)</i> .....	131
<i>TABLE 59 PROJECTED GLOBAL MARKET FOR MEMS OPTICAL SWITCHES, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	131
Information Technology.....	132
<i>TABLE 60 PROJECTED GLOBAL OPTICAL MEMS INFORMATION TECHNOLOGIES APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	132
Maskless Lithography Systems .....	132

<i>TABLE 61 PROJECTED GLOBAL MARKET FOR OPTICAL MEMS IN MASKLESS OPTICAL LITHOGRAPHY TOOLS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	133
CTP Printing Equipment.....	133
<i>TABLE 62 PROJECTED GLOBAL MARKET FOR OPTICAL MEMS IN CTP PLATESETTERS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	133
Consumer Products.....	134
Digital Light Projection MEMS.....	134
<i>TABLE 63 PROJECTED GLOBAL MARKET FOR DLPS IN HOME ENTERTAINMENT APPLICATIONS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	134
Other Applications.....	134
Laser MEMS Barcode Scanners.....	135
<i>TABLE 64 PROJECTED GLOBAL MARKET FOR OPTICAL MEMS IN LASER BARCODE SCANNERS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	136
Developmental Applications.....	136
<i>TABLE 65 PROJECTED GLOBAL MARKET FOR DEVELOPMENTAL OPTICAL MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	136
Automotive.....	136
Optical MEMS Infrared Sensor.....	136
Optical (Continued).....	137
<i>TABLE 66 PROJECTED GLOBAL MARKET FOR OPTICAL MEMS IN INFRARED SENSORS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	138
Other.....	138
Infrared MEMS Spectrometers.....	138
<i>TABLE 67 PROJECTED GLOBAL MARKET FOR OPTICAL MEMS IN IR SPECTROMETERS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	139
MICROFLUIDICS.....	139
Summary.....	139
<i>TABLE 68 PROJECTED GLOBAL MICROFLUIDIC MEMS MARKET, THROUGH 2014 (\$ MILLIONS)</i> .....	139
<i>FIGURE 30 GLOBAL MICROFLUIDIC MEMS SALES BY APPLICATION SEGMENT, 2008 AND 2014 (\$ MILLIONS/PERCENT OF TOTAL SHIPMENTS)</i> .....	140
Established Applications.....	141
<i>TABLE 69 PROJECTED GLOBAL MARKET FOR ESTABLISHED MICROFLUIDIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	141
Life Sciences.....	141

<i>TABLE 70 PROJECTED GLOBAL MARKET FOR ESTABLISHED MICROFLUIDIC MEMS APPLICATIONS IN THE LIFE SCIENCES, THROUGH 2014 (\$ MILLIONS)</i> .....	141
Labs-on-a-Chip .....	142
<i>TABLE 71 PROJECTED GLOBAL MARKET FOR MICROFLUIDIC MEMS LABS-ON-A-CHIP, THROUGH 2014 (\$ MILLIONS)</i> .....	142
Microarray Printers .....	142
<i>TABLE 72 PROJECTED GLOBAL BIOCHIP SHIPMENTS, THROUGH 2014 (\$ MILLIONS)</i> .....	142
<i>FIGURE 31 PROJECTED GLOBAL TRENDS IN SHIPMENTS OF BIOCHIPS, 2008–2014 (\$ MILLIONS)</i> .....	143
<i>TABLE 73 PROJECTED GLOBAL MARKET FOR MICROFLUIDIC MEMS USED IN BIOCHIP PRODUCTION, THROUGH 2014 (\$ MILLIONS)</i> .....	144
Information Technology .....	144
Inkjet Printer Heads.....	144
<i>TABLE 74 PROJECTED GLOBAL MARKET FOR INFORMATION TECHNOLOGY FLUIDIC MEMS APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	145
Developmental Applications .....	145
<i>TABLE 75 PROJECTED GLOBAL MARKET FOR DEVELOPOMENTAL MICROFLUIDIC MEMS APPLICATIONS, THROUGH 2014 (\$ BILLIONS)</i> .....	145
Information Technology .....	145
Printed Electronics .....	145
<i>TABLE 76 GLOBAL MARKET FOR DEVELOPMENTAL MICROFLUIDIC MEMS IN PRINTED ELECTRONICS PRODUCTIONS, THROUGH 2014 (\$ BILLIONS)</i> .....	146
Flat Panel Displays .....	146
<i>TABLE 77 PROJECTED GLOBAL MARKET FOR MICROFLUIDIC MEMS USED IN PRINTED P-OLED DISPLAY PRODUCTION, THROUGH 2014 (\$ MILLIONS)</i> .....	147
Military/Public Safety.....	147
CBW Detectors .....	147
<i>TABLE 78 PROJECTED GLOBAL MARKET FOR MEMS USED IN PORTABLE CBW AGENT DETECTORS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS)</i> .....	148
Other.....	148
Food Testing .....	148
<i>TABLE 79 PROJECTED GLOBAL MARKET FOR MICROFLUIDIC MEMS USED IN FOOD TESTING APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	148
RF MEMS .....	149
Summary.....	149

<i>TABLE 80 PROJECTED GLOBAL RF MEMS MARKET, THROUGH 2014 (\$ MILLIONS)</i> .....	149
Established Applications.....	149
<i>TABLE 81 PROJECTED GLOBAL MARKET FOR ESTABLISHED RF MEMS APPLICATIONS IN MOBILE PHONE APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	149
Consumer Products.....	150
MEMS Acoustic Wave Resonators .....	150
<i>TABLE 82 PROJECTED GLOBAL MARKET FOR RF MEMS ACOUSTIC WAVE RESONATORS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	150
RF MEMS Switches.....	150
<i>TABLE 83 PROJECTED GLOBAL MARKET FOR RF MEMS SWITCHES, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	151
RF MEMS Capacitors and Inductors .....	151
<i>TABLE 84 PROJECTED GLOBAL MARKET FOR RF MEMS INDUCTORS AND CAPACITORS, THROUGH 2014 (MILLION UNITS/\$ MILLIONS)</i> .....	152
Developmental Applications .....	152
Consumer Products.....	152
Other RF MEMS Applications.....	152
<i>TABLE 85 PROJECTED GLOBAL MARKET FOR OTHER TYPES OF RF MEMS, THROUGH 2014 (\$ MILLIONS)</i> .....	153
MEMS CHEMICAL AND GAS SENSORS .....	153
Summary.....	153
<i>TABLE 86 PROJECTED GLOBAL MEMS CHEMICAL AND GAS SENSOR MARKET, THROUGH 2014 (\$ MILLIONS)</i> .....	153
<i>FIGURE 32 PROJECTED GLOBAL MARKETS FOR MEMS CHEMICAL AND GAS SENSORS, 2014 (\$ MILLIONS/PERCENT SHARE)</i> .....	154
Established Applications.....	154
Other Industries .....	155
Industrial Process Control and Leak Detection ....	155
<i>TABLE 87 PROJECTED GLOBAL MARKET FOR MEMS INDUSTRIAL CHEMICAL AND GAS SENSORS, THROUGH 2014 (\$ MILLIONS)</i> .....	155
Developmental Applications .....	155
<i>TABLE 88 PROJECTED GLOBAL MARKET FOR DEVELOPMENTAL MEMS CHEMICAL AND GAS SENSOR APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	156
Automotive .....	156
Exhaust Gas and Cabin Air Quality Sensors .....	156
<i>TABLE 89 PROJECTED GLOBAL MARKET FOR MEMS GAS SENSORS USED IN AUTOMOTIVE APPLICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	157
Life Sciences.....	157

Blood Gas Monitors.....	157
<i>TABLE 90 PROJECTED GLOBAL SALES OF BLOOD GAS MONITORS, THROUGH 2014 (UNITS).....</i>	<i>158</i>
<i>FIGURE 33 PROJECTED TRENDS IN GLOBAL SALES OF BLOOD GAS MONITORS, 2008–2014 (UNITS).....</i>	<i>158</i>
<i>TABLE 91 PROJECTED GLOBAL MARKET FOR MEMS BLOOD GAS SENSORS, THROUGH 2014 (UNITS/\$ MILLIONS).....</i>	<i>159</i>
Energy and Environment .....	159
Air Quality Monitoring .....	159
<i>TABLE 92 PROJECTED GLOBAL SALES OF AIR POLLUTION MONITORING EQUIPMENT, THROUGH 2014 (\$ MILLIONS).....</i>	<i>159</i>
<i>FIGURE 34 PROJECTED GLOBAL AIR POLLUTION MONITORING AND SENSING EQUIPMENT MARKET TRENDS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>160</i>
<i>TABLE 93 PROJECTED GLOBAL MARKET FOR MEMS USED IN PORTABLE/PERSONAL AIR QUALITY MONITORS, THROUGH 2014 (UNITS/\$ MILLIONS).....</i>	<i>161</i>
Military/Public Safety.....	161
Chemical Agent Detectors.....	161
<i>TABLE 94 PROJECTED GLOBAL MARKET FOR MEMS USED IN PORTABLE CBW AGENT DETECTORS, THROUGH 2014 (THOUSAND UNITS/\$ MILLIONS).....</i>	<i>162</i>
PRESSURE SENSORS .....	162
Summary .....	162
<i>TABLE 95 PROJECTED GLOBAL MEMS PRESSURE SENSOR MARKET, THROUGH 2014 (\$ MILLIONS) .....</i>	<i>162</i>
<i>FIGURE 35 PROJECTED GLOBAL MEMS PRESSURE SENSOR SALES BY APPLICATION SEGMENT, 2008 AND 2014 (PERCENT OF TOTAL SHIPMENTS/\$ MILLIONS) .....</i>	<i>163</i>
Established Applications .....	163
<i>TABLE 96 PROJECTED GLOBAL MARKET FOR ESTABLISHED MEMS PRESSURE SENSOR APPLICATIONS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>164</i>
Automotive .....	164
<i>TABLE 97 PROJECTED GLOBAL MARKET FOR ESTABLISHED AUTOMOTIVE MEMS PRESSURE SENSORS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>164</i>
MAP Sensors .....	164
<i>TABLE 98 PROJECTED GLOBAL MARKET FOR MEMS MANIFOLD ABSOLUTE PRESSURE SENSORS, THROUGH 2014 (UNITS/\$ MILLIONS).....</i>	<i>165</i>
Tire Pressure Sensors.....	165



<i>TABLE 99 PROJECTED GLOBAL MARKET FOR MEMS TIRE PRESSURE SENSORS, THROUGH 2014 (MILLION UNITS/ \$ MILLIONS)</i> .....	166
Life Sciences.....	166
Blood Pressure Monitors.....	166
<i>TABLE 100 PROJECTED GLOBAL MARKET FOR MEMS BLOOD PRESSURE SENSORS, THROUGH 2014 (MILLION UNITS/ \$ MILLIONS)</i> .....	166
Developmental Applications.....	167
Consumer Products.....	167
Appliance Pressure Sensors.....	167
<i>TABLE 101 PROJECTED GLOBAL MARKET FOR MEMS PRESSURE SENSORS IN HOME APPIANCES, THROUGH 2014 (MILLION UNITS/ \$ MILLIONS)</i> .....	167
OTHER TYPES OF MEMS.....	167
Established Applications.....	168
Microphones.....	168
<i>TABLE 102 PROJECTED GLOBAL MARKET FOR MEMS MICROPHONES, THROUGH 2014 (MILLION UNITS/ \$ MILLIONS)</i> .....	168
CHAPTER SIX: INDUSTRY STRUCTURE AND MARKET SHARES.....	169
INDUSTRY STRUCTURE.....	169
NUMBER/SIZE OF FIRMS.....	169
<i>FIGURE 36 MEMS INDUSTRY CONCENTRATION, 2008 (PERCENT OF TOTAL MEMS SHIPMENT/ \$ MILLIONS)</i> .....	169
COMPANIES' COUNTRY OF ORIGIN.....	170
<i>FIGURE 37 MEMS COMPANIES BY COUNTRY, 2008 (PERCENT OF ALL MEMS COMPANIES WORLDWIDE)</i> .....	170
CONTRACT MANUFACTURERS.....	171
MARKET SHARES.....	171
<i>FIGURE 38 OVERALL MEMS MARKET SHARES BY COMPANY, 2008 (PERCENT OF TOTAL MEMS SHIPMENTS)</i> .....	172
CHAPTER SEVEN: VENDOR PROFILES.....	173
ACTIGRAPH, LLC.....	173
ADVANCED BIONICS, LLC.....	173
AGILENT TECHNOLOGIES, INC.....	173
AKUSTIKA, INC.....	173
ALCATEL VACUUM TECHNOLOGY.....	174
ANALOG DEVICES, INC.....	174
ARCHANGEL SYSTEMS, INC.....	175
ROBERT BOSCH GMBH.....	175
BOSTON MICROSYSTEMS, INC.....	175
CALIENT NETWORKS.....	176
CALIPER LIFE SCIENCES.....	176

CEPHEID THERAPEUTICS .....	176
COLIBRYS, LTD.....	177
DELPHI CORP.....	177
DISCERA, INC.....	178
EV GROUP .....	178
GLIMMERGLASS NETWORKS.....	178
HEWLETT PACKARD .....	179
ICX PHOTONICS .....	179
INDEPENDENCE TECHNOLOGY, LLC .....	180
INTERMEC TECHNOLOGIES CORP. ....	180
ION GEOPHYSICAL CORP.....	180
I-STAT CORP.....	181
KIONIX, INC.....	181
LEXMARK INTERNATIONAL, INC.....	181
LITREX CORP. ....	182
MEMSCAP .....	182
MEMSIC INC.....	182
MEMX.....	183
MICROCHIPS, INC. ....	183
MICROFAB BREMEN GMBH.....	184
MICRONIC LASER SYSTEMS AB.....	184
MILLENIAL NET, INC. ....	184
MOTOROLA.....	185
NANOGEN, INC.....	185
NEAH POWER SYSTEMS, INC. ....	185
NIPPON DENSO CORP. ....	186
NOVASENSOR .....	186
OLIVETTI S.P.A. ....	186
PLASTIC LOGIC, LTD.....	187
SARNOFF CORP. ....	187
SEGWAY, INC. ....	187
SEIKO EPSON CORP. ....	188
SENSOROR AS.....	188
SILICON DESIGNS, INC.....	188
SILEX MICROSYSTEMS AB.....	189
SILICON SENSING SYSTEMS.....	189
SONY CORP.....	189
SPHERE MEDICAL, LTD.....	190
STMICROELECTRONICS N.V. ....	190
SURFACE TECHNOLOGY SYSTEMS, PLC .....	190
SÜSS MICROTEC AG .....	191
TEXAS INSTRUMENTS, INC. ....	191
TRONICS MICROSYSTEMS S.A. ....	191
VTI TECHNOLOGIES OY .....	192

XEROX CORP. .... 192  
WOWWEE, LTD. .... 192