
The Global Market for Shape Memory Materials

Table of contents

1	RESEARCH METHODOLOGY.....	8
2	EXECUTIVE SUMMARY.....	9
2.1	MARKET DRIVERS.....	11
2.2	APPLICATIONS.....	12
2.3	MARKET CHALLENGES.....	14
3	TYPES.....	15
3.1	SHAPE MEMORY ALLOYS (SMA).....	15
3.1.1	Nickel-Titanium (Ni-Ti) alloys.....	17
3.1.2	Copper-based SMAs.....	19
3.1.3	Other SMAs.....	20
3.1.4	Nickel-free SMAs.....	20
3.1.5	SMA actuators.....	21
3.1.6	Comparison of shape memory alloy types-advantages and disadvantages.....	23
3.2	SHAPE MEMORY POLYMERS (SMP).....	24
3.2.1	Shape memory polyurethane films.....	25
3.2.2	Polyhedral oligosilsesquioxane (POSS) shape memory.....	26

3.2.3	Shape memory hydrogels.....	26
3.2.4	Diaplex.....	27
3.2.5	Carbon nanotubes SMPs.....	28
3.2.6	Graphene SMPs.....	29
4	SHAPE MEMORY PATENTING.....	30
5	MARKETS AND APPLICATIONS.....	33
5.1	BIOMEDICAL.....	33
5.1.1	Stents.....	34
5.1.2	Dental braces.....	35
5.1.3	Coronary duct occluder.....	35
5.1.4	Prosthetics/Orthotics.....	36
5.1.5	Surgical devices.....	37
5.1.6	Sutures.....	37
5.1.7	Sensors.....	38
5.1.8	Tissue engineering.....	38
5.2	ELECTRONICS.....	40
5.2.1	Flexible electronics.....	40
5.2.2	Displays.....	41
5.2.3	3D printed shape memory alloys.....	41
5.3	CONSUMER GOODS.....	43
5.3.1	Eyeglass frames.....	43

5.3.2	Home appliances.....	44
5.3.3	Toys.....	44
5.4	CONSTRUCTION.....	45
5.4.1	Structural engineering.....	45
5.4.2	Vibration dampers.....	46
5.5	TIRES.....	47
5.5.1	Shape memory tires.....	47
5.6	AEROSPACE.....	48
5.6.1	SMA actuators.....	49
5.6.2	SMA composites.....	49
5.6.3	Space wheel.....	50
5.7	TEXTILES.....	51
5.7.1	Electronic textiles.....	52
5.7.2	Medical textiles.....	52
5.7.3	Insulating fabric.....	53
5.8	SOFT ROBOTICS.....	55
5.8.1	Soft actuators.....	56
5.9	AUTOMOTIVE.....	56
5.9.1	Actuators.....	57
5.9.2	Shape memory polymers.....	57
5.10	OTHER MARKETS.....	57

5.10.1	Water mixing valves.....	58
5.10.2	Fire dampers.....	59
5.10.3	Hot water valves.....	60
5.10.4	Oil and gas.....	60
5.10.5	Shape memory screws.....	60
5.10.6	Solar panels.....	61
6	GLOBAL REVENUES AND REGIONAL MARKETS.....	62
6.1	Global market to 2030, total revenues (USD).....	62
6.2	Global market to 2030, by market.....	63
6.3	Global market to 2030, by region.....	65
7	COMPANY PROFILES.....	68 (21
	COMPANY PROFILES INCLUDING PRODUCTS AND TARGET MARKETS).	
8	REFERENCES.....	85

Tables

Table 1.	Market drivers for the use of shape memory materials.....	11
Table 2.	Applications and market for shape memory materials.....	12
Table 3.	Market challenges for shape memory materials.....	14
Table 4.	Properties of shape memory alloys.....	15
Table 5.	Types of shape memory alloys, by materials.....	15
Table 6.	Nitinol properties.....	17
Table 7.	Applications of shape memory materials in actuators.....	21
Table 8.	Comparison of shape memory types.....	23

Table 9. Main shape memory materials patent assignees.....	31
Table 10. Location of shape memory materials patent filings 2008-2018.....	31
Table 11. Applications of shape memory materials in medical and stage of development.....	33
Table 12. Applications of shape memory materials in electronics and stage of development.....	40
Table 13. Applications of shape memory materials in consumer goods and stage of development.....	43
Table 14. Applications of shape memory materials in construction and stage of development.....	45
Table 15. Applications of shape memory materials in aerospace and stage of development.....	48
Table 16. Applications of shape memory materials in textiles and stage of development.....	51
Table 17. Applications of shape memory materials in soft robotics and stage of development.....	55
Table 18. Applications of shape memory materials in automotive and stage of development.....	56
Table 19. Applications of shape memory materials in other markets and stage of development.....	58
Table 20. Global market for shape memory materials, total, revenues (USD) 2015-2030.....	62
Table 21. Global market for shape memory materials, by market, revenues (USD) 2015-2030.....	64
Table 22. Global market for shape memory materials, by region, revenues (USD) 2015-2030.....	66

Figures

Figure 1. Shape memory materials.....	14
Figure 2. Phase transformation process for SMAs.....	19
Figure 3. Shape memory cycle.....	24
Figure 4. Shape memory materials patent applications 2001-2018.....	30
Figure 5. Stent based on film polyurethane shape memory polymer.....	34
Figure 6. Shape memory dental braces.....	35
Figure 7: Self-healing shape memory polymer patent schematic.....	41

Figure 8. SMA incorporated into eyeglass frames..... 43

Figure 9. Global market for shape memory materials, total, revenues (USD) 2015-2030..... 63

Figure 10. Global market for shape memory materials, by market, revenues (USD) 2015-2030..... 64

Figure 11. Global market for shape memory materials, by region, revenues (USD) 2015-2030..... 67