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# World Nanomaterials

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Industry Study with Forecasts for **2016 & 2021**

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Study #2871 | May 2012 | \$6100 | 488 pages

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*Gains will be driven by increased market penetration of existing materials -- such as nanotubes, nanoclays and quantum dots -- and ongoing development of new materials and applications.*

## World demand to reach \$5.5 billion in 2016

World demand for nanomaterials will rise more than two-and-a-half times to \$5.5 billion in 2016 driven by a combination of increased market penetration of existing materials, and ongoing development of new materials and applications. Nanotubes, along with other materials such as nanoclays and quantum dots, will grow at the fastest pace.

## China, India to see most rapidly growing demand

The high-value nature of nanomaterials has concentrated demand in wealthier countries where the majority of research and development occurs, and where many companies continue to manufacture their most technologically advanced products due to concerns about intellectual property rights in developing countries. Through 2016, however, the fastest growth in nanomaterial demand will be in China and India as these countries gain a greater share of global research and development spending, and as large multinational corporations become increasingly comfortable allowing their most advanced products to be made in these manufacturing powerhouses.

## Energy, construction to be fastest growing markets

The energy storage and generation market and the construction market will expand at the fastest paces through 2016. However, this primarily reflects the

## World Nanomaterial Demand (\$5.5 billion, 2016)



United States  
40%

Asia/Pacific  
35%

Western Europe  
20%

All Other  
5%

photo: University of Nebraska

limited historical penetration of nanomaterials in these markets. As prices continue to fall and material properties continue to improve, both markets will offer significant opportunities for expansion. Growth in the electronics market, in contrast, while still robust, will trail all other markets. The electronics sector was one of the first to experience significant penetration of nanomaterials, and consequently demand in this market is already quite high. The long term outlook for nanomaterial demand in electronics remains quite bright, though. It will benefit as the semiconductor industry confronts the limits of dimension scaling on silicon by the development and use of new materials such as graphene in semiconductor chip design.

The largest market in 2011 was the health care market, due primarily to the use of nanocrystalline active pharmaceutical intermediates to improve bioavailability and system uptake. Significant opportunities remain as many pharmaceuticals still have not been converted into a nanocrystalline form, and the use of nanocomposites to produce advanced medical devices remains in its infancy. Significant opportunities for market expansion will also exist in many smaller markets such as aerospace and defense, packaging, personal care products, and sports equipment. However, a potential restraining factor in many of these markets will be growing concern about the environmental impact and toxicity of nanomaterials.

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## Sample Text, Table & Chart

### MARKETS OVERVIEW

#### Paints & Coatings

Demand for nanomaterials in paint and coating products is expected to grow through 2016. Paint and similar products are significant commercial outlets for nanomaterials. It is expected to remain the largest market for nanomaterials. The paint industry offers considerable promise as a market for nanomaterials because paint is used in so many applications because nanomaterials can be used to enhance properties such as microbial activity, ultraviolet light protection, and abrasion resistance. For the purposes of this study, construction paints are defined to include paint and coatings applied on buildings and other structures. Factory-applied coatings are not included.

Nanomaterials can be used to dramatically enhance the properties of paints. The incorporation of inorganic nanoparticles helps to create a much harder and more hydrophilic surface. This makes it more difficult for dirt to stick to the surface. Because the paint's mineral content is higher than in traditional paints, it is much slower to burn. Additionally, color retention is enhanced.

It is likely that industrial maintenance coatings will become more significant users of nanomaterials, mainly because the performance advantages offered by nanomaterials are more critical in harsher environments, when the protection of expensive equipment is needed. Coating failure would be a costlier proposition. Industrial manufacturers have developed a wide array of brush-on and spray-on products. In addition to strictly decorative paints, these products, such as NANOSU, are used for functional reasons such as insulation or waterproofing.

In the architectural segment, nanomaterials will enter the market first in higher-end products, such as those for which performance requirements are sufficiently high to justify additional cost. For example,

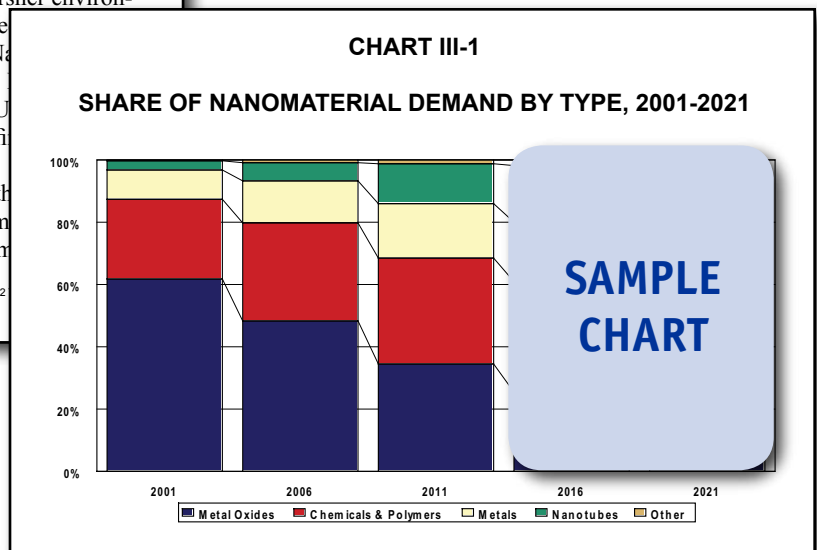
124

Copyright 2012

**TABLE VII-4**  
**JAPAN: NANOMATERIAL DEMAND BY TYPE & MARKET**  
 (million dollars)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)					
\$ nano/mil \$ GDP					
Nanomaterial Demand					
By Type:					
Metal Oxides					
Chemicals & Polymers					
Metals					
Nanotubes					
Other Materials					
By Market:					
Health Care					
Electronics					
Energy Generation & Storage					
Construction					
Other Markets					

**SAMPLE  
TABLE**



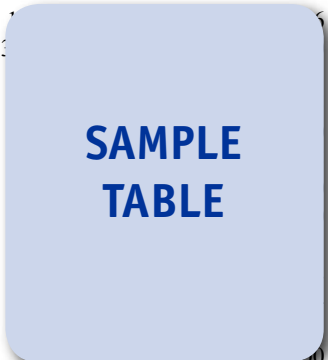
**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VII-3**

**JAPAN: KEY INDICATORS FOR NANOMATERIAL DEMAND**  
(billion 2010 dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)					
per capita GDP					
Gross Domestic Product					
Manufacturing Value Added					
Construction Expenditures					
Electronic Product Shipments (bil \$)					
Health Expenditures (bil \$)					
\$ nano/capita					
\$ nano/000\$ MVA					
Nanomaterial Demand (mil \$)					



**COMPANY PROFILES**

**Starpharma Holdings Limited**  
 Baker IDI Building  
 75 Commercial Road  
 Melbourne  
 Australia  
 613-853  
 http://w

**SAMPLE PROFILE**

Key Pro... associated technologies  
 for healt

Key Info... cal firm that focuses  
 on the development and application of dendrimer nanotechnology  
 products for use in the pharmaceutical and life science fields, among  
 other application areas. The Company's core technology facilitates  
 the creation of dendrimer nanomaterials that engage in polyvalent  
 interaction with biological targets across a broad spectrum of diseases,  
 thereby providing many novel pharmaceutical properties and benefits.  
 Starpharma's lead product is VIVAGEL, a topical nanopharmaceutical  
 that is being developed as a vaginal microbiocide gel for the prevention  
 of HIV and other sexually transmitted diseases in women. This product  
 contains active dendrimer with surfaces covered with regions believed  
 to bind to the HIV or genital herpes viruses, imparting microbiocidal  
 activity by blocking the viruses from entering cells and consequently  
 stopping infection. In March 2012, Starpharma began two concur-  
 rent Phase 3 clinical trials of VIVAGEL for the treatment of bacterial  
 vaginosis, the results of which are expected to be obtained by the end  
 of 2012.

Additional Subsidiary: Starpharma's operations also include Dendritic  
 NanoTechnologies Incorporated (Mt. Pleasant, Michigan), a subsidiary  
 engaged in the development and commercialization of dendrimers and

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"Nanomaterial demand in Japan will increase to \$670 million in 2016, remaining the second largest nanomaterial market in the world. By 2021, demand in Japan is expected to reach \$1.9 billion. Japan, along with the United States, has been at the forefront of developing new nanomaterials -- such as carbon nanotubes, fullerenes, and quantum dots -- and in bringing commercial applications of these products to market. This is due in large part to the ..."  
 --Section VII, pg. 228





**OTHER STUDIES**

**Membrane Separation Technologies**

Demand for membranes in the US is expected to increase 7.7 percent per year to \$5.4 billion in 2016, driven by water and wastewater regulations. Polymeric membranes will remain the dominant material. Microfiltration membranes will continue as the largest product segment, while reverse osmosis and ultrafiltration membranes will grow the fastest. This study analyzes the \$3.7 billion US membrane industry, with forecasts for 2016 and 2021 by product type, application and market. The study also evaluates company market shares and profiles industry players.

#2872 ..... March 2012 ..... \$5100

**World Cement & Concrete Additives**

World demand for cement and concrete additives is projected to increase 8.3 percent annually to \$15.8 billion in 2015. Gains will be bolstered by cement markets in developed regions, which consume much higher volumes of additives per ton of cement than many of the largest cement markets in developing regions. This study analyzes the \$10.6 billion world cement and concrete additive industry, with forecasts for 2015 and 2020 by type, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#2841 ..... January 2012 ..... \$5900

**Metal Powders**

US metal powder demand will grow 6.2 percent annually to \$4.8 billion in 2015, driven primarily by increased output in several key industries. Ferrous metal powders will outpace nonferrous types in volume terms, but nonferrous metal powders will remain dominant in value terms. The fastest growing types include tungsten, nickel and ferrous metal powders. This study analyzes the \$3.4 billion US metal powders industry, with forecasts for 2015 and 2020 by type, application and market. The study also evaluates company market share and profiles industry players.

#2811 ..... December 2011 ..... \$4900

**Advanced Ceramics**

Demand for advanced ceramics in the US is forecast to increase 6.0 percent annually through 2015. Transportation and electrical equipment will be the fastest growing markets, while electronic components remain the largest market. Monolithic ceramics will remain the dominant product while ceramic matrix composites grow the fastest. This study analyzes the \$10.5 billion US advanced ceramics industry, with forecasts for 2015 and 2020 by type, product, process and market. The study also evaluates company market share and profiles industry players.

#2794 ..... September 2011 ..... \$4900

**World Fuel Cells**

Global commercial fuel cell product and service demand will more than triple by 2015, and claim nearly half of all fuel cell spending (including R&D funding and investment) by 2020. Electric power generation will remain the largest application through 2015, while portable electronics and other uses will grow the fastest. This study analyzes the \$780 million world fuel cell industry, with forecasts for 2015 and 2020 by product, chemistry, application, world region and for 15 countries. The study also evaluates company market share and profiles major players.

#2769 ..... June 2011 ..... \$6100

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