

The Global Market for Printed, Flexible and Stretchable Electronics to 2031

<https://marketpublishers.com/r/GD250047DCA9EN.html>

Date: January 2021

Pages: 720

Price: US\$ 2,050.00 (Single User License)

ID: GD250047DCA9EN

Abstracts

The market for printed, flexible and stretchable electronics is growing fast. The rapid boom in smart wearable and integrated electronic devices has stimulated demand for advanced intelligent systems with high performance, micro size, mechanical flexibility, and high-temperature stability for application as flexible and stretchable displays, personal health monitoring, human motion capturing, smart textiles, electronic skins and more. The key requirement for these applications is flexibility and stretchability, as these devices are subject to various mechanical deformations including twisting, bending, folding, and stretching during operation.

The development of printed, flexible and stretchable conductors over the last decade has resulted in commercialization of flexible and stretchable sensors, circuits, displays, and energy harvesters for next-generation wearables and soft robotics. These systems must be able to conform to the shape of and survive the environment in which they must operate. They are typically fabricated on flexible plastic substrates or are printed/woven into fabrics.

The electronics industry is moving at a fast pace from standard, inflexible form factors to stretchable and conformable devices. Printed, flexible and stretchable electronics products are increasing weekly from wearables for healthcare to smart packaging, sensors, automotive tail lights and displays, flexible displays, photovoltaics and more.

Based on a new generation of advanced materials, printed, flexible and stretchable sensors and electronics will enable new possibilities in a diverse range of industries from healthcare to automotive to buildings. These technologies will drive innovation in smart medical technology, automotive, smart manufacturing, Internet of Things (IoT) and consumer electronics.

Recent advances in stimuli-responsive surfaces and interfaces, sensors and actuators, flexible electronics, nanocoatings and conductive nanomaterials has led to the development of a new generation of smart and adaptive electronic fibers, yarns and fabrics for application in E-textiles. Wearable low-power silicon electronics, light-emitting diodes (LEDs) fabricated on fabrics, textiles with integrated Lithium-ion batteries (LIB) and electronic devices such as smart glasses, watches and lenses have been widely investigated and commercialized. Smart textiles and garments can sense environmental stimuli and react or adapt in a predetermined way. This involves either embedding or integrating sensors/actuators and electronic components into textiles for use in applications such as medical diagnostics and health monitoring, consumer electronics, safety instruments and automotive textiles.

In the flexible displays market, electronics giants such as Samsung and LG Electronics have brought flexible, foldable and rollable smartphone, display and tablet products to the market.

Wearable and mobile health monitoring technologies have recently received enormous interest worldwide due to the rapidly aging global populations and the drastically increasing demand for in-home healthcare. Commercially available and near commercial wearable devices facilitate the transmission of biomedical informatics and personal health recording. Body worn sensors, which can provide real-time continuous measurement of pertinent physiological parameters noninvasively and comfortably for extended periods of time, are of crucial importance for emerging applications of mobile medicine. Wearable sensors that can wirelessly provide pertinent health information while remaining unobtrusive, comfortable, low cost, and easy to operate and interpret, play an essential role.

Battery and electronics producers require thin, flexible energy storage and conversion devices to power their wearable technology. The growth in flexible electronics has resulted in increased demand for flexible, stretchable, bendable, rollable and foldable batteries and supercapacitors as power sources for application in flexible and wearable devices.

Many major companies have integrated conductive and electronic ink and materials in applications ranging from photovoltaics to smart packaging. There are over 100 companies with products in this space for RFID, smart clothing, sensors, antennas and transistors. As well as advancing product security and consumer interaction, the use of smart inks and coatings in active and intelligent packaging can help reduce food waste

and improve medical compliance-which would have significant environmental benefits.

Report contents include:

Current and developmental printable, flexible and stretchable products.

Advanced materials used in printable, flexible and stretchable electronics and sensors. Materials covered include conductive inks materials, carbon nanotubes, graphene, organic semiconductors, semiconducting perovskites, conductive polymers, metal mesh, silver ink, copper ink, various metal and metal oxide nanoparticles, 2D materials, nanofibers, nanocellulose, quantum dots, graphene quantum dots, perovskite quantum dots and functional inorganic inks.

Stage of commercialization for applications, from basic research to market entry. Markets covered include wearables and IoT, medical & healthcare sensors, electronic clothing & smart apparel, energy harvesting & storage, electronics components and flexible displays.

Market drivers and trends.

Product databases.

Market figures for printable, flexible and stretchable electronics, by markets, materials and applications to 2031.

Profiles of over 450 producers and product developers.

Contents

1 EXECUTIVE SUMMARY

- 1.1 The evolution of electronics
 - 1.1.1 The wearables revolution
 - 1.1.2 Wearable market leaders
 - 1.1.3 Flexible, stretchable, thin, and large-area form factors
- 1.2 What are flexible and stretchable electronics?
 - 1.2.1 From rigid to flexible and stretchable
 - 1.2.2 Organic and printed electronics
 - 1.2.3 New conductive materials
 - 1.2.4 Foldable smartphones and tablets
- 1.3 Growth in flexible and stretchable electronics market
 - 1.3.1 Recent growth in Printed, flexible and stretchable products
 - 1.3.2 Future growth
 - 1.3.3 Nanotechnology as a market driver
 - 1.3.4 Growth in remote health monitoring and diagnostics

2 RESEARCH METHODOLOGY

3 PRINTED, FLEXIBLE AND STRETCHABLE ELECTRONIC MATERIALS AND COMPOSITES

- 3.1 CONDUCTIVE INK MATERIALS
 - 3.1.1 MARKET DRIVERS
 - 3.1.2 CONDUCTIVE INK TYPES
 - 3.1.2.1 Conductive ink materials
 - 3.1.3 PRINTING METHODS
 - 3.1.3.1 Nanoparticle ink
 - 3.1.4 Sintering
 - 3.1.5 Conductive Filaments
 - 3.1.6 Conductive films, foils and grids
 - 3.1.7 Inkjet printing in flexible electronics
 - 3.1.8 Drawn-on-skin electronics
 - 3.1.9 CURRENT STATE OF THE ART
 - 3.1.9.1 Current products
 - 3.1.10 APPLICATIONS
 - 3.1.10.1 Comparative properties

- 3.1.10.2 Nanomaterials in conductive inks
 - 3.1.10.2.1 Graphene conductive inks
- 3.1.10.3 RFID
 - 3.1.10.3.1 Printed RFID antennae
- 3.1.10.4 Smart labels
- 3.1.10.5 Smart clothing and electronic textiles
- 3.1.10.6 Printed sensors
 - 3.1.10.6.1 Strain sensors
- 3.1.10.7 Printed batteries
- 3.1.10.8 In-mold electronics
- 3.1.10.9 Printed transistors
- 3.1.11 GLOBAL MARKET SIZE
- 3.1.12 COMPANY PROFILES 89 (98 company profiles)
- 3.2 TRANSPARENT CONDUCTIVE FILMS (TCFs)
- 3.3 CARBON NANOTUBES
 - 3.3.1 Properties
 - 3.3.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.3.2.1 Single-walled carbon nanotubes (SWCNT)
 - 3.3.2.2 Double-walled carbon nanotubes
 - 3.3.3 Applications in printed, flexible and stretchable electronics
 - 3.3.3.1 Transparent conductive films
 - 3.3.3.2 Printed sensors
 - 3.3.3.3 Companies
- 3.4 ORGANICS SEMICONDUCTOR MATERIALS
 - 3.4.1 Types
 - 3.4.2 Applications in printed, flexible and stretchable electronics
 - 3.4.2.1 OLED materials
 - 3.4.2.1.1 Fluorescent OLED
 - 3.4.2.1.2 Phosphorescent OLED (PhOLED)
 - 3.4.2.1.3 Flexible OLEDs
 - 3.4.2.1.4 Inkjet printed OLEDs
 - 3.4.2.1.5 TADF Materials
 - 3.4.2.1.6 Companies
 - 3.4.2.2 Organic photovoltaic (OPV) materials
 - 3.4.2.2.1 Types
 - 3.4.2.2.2 Applications in printed, flexible and stretchable electronics
 - 3.4.2.2.3 Companies
 - 3.4.2.3 Organic thin film transistor (OTFT) materials
 - 3.4.2.3.1 Printed Organic thin film transistors

- 3.4.2.3.2 Printed logic
- 3.4.2.3.3 Companies
- 3.4.2.4 Organic photodetector materials
 - 3.4.2.4.1 Types
 - 3.4.2.4.2 Applications in printed, flexible and stretchable electronics
 - 3.4.2.4.3 Companies
- 3.5 SEMICONDUCTING PEROVSKITES
 - 3.5.1 Types
 - 3.5.2 Applications in printed, flexible and stretchable electronics
 - 3.5.3 Companies
- 3.6 CONDUCTIVE POLYMERS (CP)
 - 3.6.1 Properties
 - 3.6.1.1 PDMS
 - 3.6.1.2 PEDOT: PSS
 - 3.6.1.2.1 Transparency
 - 3.6.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.6.3 Applications in Printed, flexible and stretchable electronics
- 3.7 GRAPHENE
 - 3.7.1 Properties
 - 3.7.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.7.3 Applications in Printed, flexible and stretchable electronics
 - 3.7.3.1 Electrodes
 - 3.7.3.2 Sensors
- 3.8 METAL MESH
 - 3.8.1 Properties
 - 3.8.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.8.3 Applications in Printed, flexible and stretchable electronics
- 3.9 SILVER INK (Flake, nanoparticles, nanowires, ion)
 - 3.9.1 Silver flake
 - 3.9.2 Silver (Ag) nanoparticle ink
 - 3.9.2.1 Conductivity
 - 3.9.3 Silver nanowires
 - 3.9.4 Prices
 - 3.9.4.1 Cost for printed area
- 3.10 COPPER INK
 - 3.10.1 Silver-coated copper
 - 3.10.2 Copper (Cu) nanoparticle ink
 - 3.10.3 Prices
- 3.11 NANOCELLULOSE

- 3.11.1 Properties
- 3.11.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.11.2.1 Cellulose nanofibers CNF
 - 3.11.2.2 Cellulose nanocrystals (CNC)
- 3.11.3 Applications in Printed, flexible and stretchable electronics
 - 3.11.3.1 Nanopaper
 - 3.11.3.2 Paper memory
 - 3.11.3.3 Conductive inks
- 3.12 NANOFIBERS
 - 3.12.1 Properties
 - 3.12.2 Properties utilized in Printed, flexible and stretchable electronics
 - 3.12.3 Applications in Printed, flexible and stretchable electronics
- 3.13 QUANTUM DOTS
 - 3.13.1 Properties
 - 3.13.2 Synthesis
 - 3.13.3 Types
 - 3.13.3.1 Cadmium Selenide, Cadmium Sulfide and other materials
 - 3.13.3.2 Cadmium free quantum dots
 - 3.13.4 Applications in Printed, flexible and stretchable electronics
 - 3.13.4.1 Optical sensors
 - 3.13.5 Companies
- 3.14 GRAPHENE QUANTUM DOTS
 - 3.14.1 Synthesis
 - 3.14.2 Recent synthesis methods
- 3.15 ELECTROACTIVE POLYMERS (EAPS)
 - 3.15.1 Properties
- 3.16 PEROVSKITE QUANTUM DOTS (PQDs)
 - 3.16.1 Properties
 - 3.16.2 Comparison to conventional quantum dots
 - 3.16.3 Synthesis methods
 - 3.16.4 Applications
 - 3.16.4.1 Colour enhanced displays
- 3.17 OTHER TYPES
 - 3.17.1 Gold (Au) nanoparticle ink
 - 3.17.2 Siloxane inks
 - 3.17.3 Copper nanowires
 - 3.17.4 Functional inorganic inks
- 3.18 OTHER 2-D MATERIALS
 - 3.18.1 BOROPHENE

- 3.18.1.1 Properties
- 3.18.1.2 Applications
- 3.18.2 BLACK PHOSPHORUS/PHOSPHORENE
 - 3.18.2.1 Properties
 - 3.18.2.2 Applications in Printed, flexible and stretchable electronics
- 3.18.3 GRAPHITIC CARBON NITRIDE (g-C₃N₄)
 - 3.18.3.1 Properties
 - 3.18.3.2 Applications in Printed, flexible and stretchable electronics
- 3.18.4 GERMANENE
 - 3.18.4.1 Properties
 - 3.18.4.2 Applications in Printed, flexible and stretchable electronics
- 3.18.5 GRAPHDIYNE
 - 3.18.5.1 Properties
 - 3.18.5.2 Applications in Printed, flexible and stretchable electronics
- 3.18.6 GRAPHANE
 - 3.18.6.1 Properties
 - 3.18.6.2 Applications in Printed, flexible and stretchable electronics
- 3.18.7 HEXAGONAL BORON NITRIDE
 - 3.18.7.1 Properties
 - 3.18.7.2 Applications in Printed, flexible and stretchable electronics
- 3.18.8 MOLYBDENUM DISULFIDE (MoS₂)
 - 3.18.8.1 Properties
 - 3.18.8.2 Applications in Printed, flexible and stretchable electronics
- 3.18.9 RHENIUM DISULFIDE (ReS₂) AND DISELENIDE (ReSe₂)
 - 3.18.9.1 Properties
 - 3.18.9.2 Applications in Printed, flexible and stretchable electronics
- 3.18.10 SILICENE
 - 3.18.10.1 Properties
 - 3.18.10.2 Applications in Printed, flexible and stretchable electronics
- 3.18.11 STANENE/TINENE
 - 3.18.11.1 Properties
 - 3.18.11.2 Applications in Printed, flexible and stretchable electronics
- 3.18.12 TUNGSTEN DISELENIDE
 - 3.18.12.1 Properties
 - 3.18.12.2 Applications in Printed, flexible and stretchable electronics
- 3.18.13 ANTIMONENE
 - 3.18.13.1 Properties
 - 3.18.13.2 Applications
- 3.18.14 INDIUM SELENIDE

3.18.14.1 Properties

3.18.14.2 Applications

4 MARKETS FOR PRINTABLE, FLEXIBLE AND STRETCHABLE ELECTRONICS

4.1 WEARABLE ELECTRONICS

4.1.1 MARKET DRIVERS AND TRENDS

4.1.2 APPLICATIONS

4.1.2.1 Smartwatches

4.1.2.1.1 Main smart watch producers and products

4.1.2.2 Sports and fitness trackers

4.1.2.2.1 Products

4.1.2.3 Sleep trackers and wearable monitors

4.1.2.3.1 Products

4.1.2.4 Smart glasses and head-mounted displays (VR, AR, MR, vision loss and eye trackers)

4.1.2.4.1 Products

4.1.2.5 Military

4.1.2.6 Industrial and workplace monitoring

4.1.2.7 Flexible and stretchable electronics in wearables

4.1.2.8 Stretchable artificial skin

4.1.3 GLOBAL MARKET SIZE

4.1.4 MARKET CHALLENGES

4.1.5 COMPANY PROFILES 258 (61 companies)

4.2 MEDICAL AND HEALTHCARE SENSORS AND WEARABLES

4.2.1 MARKET DRIVERS

4.2.2 CURRENT STATE OF THE ART

4.2.2.1 Monitoring solutions to track COVID-19 symptoms

4.2.2.1.1 Temperature and respiratory rate monitoring

4.2.3 APPLICATIONS

4.2.3.1 Companies and products

4.2.3.2 Electronic skin patches

4.2.3.3 Nanomaterials-based devices

4.2.3.4 Wearable health alert and monitoring devices

4.2.3.5 Continuous glucose monitoring (CGM)

4.2.3.5.1 Minimally-invasive CGM sensors

4.2.3.5.2 Non-invasive CGM sensors

4.2.3.5.3 Companies and products

4.2.3.6 Cardiovascular

- 4.2.3.6.1 ECG sensors
- 4.2.3.6.2 PPG sensors
- 4.2.3.7 Pregnancy and newborn monitoring
- 4.2.3.8 Wearable temperature monitoring
- 4.2.3.9 Hydration sensors
- 4.2.3.10 Wearable sweat sensors (medical and sports)
 - 4.2.3.10.1 Products
- 4.2.3.11 Wearable drug delivery
- 4.2.3.12 Cosmetics patches
- 4.2.4 Smart footwear
- 4.2.5 Smart contact lenses
- 4.2.6 Smart wound care
- 4.2.7 Wearable exoskeletons
- 4.2.8 Medical hearables
- 4.2.9 GLOBAL MARKET SIZE
- 4.2.10 MARKET CHALLENGES
- 4.2.11 COMPANY PROFILES 349 (135 company profiles)
- 4.3 ELECTRONIC TEXTILES (E-TEXTILES) AND SMART TEXTILES
 - 4.3.1 MARKET DRIVERS
 - 4.3.2 MATERIALS AND COMPONENTS
 - 4.3.2.1 Conductive and stretchable yarns
 - 4.3.2.2 Conductive polymers
 - 4.3.2.2.1 PDMS
 - 4.3.2.2.2 PEDOT: PSS
 - 4.3.2.3 Conductive coatings
 - 4.3.2.4 Conductive inks
 - 4.3.2.5 Nanomaterials
 - 4.3.2.5.1 Nanocoatings in smart textiles
 - 4.3.2.5.2 Graphene
 - 4.3.2.5.3 Nanofibers
 - 4.3.2.5.4 Carbon nanotubes
 - 4.3.2.6 Phase change materials
 - 4.3.2.6.1 Temperature controlled fabrics
 - 4.3.3 APPLICATIONS, MARKETS AND PRODUCTS
 - 4.3.3.1 Smart clothing products
 - 4.3.3.2 Temperature monitoring and regulation
 - 4.3.3.2.1 Heated clothing
 - 4.3.3.3 Stretchable E-fabrics
 - 4.3.3.3.1 Therapeutic products

- 4.3.3.3.2 Sport & fitness
- 4.3.3.3.3 Smart footwear
- 4.3.3.3.4 Military/Defence
- 4.3.3.4 Medical and healthcare
 - 4.3.3.4.1 Wearable health monitoring
 - 4.3.3.4.1.1 Companies and products
 - 4.3.3.4.2 Monitoring solutions to track COVID-19 symptoms
 - 4.3.3.4.3 Temperature and respiratory rate monitoring
 - 4.3.3.4.4 Pregnancy and newborn monitoring
 - 4.3.3.4.5 Biometric monitoring
 - 4.3.3.4.6 ECG sensors
 - 4.3.3.4.7 Smart wound care
- 4.3.3.5 Industrial and workplace monitoring
- 4.3.3.6 Flexible and wearable display advertising
- 4.3.3.7 Textile-based lighting
 - 4.3.3.7.1 OLEDs
- 4.3.3.8 Antimicrobial textiles
 - 4.3.3.8.1 Nanosilver
 - 4.3.3.8.2 Zinc oxide
 - 4.3.3.8.3 Chitosan
- 4.3.3.9 Smart diapers
- 4.3.3.10 Protective clothing
- 4.3.3.11 Automotive interiors
- 4.3.3.12 Powering E-textiles
 - 4.3.3.12.1 Batteries
 - 4.3.3.12.2 Supercapacitors
 - 4.3.3.12.3 Energy harvesting
 - 4.3.3.12.3.1 Photovoltaic solar textiles
 - 4.3.3.12.3.2 Energy harvesting nanogenerators
 - 4.3.3.12.3.3 Radio frequency (RF) energy harvesting
- 4.3.4 GLOBAL MARKET SIZE
- 4.3.5 MARKET CHALLENGES
- 4.3.6 COMPANY PROFILES 512 (101 company profiles)
- 4.4 PRINTED, FLEXIBLE AND STRETCHABLE ENERGY STORAGE, GENERATION AND HARVESTING
 - 4.4.1 MARKET DRIVERS AND TRENDS
 - 4.4.2 CURRENT STATE OF THE ART
 - 4.4.2.1 Products
 - 4.4.2.2 Nanomaterials

4.4.3 APPLICATIONS

4.4.3.1 Flexible and stretchable batteries in electronics

4.4.3.1.1 Flexible and stretchable LIBs

4.4.3.1.1.1 Fiber-shaped Lithium-Ion batteries

4.4.3.1.1.2 Stretchable lithium-ion batteries

4.4.3.1.1.3 Origami and kirigami lithium-ion batteries

4.4.3.1.2 Flexible Zn-based batteries (ZIBs)

4.4.3.2 Flexible and stretchable supercapacitors

4.4.3.2.1 Materials

4.4.3.3 3D Printed batteries

4.4.3.4 Stretchable heaters

4.4.3.5 Flexible and stretchable solar cells

4.4.3.6 Stretchable nanogenerators

4.4.3.6.1 TENGs

4.4.3.6.2 PENGs

4.4.3.7 Perovskite based solar cells

4.4.3.8 Photovoltaic solar textiles

4.4.4 GLOBAL MARKET SIZE

4.4.5 MARKET CHALLENGES

4.4.6 COMPANY PROFILES 611 (33 company profiles)

4.5 PRINTED, FLEXIBLE AND STRETCHABLE DISPLAYS AND CONSUMER ELECTRONICS

4.5.1 MARKET DRIVERS

4.5.2 CURRENT STATE OF THE ART

4.5.2.1 Printed OLEDs

4.5.2.2 Printed, flexible and stretchable circuit boards and interconnects

4.5.2.3 Printed, flexible and stretchable transistors

4.5.3 APPLICATIONS

4.5.3.1 OTFT materials for LCD and electrophoretic displays

4.5.3.2 Flexible AMOLEDs

4.5.3.3 Flexible PMOLED (Passive Matrix OLED)

4.5.3.4 Foldable and rollable OLED smartphones

4.5.3.5 Foldable and rollable OLED displays

4.5.3.6 Transparent displays

4.5.3.7 Curved automotive displays

4.5.3.8 Flexible and wearable display advertising

4.5.3.9 Flexible OLED lighting

4.5.3.10 Flexible quantum dot displays

4.5.3.10.1 Quantum dot enhancement film (QDEF) for current QLEDs

- 4.5.3.10.2 Quantum Dot on Glass (QDOG)
- 4.5.3.10.3 Quantum dot colour filters
- 4.5.3.10.4 Quantum dots on-chip
- 4.5.3.10.5 Electroluminescent quantum dots
- 4.5.3.10.6 QD-Micro-LEDs
- 4.5.3.11 Flexible electrophoretic displays
- 4.5.3.12 Electrowetting displays
- 4.5.3.13 Electrochromic Displays
 - 4.5.3.13.1 Inorganic metal oxides
 - 4.5.3.13.2 Organic EC materials
 - 4.5.3.13.3 Nanomaterials
- 4.5.3.14 Flexible organic liquid crystal displays (OLCD)
- 4.5.4 GLOBAL MARKET SIZE
- 4.5.5 MARKET CHALLENGES
- 4.5.6 COMPANY PROFILES 662 (47 company profiles)

5 REFERENCES

List Of Tables

LIST OF TABLES

- Table 1. Types of wearable devices and applications.
- Table 2. Wearable market leaders by market segment.
- Table 3. Advanced materials for Printed, flexible and stretchable sensors and Electronics-Advantages and disadvantages.
- Table 4. Sheet resistance (RS) and transparency (T) values for transparent conductive oxides and alternative materials for transparent conductive electrodes (TCE).
- Table 5. Foldable smartphones and tablets, on or near market.
- Table 6. Market drivers and trends for Printed, flexible and stretchable conductive inks.
- Table 7. Typical conductive ink formulation.
- Table 8. Comparative properties of conductive inks.
- Table 9. Characteristics of analog printing processes for conductive inks.
- Table 10. Characteristics of digital printing processes for conductive inks.
- Table 11. Printable electronics products.
- Table 12. Comparative properties of conductive inks.
- Table 13. Applications in conductive inks by type and benefits thereof.
- Table 14. Price comparison of thin-film transistor (TFT) electronics technology.
- Table 15. Global market for conductive inks 2017-2031, revenues (million \$), by ink types.
- Table 16. Comparison of ITO replacements.
- Table 17. Properties of CNTs and comparable materials.
- Table 18. Market and applications for SWCNTs in transparent conductive films.
- Table 19. Companies developing carbon nanotubes for applications in Printed, flexible and stretchable electronics.
- Table 20. Organic semiconductor/OLED materials companies.
- Table 21. Organic photovoltaics (OPV) companies.
- Table 22. Organic thin film transistor (OTFT) materials companies.
- Table 23. Organic photovoltaics (OPV) companies.
- Table 24. Semiconducting perovskite companies.
- Table 25. Types of flexible conductive polymers, properties and applications.
- Table 26. Properties of graphene.
- Table 27. Graphene properties relevant to application in sensors.
- Table 28. Companies developing graphene for applications in Printed, flexible and stretchable electronics.
- Table 29. Advantages and disadvantages of fabrication techniques to produce metal mesh structures.

- Table 30. Types of flexible conductive polymers, properties and applications.
- Table 31. Companies developing metal mesh for applications in Printed, flexible and stretchable electronics.
- Table 32. Silver nanocomposite ink after sintering and resin bonding of discrete electronic components.
- Table 33. Nanocellulose properties.
- Table 34. Properties and applications of nanocellulose
- Table 35. Properties of flexible electronics?cellulose nanofiber film (nanopaper).
- Table 36. Properties of flexible electronics cellulose nanofiber films.
- Table 37. Companies developing nanocellulose for applications in Printed, flexible and stretchable electronics.
- Table 38. Chemical synthesis of quantum dots.
- Table 39. Comparison of graphene QDs and semiconductor QDs.
- Table 40. Comparative properties of conventional QDs and Perovskite QDs.
- Table 41. Applications of perovskite QDs.
- Table 42. Properties of perovskite QLEDs comparative to OLED and QLED.
- Table 43. Electronic and mechanical properties of monolayer phosphorene, graphene and MoS₂.
- Table 44. Market drivers for printed, flexible and stretchable electronics for wearables and IoT.
- Table 45. Main smart watch producers and products.
- Table 46. Wearable sensors for sports performance.
- Table 47. Wearable sensor products for monitoring sport performance.
- Table 48. Wearable sleep tracker products.
- Table 49. Smart glasses companies and products.
- Table 50. Wearable electronics applications in the military.
- Table 51. Applications in printed, flexible and stretchable electronics, by advanced materials type and benefits thereof.
- Table 52. Global market for wearable electronics, 2015-2031, by product type, billions \$.
- Table 53. Market challenges in wearable electronics and IoT.
- Table 54. Market drivers for printed, flexible and stretchable medical and healthcare sensors and wearables.
- Table 55. Examples of wearable medical device products.
- Table 56. Medical wearable companies applying products to COVID-19 monitoring and analysis.
- Table 57. Applications in flexible and stretchable health monitors, by advanced materials type and benefits thereof.
- Table 58. Wearable bio-signal monitoring devices.
- Table 59. Technologies for minimally-invasive and non-invasive glucose detection-

advantages and disadvantages.

Table 60. Commercial devices for non-invasive glucose monitoring not released or withdrawn from market.

Table 61. Minimally-invasive and non-invasive glucose monitoring products.

Table 62. Companies developing wearable sweat sensors.

Table 63. Wearable drug delivery companies and products.

Table 64. Companies and products, cosmetics and drug delivery patches.

Table 65. Companies and products in smart footwear.

Table 66. Companies and products in smart contact lenses.

Table 67. Companies and products in smart wound care.

Table 68. Companies developing wearable exoskeletons.

Table 69. Companies and products in hearables.

Table 70. Global medical and healthcare wearables market, 2017-2031, billions \$, by product.

Table 71. Market challenges in medical and healthcare sensors and wearables.

Table 72. Market drivers for printed, flexible, stretchable and organic electronic textiles.

Table 73. Types of smart textiles.

Table 74. Examples of smart textile products.

Table 75. Types of smart textiles.

Table 76. Examples of smart textile products.

Table 77. Types of flexible conductive polymers, properties and applications.

Table 78. Typical conductive ink formulation.

Table 79. Comparative properties of conductive inks.

Table 80. Applications in textiles, by advanced materials type and benefits thereof.

Table 81. Nanocoatings applied in the textiles industry-type of coating, nanomaterials utilized, benefits and applications.

Table 82. Applications and benefits of graphene in textiles and apparel.

Table 83. Properties of CNTs and comparable materials.

Table 84. Applications and markets for e-textiles.

Table 85. Commercially available smart clothing products.

Table 86. Electronic textiles products.

Table 87. Heated jacket and clothing products.

Table 88. Examples of materials used in flexible heaters and applications.

Table 89. Companies and products in smart footwear.

Table 90. Wearable electronics applications in the military.

Table 91. Examples of wearable medical device products.

Table 92. Medical wearable companies applying products to COVID-19 monitoring and analysis.

Table 93. Companies and products in smart wound care.

Table 94. Antibacterial effects of ZnO NPs in different bacterial species.

Table 95. Companies developing smart diaper products.

Table 96: Applications in textiles, by advanced materials type and benefits thereof.

Table 97: Nanocoatings applied in the textiles industry-type of coating, nanomaterials utilized, benefits and applications.

Table 98. Comparison of prototype batteries (flexible, textile, and other) in terms of area-specific performance.

Table 99. Global electronic textiles and smart clothing market 2017-2031, revenues (billions USD).

Table 100. Market challenges in E-textiles.

Table 101. Market drivers and trends for Printed, flexible and stretchable electronic energy storage, generation and harvesting.

Table 102. Wearable energy storage and energy harvesting products.

Table 103. Nanomaterials in flexible and stretchable batteries, by materials type and benefits thereof.

Table 104. Applications in flexible and stretchable supercapacitors, by advanced materials type and benefits thereof.

Table 105. Examples of materials used in flexible heaters and applications.

Table 106. Global thin film, flexible and printed batteries market 2017-2031, revenues (millions USD) by applications.

Table 107. Market challenges in printed, flexible and stretchable energy storage.

Table 108. Market drivers for Printed, flexible and stretchable displays and electronic components.

Table 109. Printed, flexible and stretchable displays products.

Table 110. Applications in flexible and stretchable circuit boards, by advanced materials type and benefits thereof.

Table 111. Foldable display products and prototypes.

Table 112. Companies developing transparent display products.

Table 113. Companies developing curved automotive displays.

Table 114: QD colour filter options and advantages.

Table 115. Types of electrochromic materials and applications.

Table 116. Market challenges in printed, flexible and stretchable displays and consumer electronics.

List Of Figures

LIST OF FIGURES

- Figure 1. Evolution of electronics.
- Figure 2. Wove Band.
- Figure 3. Wearable graphene medical sensor.
- Figure 4. Applications timeline for organic and printed electronics.
- Figure 5. Xiaomi MIX Flex.
- Figure 6. Baby Monitor.
- Figure 7. Wearable health monitor incorporating graphene photodetectors.
- Figure 8. BGT Materials graphene ink product.
- Figure 9. Flexible RFID tag.
- Figure 10. Stretchable material for formed an in-molded electronics.
- Figure 11. Wearable patch with a skin-compatible, pressure-sensitive adhesive.
- Figure 12. Thin film transistor incorporating CNTs.
- Figure 13. Global market for conductive inks 2017-2031, revenues (million \$), by ink types.
- Figure 14. Talcoat graphene mixed with paint.
- Figure 15. Transparent conductive switches-PEDOT.
- Figure 16. CNT stretchable Resin Film.
- Figure 17. Schematic of single-walled carbon nanotube.
- Figure 18. Flexible CNT CMOS integrated circuits with sub-10 nanoseconds stage delays.
- Figure 19. Stretchable SWNT memory and logic devices for wearable electronics.
- Figure 20. CNT transparent conductive film formed on glass and schematic diagram of its structure.
- Figure 21. Stretchable carbon aerogel incorporating carbon nanotubes.
- Figure 22. Graphene layer structure schematic.
- Figure 23. Flexible graphene touch screen.
- Figure 24. Graphene electrochromic devices.
- Figure 25. Flexible mobile phones with graphene transparent conductive film.
- Figure 26. Large-area metal mesh touch panel.
- Figure 27. Bending durability of Ag nanowires.
- Figure 28. Flexible silver nanowire wearable mesh.
- Figure 29. Copper based inks on flexible substrate.
- Figure 30. Cellulose nanofiber films.
- Figure 31. Nanocellulose photoluminescent paper.
- Figure 32. LEDs shining on circuitry imprinted on a 5x5cm sheet of CNF.

- Figure 33. Foldable nanopaper.
- Figure 34. Foldable nanopaper antenna.
- Figure 35. Paper memory (ReRAM).
- Figure 36: Quantum dot schematic.
- Figure 37. Quantum dot size and colour.
- Figure 38. Quantum dot companies in printed, flexible and stretchable electronics.
- Figure 39. A pQLED device structure.
- Figure 40. Development roadmap for perovskite QDs.
- Figure 41. Perovskite quantum dots under UV light.
- Figure 42. Borophene schematic.
- Figure 43. Black phosphorus structure.
- Figure 44. Black Phosphorus crystal.
- Figure 45. Bottom gated flexible few-layer phosphorene transistors with the hydrophobic dielectric encapsulation.
- Figure 46. Graphitic carbon nitride.
- Figure 47. Schematic of germanene.
- Figure 48. Graphdiyne structure.
- Figure 49. Schematic of Graphane crystal.
- Figure 50. Structure of hexagonal boron nitride.
- Figure 51. Structure of 2D molybdenum disulfide.
- Figure 52. SEM image of MoS₂.
- Figure 53. Atomic force microscopy image of a representative MoS₂ thin-film transistor.
- Figure 54. Schematic of the molybdenum disulfide (MoS₂) thin-film sensor with the deposited molecules that create additional charge.
- Figure 55. Schematic of a monolayer of rhenium disulphide.
- Figure 56. Silicene structure.
- Figure 57. Monolayer silicene on a silver (111) substrate.
- Figure 58. Silicene transistor.
- Figure 59. Crystal structure for stanene.
- Figure 60. Atomic structure model for the 2D stanene on Bi₂Te₃(111).
- Figure 61. Schematic of tungsten diselenide.
- Figure 62. Schematic of Indium Selenide (InSe).
- Figure 63. Applications of wearable flexible sensors worn on various body parts.
- Figure 64. Wearable bio-fluid monitoring system for monitoring of hydration.
- Figure 65. Beddr SleepTuner.
- Figure 66. Vuzix Blade.
- Figure 67. NReal Light MR smart glasses.
- Figure 68. Wearable gas sensor.
- Figure 69. Stretchable transistor.

- Figure 70. Artificial skin prototype for gesture recognition.
- Figure 71. Global market for wearables, 2015-2031, by product type, billions US\$.
- Figure 72. Global market for hearables, 2017-2031, by product type, billions \$.
- Figure 73. Global market for wearables, 2015-2031, by market share of product type
- Figure 74. Connected human body and product examples.
- Figure 75. Companies and products in wearable health monitoring and rehabilitation devices and products.
- Figure 76. Smart e-skin system comprising health-monitoring sensors, displays, and ultra flexible PLEDs.
- Figure 77. Graphene medical patch.
- Figure 78. Graphene-based E-skin patch.
- Figure 79. Technologies for minimally-invasive and non-invasive glucose detection.
- Figure 80. Schematic of non-invasive CGM sensor.
- Figure 81. Adhesive wearable CGM sensor.
- Figure 82. VitalPatch.
- Figure 83. Wearable ECG-textile.
- Figure 84. Wearable ECG recorder.
- Figure 85. Nexkin™.
- Figure 86. Bloomlife.
- Figure 87. Enfucell wearable temperature tag.
- Figure 88. TempTraQ wearable wireless thermometer.
- Figure 89. Nanowire skin hydration patch.
- Figure 90. NIX sensors.
- Figure 91. Wearable sweat sensor.
- Figure 92. Wearable sweat sensor.
- Figure 93. Gatorade's GX Sweat Patch.
- Figure 94. Sweat sensor incorporated into face mask.
- Figure 95. Lab-on-Skin™.
- Figure 96. D-mine Pump.
- Figure 97. My UV Patch.
- Figure 98. Overview layers of L'Oreal skin patch.
- Figure 99. Digitsole Smartshoe.
- Figure 100. Schematic of smart wound dressing.
- Figure 101. REPAIR electronic patch concept. Image courtesy of the University of Pittsburgh School of Medicine.
- Figure 102. Honda Walking Assist.
- Figure 103. Nuheara IQbuds? Max.
- Figure 104. Global medical and healthcare wearables market, 2017-2031, billions \$, by product.

Figure 105. Global market for medical and healthcare sensors and wearables, 2015-2031, by market share of product type.

Figure 106. Conductive yarns.

Figure 107. Conductive yarns.

Figure 108. SEM image of cotton fibers with PEDOT:PSS coating.

Figure 109. Applications of graphene in smart textiles and apparel.

Figure 110. PCM cooling vest.

Figure 111. EXO2 Stormwalker 2 Heated Jacket.

Figure 112. Flexible polymer-based heated glove, sock and slipper.

Figure 113. ThermaCell Rechargeable Heated Insoles.

Figure 114. Myant sleeve tracks biochemical indicators in sweat.

Figure 115. Flexible polymer-based therapeutic products.

Figure 116. iStimUweaR .

Figure 117. Digitsole Smartshoe.

Figure 118. Wearable medical technology.

Figure 119. Connected human body and product examples.

Figure 120. Companies and products in wearable health monitoring and rehabilitation devices and products.

Figure 121. Bloomlife.

Figure 122. VitalPatch.

Figure 123. Wearable ECG-textile.

Figure 124. Wearable ECG recorder.

Figure 125. Nexkin™.

Figure 126. Schematic of smart wound dressing.

Figure 127. REPAIR electronic patch concept. Image courtesy of the University of Pittsburgh School of Medicine.

Figure 128. Wearable gas sensor.

Figure 129. Basketball referee Royole fully flexible display.

Figure 130: Anti-bacterial sol-gel nanoparticle silver coating.

Figure 131. Schematic of antibacterial activity of ZnO NPs.

Figure 132/ ABENA Nova smart diaper.

Figure 133: Omniphobic-coated fabric.

Figure 134. Textile-based car seat heaters.

Figure 135. Micro-scale energy scavenging techniques.

Figure 136. Schematic illustration of the fabrication concept for textile-based dye-sensitized solar cells (DSSCs) made by sewing textile electrodes onto cloth or paper.

Figure 137 . 3D print piezoelectric material.

Figure 138. Global electronic textiles and smart clothing market 2017-2031, revenues (billions USD).

Figure 139. Global market for electronic textiles and smart clothing, 2017-2031, by market share of product type.

Figure 140. Graphene dress. The dress changes colour in sync with the wearer's breathing.

Figure 141. Descante Solar Thermo insulated jacket.

Figure 142. G+ Graphene Aero Jersey.

Figure 143. HiFlex strain/pressure sensor.

Figure 144. Electroskin integration schematic.

Figure 145. Smardii smart diaper.

Figure 146. Teslasuit.

Figure 147. Flexible batteries on the market.

Figure 148. Printed 1.5V battery.

Figure 149. Materials and design structures in flexible lithium ion batteries.

Figure 150. LIBEST flexible battery.

Figure 151. Schematic of the structure of stretchable LIBs.

Figure 152. Electrochemical performance of materials in flexible LIBs.

Figure 153. Carbon nanotubes incorporated into flexible, rechargeable yarn batteries.

Figure 154. (A) Schematic overview of a flexible supercapacitor as compared to conventional supercapacitor.

Figure 155. Stretchable graphene supercapacitor.

Figure 156. Origami-like silicon solar cells.

Figure 157. Schematic illustration of the fabrication concept for textile-based dye-sensitized solar cells (DSSCs) made by sewing textile electrodes onto cloth or paper.

Figure 158. Global market for electronics and smart textiles, 2017-2027, by market share of product type.

Figure 159. Global thin film, flexible and printed batteries market 2017-2031, revenues (millions USD) by applications.

Figure 160. PowerWalk®.

Figure 161. Hitz all-solid-state lithium-ion battery.

Figure 162. ZincPoly™ Battery.

Figure 163. J.Flex.

Figure 164. Schematic illustration of three-chamber system for SWCNH production.

Figure 165. TEM images of carbon nanobrush.

Figure 166. Thin film transistor incorporating SWCNTs.

Figure 167. LG Signature OLED TV R.

Figure 168. Flexible display.

Figure 169. AMOLED schematic.

Figure 170. Mirage smart speaker with wraparound touch display.

Figure 171. Rollable display producers and products.

Figure 172. LG Display transparent OLED touch display.

Figure 173. Transparent display in subway carriage window.

Figure 174. Basketball referee Royole fully flexible display.

Figure 175. LG OLED flexible lighting panel.

Figure 176. Flexible OLED incorporated into automotive headlight.

Figure 177. Quantum dot film schematic.

Figure 178: Quantum Dots on Glass schematic.

Figure 179: Samsung 8K 65" QD Glass.

Figure 180: QD/OLED hybrid schematic.

Figure 181: Electroluminescent quantum dots schematic.

Figure 182: The Wall microLED display.

Figure 183: Individual red, green and blue microLED arrays based on quantum dots.

Figure 184. Flexible & stretchable LEDs based on quantum dots.

Figure 185. LECTUM® display.

Figure 186. Argil electrochromic film integrated with polycarbonate lenses.

Figure 187. Organic LCD with a 10-mm bend radius.

Figure 188. Global flexible, foldable and rollable OLED revenues, 2017-2031 (billion \$).

Figure 189. Global foldable displays revenues by application, 2018-2031 (millions \$).

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