

emerging ceramics & glass technology

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REFERENCE & BUYER'S RESOURCE DIRECTORY 2017

- Ceramic and glass industry forecast
 - Preview Ceramics Expo 2017 •
 - Meetings: ICACC, EMA, CBLS •





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Contents December 2016 • Vol. 95 No.9

feature articles



Ceramic industry 2016 profile and manufacturing forecast

Rising demand for smarter electronics, cleaner energy solutions, and lighter, more fuel-efficient vehicles continue to set the pace for functional applications of ceramic and glass growth on an international scale.

by April Gocha, Stephanie Liverani, and Eileen De Guire



Ceramics Expo 2017 returns to Cleveland

Following rapid industry developments in various user segments, Ceramics Expo 2017 again will set the agenda as the progressive hub for the industry.



ceramicSOURCE 2017

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Correction to the October/November issue of the ACerS Bulletin

"New silica dust regulations will require changes in workplaces," p. 32.

A correction was made to a unit error in the original publication—the new exposure limits are measured in μ g/m³, not g/m³ as was originally printed. In addition, all instances of silica in this article refer to respirable crystalline silica. The archived electronic version has the correction.

meetings

EMA 2017	
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AMERICAN CERAMIC SOCIETY

Obulletin

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news & trends

Ceramic and glass researchers seek 'Big Ideas' at NSF-funded workshop

To fulfill its mission, the National Science Foundation has to be focused and smart about how it spends its budget. The focus needs to be on science, and the "smart" has to be on emerging opportunities that will advance society in the long run.

According to the NSF's website, its \$7.5 billion annual budget supports about one-fourth of basic science research conducted at United Statesbased universities and colleges through about 12,000 new awards per year.

That sounds like a lot of science, but the budget divides into seven research directorates and several "management and overhead" buckets. Thirty-two divisions reside under those seven research directorates, and those divisions break down further into discipline-specific programs.

The Directorate for Mathematical & Physical Sciences' Division of Materials Research (DMR)—which hosts the Ceramics Program—recently funded a workshop that looked into

the minds of leading researchers in the U.S. and abroad.

Caltech professor Katherine Faber organized the two-and-a-half-day workshop to identify emerging opportunities in ceramics and glass science. She worked with an organizing committee of Jennifer Lewis (Harvard University), Clive Randall (Pennsylvania State University), and Greg Rohrer (Carnegie Mellon University). About 45 scientists presented the latest work in the field, challenges they are addressing, and, most importantly, why it matters in the context of scientific trends and society's compelling grand challenges.

Most attendees hailed from academia, although organizers were careful to balance experience levels. Perspectives from national laboratories and industry also were represented—the latter being especially important for providing "rubber meets the road" perspectives. Organizers also reached beyond the obvious community and invited experts outside the field working in "nearby" research areas, such as a mineral physicist and a solid-state chemist.

The first day-and-a-half comprised of



Javier Garay (center, University of California, Riverside) fields a question during a panel discussion at a recent NSF workshop on emerging opportunities in ceramics and glass science. Also pictured are Gary Messing from Pennsylvania State University and Kathy Lu from Virginia Polytechnic Institute and State University.

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ACSBA7, Vol. 95, No. 9, pp 1-142. All feature articles are covered in Current Contents.

presentations arranged in five challenges:

• Advanced processing. Where can we go with advances in additive manufacturing? What new synthesis opportunities do polymer-derived ceramics offer? What does new science into low-temperature, pressurized sintering imply?

• Defect-enabled phenomena. What advantages do imperfect materials offer? Can "designer defects" lead to new functionality?

• Low-dimensional phenomena. Can properties of 2-D materials be tuned? Can we learn to process them with advanced methods, such as 3-D printing? Can surfaces be designed for catalysis, switching, or other functions? • Materials in extreme environments. Extreme environments push materials to their critical property limits, including thermal, heat, or radiation flux and mechanical or electrical loads. How do we discover new materials for these environments and test and characterize them?

• Glass and high-entropy materials. What can we learn by better understanding and controlling amorphous structures? Do new approaches to achieving amorphicity open new ways of thinking about glass and its uses?

Topical sessions included panel discussions that generated lively conversation on a wide range of topics. Modeling techniques and strategies cut across all topics. In breakout sessions on the sec-

Business news

Microban secures patents for antimicrobial technology in ceramics (microban. com)...DOE announces \$30M investment in hydrogen and fuel cells (energy. gov)...Faraday Future announces supply agreement with LG Chem (ff.com)... Morgan Advanced Materials develops alumina sensor to withstand extreme temperatures (morganadvanced materials.com)...Kyocera develops MLCCs with volumetric efficiency ideal for smartphones (global.kyocera.com)... Half of U.S. business R&D concentrated in five states (nsf.gov)...New NIST test bed provides all-in-one toolbox to explore digital manufacturing (nist. gov)...DOE invests \$1.2M to advance national lab partnerships with manufacturing leaders (energy.gov)...Amedica announces 38% workforce reduction (amedica.com)...AGC glass furnace to go back into production at Boussois, France (agc-glass.eu)...RAK Ceramics launches new global brand identity (rakceramics.com)...Morgan Advanced Materials awarded £1.1M ballistic shields contract (morgandefence systems.com)...Vitro completes acqui-

sition of PPG's flat-glass business (vitro. com)...NREL report shows U.S. solar photovoltaic costs continuing to fall in 2016 (nrel.gov)...Alcoa Inc. board of directors approves separation of company (alcoa.com)...OLED on ceramic heralds new possibilities for durable, flexible lighting and displays (holstcentre. com)...AGC to release Dragontrail Pro, new specialty glass for chemical strengthening (asahi-glass.com)...NSF awards \$94M to create four new Science and Technology Centers (nsf.gov)...Xaar 2001+ two-color printhead delivers production flexibility, reliability for tile manufacturers (xaar.com)...Pilot projects will bring MEP small-business expertise to Manufacturing USA institutes (nist. gov)...NASA iTech fosters technology needed for journey to Mars (nasa.gov)... PiBond develops new materials with high refractive index for optical applications (pibond.com)...glasstec 2016 generates important impulses: Good mood and solid investment climate (glasstec-online. com)...Air Products and NICE to work jointly on hydrogen fueling projects in China (airproducts.com).

ond day-and-a-half, participants worked on refining the definition of these areas and teasing out grand challenges and emerging opportunities.

Faber says, "The workshop has provided us with valuable assessments of where knowledge gaps exist in ceramic and glass science. These will form the basis of our emerging opportunities report and ultimately inspire researchers with a host of challenges to tackle." Putting it another way, Faber encouraged participants to seek "overarching ideas that provide a framework for individual contributions."

The output from the workshop will be an open-access article that will detail these opportunities, challenges that they present, and cross-cutting themes (for example, modeling and dataset management). Watch for that to publish in early 2017.

Apple releases new iPhone 7 and ceramic Watch

Apple recently unveiled the latest iteration of its tech products, debuting the new iPhone 7 and Series 2 Watches.

And the rumors were true—the new iPhone 7 drastically ditched the headphone jack to make room for a stereo set of speakers to improve audio quality. New iPhone users now have to make the move to wireless headphones or use a lightning port headphone adapter.

As with virtually every other smartphone iteration, the new iPhone 7 also boasts a better-than-ever battery and an improved camera, including new dual wide angle and telephoto lenses on the iPhone 7 Plus.

The iPhone 7 has a new processor that runs twice as fast as the iPhone 6, and comes in a shiny new jet black finish as well as the more standard matte finishes.

But, its materials remain largely unchanged—the body case of the new phone is aluminum. So, as expected, consumers have to wait until next year to see if glass gets its chance in the iPhone 8.

onews & trends-



The new Apple Watch Edition features a white ceramic case.

Apple, instead, made its big materials news this time around with the new Apple Watch Series 2—the special Edition version of the watch is now allwhite and all-ceramic.

The new ceramic Edition watch replaces the previous expensive gold one—which contained ceramics in the gold mix—that started at a steep price of \$10,000. The new all-ceramic Series 2 Edition, however, starts at just \$1,249.

Although that remains a hefty price tag, it may be a relatively small price to pay for the peace of mind of not having to worry about scratches on the new smartwatch. Apple boasts that the alumina-zirconia ceramic in its new Watch is four times as hard as stainless steel, which many previous Apple Watch wearers have complained about because of its relative scratchability.

About a year ago, *Ceramic Tech Today* reported on Apple's patent for making harder ceramics.

That patent detailed the company's vacuum-based method for making ceramics from a slurry containing zirconia particles. Although it is not certain that the patent details the same process used to make the new ceramic Apple Watch, it does not seem like much of a stretch.

The patented method reduces porosity by using a vacuum to remove air bubbles from the ceramic slurry. Pores are a problem because they are one factor that can introduce weaknesses in the materials by serving as starting points for crack formation. So, removing bubbles in the slurry creates a harder ceramic.

According to the company, "The process of creating the Apple Watch Edition case begins with a high-strength zirconia powder that's combined with alumina to achieve its rich, white color. Each case then is compression molded, sintered, and polished using a diamond slurry, which results in a remarkably smooth surface and an exquisite shine."

Catch a glimpse of the latest releases in a short Apple preview video at youtu.be/GeoUELDgyM4.

ICG Summer School 2016 draws strong international turnout for intensive glass course

Editor's note: This story comes to us from the International Commission on Glass. For more information on ICG or its educational programs, contact J.M. Parker, University of Sheffield (U.K.) at j.m.parker@sheffield.ac.uk.

The 8th International Commission on Glass Summer School program took place in July in Montpellier, France, and it drew a strong turnout—36 participants from 10 countries gathered for the program's intensive glass course. Twentyeight of those participants signed up for the glass science educational track and eight for glass technology.

The program combined formal lec-

tures with student presentations, which gave participants a chance to share their research interests and aspirations. Students engaged in project work and tutorials and researched on site. Six of the lecturers arranged small group discussions to address student questions and topics of interest. Students also had the opportunity to network during various coffee breaks and lunches and during an opening welcome party and closing banquet.

On day one of the program, participants attended the same introductory courses, and the seven project groups included attendees from the glass science educational and glass technology tracks. Student feedback gathered during and after the program commented on friendliness of the lecturers and high quality of their teaching.

The last day of the program gave students the opportunity to demonstrate their lecturing skills and present conclusions on their projects in front of their peers. Final presentations also facilitated discussion and probing questions about research done during the course of the program.

Presentations were judged, and two first prizes were awarded: one to a group that examined mechanisms of sodiumion diffusion and the involvement of nonbridging oxygen (Helene Pablo, Luka Pavic, Celine Ragoen, Alessio Zandona, and Abdul Rahshidi); and the other to a group tasked with creating a project for a



ICG Summer School 2016 participants get ready to dive into some serious glass research in Montpellier, France, in July.

final year undergraduate student on glass melting (Vickie Falk Jensen, Miroslava Huyjova, So Sakurai, Damier Bolore, Frederik Van Hoof, and Ana Aznar). Third place went to the big EGO company, based on an Environmental Glass Organization, set up to win a large international prize by solving a major social issue (Thorben Welter, Laura Aalta-Setala, Julian Moriceau, Ben Allsopp, and Philipe Kiefer).

Another ICG summer school program is already scheduled for July 2017 and will feature sessions focused on glass science and the use of computer modeling in glass science and technology. Visit ICG's website for more information (icglass.org).

Panasonic debuts OLEDembedded transparent-glass TV

Television has come a long way since it first started broadcasting moving images into households almost a century ago. But, TV is going to new places—and, if Panasonic is any prognosticator, TV receivers of the future will be almost invisible in our homes.

The electronics giant recently unveiled its latest concept of an invisible TV that seamlessly blends into a house's décor. When off, the new TV looks no different from an ordinary panel of glass—but when switched on, it provides a bright display that is almost indistinguishable from that of a conventional TV.

According to an *Engadget* article, the new invisible TV is a glass panel with an embedded mesh OLED screen, offering up unprecedented picture quality when turned on yet ultratransparency when off.

A video from Panasonic showing off the tech company's latest concepts is available at youtu.be/eoIQmWd8LTQ.

Wearable tech company Amazfit debuts ceramic wearable activity tracker

Wearable tech company Amazfit recently debuted its simple ceramic activity tracker in the United States market and at a retail price of \$79.99, it provides a more affordable ceramic option than the new Apple Watch.

Akin to the Misfit brand, Amazfit's tech design is aimed toward individuals who want an activity tracker "disguised as a fashion accessory," as Amazfit describes.

Amazfit's wearables consist of a donutshaped zirconium oxide ceramic casing that houses its "new-generation ADI sensors" and a small-yet-mighty battery that boasts 10 days of life from a single charge.

According to the press release, the ceramic casing "undergoes 30 manufacturing procedures" before being polished to a shiny wearable. "Its hardness is



Panasonic's vision is that future televisions will be barely noticeable.



dit: Amazfit

Amazfit is a wearable tech company that is debuting new fashionable ceramic activity trackers.

second only to diamond and sapphire, creating a long-lasting, luminescent, and strong surface." Amazfit's website further details that the zirconium oxide material is fired at 2,642°F.

The ceramic makes the tracker tough and waterproof, yet lightweight—it weighs in at just 0.5 oz.

Amazfit launched as a U.S. wearable tech company in 2016, although its tech is not new—the company is owned by larger global wearable tech manufacturer Huami. Huami is a leading global wearable tech provider that partners with Xiamoi, a company that has had marked success with economical activity trackers in Asian markets.

"After selling more than 24 million activity trackers in China through our partnership with Xiaomi, we're excited to further expand our success into the U.S. market," Frederik Hermann, who leads Amazfit's U.S. marketing and sales, says in a recent press release.

To see and hear more from the company's industrial design team, watch the Amazfit video at youtu.be/K7Z2eSCAtMQ.

Ceramic Tech Today blog www.ceramics.org/ ceramictechtoday

acers spotlight

Society and Division news

Welcome to our newest **Corporate Members!**

ACerS recognizes organizations that have joined the Society as Corporate Members. For more information on becoming a Corporate Member, contact Kevin Thompson at kthompson@ceramics.org, or visit www.ceramics.org/corporate.

> **ER Advanced Ceramics Inc.** East Palestine, Ohio www.eracinc.com

ACerS establishes first international chapter

ACerS Board of Directors approved its first application for the establishment of an international chapter at its recent meeting in Salt Lake City, Utah. The United Kingdom Chapter of ACerS will be based at Imperial College London and will be led by Eugenio Zapata-Solvas. "This is a great opportunity, and I will try my best to make it successful," says Zapata-Solvas. To become involved in the U.K. Chapter, contact eugenio. zapata-solvas@imperial.ac.uk.

Members: Save time with multiyear renewal

If your membership expires this month-and many do-or even if you have another expiration date, please take time to renew now. To renew online, visit ceramics.org and click the "Renew" button or call customer service at 866-721-3322 (U.S.) or 240-646-7054 (outside U.S.), or email customerservice@ ceramics.org. Tired of getting renewal notices every year? Let customer service know you would like the multiyear renewal option that lets you decide how many years to renew.

Names in the news

Singh honored with Keramos Award in Krakow, Poland

AGH University of Science and Technology awarded ACerS then-president Mrityunjay Singh with the Keramos Award. The award is bestowed on individuals who have made outstanding scientific and technological contributions. Singh was recognized during the open-



From Left to right: Jerzy Lis, vice rector of AGH; Singh; and W. Mozgawa, dean, faculty of materials science and ceramics at AGH.

ing of Polish Ceramics 2016-IX International Scientific and Technological Conference in Krakow, Poland, September 12.

Society of Glass Technology celebrates 100th anniversary



Edgar Zanotto (left) and David Pye (right) with the stained glass artwork commissioned by ACerS GOMD to commemorate SGT's 100th anniversary. Pye designed and created the piece.

Russell Hand, SGT president, accepts a plaque from Kathleen Richardson, ACerS past president, congratulating the SGT on behalf of ACerS members.



Successful golf outing for **Pittsburgh Section**

ACerS Pittsburgh Section hosted its annual golf outing September 12 at Lenape Heights Golf Resort in Ford City, Pa. Participants enjoyed a complete program of special events, 18 holes of golf, refreshments, prizes, and awards. This year's first place team included Michael Neiport, Rob Conn, Garrett Sullivan, and Jack Tomina. Second place

went to Chad Rittle, Eric Meuschke, Jay Hope, and Mike DeLucia. Third place went to Greg Andrews, Leslie Beiter, Robert Christensen, and Chris Beiter. The Pittsburgh Section thanks all who participated and donated prizes, including the following sponsors: Aluchem, CeramTec, Fusion Ceramics Inc., Henry F. Teichmann, Imerys/KT Clay, Morgan Advanced Materials, Rath, Standard Ceramic, ThermalMax, and Vanderbilt Minerals LLC.

2016 Ceramographic Exhibit and Contest winners

Congratulations to the winners of the 2016 Ceramographic Exhibit and Contest, which took place during Materials Science & Technology 2016 in Salt Lake City, Utah. Sponsored by the Basic Science Division, this annual competition promotes microscopy and microanalysis tools for investigating ceramic materials. The winning entries will be showcased on the back covers of the *Journal of the American Ceramic Society* in 2017.

WINNERS BY CATEGORY Scanning transmission electron microscopy

First place and Roland B. Snow Award for Best in Show

Silicon brains

Ezra Feilden, Finn Guiliani, Luc Vandeperre, and Eduardo Saiz, Imperial College, London

Second place

Vapor-deposited ZnO neural network Derek R. Miller, Ohio State University

Third place

Waves of the MXene ocean and castaway on the boride sea

Sankalp Kota, Michael Ghidiu, and Michel W. Barsoum, Drexel University

Transmission electron microscopy and scanning transmission electron microscopy

First place

Nitrogen atoms inside the nitride Akihito Kumamoto, Eita Tochigi, Naoya Shibata, and Yuichi Ikuhara, University of Tokyo

Second place

I'm B₄C, *can you find my flaw* **Christopher Marvel** and **Martin Harmer**, Lehigh University; **Kristopher Behler**, **Scott Walck**, and **Jerry LaSalvia**, Army Research Laboratory

Third place

A window of transformation Kevin P. Anderson, Mary Anne Lynch, Richard P. Vinci, and Helen M. Chan, Lehigh University

Microanalysis/combined techniques

First place

Effects of the interlayer incorporation of $\rm H_2O$ in potassium hexaniobate followed by dehydration

Lynn Boatner, Shirley B. Waters, Tom Greer, and Joanne O. Ramey, Oak Ridge National Laboratory

Second place

Copper power lines M. Kracum, C. Marvel, M.P. Harmer, and H.M. Chan, Lehigh University

Third place

Like lanthanum on spinel Sanchita Dey, Md Hasan, and Ricardo H.R. Castro, University of California Davis; John Mardinly, Arizona State University

Remembering ACerS Distinguished Life Member Hans Hausner



Hans Hausner, founding member of the European Ceramic Society (ECerS) passed away August 26 at age 89. As the second President of ECerS

(1989–1991), he helped create the International Ceramic Federation and served as ICF president from 1993–1995. Additionally, Hausner was a member of the World Academy of Ceramics and a Fellow and Distinguished Life Member of the American Ceramic Society.

> In memoriam Wolfgang Haller Hans Hausner Irving Klaus

Some detailed obituaries also can be found on the ACerS website, www.ceramics.org/in-memoriam.

Students and outreach

The Refractories Institute announces 2016 scholarship winners

The Refractories Institute (TRI) awarded academic scholarships to ACerS student members Anna Mattione (Missouri University of Science and Technology) and Sankalp Kota (Drexel University). TRI awards scholarships of \$5,000 to students enrolled full-time for an undergraduate or advanced degree in ceramic engineering, materials science, or a similar discipline at a North American college or university. For more information, visit www.refractoriesinstitute.org.

MS&T16 student contest winners

The Material Advantage Student Program sponsored five contests for undergraduate and graduate students during MS&T16 in Salt Lake City, Utah. Thank you to all who helped judge and organize the contests this year, and congratulations to all winners.

Material Advantage Graduate Student Poster Competition

First place

Jamesa L. Stokes, Pennsylvania State University

Assessment of mechanical behaviors of coevaporated EBPVD TBCs with varying rare earth content

Second place

Lindsey Pruden, University of Utah Plasmonic, flexible, free-standing, monolayer gold nanoparticle films for plasmonic applications

Third place

Leila Ghadbeigi, University of Utah High-performance Na-β-alumina electrolite doped with iron oxide



Students and outreach (continued)

Material Advantage Undergraduate Student Poster Competition

First place

Jacob Kline, University of Idaho Doubling the life of concrete structures

Second place

Andrew Nguyen, University of Connecticut Design, fabrication, and characterization

of collagen-based multi-zonal scaffolds for osteochondral tissue engineering

Third place

Daisy M. Margrave, Montana Tech of the University of Montana Deposition of rare earth elements on ionexchange resins

Honorable mention

Justin Weinstein, Rensselaer Polytechnic Institute Melting prevention of superalloys in high temperature heat treatments

Material Advantage Undergraduate Student Speaking Contest

Winner

Wyatt Surbey, Virginia Polytechnic Institute and State University *Bio-inspired tissue repair*

First runner up

Evan Musterman, Missouri University of Science and Technology Mechanization of flat glass production

Second runners up

Sarah Rappaport, Northwestern University The atomic layer deposition of tin sulfide

Joshua Tedesco, Rutgers University Potassium doped silica nanoparticles as an advanced, ecofriendly, and economical insecticide

Material Advantage Ceramic Mug Drop Contest (organized by Keramos)

Winner (passing @ 120 cm drop)

Michael Hu, University of Illinois at Urbana-Champaign

Most aesthetic mug

Stephanie Soendker, Missouri University of Science and Technology

Material Advantage Ceramic Disc

Golf Contest (organized by Keramos)

Winner (7 m winning throw)

Reed Coots, Clemson University

Awards, scholarship opportunities for students

ACerS Nuclear & Environmental Technology Division sponsored six \$500 travel stipends to help students fund their attendance to MS&T16 in Salt Lake City, Utah. Congratulations to this year's winners: Claudia Gasparrini, Imperial College London; Austin Travis, University of California, Irvine; Hwasung Yeom, University of Wisconsin-Madison; Kassiopeia Smith, Boise State University; Theresa Davey, Imperial College London; and Helen Pratt, University of Oxford.

Most aesthetic disc

at Urbana-Champaign

Elisabeth Lang, University of Illinois

Additionally, ACerS Basic Science Division recently announced the winners of its 2016 Graduate Excellence in Materials Science (GEMS) awards.

Diamond ranking

Joseph Muth, Harvard University Kate Reeve, Purdue University David Kok, University of California, Irvine

Sapphire award

Swetha Barkam, University of Central Florida Hwasung Yeom, University of Wisconsin-Madison Cody V. Cushman, Brigham Young University

Lisa Rueschhoff, Purdue University

Theresa Davey, Imperial College London

Graduate students whose abstracts are accepted for a talk at MS&T17 should consider applying for the 2017 GEMS Awards. For more information, visit ceramics.org/awards.

Apply by December 31 for Washington, D.C. engineering internship

ACerS will support an intern in the Washington Internships for Students of Engineering (WISE) 2017 program. U.S. citizens or legal permanent residents who are juniors or seniors entering their final year of undergraduate studies are eligible. WISE also accepts applications from engineering graduates who are beginning master's level study in a technology policy-related degree. Applications are due **December 31** at noon (EST). Learn more at www.wise-intern.org or contact Tricia Freshour at tfreshour@ceramics.org.

ACerS Winter Workshop for students returns in January

ACerS and The Ceramic and Glass Industry Foundation are co-organizing a Winter Workshop program for students with help from the President's Council of Student Advisors and the Young Professionals Network. The workshop welcomes students and young professionals from around the world and will be held in conjunction with the Electronic Materials and Applications 2017 conference in Orlando, Fla., January 18–22, 2017. For more information, visit ceramics.org/

Awards and deadlines

GOMD awards nomination deadlines

ACerS Glass & Optical Materials Division invites nominations for the following awards:

• The Stookey Lecture of Discovery Award recognizes an individual's lifetime of innovative exploratory work or noteworthy contributions of outstanding research on new phenomena or processes involving glass that have commercial significance or the potential for commercial impact.

• The George W. Morey Award recognizes new and original work in the field of glass science and technology based on excellence in publication of work, either experimental or theoretical, done by an individual.

• The Norbert J. Kreidl Award for Young Scholars recognizes research excellence in glass science and is open to all degree-seeking graduate students (M.S. or Ph.D.) or those who have graduated within a 12-month period of the GOMD meeting.

Nominations for all three awards must be received by **January 21, 2017**. For more information, visit ceramics.org/awards or contact Erica Zimmerman at ezimmerman@ceramics.org.

Society award nominations due January 15

Nominations for most ACerS Society awards, including Distinguished Life Member, Kingery, Jeppson, Coble, Corporate Achievement, Spriggs, Friedberg, and Fulrath, are due **January 15, 2017**. For more information, visit ceramics.org/ awards or contact Erica Zimmerman at ezimmerman@ceramics.org.

CERAMICANDGLASSINDUSTRY FOUNDATION

CGIF releases updated science kit

The Ceramic and Glass Industry Foundation announces the launch of the newly redesigned Materials Science Classroom Kit.

The kit, originally developed by the ACerS President's Council of Student Advisors, facilitates learning and inspires students to pursue careers in materials science. Feedback from teachers and other users was utilized to select the best demonstrations and interactive labs from earlier versions of the kit for inclusion into one convenient updated package.

The kit is the most comprehensive resource of its kind. Lessons comply with Next Generation Science Standards and STEM teachers from around the country are being introduced to this valuable, effective teaching tool.

To further assist those who teach materials science, the CGIF now includes the book, *The Magic of Ceramics*, in each kit. This popular book introduces the nontechnical reader to the many exciting applications of ceramics while teaching key scientific concepts.

ACerS individual and corporate members can sponsor a Materials Science Classroom Kit and *The Magic of Ceramics* book for a local school for only \$250. For multiple orders, the sponsor's name will be added to the kit packaging to signify the source of the donation.

Contact Belinda Raines, outreach manager, at braines@ceramics.org for more information or go to ceramics.org/donateakit.



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Ceramics and glass— Materials for diverse industries A 2016 industry profile and manufacturing forecast

By April Gocha, Stephanie Liverani, and Eileen De Guire

THE GLOBAL PICTURE

Beyond the United States, how does the worldwide economy look?

The International Monetary Fund (IMF) usually publishes its World Economic Outlook twice a year, representing a survey of staff economists' analyses of global economic developments. The outlook report published in October 2016 indicates subpar global growth of 3.1% in 2016, with a slight increase of 3.4% predicted for 2017.¹ "Taken as a whole, the world economy has moved sideways," IMF chief economist and economic counsellor Maurice Obstfeld says in the report. "We have slightly marked down 2016 growth prospects for advanced economies whereas marking up those in the rest of the world."

Stagnation in the U.S. market, uncertainty following the United Kingdom's exit from the European Union, and slow growth in Japan's leading economy are all contributing to this subpar market growth. But, despite the lackluster performance of those advanced markets, emerging markets are expected to pick up some of the worldwide slack with an overall 4.6% growth rate. China's economy is expected to expand 6.6% in 2016 and 6.2% in 2017, showing signs of slowing as the country shifts away from investment and industry and, instead, moves toward more sustainable reliance on consumption and services, according to the IMF. In addition, India is expected to continue to grow at one of the fastest paces for major world economies, with more mixed economic predictions in Africa and Latin America. ■ The ceramic and glass industry cuts a wide swath across industries producing commodity products, such as brick, tile, and glass containers; to components, such as fasteners, multilayer capacitors, and armor; to highly engineered products, such as optical fibers, medical devices, jet engine components, and display glass for consumer electronics. The spectrum of applications along the way is densely packed.

Analysts categorize "the ceramic industry" into advanced technical ceramics and traditional ceramics (Figure 1). However, those in the industry recognize that the "traditional" industries, such as refractories and glass, produce highly engineered, innovative products that arguably qualify as advanced technical ceramics.

Specifically, the global advanced technical ceramic market was valued at \$56.70 billion in 2015, according to a June 2016 analysis conducted by Grand View Research that looked internationally at product, application, and end-use projections through 2024.² The report covers markets for alumina, titanate, zirconate, and ferrite components (among other ceramic materials) in monolithic ceramics, ceramic coatings, and ceramic-matrix composites for electronic, automobile, machinery, environmental technologies, and medical applications.

"Numerous players are expected to increase their R&D expenditure to comply with growing demand from new applications, and most companies have been trying to improve their operations at a reduced cost, which in turn is expected to boost product market over the next eight years," the report states.

Another recent report from BCC Research estimates that the North American market alone for advanced technical ceramics was \$4.5 billion in 2015 and projects it will grow to \$6.7 billion by 2020, a compounded annual growth rate (CAGR) of 6.7% for the five-year span. Figure 2 shows how several sectors of the market are expected to contribute to the projected growth.³

The aerospace industry provides an illustration of how an industry drives significant revenues across its supply chain, including ceramics. According to one report, global sales of gas-turbine engines in 2015

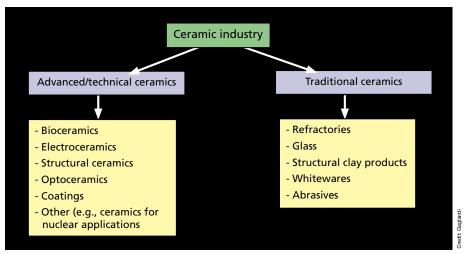


Figure 1. Typical categorization of the ceramic industry.

reached about \$39 billion. Projecting out to 2028, domestic and military aircraft are estimated to generate sales of \$1.07 trillion through 2028.⁴

Protective coatings—thermal barriers and environmental barriers—comprise one critical component of gas-turbine engines that use ceramic materials. The global ceramic coatings market, which includes aircraft applications, is estimated to reach \$9.07 billion in 2020,⁵ with about \$1.9 billion contributed by the North American market.⁶ Also, GE-Safran's much-anticipated LEAP engine with a 3-D-built ceramic-matrix composite component was introduced in fall 2016. GE's website says the company already has booked more than 6,000 orders valued in excess of \$78 billion.⁷

In the future, new processes, such as additive manufacturing and polymerderived ceramics, will lead to novel materials and novel forms. The projected market for 3-D-printed ceramic components of \$131.5 million by 2021 reflects an industry continuing to learn how to use the technology. However, this projection represents a 29.6% CAGR, evidence of optimism in the industry for great opportunity.⁸ Function will follow form as applications emerge for monolithic, composite, porous, fiber, or coating form factors.

Newly established events and initiatives dedicated to furthering technological advances in functional ceramics have gained traction over the past few years, drawing attention to the field and industry growth. Now in its third year, Ceramics Expo has secured its place as the annual event in North America that brings together companies and organizations that produce and rely on ceramic technologies. The American Ceramic Society also created The Ceramic and Glass Industry Foundation in 2014 to attract, inspire, and train the next generation of ceramic and glass professionals.

These factors signal a vibrant industry, but what specifically is driving growth and what will the future bring? The following profile examines industry indicators in the United States, including employment and output projections, manufacturing trends, and current priorities for the federal budget in FY 2017 when it comes to clean energy, emerging technologies, and transportation. The profile also looks at two specific ceramic sectors and reports recent revenue for some of the industry's heaviest hitters.

Broader industry indicators signal mildly optimistic manufacturing forecast

The Institute for Supply Management (ISM) is a worldwide professional supply management organization that provides economic indicators through its monthly publication, Report on Business. Based on a survey of manufacturing supply executives across a variety of industries, the report provides a general measure of the state of manufacturing and nonmanufacturing industries in the U.S., quantified as a Purchasing Manager's Index (PMI).

Although the figures are U.S.-centric, global manufacturers follow PMI scores, because they provide a snapshot of the



Figure 2. Market segments expected to contribute to growth of the North American advanced technical ceramic market. Projected market values by 2020.³

overall economy and of the status of segmented industries. According to ISM, PMI scores "have been consistently accurate in indicating the direction of the overall economy in addition to the manufacturing and nonmanufacturing sectors."⁹ Scores are provided as a percentage—scores greater than 50% indicate expansion, whereas scores less than 50% signal contraction.

ISM's most recent manufacturing PMI registered 51.5% in September 2016, with reported growth in seven separate industries, including nonmetallic mineral products.¹⁰ Average PMI during the past 12 months is 50.3%, and average PMI during the past four years is 52.9% (Figure 3). ISM indicates that consistent PMI scores greater than 43.2% indicate overall economic expansion—by that measure, the latest score is the 88th consecutive month of expansion in the manufacturing sector, according to ISM.

To complement the ISM PMI scores, the U.S. Department of Labor's Bureau of Labor Statistics (BLS) tracks and publicly releases detailed economic information related to the U.S. labor market. This data-rich source of information provides overall and individual snapshots of metrics detailing employment and productivity for individual sectors, which can signal the overall health of those industries. Data come from the BLS Current Employment Statistics survey, which includes approximately 146,000 businesses and government agencies representing all 50 states.

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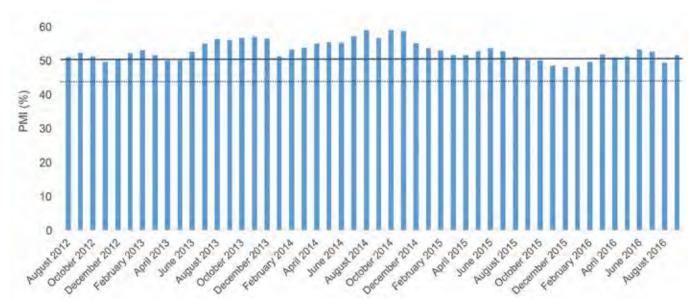


Figure 3. ISM U.S. manufacturing PMI scores from August 2012 to September 2016.¹¹ Scores greater than 50% (solid line) indicate expansion, whereas scores less than 50% indicate contraction. Consistent PMI scores greater than 43.2% (dotted line) indicate overall economic expansion.

BLS issues biennial data projections by industry, identifying sectors according to the North American Industry Classification System (NAICS) (see sidebar, page 21). According to statistics published in the December 2015 *Monthly Labor Review*, there is tempered optimism for the future: "With this set of biennial 10-year projections, the BLS presents a view of an economy that is returning to a more consistent growth path, but the growth is slower than the long-term trends that existed prior to the Great Recession."¹²

Overall, BLS predicts total U.S. employment will reach 160.3 million by 2024, representing a 0.6% CAGR. Productivity projections predict that overall U.S. output will reach \$34.6 trillion in 2024, a 2.2% average annual increase from 2014 figures. Output has increased on average 1.0% annually from 2004 to 2014.

BLS further breaks its employment and output statistics into four main areas: goods-producing sectors (excluding agriculture); service-providing sectors; agriculture, forest, fishing, and hunting; and nonagricultural self-employed. The goodsproducing sector is divided into mining, construction, and manufacturing.

Employment and output statistics for 2004–2014 and projections for 2014–2024 for the mining, construction, and manufacturing industries are shown in Table 1. Slow employment growth in mining is largely caused by uncertainty regarding future oil prices—increased horizontal drilling, hydraulic fracturing, and offshore exploration are expected to contribute to the increase in mining output.

The construction industry is predicted to add the most jobs to the goods-producing sector from 2014 to 2024, but will not reach prerecession levels, the report notes. Construction output, like construction employment, is expected to be fastest growing within the goods-producing sectors, with a growth rate that outpaces overall economic growth. Growth in residential and nonresidential investments is expected to contribute to the heightened

Table 1. BLS data on annual rates of change in employment and output for goods-producing sectors ¹²							
	Annual rate of change in employment, 2004–2014	Annual rate of change in output, 2004–2014					
Mining	4.9%	0.9%	2.1%	1.9%			
Construction	-1.3%	1.2%	-3.0%	2.8%			
Manufacturing	-1.6%	-0.7%	0.7%	1.9%			

output, with nonresidential investments finally getting back on track to surpass prerecession numbers by 2024.

Manufacturing jobs are projected to decline, but manufacturing output is expected to grow from 2014 to 2024. How can that be? According to the report, "Although manufacturing employment is projected to fall, real output in the manufacturing sector is expected to grow 1.9% annually to reach almost \$6.6 billion in 2024, up from more than \$5.4 billion in 2014. ... Increased productivity—because of automation, contract manufacturing, and a more efficient manufacturing process in most industries—will lead to more real output with fewer employees required."

In addition to the decrease in available skilled manufacturing jobs, the remaining jobs are shifting focus. Although this shift introduces challenges for skilled laborers, the changes could signal new growth opportunities for the manufacturing sector. The report continues, "Over the past few decades, manufacturing plants have become more automated, thus requiring skills that are more technical. For example, computer programmers and coders are needed by manufacturers, as are people to design and run the machines."

The manufacturing division within the goods-producing sectors is further

divided into specific manufacturing industries, again following NAICS code designations. NAICS code 327, manufacturing of nonmetallic mineral products, covers much of our industry's outputs (see sidebar for more information).

Nonmetallic mineral product manufacturing

Manufacturing of nonmetallic mineral products experienced an annual decline of 1.3% in output from 2004 to 2014, but is expected to grow at a rate of 1.8% from 2014 to 2024. All four divisions within this category—clay product and refractories; glass and glass products; cement and concrete products; and lime, gypsum, and other products—are expected to increase output from 2014 to 2024, with the greatest gain in cement and concrete product manufacturing at a 2.5% annual rate of change.

The U.S. Census Bureau's Annual Survey of Manufactures provides estimated statistics for U.S. manufacturing establishments based on a sample survey of approximately 50,000 establishments selected from the most recent Economic Census.¹³ The most recent survey from 2014 provides, among much more data, statistics on the total value of products shipped, broken down by NAICS codes.

Total value of shipments of nonmetallic mineral products overall grew 26% from 2010 to 2014. Values of clay products and refractories shipments increased 15%; glass and glass products increased 20%; cement and concrete products increased 25%; and lime, gypsum, and other products increased 45% (Figure 4).

Manufacturing in selected end-use industries

Typically ceramic and glass materials are used in complex systems, such as automobiles or buildings, or are used to manufacture other goods. Refractories are an example of the latter. Thus, trends in end-use industries can have important implications for ceramic and glass industry sectors. What follows are indicators for few key industries—not a comprehensive list of end-use industries—that utilize a large proportion of ceramic and glass materials.

Manufacturing of computer and

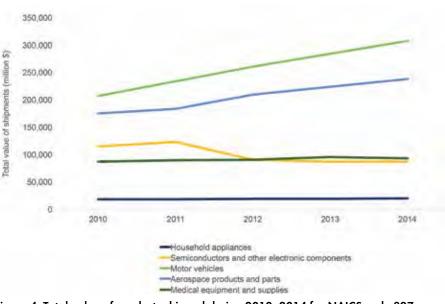


Figure 4. Total value of products shipped during 2010–2014 for NAICS code 327, manufacturing of nonmetallic mineral products. Data are from the U.S. Census Bureau's most recent Annual Survey of Manufactures.¹³

electronic products (NAICS code 334) experienced an annual increase of 2.6% in output from 2004 to 2014 and is expected to continue to grow at that rate from 2014 to 2024.

Manufacturing of electrical equipment, appliances, and components (NAICS code 335) experienced a decline of 0.7% in output from 2004 to 2014 and is expected to grow at a rate of 2.1% from 2014 to 2024.

Manufacturing of transportation equipment (NAICS code 336) experienced an increase of 1.9% in output from 2004 to 2014 and is expected to grow at a rate of 1.3% from 2014 to 2024.

Manufacturing of miscellaneous products (NAICS code 339) experienced an annual growth of 3.3% in output from 2004 to 2014 and is expected to continue to grow at that rate from 2014 to 2024. Manufacturing of medical equipment and supplies, which includes orthopedic devices and dental prosthetics, falls within this catch-all category and is expected to grow at an annual rate of 3.3% from 2014 to 2014, slowing from a growth rate of 5.6% from 2004 to 2014.

Data on total shipments for each of these categories during the past five years can be found in Figure 5.

Sales data provide a sense of scale for the industry

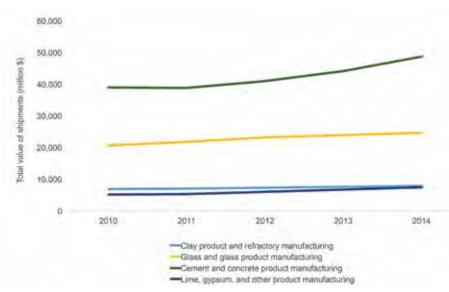
Although general manufacturing and industry trends provide a broader context, such high-level metrics also can gloss over more nuanced trends within a particular sector, and many metrics and indexes exist to measure industry and business health.

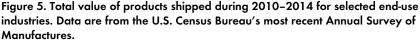
Here we focus on sales data for select companies to provide a sense of the scale of industry contributing to the sectors' overall commerce. Care should be taken to not over-interpret these data. For example, sales data at most companies reflect revenues from sales of more than ceramic and glass products. Also, sales data exclude the cost of doing business and similar considerations. Data sources and its timeliness are noted in the tables. Most data are from Mergent Intellect, formerly known as Dun & Bradstreet's Million Dollar Database and company websites.

Table 2 presents sales data and market drivers for select ceramic and glass manufacturing companies. Large companies, such as GE and 3M, are as much end users as suppliers, and their highly diversified product portfolios generate massive revenues. However, the table also shows the broad range of contributors to the industry's commerce. Even small companies like Du-Co Ceramics and Superior Technical Ceramics are multi-million dollar enterprises.

In addition, we highlight two industries, each broad in its own right—electroceramics and refractories. The summaries that follow provide a snapshot glimpse of the sectors, their corporate composition, and the industry's drivers.

Ceramics and glass—Materials for diverse industries





This market profile is representative, but not comprehensive. Inevitably, some companies are not included that could have been. Thus, we invite readers to suggest companies or sectors to profile in the future (see author contact information on p. 20).

Electroceramics

The electroceramics segment of the

advanced technical ceramic industry manufactures ceramic piezoelectrics, capacitors, insulators, resistors, and conductors. Integration of electronics into systems such as automobiles, energy technologies, medical devices, buildings, appliances, industrial equipment, and the Internet of Things drive demand for better, faster, cheaper, lighter electronics, and in turn, drive the electronic compo-

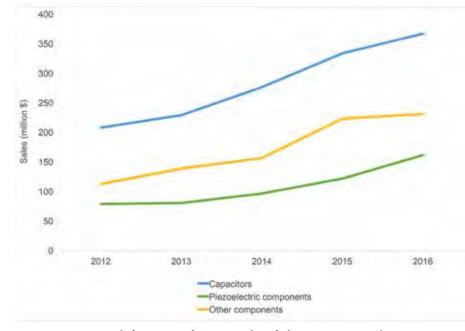


Figure 6. Rising trends for Murata five-year sales of electronic parts and components. Data are for FY ending March 31 and are based on an exchange rate of ¥1= \$0.0096 on 10/6/2016. Source: www.murata.com/en-us/about/ir/financial/products (accessed 10/6/2016).

nents industry. Arguably, batteries and energy conversion devices, such as fuel cells, could be included in this category, but those sectors are excluded for this profile even though some companies also produce energy conversion and storage technologies.

The number of components manufactured is staggering-one report estimates Chinese manufacturers made 1.98 trillion multilayer ceramic capacitors (MLCCs), which fell short of meeting an estimated demand for more than 2 trillion MLCCs in 2015 in China alone.¹⁴ Market research analysts value the ceramic capacitor global market at \$7-\$10 billion in 2015¹⁵ and the piezoelectric market at more than \$20 billion in 2015.¹⁶ Note that the piezoelectric market includes piezoceramics as well as polymer- and composite-based devices. The market for spark plugs, an insulation application, is expected to climb to \$2.8 billion in value by 2019 at a CAGR of 5.26%.17

Table 3 summarizes sales and key business drivers for select companies in the sector. Sales data show the top three companies—all Japan-based—generate revenues of \$5-\$10 billion yearly. Samsung Electro-Mechanics is gaining on its next competitor, TDK, and is reported to have passed it in MLCC sales since 2009.¹⁴

The business drivers for these largest companies—Kyocera, Murata, TDK, and Samsung—come from applications in telecommunications, automobiles, sensors, industrial equipment, electronic devices, and medical technology. Several major brands are owned by larger companies. For example, TDK owns EPCOS, and Kyocera owns AVX and its subsidiary American Technical Ceramics.

Murata Manufacturing Company (Kyoto, Japan) provides an example of the magnitude of the business in this sector. Murata dominates the MLCC market with a 22.8% share in 2015 according to a Research and Markets report.¹⁴ Sales data (Figure 6) from the company's 2015 annual report show how products within its portfolio have generated increasing revenues during a five-year span.¹⁸

Other companies listed in Table 3 report significant revenues—sales in the

Table 2. Sales data for co	ompanies se	lling, using, o	or developing	advanced technical ceramic components
Company	Location	Sales, \$M	Data recency	Description
General Electric Co	U.S.	117,386	July 2016	GE supports its Global Research Center with a budget of ~\$5B. Technologies include aircraft engines, locomotives and other transportation equipment, lighting, electric control equipment, generators and turbines, and medical imaging equipment. Businesses include Aviation; Capital; Digital; Energy Connections; Healthcare; Lighting; Oil & Gas; Power; Renewable Energy; and Transportation.
Saint-Gobain Group	France	43,500	October 2016	Operates in 66 countries. Sales is divided into: 48% building materials distribution; 24% innovative materials (flat glass and high-performance materials); 28% construction products (plaster, insulation, tile adhesives, industrial mortars, cast iron pope, wall facings, and siding).
3M Co	U.S.	30,274	July 2016	Five operating segments: Industrial; Safety and Graphics; Electronics and Energy; Health Care; and Consumer. Business drivers are healthcare, electronics, and alternative energy.
• Ceradyne, a 3M Co	U.S.	543	May 2016	Owned by 3M. One-third of sales are to U.S. government and its agencies. Applications include armor for military helicopters, missile nose cones, body armor and helmets, diesel engine components, ceramic industrial products, solar glass products, and orthodontic brackets. Business drivers are defense, automotive, and aerospace.
PPG	U.S.	15,330	July 2016	Manufactures coating materials, fiberglass, and flat glass at 156 manufacturing facilities in 70 countries. Business drivers are aerospace, architecture, automotive, industrial equipment, consumer electronics, and specialty coatings.
Kyocera Corp	Japan	12,645	June 2016	Industries served include telecommunications, automotive, medical, electronics, and industrial manufacturing, among others. In addition to manufacturing components, the company produces electronic products, such as wireless phones and office equipment. Business drivers are sensors, smartphones, energy, electronics, and LEDs.
Corning Inc	U.S.	9,111	July 2016	Operates 90 facilities in 17 countries. Business drivers are consumer electronics, telecommunications, automotive, and life science.
Owens-Illinois	U.S.	6,156	July 2016	Manufactures glass containers in more than 10,000 varieties for customers in 85 countries. Business drivers are food/ beverage and pharmaceutical.
Federal-Mogul Corp	U.S.	6,117	April 2016	U.Sbased business generates 38% of total revenue, followed by German market with 24% of sales. Products include pistons, spark plugs, ignition coils, bearings, gaskets, seals, and brake pads. Business drivers inlcude automotive.
Owens Corning	U.S.	5,350	July 2016	Manufactures glass fiber insulation, roofing, and fiberglass for composites. Business drivers are transportation, industrial, infrastructure, marine, wind energy, and consumer products
NGK Spark Plug Co Ltd	Japan	3,275	July 2015	Automotive parts, such as spark plugs and automotive oxygen sensors, generate more than half of sales. Balance comes from sales of semiconductor and electronic components; medical products, such as artificial bone and oxygen concentrators; industrial components; and cutting tools. Business drivers are automotive and orthopedics.
Osram GmbH	Germany	2,078	July 2016	Business drivers are lighting, LEDs, photonics, lasers, and automobiles.
Morgan Advanced Materials PLC	U.K.	1,375	July 2016	Organized into two divisions — Thermal Products; and Carbon and Technical Ceramics — encompassing five business units. The Composites and Defence Systems unit is outside the division structure. Business drivers are electronics, energy, healthcare, industrial equipment, petrochemical industry, defense, and transportation.
Ferro Corp	U.S.	1,075	June 2016	Produces glazes, colorants, pigments, and enamels. Business drivers are paint and coatings, chemicals, auto exteriors, and appliances.
CoorsTek Inc	U.S.	954	June 2016	CoorsTek also offers materials testing, analytical chemistry, custom manufacturing, precision machining, and other services. Business drivers are automotive components, energy equipment, medical devices, and high-performance machinery.
CeramTec GmbH	Germany	538	April 2016	Industries include automotive parts, clay refractories, ceramic fiber, electronic equipment housewares, and pottery.
Rauschert Heinersdorf— Pressig GmbH	Germany	159	April 2015	Products include technical ceramics, functional components, ignition systems, and heating elements.
Superior Graphite Co	U.S.	94	May 2016	Manufactures graphite and silicon carbide for various applications, including batteries, fuel cells, machine lubricants, technical ceramics, and printer toner.
Du-Co Ceramics Co	U.S.	35	May 2015	Manufactures technical ceramic components of steatite, cordierite, porcelain, magnesium oxide, alumina, mullite, and forsterite. Product lines include ball and socket beads, bushings, thermocouple tubes, ceramic tape, crushable ceramics, and custom parts.
Superior Technical Ceramics	U.S.	34	May 2016	Custom manufacturer of technical ceramic components. Applications include aerospace, fuel cells, optics, medical, defense, oil and gas, paper and pulp, scientific instruments, semiconductor processing, and telecommunications.
McDanel Advanced Ceramic Technology LLC	U.S.	24	January 2015	Manufactures ceramic tubes, rods, crucibles, labware, and components of high-purity alumina, mullite, fully stabilized zirconia, and SiAION. Applications include protective atmospheres, corrosive environments, and high temperatures.
Amedica Corp	U.S.	19	July 2016	Manufactures joint and spine implants made of silicon nitride.
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Data are from Mergent Intellect, formerly Dun & Bradstreet Million Dollar Database (accessed 9/27/2016), and websites [http://qz.com/355116/ges-5-billion-annual-rd-budget-is-transforming-advanced-manufacturing-and-theindustrial-internet/ (accessed 10/5/2016); www.saint-gobain.com/en/group/about-saint-gobain (accessed 10/5/2016; currency converted as 1.10E=51); http://solutions.3m.com/wps/portal/3M/en_US/3M-Company/ Information/Profile/Performance/ (accessed 10/16/16); http://www.morganadvancedmaterials.com/en-gb/about-us/strategy/ (accessed 11/1/16); http://www.du-co.com (accessed 11/1/16); http://www.ceramics.net. (accessed 11/1/16); http://www.mcdanelceramics.com/about (accessed 11/1/16); http://investor.ppg.com/~/media/Files/P/PPG-IR/financial-information/annual-reports/2015-annual-report.pdf (accessed 11/1/16);

Ceramics and glass—Materials for diverse industries

Table 3. Sales revenues for select companies in the electroceramics sector (data represent total revenues across entire product lines, including non-electroceramic products)

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Company	Location	Sales, \$M	Data recency	Description
Kyocera	Japan	\$12,645	June 2016	Electronic and semiconductor components for telecommunications, auto, medical, electronics, and industrial manufacturing.
• AVX Corp	U.S.	\$1,196	June 2016	Kyocera owns controlling stake. Produces passive electronic components for autos, copiers, hearing aids, locomotives, and cell phones. Business drivers are transistors and ultracapacitors.
 American Technical Ceramics Co 	U.S.	\$148	June 2016	Subsidiary of AVX, a Kyocera company. Manufactures single layer and MLCC for cell phones, instrumentation, radar, broadcast satellites, military, and aerospace applications. Business drivers are transistors, electrical connectors, ultracapacitors, and semiconductor supply chain.
Murata Manufacturing Co Ltd	Japan	\$10,348	May 2016	Manufactures passive electronic components, primarily capacitors. Business drivers are sensors and electronic devices.
TDK Corp	Japan	\$9,847	July 2016	TDK owns EPCOS. Products include ferrite magnets, transformers, and MLCC. Business drivers are sensors and electronic devices. Has operations in 30 countries; 90% of revenue is generated outside Japan.
• EPCOS AG	Germany	\$2,487	May 2016	Owned by TDK. Produces capacitors, including MLCC, ceramic components, ferrites, inductors, and resistors. Business drivers are sensors and electronic devices.
Samsung Electro-Mechanics	South Korea	\$5,913	October 2016	Manufactures MLCC, passive electronic components, and more.
NGK Insulators Inc	Japan	\$3,724	June 2016	Business drivers are electric power and semiconductors.
NGK Spark Plug Co Ltd	Japan	\$3,275	July 2015	Produces spark plugs, auto sensors, and semiconductor and electronic compo- nents. Technical Ceramics segment produces medical products, industrial components, and cutting tools. Business drivers are automotives and orthopedics.
Taiyo Yuden Co Ltd	Japan	\$2,054	May 2016	Business drivers are transistors, capacitors, and semiconductor industry.
Vishay Intertechnology	U.S.	\$2,300	August 2016	Manufactures passive electronic components, including inductors, capacitors, and resistors, and also semiconductor components, such as diodes, MOSFET, and solid state power control switches. Business drivers are sensors, semiconductor applications, LEDs, and lighting.
Nippon Chemi-con Corp	Japan	\$1,012	August 2015	Manufactures electronic capacitors and ultracapacitors. Business drivers are personal computers, printed circuits, and microelectronics.
Yageo Corp	Taiwan	\$847	July 2016	Manufactures resistors, MLCC, and ferrites. Business drivers are capacitors, radio frequency applications, and telecom munications.
KEMET Corp	U.S.	\$735	November 2015	Produces 35 billion capacitors/year for aerospace, automotive, communication systems, computers, and military equipment. Business drivers are transistors, semiconductor suppply chain, electrical connectors, and ultracapacitors.
KOA Corp	Japan	\$435	March 2016	Manufactures resistors, thermistors, inductors, fuses, varistors, and LTCC substrates. Applications include automotive, telecommunication, home appliances, consumer electronics, and energy efficient devices. Business drivers are capacitors, ultracapacitors, semiconductors, and power transmission.
Morgan Technical Ceramics	U.K.	\$300	October 2016	Segment of Morgan Advanced Materials that produces high-voltage capacitors, rf capacitors, piezoceramics, and other technical ceramics.
Piezo Kinetics Inc	U.S.	\$6	June 2015	Manufacturers piezoceramics.
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Data are from Mergent Intellect, formerly Dun & Bradstreet Million Dollar Database (accessed 9/27/2016), and company websites [www.murata.com/en-us/about/ir/financial/products (accessed 10/6/2016); www.samsungsem. com/global/news/index.jsp?artId=1396649 (accessed 10/4/16); www.koaglobal.com/ir/highlight (accessed 10/30/16; currency converted 10/30/16); www.morganadvancedmaterials.com/en-gb/investors/financialhighlights/divisional-performance/ (accessed 10/4/16; currency converted 10/6/2016)].

billions will always be impressive—but clearly they face challenging competition from the industry's giants. Business drivers for these "smaller" companies include semiconductor and electronic devices, electric power, automotives, sensors, telecommunications, and defense.

Refractories

It has been said that if you are in the refractories business, you are in the steel business. The iron and steel industry consumes about 60% of global refractory production, with the rest serving the glass, cement, nonferrous, energy, and petrochemicals industries (Figure 7).¹⁹

The combined refractories and clay building materials industry generates revenues and has a consolidated supplier base that suggest a delayed response to the Great Recession. Figure 8 compares 10-year trends for revenues and the number of companies operating under NAICS code 327120, "clay building material and refractories manufacturing."

At the industry's peak in 2009, 317 companies operated in this sphere and generated almost \$95 billion in sales, according to Gale Business Insights database.²⁰ By 2013, the number of active companies dropped to 80 worldwide, with annual global revenues of almost \$14 billion.

Data from 2014 appear to point to the beginning of a recovery for the industry, although further consolidation looks imminent with the merger between RHI and Magnesita to form RHI Magnesita.²¹ The deal—announced October 5, 2016—will be effective in 2017 if approved by government regulating agencies. The new company would be based in The Netherlands.

The global impact of the Great Recession, however, is only part of the story. Advances in refractories engineering have led to increased efficiency and longer furnace campaigns for steelmaking. To illustrate, in a 2014 ACerS Bulletin article, Charles Semler reported refractory consumption from 1950 to 2010 dropped from 61 kg/(ton steel) to 15 kg/(ton steel)—some steel plants even achieved extreme efficiencies of 7–8 kg/(ton steel).²² Trends in refractory engineering include an increase in the use of unshaped monolithic refractories over brick and improved castables, along with improved shotcasting and gunning processes. Nonetheless, overall consumption of refractories by the iron and steel industry is increasing (Table 4).

As the high-volume carbon-steelproducing industry gains efficiency, longer-lasting refractories means slower turnover for refractory producers. In contrast, alloyed steels and other highquality materials drive development of refractories engineered to specific needs. In a recent paper, Buhr et al.²³ note that more than 2,000 grades of steel are on the market—each with properties engineered for specific applications. These steel operations call for refractories engineered for high-performance in critical areas, such as ladle linings, purge plugs, and sliding gates.

New technologies in refractory engineering also push industry innovation. The

dusty refractories plants of old are giving way to modern plants with the ability to engineer customized refractory solutions and robotic production lines. Future refractories will be highly engineered, high-performance materials systems, some with functionality not imagined previously. Emerging ideas include refractories with shape-engineered aggregate, nanoparticle additions to control pore-space properties, self-healing refractories, and refractories that can "clean" steel at interfaces.

Table 5 lists select refractory producers worldwide. A handful of companies achieve yearly revenues in the billion-dollar neighborhood of \$924 million to more than \$5 billion. Other companies generate revenues in the hundreds of millions. Interestingly, a fair number of smaller companies produce revenues in the tens of millions. The market also supports smaller companies (not listed) that post revenues less than \$10 million per year.

R&D top priority in FY 2017: Renewable energy and emerging technologies

Beyond output, employment, and sales data, another important measure of the health and trajectory of an industry is the amount of money diverted to R&D. The National Science Foundation (NSF) tracks business R&D expenditure data with its Business Research and Development and Innovation Survey (BRDIS). BRDIS provides data on domestic and global R&D expenditures at for-profit businesses based on a survey conducted annually by the U.S. Census Bureau in accordance with NSF's National Center for Science and Engineering Statistics.

Table 4. Refractory consumption rates per ton of steel ²⁰							
Year	Refractory demand (10 ⁶ metric tons)	Notes					
2000	30.4	Based on 25 kg/(ton steel) produced					
2012	32.6	Based on 20 kg/(ton steel) produced					
2012	43.4	Based on 15 kg/(ton steel produced)					
2016	46.3						
2020	55						

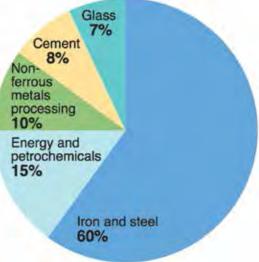


Figure 7. Major industries that consume global refractory production.¹⁹

The latest report, issued this year, details statistics from 2013.

Dollars spent on R&D at businesses worldwide in 2013 greatly varied by sector, with semiconductor and other electronic component manufactur-

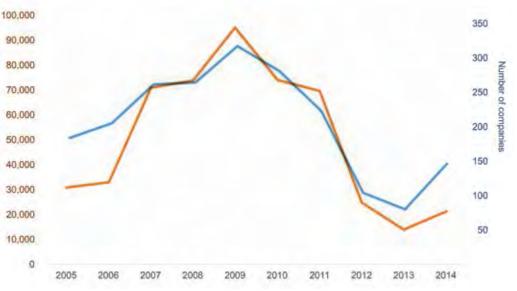


Figure 8. Ten-year sales trend (red line) for companies active in clay building material and refractories manufacturing, which includes nonrefractory manufacturers, such as brick and clay-tile manufacturers. Sales revenue reflects the trend for number of companies active in the sector (blue line). These data include products such as architectural brick, clay roof tile, and clay pipe, and exclude nonclay refractories.¹⁸

S

Revenue (million

Ceramics and glass—Materials for diverse industries

ing spending more than \$40 billion (Figure 9).²⁴ Aerospace product and parts manufacturing and motor vehicle manufacturing also spent tens of billions

Table 5. Cales a

of dollars on R&D, reflecting their vast sizes and market values. Perhaps surprisingly, R&D for medical equipment and supplies manufacturing is slightly more than \$10 billion, although this category accounts only for equipment, supplies, and implants for medical, dental, surgical, and ophthalmic areas. Many NAICS

Company	Location	Sales, \$M	Recency	Notes
HarbisonWalker Intl	U.S.	500— 1,000	June 2016	Formerly known as ANH Refractories Co, the company rebranded itself in January 2015.
RHI AG	Austria	1,882	Not available	Proposed merger with Magnesita Refratarios S/A in 2017 to form RHI Magnesita.
Minerals Technologies Inc	U.S.	1,798	May 2016	
Minteq International Inc	U.S.	303	September 2015	Parent company is Minerals Technologies Inc.
Imerys S.A.	France	1,374	October 2016	
C-E Minerals Inc	U.S.	355	August 2015	A subsidiary of Imerys.
Magnesita Refratarios S/A	Brazil	1,284	April 2016	Proposed merger with RHI AG in 2017 to form RHI Magnesita.
POSCO Chemtech Co Ltd	South Korea	1,228		Parent company is POSCO.
GrafTech International Ltd	U.S.	1,085	April 2016	Parent company is Brookfield Asset Management Inc.
Krosaki Harima Corp	Japan	984	July 2015	
Shinagawa Refractories Co Ltd	Japan	924	Not available	
 Isolite Insulating Products Co Ltd 	Japan	122	February 2016	Parent company is Shinagawa Refractories Co Ltd.
Saint-Gobain Ceramics & Plastics Inc	U.S.	845	July 2015	Parent company is Saint-Gobain Abrasives, one of 14 subsidiaries of the High Performance Materials segment of Compagnie de Saint-Gobain.
Corhart Refractories Corp	U.S.	103	March 2015	Parent company is Saint-Gobain Ceramics & Plastics.
Morgan Thermal Ceramics	U.K.	484	December 2015	Parent company is Morgan Advanced Materials.
Refratechnik Holding GmbH	Germany	446	Not available	Parent company is Alexander—Tutsek—Stiftung.
Unifrax I LLC	U.S.	438	May 2016	Parent company is American Securities LLC.
Chosun Refractories Co Ltd	South Korea	410	Not available	
Korea Refractories Co Ltd	South Korea	243	September 2014	
Almatis GmbH	Germany	230	December 2015	Parent company is Almatis Holdings GmbH.
Goodwin PLC	U.K.	187	July 2016	
Yotai Refractories Co Ltd	Japan	183	January 2015	
Resco Products Inc	U.S.	182	May 2016	
CFS Group Inc	Canada	119	December 2014	Parent company is Ajawak Investments Ltd.
Allied Mineral Products Inc	U.S.	96	August 2015	
Mino Ceramic Co Ltd	Japan	85	August 2016	
Nippon Crucible Co Ltd	Japan	68	Not available	
Magneco/Metrel Inc	U.S.	66	Jun 2016	
Alsey Refractories Co	U.S.	55	Not available	
Riverside Refractories	U.S.	52	Not available	Parent company is Riverside Clay Co.
Plibrico Co LLC	U.S.	35	Not available	
Minco Inc	U.S.	30	October 2015	Parent company is Ceradyne, a 3M Co.
Zircoa Inc	U.S.	24	November 2015	
Christy Refractories	U.S.	24	Not available	Parent company is O'Brien Industrial Holdings LLC.
Reno Refractories	U.S.	16	Not available	
	0.5.	10		//////////////////////////////////////

Data are from Mergent Intellect, formerly Dun & Bradstreet Million Dollar Database (accessed 9/27/2016), private communications, and company websites [www.imerys.com/scopi/Group/ImerysCom/imeryscom.nsf/pagesref/ REBA-A9LL9Z/Sfile/RA_Imerys_2015_VA.pdf (accessed 10/31/16; currency conversion calculated 10/31/16); www.morganadvancedmaterials.com/en-gb/investors/financial-highlights/divisional-performance/ (accessed 10/4/16)]. industry codes cross-reference with other coding areas, indicating that the coding divisions imperfectly divide markets.

In addition to R&D dollars spent within industry, government allocation of federal R&D spending is another metric to examine the health of particular sectors. On September 30, 2016, the United States Congress passed a continuing resolution through December 9 to delay definitive FY 2017 spending decisions until after the November presidential election.²⁵

The Obama Administration released its R&D budget proposal for FY 2017 in February, highlighting the need to prioritize funds to further clean energy and climate initiatives. However, increased spending did not span all science-related programs. Agencies including NSF received limited discretionary increases, and the plan recommends that billions of dollars be slashed from National Institutes of Health (NIH) and National Aeronautics and Space Administration (NASA) budgets.

Staring down the barrel of the current appropriations cycle, President Obama and Congress did not have much fiscal latitude. In its recent budget analysis, American Association for the Advancement of Science (AAAS)²⁶ reports in a recent FY 2017 appropriation summary that "discretionary spending—the part of the budget adjusted annually by appropriators, and the source of most federal science funding was slated to be held flat at \$1.07 trillion, under the second and final year of

the Bipartisan Budget Act." Science and technology agencies currently face an uncertain budgetary future while Congress hashes out federal spending details from now through the end of the year. Although the financial outlook appears hazy, AAAS reports that with a "complete set of twelve appropriations bills already through committee, and appropriators' decisions so far will factor into omnibus negotiations later."

But, according to the latest AAAS estimates, the House

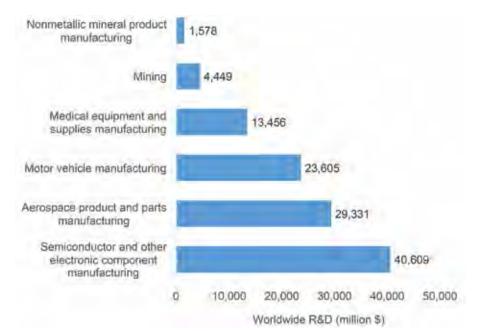


Figure 9. Dollars spent on R&D at worldwide businesses in 2013. Data are from the 2013 Business Research and Development and Innovation Survey.

and Senate would provide moderate increases to federal R&D overall in FY 2017—the House would provide a \$3.1 billion or 2.1% increase for R&D above FY 2016 levels, while the Senate would provide a \$4.7 billion or 3.2% increase. Both amounts would represent real-dollar increases given at a 1.8% rate of inflation which would actually outpace spending levels outlined in Obama's budget proposal.

Table 6 presents a high-level two-year snapshot of funding for some of the largest science agencies from FY 2015 to FY 2017, including the numbers proposed in Obama's FY 2017 R&D budget, according to AAAS.²⁷

Clean energy and environmental research get top billing. This includes the Department of Energy's programs. Obama's budget plan requests \$16.8 billion for clean energy research and renewable energy programs—the highest increase in federal R&D spending—up 15.07% from FY 2016. Interior and environment R&D spending, which includes the Environmental Protection Agency's programs and initiatives, comes in second with a request for \$2.1 billion—up 5.0% from FY 2016.

More money for national defense also is a priority. This includes the Department of Defense (DOD) science and technology initiatives. The Obama administration requests \$73.6 billion for DOD science and technology R&D in FY 2017–up 1.9% from FY 2016.

Labor, health, and human services, and education could take a hit. This

Department/agency	FY 2015	FY 2016	FY 2017	Change FY 2016–FY 2017		
	actual (billion \$)	estimates (billion \$)	Obama request (billion \$)	Billion \$	%	
Energy and water Includes DOE	14.5	14.6	16.8	2.2	15.07	
Interior and environment Includes EPA	2.0	2.0	2.1	0.1	5.0	
Defense Includes DOD Science & Technology	66.4	72.2	73.6	1.4	1.9	
Labor/HHS/Education Includes NIH	30.4	32.2	31.3	-1.0	-2.8	
Commerce/justice/science Includes NSF, NASA, ARPA-E, and NIST	19.0	21.4	20.3	-1.1	-5.14	

Ceramics and glass—Materials for diverse industries

includes NIH programs. Obama's budget plan requests \$31.3 billion for labor, health, and education initiatives—down 2.8% from FY 2016.

Broad cutbacks could be imminent for commerce, justice, and science. This includes programs within the NSF, NASA, Advanced Research Projects Agency-Energy (ARPA-E), and National Institute of Standards and Technology. Obama's budget plan requests \$20.3 billion for R&D in these areas—down 5.14% from FY 2016.

According to a fact sheet published in February by the White House,²⁸ Obama's budget proposal specifically includes \$512 million for NSF research in conversion, storage, and distribution of diverse power sources and the science and engineering of energy materials. In July, NSF announced it will invest more than \$400 million over the next seven years to support fundamental wireless research to develop platforms for advanced wireless research in support of the White House's Advanced Wireless Research Initiative.²⁹

Obama's budget proposal also requests \$350 million in Mission Innovation discretionary funding for DOE's ARPA-E, which supports transformational applied clean energy R&D across a wide array of technologies; and \$348 million for clean energy research at NASA in revolutionary aircraft technologies and configurations to facilitate development of fuel-efficient, low-carbon-emitting aircraft.

Of course, these numbers are not set in stone. Congress will likely increase R&D spending in fiscal 2017 before year's end, according to AAAS. And Congress is on track to increase federal spending for R&D by at least \$3.1 billion in FY 2017 over the previous year, despite the fact that overall federal discretionary spending is slated to remain relatively flat, according to the latest AAAS analysis of federal spending programs.

About the authors

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Resources

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NAICS CODES—WHAT DO THEY MEAN?

The North American Industry Classification System (NAICS) divides business establishments by industry to collect, analyze, and publish statistical data related to the U.S. economy. NAICS was adopted in 1997 to replace the Standard Industrial Classification (SIC) system. Pertinent codes for the ceramic and glass industries, including selected relevant end-use industries, are described below.

327—Nonmetallic mineral product manufacturing

Includes establishments that manufacture brick, refractory, ceramic, glass, cement, concrete, lime, gypsum, and other nonmetallic minerals and their respective products. This general classification is further broken down into more specific subsectors.

3271—Clay product and refractory manufacturing

Includes establishments engaged in forming or processing pottery, ceramics, clay or ceramic plumbing fixtures, clay or ceramic electrical fixtures, clay and nonclay refractories, ceramic tile, structural clay tile, brick, and other structural clay building materials.

3272—Glass and glass product manufacturing

Includes establishments that manufacture glass and glass products, including flat glass, pressed and blown glass and glassware, and glass containers.

3273—Cement and concrete product manufacturing

Includes establishments that manufacture cement; ready-mix concrete; concrete pipe, brick, and block; and other concrete products.

3274—Lime and gypsum product manufacturing

Includes establishments that manufacture lime from limestone, dolomitic limestone, or other calcareous materials, such as coral, chalk, and shells; and companies that manufacture gypsum products, such as wallboard, plaster, plasterboard, molding, ornamental moldings, statuary, and architectural plaster work.

334—Computer and electronic product manufacturing

Includes establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products; and establishments that manufacture components for such products.

335—Electrical equipment, appliance, and component manufacturing

Broadly includes establishments that manufacture products that generate, distribute, and use electrical power. This includes establishments that produce electric lamp bulbs, lighting fixtures, and parts; small and major electrical appliances and parts; electric motors, generators, transformers, and switchgear apparatus; and devices for storing electrical power (e.g., batteries), for transmitting electricity (e.g., insulated wire), and wiring devices.

336—Transportation equipment manufacturing

Broadly includes establishments that manufacture equipment that transports people and goods. This includes establishments that manufacture equipment for road, rail, air, and water transportation, including operations that process metal or plastic parts into components and finished products and operations that assemble components into finished products.

339—Miscellaneous manufacturing

Includes industries that manufacture diverse products that do not readily fit into other NAICS manufacturing subsectors, such as establishments that manufacture medical equipment and supplies, jewelry, sporting goods, toys, and office supplies.

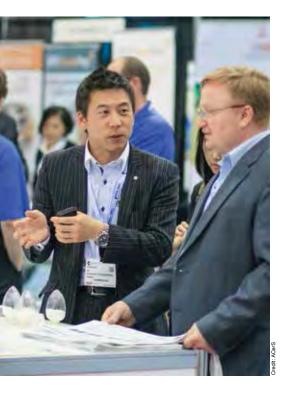
ceramics

Cleveland, OH

Advancing the use and adoption of technical ceramic and glass materials and

technologies

By Adam Moore



he third annual Ceramics Expo returns to Cleveland, Ohio, April 25–27, 2017, for the ultimate performance—a freeto-attend exhibition of everything new in the world of manufacturing and engineering for ceramic technologies and materials.

Following rapid industry developments in various user segments, Ceramics Expo 2017 again will be setting the agenda as the progressive hub for the industry. "We see a resurgence of interest in ceramics, and the Cleveland show is growing strongly and creating a real buzz in the industry," says Alan Rae, a veteran in the field of technical ceramics and current executive director of IncubatorWorks (Corning, N.Y.), which nurtures the development of entrepreneurial companies. "Once again, there is a great venue to

meet with colleagues and new contacts in the ceramic industry."

Ceramics Expo exhibitors will reveal all the burgeoning technologies behind novel, high-performance, precisely engineered components that are proving invaluable in many manufacturing sectors. The exhibition will present a wide offering, with everything from raw materials, preparation and processing equipment, advanced forming technologies, drying and conditioning, and energy-efficient firing and sintering to technical ceramic components, refractories, finishing, testing and analysis, and logistics.

In particular, this established, dynamic, and all-inclusive event aims to expand the knowledge base for senior executives, production controllers, quality managers, design engineers, materials scientists, and researchers. Ceramics Expo directly caters to the needs of key end-user industries, such as automotive, aerospace, medical, electronics, defense, energy, and environmental technologies.

Technical ceramics play a central role throughout the exhibit space, and many of the world's leading manufacturers are already preparing for groundbreaking presentations—including names such as **CoorsTek**, **Morgan Advanced Materials, Saint-Gobain, AOKEROLA, CeramTec**,

Save the date April 25 – 27, 2017!

YJC, McDanel Advanced Ceramic Technologies, Corning, Blasch, Akron Porcelain, Materion Ceramics, and IPS Ceramics. The whole gamut of ceramic and glass materials, from alumina to zirconia, will be featured, and visitors will find a smart materials solution for myriad complex applications—or someone very keen to come up with one!

For example, sponsor and exhibitor **Morgan Advanced Materials** (Berkshire, United Kingdom) has modified one of its innovative core processes to optimize microstructural control and enable enhanced machining. Morgan has reimagined its popular soft and hard piezoelectric ceramic materials to create highdensity variants, which comprise grain sizes of 2–4 µm and pore diameters of less than 3 µm.

Florence Godfrin, materials and applications engineer for Morgan, comments on the importance of this material innovation: "Like many of our material innovations, our defect-free PZT is a direct result of a real customer need, initiated back in 2013 when we were tasked with producing a PZT product that had high density and low porosity. From there, we used the same core manufacturing process to develop and research other material improvements across our soft and hard piezoelectric ceramics."

"The distinct characteristics of this new PZT material offer improved machinability and increased mechanical strength over conventional materials. This is especially beneficial for actuator applications, in which our finegrained, defect-free PZT can deliver improved reliability, higher driving fields, and lower driving voltages," Godfrin says.

"At this stage, we have manufactured a number of different small components using the new defectfree material, with a number of larger products set to benefit from the innovation in due course—which will increase piezoelectric properties as well as coupling of the parts to deliver real benefits in sonar and high-power applications."

Entering the exhibition hall, Ceramics Expo visitors will see the **CoorsTek** (Golden, Colo.) exhibit, which is set to showcase a unique range of products and solutions. CoorsTek recently announced a new process using a novel ceramic membrane to make direct, non-oxidative conversion of a gas to liquids possible for the first time-reducing cost, eliminating multiple process steps, and avoiding carbon dioxide emissions. The resulting aromatic precursors are source chemicals for insulation materials, plastics, textiles, and jet fuel, among other valuable products.

Direct activation of methane, the main component of biogas and natural gas, has been a key goal of the hydrocarbon research community for decades. "Consider the scale of the oil, gas, and petrochemicals industry today," says Jose Serra, professor with Instituto de Tecnología Química in Valencia, Spain, and leader of one of the scientific teams working alongside CoorsTek Membrane Sciences. "With new ceramic membrane reactors to make fuels and chemicals from natural gas instead of crude oil, the whole hydrocarbon value chain can become significantly less expensive, cleaner, and leaner."

"By using a ceramic membrane that simultaneously removes hydrogen and injects oxygen, we have been able to make liquid hydrocarbons directly from methane in a one-step process. As a bonus, the process also generates a high-purity hydrogen stream as a byproduct," Serra explains. "At a macro level it is really very simple-inexpensive, abundant gas goes in and valuable liquid comes out through a clean, inexpensive process. At a nanochemistry level, however, where molecules interact with catalyst and membrane at a temperature around 700°C, there were many factors to engineer and control in order to render just the specific molecules needed to make the new process work."

Blasch Precision Ceramics

(Albany, N.Y.), returning for the third year, recently launched Verkapse, a turnkey solution consisting of polyurethane-encased ceramic for

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applications involving hydrocyclone separators and other mineralprocessing equipment. Until now, this encapsulation step was completed by a subcontractor, using inserts sourced from ceramic manufacturers.

"Leveraging Blasch's decades of molding experience, coupled with significant advancements in CNC pattern making, the Verkapse process can deliver single-sourced, completely encapsulated assemblies in a few short weeks," says Jeff Bolebruch, vice president of sales at Blasch. "Our process has reduced cost and lead time for our customers while providing a product with greater overall durability and reliability."

ceramics

The mounting enthusiasm for an event that is high-tech but hands-on is a response to bringing all the right people together in an atmosphere conducive to fostering great relationships—and subsequently producing the right results. Bo-Kuai Lai, materials scientist at Lake Shore Cryotronics (Westerville, Ohio), gives top marks for the straightforward registration process, venue, access, and navigation inside Cleveland's I-X Center. "Exhibitors presented a wide spectrum of the ceramic industry, and I was able to find several companies that are related to my work," Lai says. "The expo helped me find a good ceramic substrate company, and we recently placed an

Correct as of 11/10/2016

EXHIBITOR LIST Subject to change

	J-				
Company	Booth	Company	Booth	Company	Booth
3DCeram	643	Ceramic Applications	642	Ferro Corp	808
Aadvanced Machinery Inc	618	Ceramic Industry	824	Ferro-Ceramic Grinding Inc	112
Acrow Machinery Mfg Co Ltd	912	CeramTec GMBH	923	FlackTek Inc	240
AdValue Technology LLC	816	Cerinnov Inc	219	Foam Expo	934
Advanced Abrasives Corp	1222	China Changsha Zhonglong Chemical Co Ltd	802	Formatec Ceramics	136
Advanced Energy Industries Inc	502	Cleveland Electric Laboratories	500	Fritsch USA Inc	422
Advanced Glass & Ceramics	237	Cleveland Vibrator Co	201	Gasbarre Products Inc	319
Advanced Superabrasives Inc	433	CM Furnaces Inc	430	Gasser & Sons Inc	834
Akron Porcelain & Plastics Co	528	Compass Wire Cloth	335	GeoCorp Inc	622
Alfred University	311	Control Concepts Inc	336	Glass Manufacturing Industry Council	312
Allied High Tech Products Inc	831	CoorsTek Inc	200	Glen Mills Inc	416
Allied Powers LLC	648	Corning Inc	532	Global - Pak Inc	417
Almatis Inc	224	Croda Inc	130	Goodfellow Corp	722
Alteo Gardanne	328	Crystex Composites LLC	410	H.C. Starck	230
AluChem Inc	316	Custom Processing Services	141	Haiku Tech Inc	538
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order with it with confidence."

Attendees also are set for another compelling Conference @ Ceramics Expo, an event establishing itself as a vibrant and dynamic platform for the exchange of ideas. Attendees will hear from experts with a deep knowledge of this industry; pick up on the latest ideas and developments in materials, manufacturing, and applications; and take away with them a toolbox fit for future strategies.

There already is great interest in next year's twin-track sessions, which again will be free to attend, making the experience fully accessible for everyone. "I think the free attendance gives it an egalitarian feel—I saw an 'unemployed ceramics engineer' and thought that was a great way to network and interact without the job-fair stigma," comments George Bedinger, a mineral commodity specialist at the United States Geological Survey's National Minerals Information Center (Reston, Va.).

The at-a-glance Conference @ Ceramics Expo agenda will be released soon. Visit ceramicsexpousa.com for the initial speaker roster and agenda outline.

Ceramics Expo 2017 is a must-attend event that will reflect the creativity, expertise, and optimism that abound in the ceramics and allied industries. There will be more than 300 exhibitors, and well in excess of 3,500 visitors are expected. **Preregister** for free now at ceramicsexpousa. com/visit/register.

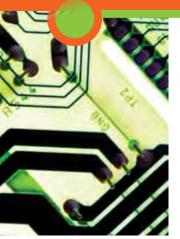


Interested in being involved in CEX 2017? Contact event director Adam Moore to discuss exhibiting, sponsoring, or attending at adam.moore@smartershows.com

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Sossina Haile

Walter P. Murphy professor of materials science and engineering, Northwestern University

Thermochemistry of redox active oxides and its relevance to solar fuel generation



Neil Alford

Professor of physical electronics and thin-film materials, vice-dean (research) faculty of engineering, Imperial College London

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SPONSORS



TENTATIVE SCHEDULE

Tuesday, January 17, 2017 Conference registration

Wednesday, January 18, 2017

Conference registration Plenary session I – Sossina Haile Coffee break Concurrent technical sessions Poster session set-up Lunch on own Student award finalist presentations Concurrent technical sessions Coffee break Poster session and reception Basic Science Division tutorial

Thursday, January 19, 2017

Conference registration Plenary session II – Neil Alford Coffee break Concurrent technical sessions Lunch on own Student award finalist presentations Concurrent technical sessions Coffee break Young Professionals reception Conference dinner

Friday, January 20, 2017

Conference registration Concurrent technical sessions Coffee break Lunch on own Concurrent technical sessions Coffee break Failure: The greatest teacher

WINTER WORKSHOP

ACerS Winter Workshop is designed for ceramic and glass students and young professionals from around the world. The workshop provides a combination of technical and professional development sessions and outstanding networking opportunities and concludes with a tour of the Kennedy Space Center. See **ceramics.org/ winter-workshop** for more details.

5 – 6:30 p.m.

Current as of October 14, 2016

7:30 a.m. – 6 p.m. 8:30 – 9:30 a.m. 9:30 – 10 a.m. 10 a.m. – 12:30 p.m. 12 – 5:00 p.m. 12:30 – 2 p.m. 12:45 – 1:50 p.m. 2 – 5:30 p.m. 3:30 – 4 p.m. 5:30 – 7:30 p.m. 7:45 – 9:45 p.m.

7:30 a.m. – 6 p.m. 8:30 – 9:30 a.m. 9:30 – 10 a.m. 10 a.m. – 12:30 p.m. 12:30 – 2 p.m. 12:45 – 1:45 p.m. 2 – 5:30 p.m. 3:30 – 4 p.m. 5:30 – 6:30 p.m. 7 – 9 p.m.

7:30 a.m. – 5:30 p.m. 8:30 a.m. – 12:30 p.m. 9:30 – 10 a.m. 12:30 – 2 p.m. 2 – 5:30 p.m. 3:30 – 4 p.m. 5:45 – 6:45 p.m.

FAILURE: THE GREATEST TEACHER

The vast majority of scientific literature and conference talks report positive results, but there is a lot to be learned from negative results and missteps as well. After the "successful" part of the meeting closes, come hear recognized leaders in the field discuss failure—and perhaps recount some of their most spectacular learning experiences—during a frank and friendly discussion in a relaxed atmosphere. Speakers and audience members alike are encouraged to check their egos at the door for this event that has turned into an EMA highlight. In addition to highlighted failures, this year we also will include contributed vignettes on failure and lessons from experience. If you would like to speak at this symposium, please contact Geoff Brennecka (geoff.brennecka@mines.edu).

TECHNICAL SESSIONS

- S1: Advanced electronic materials: Processing, structures, properties, and applications
- S2: Advanced processing for electronic and electrochemical systems: Crystals, films, and devices
- S3: Ceramic photonic materials and applications
- S4: Computational design of electronic materials
- S5: Energy sustainable optoelectronics and magnetoelectronics
- S6: Fundamentals to applications for the use of thermal energy for power generation and refrigeration
- S7: In situ experiments of microstructure evolution and properties
- S8: Interfaces and surfaces in energy-related ceramic materials
- S9: Interfaces in microstructural evolution: Structure, properties, anisotropy, and motion
- S10: Interfacial phenomena in multifunctional heterostructures: From theory to transport processes
- S11: Ion-conducting ceramics
- S12: 5G materials for the millimeter-wave revolution
- S13: Mesoscale phenomena in ceramic materials, nanostructures, and microstructures
- S14: Multifunctional nanocomposites
- S15: Superconducting materials and applications
- S16: Failure: The greatest teacher

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AWARD AND PLENARY SPEAKERS

m

JAMES I. MUELLER AWARD



Waltraud Kriven, professor, University of Illinois at Urbana-Champaign

Geopolymers: Structural inorganic polymers



BRIDGE BUILDING AWARD



Pavol Sajgalik, president, Slovak Academy of Sciences, and department head, ceramic department, Institute of Inorganic Chemistry, Slovak Academy of Sciences, Bratislava, Slovakia

Additive-free, hot-pressed silicon carbide ceramics— A material with exceptional properties

Sajgalik





Thomas J. Webster, chair and professor of chemical engineering, Northeastern University

Fifteen years of commercializing ceramic medical devices using nanotechnology

Webster PLENARY SPEAKER



Hirokazu Chazono, senior operating officer of inductor business, Taiyo Yuden Co. Ltd., Japan

MLCC/inductor trends and technological evolution

Chazono

ECD GLOBAL YOUNG INVESTIGATOR AWARD



Gang Liu, Shenyang National Laboratory for Materials Science, China

Multiscale designing of solar-driven photocatalysts

Liu

2017 Program Chair



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Shenyang National Laboratory for Materials Science Institute of Metal Research, Chinese Academy of Sciences, China

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MECHANICAL PROPERTIES OF CERAMICS AND GLASS SHORT COURSE

JANUARY 26, 2017 | 8:30 A.M. – 4:30 P.M JANUARY 27, 2017 | 8:30 A.M. – 4 P.M. LOCATION: HILTON DAYTONA BEACH RESORT AND OCEAN CENTER INSTRUCTORS: George D. Quinn, NIST, and Richard C. Bradt, University of Alabama

Make the most of your time at ICACC by registering for this two-day course that addresses the mechanical properties of ceramics and glasses for elastic properties, strength measurements, fracture parameters, and indentation hardness. For each of these topical areas, the fundamentals of the properties are discussed, explained, and related to the structure and crystal chemistry of the materials and their microstructure. Standard test methods are covered. Learn from industry experts with more than 80 years of combined experience. Register and get more information at ceramics.org/icacc2017shortcourse.









EXHIBITION INFORMATION

Showcase your organization at the premier international advanced ceramics and composites expo. Connect with decision makers and influencers in industry, government, and research and development fields. ICACC17 is your destination to collaborate with business executives, entrepreneurs, engineers, and R&D leaders around the world.

Exhibit hours: Tuesday, January 24, 5 – 8 p.m. Wednesday, January 25, 5 – 7:30 p.m.

Exhibit location: Ocean Center Arena, 101 North Atlantic Avenue, Daytona Beach, FL 32118

Exhibit space is filling up fast. To reserve your booth, visit ceramics.org/icacc2017 or contact Mona Thiel at 614-794-5834 or mthiel@ceramics.org.

Exhibitor Booth AdValue Technology 205 Alfred University 315 AVS 307 301 BCC Research Centorr 200 **CM** Furnaces 311 C-Therm 220 Gasbarre (PTX) 207 H.C. Stark 305 Haiku Tech 214 Harper International Corp. 317 J. Rettenmaier USA 201 Lithoz GmbH 107 **MEL** Chemicals 313 306 Microtrac Nanoscience Instruments 202 Netzsch Instruments 300 NGS Advanced Fibers 204 Noritake 302 320 Oxy-Gon Industries Inc. Reserved 216 Sonoscan 221 203 Superior Graphite **TA Instruments** 210 Tev Tech 212 **Thermal Wave** 321 Thermcraft Inc. 303 Verder Scientific (Carbolite) 206 Zircar Ceramics 304

SCHEDULE OF EVENTS

Sunday, January 22

Conference registration	2 – 7 p.m.
Welcome reception at Hilton	5:30 – 7 p.m.
Monday, January 23	·
Conference registration	7 a.m. – 6 p.m.
Opening awards ceremony and plenary session	8:30 a.m. – Noon
Companion coffee	9 – 10:30 a.m.
Lunch on own	Noon – 1:20 p.m.
Concurrent technical sessions	1:30 – 5:30. p.m.
Young Professional Network, Global Graduate Researcher Network student mixer	7:30 – 9 p.m.
Tuesday, January 24	
Conference registration	7:30 a.m. – 6 p.m.
Concurrent technical sessions	8:30 a.m. – Noon
Lunch on own	Noon – 1:20 p.m.
Concurrent technical sessions	1:30 – 5 p.m.
Exhibits and poster session A, including reception	5 – 8 p.m.
Wednesday, January 25	
Conference registration	7:30 a.m. – 5:30 p.m.
Concurrent technical sessions	8:30 a.m. – Noon
Lunch on own	Noon – 1:20 p.m.
Concurrent technical sessions	1:30 – 5 p.m.
Exhibits and poster session B,	5 – 7:30 p.m.
including reception	
Thursday, January 26	
Conference registration	7:30 a.m. – 6 p.m.
Concurrent technical sessions	8:30 a.m. – Noon
Mechanical Properties of Ceramics and Glass short course (Day 1)	8:30 a.m. – 4:30 p.m.
Lunch on own	Noon – 1:20 p.m.
Concurrent technical sessions	1:30 – 5:30 p.m.
Friday, January 27	
Conference registration	8 a.m. – Noon
Concurrent technical sessions	8:30 a.m. – Noon
Mechanical Properties of Ceramics and	8:30 a.m. – 4 p.m.
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Current as of October 14, 2016

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Glass short course (Day 2)



Marketing for Manufacturers Forum at

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Calendar of events

January 2017

18–20 EMA 2017: ACerS Electronic Materials and Applications – DoubleTree by Hilton Orlando Sea World, Orlando, Fla.; www.ceramics.org/ema2017

18–22 ACerS Winter Workshop 2017 – DoubleTree by Hilton Orlando Sea World, Orlando, Fla.; www.ceramics.org/winter-workshop

22–27 ICACC'17: 41st Int'l Conference and Expo on Advanced Ceramics and Composites – Hilton Daytona Beach Resort/Ocean Walk Village, Daytona Beach, Fla.; www.ceramics.org/icacc2017

February 2017

20–24 Materials Challenges in Alternative and Renewable Energy – Jeju, Korea; www.ceramics.org/ mcare2017

March 2017

29–30 53rd Annual St. Louis Section/ RCD Meeting – Hilton St. Louis Airport, St. Louis, Mo.; www.ceramics.org/ sections/st-louis-section

April 2017

24–25 6th Ceramic Business and Leadership Summit – I-X Center, Cleveland, Ohio; www.ceramics.org/ meetings/cls2017

25–27 Ceramics Expo 2017 – I-X Center, Cleveland, Ohio; www.ceramicsexpousa.com

May 2017

21–26 12th Pacific Rim Conference on Ceramic and Glass Technology, including Glass & Optical Materials Division Meeting – Hilton Waikoloa Village, Waikoloa, Hawaii; www.ceramics.org/ meetings/pacrim12

July 2017

4–7 6th European PEFC & H₂ Forum: 21st Conference in Series with Tutorial, Exhibition, and Application Market – Lucerne, Switzerland; www.EFCF.com

24–28 9th Int'l Conference on Borate Glasses, Crystals, and Melts; Int'l Conference on Phosphate Glasses – Oxford, U.K.; www.sgt.org

Dates in **RED** denote new entry in this issue.

Entries in **BLUE** denote ACerS events.

 denotes meetings that ACerS cosponsors, endorses, or otherwise cooperates in organizing.

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Statement of Ownership

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	Avg. each issue during previous 12 months	Actual no. of single issue nearest filing date
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 B. Paid and/or requested circulation 1. Paid/requested outside-county mail subscriptions 2. Paid in-county subscriptions 3. Sales through dealers and carriers, street 	3,385 none	3,352 none
vendors, counter sales and other non-USPS paid distribution 4. Other classes mailed through the USPS	2,011 none	1,914 none
C. Total paid and/or requested circulation	5,396	5,266
 D. Free distribution by mail (samples, complimentary and other free) 1. Outside-county 2. In-county 3. Other classes mailed through the USPS 	2,264 none none	2,575 none none
E. Free distribution outside the mail (carriers or other means)	532	245
F. Total free distribution	2,796	2,820
G. Total distribution	8,192	8,086
H. Copies not distributed	36	40
I. Total	8,228	8,126
J. Percent paid and/or requested circulation	65.87%	65.12%

deciphering the discipline

Jeroen Deijkers

A regular column offering the student perspective of the next generation of ceramic and glass scientists, organized by the ACerS Presidents Council of Student Advisors.

Oxidation in thermal/ environmental barrier coatings—A selfhealing paradox?

When considering self-healing materials, the first material that comes to mind is a polymer. Polymers' intrinsic healing capabilities and the ease of combining polymers with extrinsic healing methods have been a focus of materials research for many years. But what about self-healing in other materials?

One of the main applications of selfhealing materials is to heal cracking, which is a prevalent problem in ceramic materials, such as thermal barrier coatings (TBCs) used in turbine engines. Thermal cycling eventually results in delamination of TBCs, limiting the lifetime of these coatings. Ceramics do not have the intrinsic healing capabilities of polymers. So, recovering bonds in ceramics usually requires high temperatures and long times. Developing self-healing capabilities in ceramics could, therefore, greatly benefit these materials and their high-temperature applications.

During my M.Sc. studies at Delft University of Technology in the Netherlands, I was attracted to the concept of self-healing zirconia-based TBCs. For my thesis, I incorporated extrinsic self-healing to TBCs by adding small hollow Al₂O₃ shells filled with MoSi₂. Upon breaking of the shells, MoSi₂ reacts with air to form SiO₂. This oxidation causes volume expansion, filling the crack with more product than the initially supplied reactant.

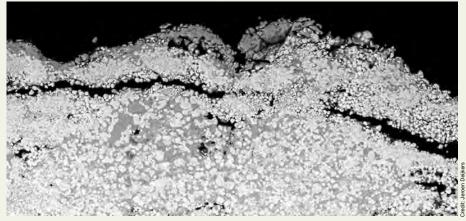
My interest in developing these types of high-temperature materials led me to a graduate student position at the University of Virginia (Charlottesville, Va.). The curious engineer in me gladly accepted an offer to work on coating systems to protect silicon carbide composites. In silicon carbide coating systems, the silicon bond coat oxidizes to SiO₂ (α/β -cristobalite). In this case, however, oxidation is detrimental, because it forms a thermally grown oxide with a high coefficient of thermal expansion, and the thermal stresses generated by the oxide crack the coating.

So, oxidation can be self-healing in some cases, but self-destructive in other situations. Because of these conflicting functions, should self-healing be designated as a material property or should it be defined as a concept to say that a material is designed to have an extended lifetime? I think the latter is true. Oxidation of the silicon bond coat in barrier coatings cannot be avoided, but we can attempt to extend the life of the coating by adding another material to heal cracks that form during thermal cycling.

Currently, adding HfO_2 to silicon seems to be a viable self-healing concept. When silicon oxidizes to SiO_2 , it quickly reacts to a stable form of $HfSiO_4$. This material has a coefficient of thermal expansion that is similar to other materials in the coating and substrate, and, when it reacts with the nonpreferential α -cristobalite, it eliminates high thermal stresses. Also, if a crack forms in the coating perpendicular to the coating surface and reaches the silicon bond coat, SiO_2 will form first, followed by formation of stable $HfSiO_4$. This reaction stops cracking and creates an oxygen barrier between the incoming gas flow and underlying substrate.

Using self-healing as a materials concept can allow us to use traditional material systems that we would initially discard because of their short lifespans and, instead, allow us to think of new designs and material composites to obtain our desired goals. It may seem to be a paradox, but an initial weakness may end up giving us a more durable product.

Jeroen Deijkers is a Ph.D. student in materials science and engineering at the University of Virginia and is working on the next generation of environmental barrier coatings. Combining his current studies with his B.Sc. and M.Sc. in aerospace engineering, Deijkers aims to develop novel materials for aircraft and spacecraft in the growing aerospace industry. In his spare time, he enjoys exploring the natural beauty of America—a contrast to the flat, windy, Dutch countryside he grew up in.



Micrograph showing an example of self-healing (formation of hafnon (gray) from SiO₂ and HfO₂ (white)) and self-destruction (delamination of the top layer) in a material because of oxidation of silicon.

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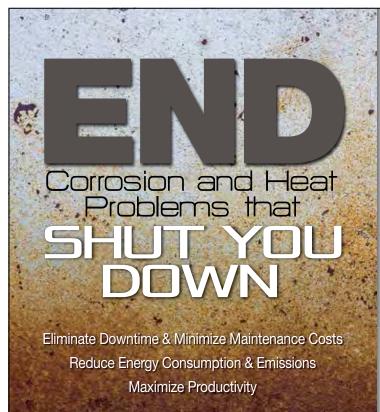
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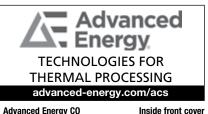
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Electronics & Electrical Materials



Advanced Energy CO

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Energy

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Engineering

Advanced Materials Associates CO Air Force Civil Engineer Center FL Alstom Grid Research & Technology UK ATC Consulting Services CA CelSian Glass & Solar BV Netherlands **CERIC** Technologies France Cerinnov France Ceritherm France Ciria India Ltd India Cyclonaire Corp NE Eglasstrek Patent Promotion & Awarding GmbH Germany EWI OH FCT Systeme GmbH Germany General Glass Equipment Co NJ Hitech Materials Pty Ltd Australia Innalox BV Netherlands Innovative Processing Solutions LLC IN Intl Ceramic Engineering MA Jenike & Johanson Inc MA Lithoz GmbH Austria Microplasmic Corp MA Nol-Tec Systems Inc MN Physical Acoustics Corp NJ Specialty Glass Inc FL Structural Ceramic Solutions NY Teeter Marketing Services LLC FL Verity Technical Consultants LLC OH Wistra France Wistra GmbH Germany

Environmental

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Fabrication

Able Supply Co TX Accuratus Corp NJ Advanced Materials Associates CO Angstrom Precision Optics Inc NY ATC Consulting Services CA Bullen OH Ceramic Engineering & Consulting Services (CECS) AZ EWI OH Gateway Materials Technology Inc IL Huber Construction Inc TX Innalox BV Netherlands Lithoz GmbH Austria MicroCIM VT PremaTech Advanced Ceramics MA Quartzite Processing Inc MA Refrac Systems AZ RocCera LLC NY Tape Casting Consultants Inc PA Technology Assessment & Transfer Inc (TA&T) MD Thermal Products Co Inc GA Verity Technical Consultants LLC OH

Furnaces

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Kilns

See ad page 51

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Litigation

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Maintenance & Repairs, After Sales

AK Das, Consultant India Cerinnov France Cetek Ltd OH Ciria India Ltd India GV Service Inc NY ROmiLL sro Czech Republic

Management

AK Das, Consultant India ATC Consulting Services CA Gateway Materials Technology Inc IL Hains Technology Associates Canada Management Recruiters of Aiken SC SC OPF Enterprises MT Print Control Services LLC MA Structural Ceramic Solutions NY Teeter Marketing Services LLC FL

Manufacturing

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Markets

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Materials Testing & Characterization

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Nuclear Materials

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Patents

Eppler Associates CT Modern Times Legal MA Refrac Systems AZ Spontaneous Materials CO Structural Ceramic Solutions NY Teeter Marketing Services LLC FL

Professional Engineer

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Quality Management/ISO 9 Lucideon UK

Recruiting & Executive Search Ceramic Recruiters Inc SC

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Refractories

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Research

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Coatings, Thermal-Resistant Aremco Products Inc NY

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Coatings, Wear-Resistant

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Drying, Custom AVEKA MN

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Polymer Innovations Inc CA See ad page 41 Sigma Advanced Materials NY VITO - Flemish Inst for Technological Research Belgium Films, Thin Advanced Energy CO Inside front cover Beamalloy Technologies LLC OH Cerakote Ceramic Coatings OR FelCom LLC OR Industrial Hard Carbon LLC NC Intelligent Micro Patterning LLC FL Morgan Technical Ceramics Auburn CA New Tech Ceramics Inc IA Technology Assessment & Transfer Inc (TA&T) MD Teeter Marketing Services LLC FL TFD Inc CA Verity Technical Consultants LLC OH **Furnace Rebuilds** Dynamic Exim Corp India Fosbel Inc OH Materials Research Furnaces Inc NH See ad page 74 Oxy-Gon Industries Inc NH TevTech LLC MA See ad page 72 Zircar Ceramics Inc NY Zircar Zirconia Inc NY Grinding, Custom



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Piezoelectrics

APC Intl Ltd PA EDO Corp UT Haiku Tech Europe BV Netherlands Haiku Tech Inc FL Meggitt Piezo Technologies IN Micromechatronics Inc PA Sparkler Ceramics Pvt Ltd India

Prototypes

Accuratus Corp NJ ESL ElectroScience PA FCT Ingenieurkeramik GmbH Germany Ferro Ceramic Grinding Inc MA Friatec AG Germany Goceram AB Sweden Ikonics Imaging-Industrial Solutions MN Industrial Ceramic Products Inc OH Innalox BV Netherlands Intelligent Micro Patterning LLC FL Intl Ceramic Engineering MA JACPA Ceramic Craftsmen MI Lithoz GmbH Austria Metoxit AG Switzerland MicroCIM VT Morgan Technical Ceramics Auburn CA Ortech Inc CA See ad page 43 P-Ker Engineering NY Precision Ceramics FL



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Refractory Installation Avkem Intl TN Birney W West PE TX Diamorph AB Sweden Dynamic Exim Corp India Fosbel Inc OH KC Industries Pty Ltd Australia Koch Knight LLC OH Promat GmbH Germany Refractory Consulting Services OH **Riverside Refractories Inc AL** Wistra France Wistra GmbH Germany

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Screening, Custom

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Toll Firing, Contract

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DECORATING

Coating Equipment

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Colors

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Decal Equipment

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Decals

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Decorating Equipment

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Decorating Supplies

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Enamels

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Engobes

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Frits

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Glazes

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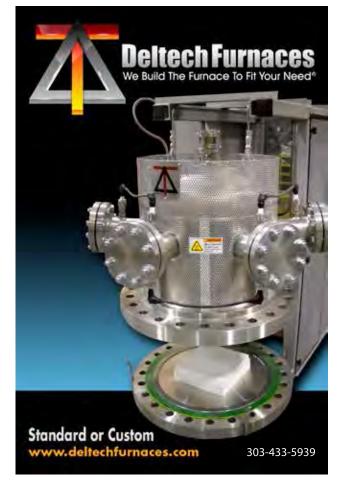
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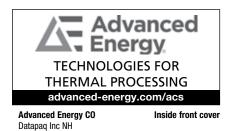
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AdTech Ceramics TN Associated Ceramics & Technology Inc PA Bharat Heavy Electricals Ltd India Ceramatec Inc UT Chaozhou Three-Circle Co Ltd China ENrG Inc NY Enterprise Personnel CO ESL ElectroScience PA Euro Support Advanced Materials Netherlands Fraunhofer-Inst Silicatforschung ISC Germany fuelcellmaterials.com OH Gwent Electronic Materials Ltd UK HC Starck GmbH Germany HC Starck Surface Technology & Ceramic Powders GmbH Germany Innovative Research & Products Inc CT Morgan Technical Ceramics Auburn CA Nexceris LLC OH NorECs AS Norway **Polymer Innovations Inc CA** See ad page 41



Praxair Specialty Ceramics IN See ad page 45 Terio Corp China Trans-Tech Inc MD

High-Voltage Insulators

Akron Porcelain & Plastics Co OH Bharat Heavy Electricals Ltd India Ceramco Inc NH CeramTec North America Corp SC Du-Co Ceramics Co PA KC Industries Pty Ltd Australia Maruti Refractories India Maruwa Ceramic Co Ltd Japan Morgan Technical Ceramics Auburn CA Olevsk Porcelain Plant Ukraine Precision Ferrites & Ceramics Inc CA Prolec SA de CV Mexico Xiamen Innovacera Advanced Materials Co China

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IC Packages

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Insulators, Electrical/Electronic

Accuratus Corp NJ AdTech Ceramics TN AdValue Technology LLC AZ See ad page 55 Akron Porcelain & Plastics Co OH Alstom Grid Research & Technology UK Blasch Precision Ceramics Inc NY Ceramco Inc NH Ceramic Oxide Fabricators Pty Ltd Australia CeramTec North America Corp SC CerCo LLC OH Du-Co Ceramics Co PA ER Advanced Ceramics Inc OH ESL ElectroScience PA Federal-Mogul MI FelCom LLC OR Ferro Ceramic Grinding Inc MA KC Industries Pty Ltd Australia Maruti Refractories India Maruwa Ceramic Co Ltd Japan Maryland Ceramic & Steatite Co Inc MD Materion Ceramics AZ Morgan Technical Ceramics Auburn CA NEVZ-Ceramics, Close JSC Russia Olevsk Porcelain Plant Ukraine P-Ker Engineering NY Precision Ferrites & Ceramics Inc CA Prolec SA de CV Mexico Sonya Ceramics (Export Div) India Superior Technical Ceramics Corp VT Toto Ltd Japan Trans-Tech Inc MD Triangle Ceramics NC Xiamen Innovacera Advanced Materials Co China Zircoa Inc OH

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DuPont Electronic Technologies NC Innovative Research & Products Inc CT Sharp Corp Japan Thales TRT CA

Magnets

Innovative Research & Products Inc CT National Magnetics Group Inc PA Spontaneous Materials CO

Microwave Packages

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Multilayer Ceramic Capacitors

Enterprise Personnel CO Euro Support Advanced Materials Netherlands Murata Manufacturing Co Ltd Japan Polymer Innovations Inc CA See ad page 41 Sharp Corp Japan Terio Corp China

Multilayer Ceramics, AIN

AdTech Ceramics TN Kyocera America Inc CA NEVZ-Ceramics, Close JSC Russia Xiamen Innovacera Advanced Materials Co China

Multilaver Ceramics, Custom

AdTech Ceramics TN Chaozhou Three-Circle Co Ltd China EBL Products Inc CT ENrG Inc NY Euro Support Advanced Materials Netherlands Kyocera America Inc CA Xiamen Innovacera Advanced Materials Co China

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See ad page 41

Pvroelectrics

Advanced Materials Technologies PA

Resistors, Thick-Film

Chaozhou Three-Circle Co Ltd China **DuPont Electronic Technologies NC** FSI ElectroScience PA Kanthal Heating Systems NY KC Industries Pty Ltd Australia Murata Manufacturing Co Ltd Japan Olevsk Porcelain Plant Ukraine **Polymer Innovations Inc CA** See ad page 41 Terio Corp China

Resonators

AVX Corp SC Murata Manufacturing Co Ltd Japan National Magnetics Group Inc PA NGK Spark Plug Co Ltd Japan Trans-Tech Inc MD

rf Components

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Semiconductors

GFI Advanced Technologies Inc NJ NEVZ-Ceramics, Close JSC Russia SCI Engineered Materials Inc OH Semiconductor Energy Laboratory Co Ltd Japan Sharp Corp Japan Superconix Inc MN Terio Corp China TFD Inc CA Toto Ltd Japan Triangle Ceramics NC

Sensors

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Valley Design Corp MA Xiamen Innovacera Advanced Materials Co China

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Substrates, Glass

Accuratus Corp NJ Centerline Technologies MA Laserage Technology Corp IL Saint-Gobain Recherche CA Sem-Com Co Inc OH Sonic-Mill NM

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Substrates, Silicon Carbide

Bullen OH

Centerline Technologies MA Ferro Ceramic Grinding Inc MA Ortech Inc CA See ad page 43 Sonic-Mill NM Superconix Inc MN Tape Casting Consultants Inc PA Tenmat Ltd UK Toto Ltd Japan Triangle Ceramics NC Valley Design Corp MA

Superconductors, High-Temperature

ENrG Inc NY Innovative Research & Products Inc CT Xiamen Innovacera Advanced Materials Co China

Tapes

Du-Co Ceramics Co PA DuPont Electronic Technologies NC ESL ElectroScience PA Euro Support Advanced Materials Netherlands Haiku Tech Europe BV Netherlands Haiku Tech Inc FL Vitta Corp CT

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AVX Corp SC Gwent Electronic Materials Ltd UK Kanthal Heating Systems NY Murata Manufacturing Co Ltd Japan **Polymer Innovations Inc CA** Quality Thermistor Inc ID

Transducers

APC Inti Ltd PA CSC Force Measurement Inc MA EBL Products Inc CT Height Electronic Co China Meggitt Piezo Technologies IN Neoptix Canada Sparkler Ceramics Pvt Ltd India Technisonic Research Inc CT

Transformers

EDO Corp UT Magnetic Specialities Inc PA Prolec SA de CV Mexico RoMan Manufacturing MI Thales TRT CA Warner Power LLC NH

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APC Intil Ltd PA EBL Products Inc CT Meggitt Piezo Technologies IN Micromechatronics Inc PA Sonic-Mill NM Thales TRT CA

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AVX Corp SC Kyocera Intl Inc CA **Polymer Innovations Inc CA**

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Accurate Diamond Tool Corp NJ Action Superabrasives OH Advanced Superabrasives NV Allied High Tech Products Inc CA Diacut Inc CO Diamond Industrial Tools Inc IL Dunhua Zhengxing Abrasive Co Ltd China Dynacut Inc PA Electro Abrasives Corp NY Elizabeth Carbide Die Co Inc PA Emtas Abrasive Products Turkey Engis Corp IL Feldco Intl CA Global Superabrasives AZ Guyson Intl Ltd UK GV Service Inc NY Hygan Products Ltd UK Industrial Tools Inc CA

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Annealing Lehrs

Casso-Solar Technologies NY

Brickmaking Equipment

Basic Machinery Co Inc NC Beamalloy Technologies LLC OH Laeis GmbH Luxembourg Manufacturers Equipment Co OH **Mohr Corp MI** Stedman Machine Co IN

Casting Equipment, Pressure

American Isostatic Presses OH Cerinnov France Cerlase France Dorst America Inc PA HED Intl Inc NJ Laguna Clay Co CA Maryland Ceramic & Steatite Co Inc MD Mohr Corp MI See ad page 81

Casting Equipment, Slip

Hygan Products Ltd UK Mohr Corp MI Peltsman Corp MN

Casting Equipment, Tape

Haiku Tech Europe BV Netherlands Haiku Tech Inc FL HED Intl Inc NJ **Mohr Corp MI** Pacific Trinetics Corp (PTC) CA **Polymer Innovations Inc CA** Tape Casting Consultants Inc PA Tape Casting Warehouse Div PA

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CNC Mills

See ad page 41

See ad page 41

Cavco Machine Tool Rebuilding CT Liberty Machinery Co IL Lunzer Technologies Inc NY OptiPro Systems LLC NY Reliance Tool & Manufacturing IL Suntech Advanced Ceramics (Shenzhen) Co Ltd China

Coating Equipment

Allied High Tech Products Inc CA Casso-Solar Technologies NY Cerakote Ceramic Coatings OR Dynacut Inc PA Haiku Tech Europe BV Netherlands Haiku Tech Inc FL Liberty Machinery Co IL Manufacturers Equipment Co OH **Mohr Corp MI** Pacific Trinetics Corp (PTC) CA UV Process Supply Inc IL

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Coating Supplies

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Cold-End Coatings, Glass Renite Co OH

Controllers Dorst America Inc PA General Glass Equipment Co NJ Kaeser Compressors Inc VA Laguna Clay Co CA Rockwell Automation Inc WI

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Liberty Machinery Co IL

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Diamond Tools

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Dies

Gasbarre Products (PTX Pentronix) PA See ad page 81

Industrial Ceramic Technology MI Infinity Stamps Inc CA North Star Equipment Inc WA Peltsman Corp MN Ram Products Inc OH Reliance Tool & Manufacturing IL

Dressing Wheels, Diamond

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Peter Pugger Manufacturing Inc CA Process Engineering Services TX

Feeders

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Casso-Solar Technologies NY General Glass Equipment Co NJ Krautzberger NA LLC VA Liberty Machinery Co IL Lithoz GmbH Austria Lunzer Technologies Inc NY OptiPro Systems LLC NY

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Mandrels, Diamond

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Molds, Case

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Molds, Ceramic-Forming

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Molds, Models

JACPA Ceramic Craftsmen MI Petro Mold Co PA Ram Products Inc OH Viridis3D LLC MA

Plasma Etching Systems Advanced Energy CO

Capovani Brothers Inc NY Liberty Machinery Co IL Logomatic GmbH Germany

Pneumatic Systems

Cyclonaire Corp NE Peltsman Corp MN Ram Products Inc OH Young Industries Inc PA

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Presses, Dry

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Presses, Extrusion

Dorst America Inc PA Maryland Ceramic & Steatite Co Inc MD Mohr Corp MI See ad page 81 Peter Pugger Manufacturing Inc CA

Presses, Hot

Inside front cover

American Isostatic Presses OH Centorr Vacuum Industries Inc NH FCT Ingenieurkeramik GmbH Germany FCT Systeme GmbH Germany GT Advanced Technologies (formerly Thermal Technology) CA Materials Research Furnaces Inc NH See ad page 74 Mohr Corp MI See ad page 81

Oxy-Gon Industries Inc NH Refrac Systems AZ

Presses, Hot Isostatic American Isostatic Presses OH

AVS Inc MA Engineered Pressure Systems Inc MA FCT Ingenieurkeramik GmbH Germany Mohr Corp MI See ad page 81 Quintus Technologies LLC OH

Presses, Hydraulic

Aadvanced Machinery Inc MI ARBURG GmbH & Co KG Germany AVS Inc MA Digital Press Inc PA Dorst America Inc PA Gasbarre Products (PTX Pentronix) PA See ad page 81 Laeis GmbH Luxembourg Materials Research Furnaces Inc NH See ad page 74 Mohr Corp MI See ad page 81 Process Engineering Services TX Ram Products Inc OH

Presses, Isostatic

Aadvanced Machinery Inc MI American Isostatic Presses OH Cerlase France Detroit Process Machinery MI Dorst America Inc PA Engineered Pressure Systems Inc MA



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Isoform Ltd UK Mohr Corp MI See ad page 81 Pacific Trinetics Corp (PTC) CA Quintus Technologies LLC OH RocCera LLC NY Suntech Advanced Ceramics (Shenzhen) Co Ltd China Triangle Ceramics NC

Presses, Other ARBURG GmbH & Co KG Germany Isoform Ltd UK

Presses, Pressure Casting Dorst America Inc PA Peter Pugger Manufacturing Inc CA Ram Products Inc OH

Presses, Refractory Shapes Engineered Pressure Systems Inc MA Laeis GmbH Luxembourg

Presses, Rotary Aadvanced Machinery Inc MI Materials Research Furnaces Inc NH See ad page 74

See ad page 81

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Presses, Tile (Ceramic) Laeis GmbH Luxembourg North Star Equipment Inc WA Peter Pugger Manufacturing Inc CA

Pug Mills Aadvanced Machinery Inc MI Basic Machinery Co Inc NC Dorst America Inc PA Mohr Corp MI Peter Pugger Manufacturing Inc CA Process Engineering Services TX Sheffield Pottery MA Young Industries Inc PA

PVD Equipment Beamalloy Technologies LLC OH Capovani Brothers Inc NY Liberty Machinery Co IL Teeter Marketing Services LLC FL

Roll Compaction Sahut Conreur SA France

Roofing Tile Machinery Laeis GmbH Luxembourg Mohr Corp MI

Setting Equipment Basic Machinery Co Inc NC

Slab Rollers North Star Equipment Inc WA

Sponges Hygan Products Ltd UK US Foam Corp OH

Spray Booths Krautzberger NA LLC VA

Sputtering Equipment Advanced Energy CO

Advanced Energy CO Inside front cover FCT Ingenieurkeramik GmbH Germany NV Bekaert SA Belgium SCI Engineered Materials Inc OH

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Wheels, Diamond

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GLASS PRODUCTS

Automotive Glass Arkema Inc PA Emtas Abrasive Products Turkey Mixer Systems Inc WI Saint-Gobain Recherche CA

Beads/Spheres

 Ceradyne Inc, a 3M Co WA
 See ad page 51

 Glass Factory Directory of North America NY
 KC Abrasive Co KS

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Canes, Glass

Glass Factory Directory of North America NY Sem-Com Co Inc OH

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Container Glass

Arkema Inc PA Cerinnov France Glass Factory Directory of North America NY Mixer Systems Inc WI Owens-Illinois Inc OH Print Control Services LLC MA Proscience Inc Canada Saint-Gobain Recherche CA Vesuvius SC

Fibers, Continuous

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Flat & Safety Glass

Arkema Inc PA Cincinnati Gasket OH Eglasstrek Patent Promotion & Awarding GmbH Germany Glass Factory Directory of North America NY Mixer Systems Inc WI Saint-Gobain Recherche CA Vesuvius SC

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Xiamen Innovacera Advanced Materials Co China

Glass-to-Metal Seals Alstom Grid Research & Technology UK Elan Technology GA ESL ElectroScience PA Fraunhofer-Inst Silicatforschung ISC Germany Glass Factory Directory of North America NY Quartz Scientific Inc OH Specialty Glass Inc FL

Laboratory & Technical Glass

Angstrom Precision Optics Inc NY Arkema Inc PA Decal Craft Canada Garg Process Glass India Pvt Ltd India Glass Factory Directory of North America NY LECO Corp MI Proscience Inc Canada Saxon Glass Technologies Inc NY Specialty Glass Inc FL Strainoptics Inc PA **TevTech LLC MA** See ad page 72

Laminated Glass

Cincinnati Gasket OH Glass Factory Directory of North America NY Vesuvius SC

Laser Glasses

Angstrom Precision Optics Inc NY Cerinnov France Glass Factory Directory of North America NY Israel Ceramic & Silicate Inst Israel

Lenses

Angstrom Precision Optics Inc NY Dynasil Fused Silica NJ Kyocera Industrial Ceramics Corp NC Quartz Scientific Inc OH **TevTech LLC MA**

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Lighting

Cincinnati Gasket OH Glass Factory Directory of North America NY Osram Sylvania Inc MA

Mirrors

Angstrom Precision Optics Inc NY Valley Design Corp MA

Optical & Optoelectronic Ceramics

Glass Factory Directory of North America NY NEVZ-Ceramics, Close JSC Russia Specialty Glass Inc FL **TevTech LLC MA** See ad page 72 Vesuvius SC

Optical Substrates

Angstrom Precision Optics Inc NY Bullen OH Dynasil Fused Silica NJ Eglasstrek Patent Promotion & Awarding GmbH Germany Feldco Intl CA GFI Advanced Technologies Inc NJ Specialty Glass Inc FL Valley Design Corp MA Vesuvius SC

Optical Thin Films

Angstrom Precision Optics Inc NY Eglasstrek Patent Promotion & Awarding GmbH Germany Feldco Intl CA See ad page 72

TevTech LLC MA

Solar

Arkema Inc PA Ceradyne Inc, a 3M Co WA See ad page 51 Feldco Intl CA Glass Factory Directory of North America NY Materion Ceramics AZ **TevTech LLC MA** See ad page 72 Texers Technical Ceramics Inc Canada Vesuvius SC

Specialty Glass

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RocCera LLC NY Tape Casting Warehouse Div PA

Colorimeters

Cargille Labs NJ Color-Tec NJ Elektro Physik IL HunterLab VA UV Process Supply Inc IL

Density Measurement Instruments

AGR Intl Inc PA Cargille Labs NJ CW Brabender Instruments Inc NJ Micromeritics Instrument Corp GA Particle Technology Labs IL Quantachrome Instruments FL RocCera LLC NY Universal Technical Equipment PA UV Process Supply Inc IL

Detectors

Amptek Inc MA Control Instruments Corp NJ Rockwell Automation Inc WI SE Intl Inc TN Siemens Process Industries & Drives GA

Dimension Measurement Instruments

AGR Intl Inc PA CSC Force Measurement Inc MA Die Quip Corp PA Elektro Physik IL Precision Measurements & Instruments Corp OR

Dryers

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Fiberoptic Illuminators

Carl Zeiss Mircolmaging Inc NY Die Quip Corp PA Mo-Sci Corp MO See ad page 83 Strainoptics Inc PA Taber Industries NY

Glassware

AdValue Technology LLC AZ See ad page 55 Garg Process Glass India Pvt Ltd India Proscience Inc Canada Quartz Scientific Inc OH

Glossimeters

Elektro Physik IL Horiba Instruments Inc CA UV Process Supply Inc IL

Hardness Measurement Instruments

Accurate Diamond Tool Corp NJ Allied High Tech Products Inc CA Buehler Ltd IL Capovani Brothers Inc NY Carl Zeiss Mircolmaging Inc NY LECO Corp MI Nanoscience Instruments AZ Shimadzu Scientific Instruments MD Taber Industries NY UV Process Supply Inc IL

Hot Plates

Capovani Brothers Inc NY Micropyretics Heaters Intl Inc OH RocCera LLC NY Zhengzhou Mission Ceramic Products Co Ltd China

Lab Crucibles

AdValue Technology LLC AZ See ad page 55 Ceramco Inc NH Ceramic Oxide Fabricators Pty Ltd Australia McDanel Advanced Ceramic Technologies LLC PA Prairie Ceramics Corp CA Robocasting Enterprises LLC NM Xiamen Innovacera Advanced Materials Co China Zhengzhou Mission Ceramic Products Co Ltd China

Lab Furnace Tubes

AdValue Technology LLC AZ See ad page 55 Carbolite Inc WI See ad page 69 Ceramic Oxide Fabricators Pty Ltd Australia McDanel Advanced Ceramic Technologies LLC PA Nabertherm Inc DE Prairie Ceramics Corp CA Quartz Scientific Inc OH Xiamen Innovacera Advanced Materials Co China Zhengzhou Mission Ceramic Products Co Ltd China

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Lucifer Furnaces Inc PA Materials Research Furnaces Inc NH See ad page 74 Micropyretics Heaters Intl Inc OH Nabertherm Inc DE Oxy-Gon Industries Inc NH Paragon Industries LP TX Prairie Ceramics Corp CA RD Webb Co Inc MA Shinagawa Advanced Materials American Inc OH



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See ad page 71 Zhengzhou Mission Ceramic Products Co Ltd China Zircar Ceramics Inc NY Zircar Zirconia Inc NY

Light Sources

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Magnetic Separation Instruments Dings Co WI

Russell Finex Inc NC

Magnetic Stirrers

UV Process Supply Inc IL

Mechanical Property Measurement Instruments

Applied Test Systems Inc PA ATS RheoSystems, A Div of Cannon Instrument Co PA Buehler Ltd IL BuzzMac Intl LLC WI CSC Force Measurement Inc MA Elektro Physik IL Nanoscience Instruments A7 Shimadzu Scientific Instruments MD TA Instruments DE See ad page 99 Taber Industries NY

Microscopes, Hot Stages

Carl Zeiss Mircolmaging Inc NY Dalmia Inst of Scientific & Industrial Research India TA Instruments DE See ad page 99

Microscopes, Interference

Buehler Ltd IL Carl Zeiss Mircolmaging Inc NY

Microscopes, Other AdValue Technology LLC AZ Allied High Tech Products Inc CA Capovani Brothers Inc NY Carl Zeiss Mircolmaging Inc NY Nanoscience Instruments AZ TA Instruments DE UV Process Supply Inc IL

Microscopes, Polarizing

Buehler Ltd IL Carl Zeiss Mircolmaging Inc NY JTF Microscopy Services Inc NY Strainoptics Inc PA

Microscopes, Reflected Light

Allied High Tech Products Inc CA Buehler Ltd IL Capovani Brothers Inc NY Carl Zeiss Mircolmaging Inc NY LECO Corp MI UV Process Supply Inc IL

Microscopes, Scanning Electron

Capovani Brothers Inc NY Nanoscience Instruments AZ SEMTech Solutions Inc MA

Microscopes, Transmission Electron Horiba Instruments Inc CA

Mills, Laboratory

Advanced Ceramics Manufacturing AZ Capovani Brothers Inc NY Custom Processing Services PA CW Brabender Instruments Inc NJ Detroit Process Machinery MI Exakt Technologies Inc OK Fluid Energy Processing & Equipment Co PA Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Laval Lab Inc Canada MSE Supplies AZ Retsch Inc PA Stedman Machine Co IN Sturtevant Inc MA Sweco KY Tape Casting Warehouse Div PA Union Process OH

Mixers, Laboratory

Capovani Brothers Inc NY Custom Processing Services PA Detroit Process Machinery MI Dynamic Air Inc MN Fritsch GmbH - Milling & Sizing Germany Lancaster Products PA Littleford Day Inc KY Peltsman Corp MN Peter Pugger Manufacturing Inc CA Ram Products Inc OH UV Process Supply Inc IL

Moisture Testing

CW Brabender Instruments Inc NJ LECO Corp MI Micromeritics Instrument Corp GA Presto Stantest Pvt Ltd India Soilmoisture Equipment Corp CA

Optical Comparitors Die Quip Corp PA

Optical Property Measurement Instruments

AGR Intl Inc PA Angstrom Precision Optics Inc NY Cargille Labs NJ Fritsch GmbH - Milling & Sizing Germany Precision Measurements & Instruments Corp OR

pH Meters

Horiba Instruments Inc CA Mettler-Toledo Inc OH Ocean Optics Inc FL Presto Stantest Pvt Ltd India Presto Testing Instruments India UV Process Supply Inc IL

Photometric Measurement Instruments Gigahertz-Optik Inc MA Presto Stantest Pvt Ltd India

Polarimeters Presto Stantest Pvt Ltd India Strainoptics Inc PA

Porosimeters Micromeritics Instrument Corp GA Particle Technology Labs IL Quantachrome Instruments FI

Powders Samplers

Fritsch Milling & Sizing PA Quantachrome Instruments FL Retsch Inc PA

Recorders

See ad page 55

See ad page 99

CSC Force Measurement Inc MA Datapaq Inc NH Rockwell Automation Inc WI Siemens Process Industries & Drives GA

Rheometers

Ankersmid Particle Size & Shape NJ ATS RheoSystems, A Div of Cannon Instrument Co PA CW Brabender Instruments Inc NJ Particle Technology Labs IL Presto Stantest Pvt Ltd India TA Instruments DE See ad page 99

Sample Preparation Equipment

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Thermometers

Optocon AG Germany Xiamen Innovacera Advanced Materials Co China

Viscosity Measurement Instruments

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Visual Inspection Instruments

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Weighing/Scales

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Auger Analysis

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Clay Testing

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Composition

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Japan Fine Ceramics Center Japan Micromeritics Instrument Corp GA North Star Imaging Inc MN NSL Analytical Services Inc OH Particle Technology Labs IL Quantachrome Instruments FL SGS Minerals Services Canada

Differential Thermal Analysis

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Electron Microprobe Analysis

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Failure Analysis

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Fracture Analysis

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Interferometers

Angstrom Precision Optics Inc NY Integrity Testing Laboratory Inc Canada Lumetrics Inc NY Precision Measurements & Instruments Corp OR

Materials Analysis

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Hysitron Inc MN Integrity Testing Laboratory Inc Canada Japan Fine Ceramics Center Japan Northrop Grumman Corp VA Precision Measurements & Instruments Corp OR Smaht Ceramics Inc UT TA Instruments DE See ad page 99 Taber Industries NY

Nondestructive Testing

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Optical Properties

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Residual Stress Analysis

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Scanning Electron Microscopy

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High Temperature Materials Laboratory TN Japan Fine Ceramics Center Japan Micron Inc DE NSL Analytical Services Inc OH

Tribological Studies

High Temperature Materials Laboratory TN Integrity Testing Laboratory Inc Canada Japan Fine Ceramics Center Japan Micron Inc DE Taber Industries NY

X-ray Diffraction

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X-ray Fluorescence

Chemir - A Div of Evans Analytical Group MO Euro Support Advanced Materials Netherlands Fraunhofer-Inst Silicatforschung ISC Germany H&M Analytical Services Inc NJ Laval Lab Inc Canada Spectrochemical Laboratories PA

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Lancaster Products PA Littleford Day Inc KY Sturtevant Inc MA

Bagging Equipment

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Bins, Storage

Bulk Pack Inc LA Dover Conveyor Inc OH Jenike & Johanson Inc MA Nol-Tec Systems Inc MN Tempo Plastic CA Whirl Air Flow Corp MN

Blenders

Aadvanced Machinery Inc MI Applicon Co IN Cyclonaire Corp NE **Detroit Process Machinery MI** Dynamic Air Inc MN Gasbarre Products (PTX Pentronix) PA See ad page 81 **Glen Mills Inc NJ** See ad page 87 Hosokawa Micron Powder Systems NJ Laguna Clay Co CA Lancaster Products PA Littleford Day Inc KY Mohr Corp MI See ad page 81 Netzsch Premier Technologies LLC PA Nol-Tec Systems Inc MN Norstone Inc PA Sturtevant Inc MA Sweco KY Whirl Air Flow Corp MN Young Industries Inc PA

Blungers

Eirich Machines Inc IL Process Engineering Services TX

Briquetting & Tableting Equipment Aadvanced Machinery Inc MI

Applicon Co IN Hosokawa Micron Powder Systems NJ

Buckets, Elevator

CERIC Technologies France Dover Conveyor Inc OH Maxi-Lift Inc TX

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Compressors, Air

Kaeser Compressors Inc VA

Conveyors Basic Machinery Co Inc NC Cambridge Intl MD

Cambridge Wire Cloth Co MD Carolina Material Technologies NC Casso-Solar Technologies NY CERIC Technologies France DeMarco Vacuum Corp IL Dover Conveyor Inc OH Dynamic Air Inc MN General Glass Equipment Co NJ Kornylak Corp OH Manufacturers Equipment Co OH Martin Engineering IL Maxi-Lift Inc TX Nol-Tec Systems Inc MN Rockwell Automation Inc WI Siemens Process Industries & Drives GA UV Process Supply Inc IL

UV Process Supply Inc IL Velco GmbH Germany WCS Inc CA Whirl Air Flow Corp MN Young Industries Inc PA

Conveyors, Belt

Applicon Co IN Cambridge Intl MD Cambridge Wire Cloth Co MD Carolina Material Technologies NC Casso-Solar Technologies NY Dover Conveyor Inc OH GV Service Inc NY Lanly Co OH Martin Engineering IL The CS Bell Co OH UV Process Supply Inc IL

Conveyors, Bucket

Applicon Co IN Dover Conveyor Inc OH Maxi-Lift Inc TX

Conveyors, Pneumatic

Applicon Co IN Carolina Material Technologies NC Cyclonaire Corp NE Dynamic Air Inc MN Nol-Tec Systems Inc MN Vector Technologies Inc WI Velco GmbH Germany Whirl Air Flow Corp MN

Conveyors, Screw

Applicon Co IN Carolina Material Technologies NC Cyclonaire Corp NE Dover Conveyor Inc OH Dynamic Air Inc MN

Conveyors, Vibrating

Applicon Co IN Carman Industries Inc IN Carolina Material Technologies NC Cleveland Vibrator Co OH Dynamic Air Inc MN GV Service Inc NY Martin Engineering IL

Crushers

Aadvanced Machinery Inc MI AVEKA MN Basic Machinery Co Inc NC **CERIC** Technologies France Detroit Process Machinery MI Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Glen Mills Inc NJ See ad page 87 Gundlach Equipment Corp IL Hosokawa Micron Powder Systems NJ Lancaster Products PA Manufacturers Equipment Co OH Mohr Corp MI See ad page 81 Retsch Inc PA Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA Williams Patent Crusher & Pulverizer Co Inc MO Wyssmont Co NJ Crushers, Hammermill AVEKA MN

Glen Mills Inc NJ

Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA The CS Bell Co OH Williams Patent Crusher & Pulverizer Co Inc MO Wyssmont Co NJ

Hosokawa Micron Powder Systems NJ

Crushers, Impact

Applicon Co IN Glen Mills Inc NJ Gundlach Equipment Corp IL Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA Williams Patent Crusher & Pulverizer Co Inc MO Wyssmont Co NJ

Crushers, Jaw

Applicon Co¹N Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Glen Mills Inc NJ Schutte-Buffalo Hammermill LLC NY Sturtevant Inc MA

Crushers, Primary

CERIC Technologies France Gundlach Equipment Corp IL Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA Williams Patent Crusher & Pulverizer Co Inc MO

Crushers, Roll

Applicon Co^IN CERIC Technologies France Gundlach Equipment Corp IL Lancaster Products PA Manufacturers Equipment Co OH Sturtevant Inc MA Williams Patent Crusher & Pulverizer Co Inc MO

Cullet-Handling Equipment

Applicon Co IN Carman Industries Inc IN Dover Conveyor Inc OH Dynamic Air Inc MN General Glass Equipment Co NJ Whirt Air Flow Corp MN

Drum Tumblers Glen Mills Inc NJ

See ad page 87

Dryers, Fluid Bed Applicon Co IN AVEKA MN Carman Industries Inc IN Dynamic Air Inc MN Williams Patent Crusher & Pulverizer Co Inc MO

Dryers, Rotating Tray Raymond Bartlett Snow IL Wyssmont Co NJ

Dust Collectors

Cyclonaire Corp NE Dynamic Air Inc MN Guyson Intl Ltd UK Nilfisk-Advance America Inc MN Nol-Tec Systems Inc MN Spencer Turbine Co CT

Dust Control Equipment

Bindicator SC Carolina Material Technologies NC Dynamic Air Inc MN Guyson Inti Ltd UK Martin Engineering IL Nifisk-Advance America Inc MN Spencer Turbine Co CT UV Process Supply Inc IL Vector Technologies Inc WI Whirl Air Flow Corp MN Young Industries Inc PA

Edge Protectors

Presto Stantest Pvt Ltd India Tempo Plastic CA

See ad page 87

Electric Screen Heating Midwestern Industries Inc OH

Environmental/Waste Treatment Equipment

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Feeders

Basic Machinery Co Inc NC Carman Industries Inc IN Carolina Material Technologies NC Cleveland Vibrator Co OH Dover Conveyor Inc OH Dynamic Air Inc MN Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA General Glass Equipment Co NJ Jenike & Johanson Inc MA Manufacturers Equipment Co OH Nol-Tec Systems Inc MN Whirl Air Flow Corp MN Young Industries Inc PA

Feeders, Batch

Applicon Co IN Carman Industries Inc IN Carolina Material Technologies NC Dover Conveyor Inc OH Merkle Intl Inc II Nol-Tec Systems Inc MN Siemens Process Industries & Drives GA

Feeders, Gravimetric

Applicon Co IN Carolina Material Technologies NC Dynamic Air Inc MN

Feeders, Pneumatic

Carolina Material Technologies NC Cyclonaire Corp NE Dynamic Air Inc MN Nol-Tec Systems Inc MN Whirl Air Flow Corp MN

Filters

Cambridge Intl MD Cambridge Wire Cloth Co MD Croll-Reynolds Engineering Co CT Filtros Ltd NY Haver & Boecker OHG Germany Kaeser Compressors Inc VA Naylor Hathernware UK Norstone Inc PA ProChem Inc VA Russell Finex Inc NC Sweco KY Tape Casting Warehouse Div PA Texers Technical Ceramics Inc Canada Whirl Air Flow Corp MN

Filters, Cloth/Felt

Haver & Boecker OHG Germany Norstone Inc PA Tape Casting Warehouse Div PA Vector Technologies Inc WI

Granulators

Aadvanced Machinery Inc MI CW Brabender Instruments Inc NJ Fritsch GmbH - Milling & Sizing Germany Hosokawa Micron Powder Systems NJ Littleford Day Inc KY Mohr Corp MI See ad page 81 Netzsch Premier Technologies LLC PA Wyssmont Co NJ

Grinders

Action Superabrasives OH Buehler Ltd IL **CERIC** Technologies France Diamond Industrial Tools Inc IL Fluid Energy Processing & Equipment Co PA Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Glen Mills Inc NJ See ad page 87 Hosokawa Micron Powder Systems NJ Logomatic GmbH Germany Lunzer Technologies Inc NY Netzsch Premier Technologies LLC PA Norstone Inc PA Stedman Machine Co IN Sturtevant Inc MA Sweco KY The CS Bell Co OH Wyssmont Co NJ

Grinding Media

CerCo LLC OH Dunhua Zhengxing Abrasive Co Ltd China ER Advanced Ceramics Inc OH Federal-Mogul MI Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Glen Mills Inc NJ See ad page 87 Jyoti Ceramic Industries Pvt Ltd India KC Abrasive Co KS MSE Supplies AZ Netzsch Premier Technologies LLC PA Norstone Inc PA **OPF Enterprises MT** Sweco KY Tape Casting Warehouse Div PA Texers Technical Ceramics Inc Canada Union Process OH Zibo Guangtong Chemical Co Ltd China Zircoa Inc OH

Grinding Mills, Vibratory

Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Sturtevant Inc MA Sweco KY

Gunning Equipment, Refractory Reed Gunite & Shotcrete Equipment CA

Velco GmbH Germany

Hoppers

Basic Machinery Co Inc NC Carolina Material Technologies NC Dover Conveyor Inc OH Jenike & Johanson Inc MA Manufacturers Equipment Co OH Reed Gunite & Shotcrete Equipment CA Whirl Air Flow Corp MN

Hydraulic Systems

Basic Machinery Co Inc NC Mark Hydrauliks Pvt India Ram Products Inc OH

Impeller, Mixing Lancaster Products PA

Norstone Inc PA UV Process Supply Inc IL

Materials Handling Equipment Abresist Corp IN

Basic Machinery Co Inc NC Carolina Material Technologies NC CERIC Technologies France Cyclonaire Corp NE DeMarco Vacuum Corp IL Dover Conveyor Inc OH Dynamic Air Inc MN Eirich Machines Inc IL Gasbarre Products (PTX Pentronix) PA See ad page 81 Jet Edge Waterjet Systems MN Kornylak Corp OH Lancaster Products PA Manufacturers Equipment Co OH Maxi-Lift Inc TX Nol-Tec Systems Inc MN North Star Equipment Inc WA Reed Gunite & Shotcrete Equipment CA

Bockwell Automation Inc WI Siemens Process Industries & Drives GA Spencer Turbine Co CT Sweco KY Tempo Plastic CA Vector Technologies Inc WI Whirl Air Flow Corp MN Young Industries Inc PA

Mill Linings

Abresist Corp IN CerCo LLC OH ER Advanced Ceramics Inc OH Jyoti Ceramic Industries Pvt Ltd India Norstone Inc PA Sweco KY Xieta Intl SL Spain

Mills

Custom Processing Services PA CW Brabender Instruments Inc NJ Eirich Machines Inc IL ER Advanced Ceramics Inc OH Euro Support Advanced Materials Netherlands Evakt Technologies Inc OK Fritsch Milling & Sizing PA Glen Mills Inc NJ See a See ad page 87 Gundlach Equipment Corp IL Hockmeyer Equipment Corp NC Naylor Hathernware UK Netzsch Premier Technologies LLC PA Norstone Inc PA Raymond Bartlett Snow IL Retsch Inc PA Schutte-Buffalo Hammermill LLC NY Sonic-Mill NM Stedman Machine Co IN Sturtevant Inc MA Sweco KY Tape Casting Warehouse Div PA Union Process OH

Mills, Attritor

Aadvanced Machinery Inc MI Custom Processing Services PA Detroit Process Machinery MI Glen Mills Inc NJ Netzsch Premier Technologies LLC PA Norstone Inc PA **OPF Enterprises MT** Sturtevant Inc MA Union Process OH Wyssmont Co NJ

See ad page 87

Mills, Ball & Pebble

Aadvanced Machinery Inc MI Advanced Ceramics Manufacturing AZ Detroit Process Machinery MI ER Advanced Ceramics Inc OH Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Glen Mills Inc NJ See ad page 87 Haiku Tech Europe BV Netherlands Haiku Tech Inc FL Hosokawa Micron Powder Systems NJ MSE Supplies AZ Naylor Hathernware UK Netzsch Premier Technologies LLC PA Norstone Inc PA Process Engineering Services TX Raymond Bartlett Snow IL Sweco KY Union Process OH

Xieta Intl SL Spain Mills, Centrifugal

Fritsch GmbH - Milling & Sizing Germany Glen Mills Inc NJ See ad page 87

Mills, Hammer

AVEKA MN Glen Mills Inc NJ See ad page 87 Hosokawa Micron Powder Systems NJ Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA The CS Bell Co OH Williams Patent Crusher & Pulverizer Co Inc MO

Mills, Jar

Detroit Process Machinery MI Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Norstone Inc PA Tape Casting Warehouse Div PA

Mills, Jet

AVEKA MN Fluid Energy Processing & Equipment Co PA Hosokawa Micron Powder Systems NJ Netzsch Premier Technologies LLC PA Norstone Inc PA Sturtevant Inc MA

Mills, Planetary

Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Hockmeyer Equipment Corp NC MSE Supplies AZ Retsch Inc PA

Mills, Rod

Wyssmont Co NJ

Mills, Roll

CERIC Technologies France CW Brabender Instruments Inc NJ Exakt Technologies Inc OK Gundlach Equipment Corp IL Haiku Tech Europe BV Nethenlands Haiku Tech Inc FL Mark Hydrauliks Pvt India MSE Supplies AZ Norstone Inc PA Raymond Bartlett Snow IL Tape Casting Warehouse Div PA Williams Patent Crusher & Pulverizer Co Inc MO

Mills, Vibratory

Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA Sweco KY

Mining & Beneficiation Equipment

Dover Conveyor Inc OH Netzsch Premier Technologies LLC PA Reed Gunite & Shotcrete Equipment CA Rockwell Automation Inc WI Siemens Process Industries & Drives GA

Mixers, Batch

Carolina Material Technologies NC Custom Processing Services PA CW Brabender Instruments Inc NJ Dynamic Air Inc MN





Goceram AB Sweden Lancaster Products PA Netzsch Premier Technologies LLC PA Nol-Tec Systems Inc MN Norstone Inc PA OPF Enterprises MT Peter Pugger Manufacturing Inc CA UV Process Supply Inc IL Whirl Air Flow Corp MN

Mixers, Drum

Glen Mills Inc NJ Hockmeyer Equipment Corp NC Norstone Inc PA UV Process Supply Inc IL

Mixers, Pneumatic

Carolina Material Technologies NC Dynamic Air Inc MN Nol-Tec Systems Inc MN Whirl Air Flow Corp MN

Mixers, Portable

Dynamic Air Inc MN Jiffy Mixer Co Inc CA Peter Pugger Manufacturing Inc CA

Mixers, Refractory

Applicon Co IN Eirich Machines Inc IL EZ Grout Corp OH GV Service Inc NY Laeis GmbH Luxembourg Lancaster Products PA Littleford Day Inc KY Netzsch Premier Technologies LLC PA Peter Pugger Manufacturing Inc CA Reed Gunite & Shotcrete Equipment CA

Mixers, Vacuum

Applicon Co IN Errich Machines Inc IL Netzsch Premier Technologies LLC PA Norstone Inc PA Peter Pugger Manufacturing Inc CA

Mixing Equipment

Aadvanced Machinery Inc MI Carolina Material Technologies NC Custom Processing Services PA

BUYING AND SELLING



Detroit Process Machinery MI Dynamic Air Inc MN



See ad page 92

Eirich Machines Inc IL ER Advanced Ceramics Inc OH General Glass Equipment Co NJ



Hockmeyer Equipment Corp NC Hosokawa Micron Powder Systems NJ Laguna Clay Co CA Lancaster Products PA Littleford Day Inc KY Netzsch Premier Technologies LLC PA Norstone Inc PA

See ad page 87

OPF Enterprises MT Peltsman Corp MN Peter Pugger Manufacturing Inc CA Process Engineering Services TX Resodyn Acoustic Mixers Inc MT Sweco KY UV Process Supply Inc IL Whirl Air Flow Corp MN Young Industries Inc PA

Nozzles

CerCo LLC OH CERIC Technologies France Dunhua Zhengxing Abrasive Co Ltd China HC Starck GmbH Germany Maryland Ceramic & Steatite Co Inc MD Renite Co OH Tenmat Ltd UK

Packaging

Lachenmeier ApS Denmark Tempo Plastic CA

Packaging Equipment

Basic Machinery Co Inc NC Haver & Boecker OHG Germany Hosokawa Micron Powder Systems NJ Lachenmeier ApS Denmark OPF Enterprises MT PackagingSuppliesByMail.com OH Presto Stantest Pvt Ltd India



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- Nol-Tec Systems Inc MN
- Reed Gunite & Shotcrete Equipment CA Velco GmbH Germany
- Whirl Air Flow Corp MN
- Young Industries Inc PA

Process Control Equipment

Bindicator SC Control Instruments Corp NJ Datapaq Inc NH Eirich Machines Inc IL General Glass Equipment Co NJ Nol-Tec Systems Inc MN Norcross Viscosity Controls MI Ram Products Inc OH Rockwell Automation Inc WI Siemens Process Industries & Drives GA Strainoptics Inc PA

Pulverizers

Applicon Co IN Basic Machinery Co Inc NC Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA **Glen Mills Inc NJ** Gundlach Equipment Corp IL Hosokawa Micron Powder Systems NJ Process Engineering Services TX Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA Williams Patent Crusher & Pulverizer Co Inc MO Wyssmont Co NJ

Pumps

ER Advanced Ceramics Inc OH Fluid Metering Inc NY Goulds Pumps ITT NY GV Service Inc NY Ram Products Inc OH Reed Gunite & Shotcrete Equipment CA Warren Rupp Inc OH

Pumps, Concrete Plasma Etch Inc NV Reed Gunite & Shotcrete Equipment CA

Pumps, Drum UV Process Supply Inc IL

Pumps, Vacuum CERIC Technologies France Kaeser Compressors Inc VA

Scale Systems

CSC Force Measurement Inc MA Mettler-Toledo Inc OH Whirl Air Flow Corp MN

Screens & Screening Equipment

Aadvanced Machinery Inc MI Basic Machinery Co Inc NC Cambridge Intl MD Cambridge Wire Cloth Co MD Cleveland Vibrator Co OH Control Instruments Corp NJ Croll-Reynolds Engineering Co CT **Detroit Process Machinery MI** Emery Winslow Scale Co CT Fluid Metering Inc NY Fritsch GmbH - Milling & Sizing Germany Fritsch Milling & Sizing PA **Glen Mills Inc NJ** See ad page 87 Haver & Boecker OHG Germany Hebei Tengfei Wire Mesh Co Ltd China Hosokawa Micron Powder Systems NJ Manufacturers Equipment Co OH Midwestern Industries Inc OH Mohr Corp MI See ad page 81 Norstone Inc PA Process Engineering Services TX Retsch Inc PA Russell Finex Inc NC Schutte-Buffalo Hammermill LLC NY Sellick Equipment Ltd Canada Sicco Engineering Works India Spencer Turbine Co CT Sturtevant Inc MA

Sweco KY WCS Inc CA Separators

Gundlach Equipment Corp IL Hosokawa Micron Powder Systems NJ Kaeser Compressors Inc VA Midwestern Industries Inc OH Presto Testing Instruments India Russell Finex Inc NC Spencer Turbine Co CT Sturtevant Inc MA Sweco KY Williams Patent Crusher & Pulverizer Co Inc MO

Shredders

CERIC Technologies France Fritsch GmbH - Milling & Sizing Germany Glen Mills Inc NJ See ad page 87 Gundlach Equipment Corp IL Hosokawa Micron Powder Systems NJ Stedman Machine Co IN Williams Patent Crusher & Pulverizer Co Inc MO

Single-Wafer Packs Tempo Plastic CA

Size Reduction Equipment

AVEKA MN Basic Machinery Co Inc NC Ceramic Engineering & Consulting Services (CECS) AZ Custom Processing Services PA Dynamic Air Inc MN Eirich Machines Inc IL ER Advanced Ceramics Inc OH Fritsch GmbH - Milling & Sizing Germany **Glen Mills Inc NJ** See ad page 87 Gundlach Equipment Corp IL Hosokawa Micron Powder Systems NJ Lancaster Products PA Manufacturers Equipment Co OH Netzsch Premier Technologies LLC PA Norstone Inc PA **OPF Enterprises MT** Raymond Bartlett Snow IL Retsch Inc PA Schutte-Buffalo Hammermill LLC NY Stedman Machine Co IN Sturtevant Inc MA Sweco KY The CS Bell Co OH Union Process OH Williams Patent Crusher & Pulverizer Co Inc MO Wyssmont Co NJ

Spray Dryers

Aadvanced Machinery Inc MI Arch Maintenance Services GA AVEKA MN Detroit Process Machinery MI Dorst America Inc PA Elan Technology GA Euro Support Advanced Materials Netherlands Presto Testing Instruments India Spray Drying Systems Inc MD

Spray Guns, Manual

Amstat Industries Inc IL

Storage Equipment

Basic Machinery Co Inc NC Cyclonaire Corp NE Kornylak Corp OH Manufacturers Equipment Co OH Martin Engineering IL Presto Testing Instruments India Whirl Air Flow Corp MN

Substrate Wafer Trays Tempo Plastic CA

Tile-Sorting Equipment GV Service Inc NY

Used Equipment Aadvanced Machinery Inc MI American Isostatic Presses OH

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Dorst America Inc PA Gundlach Equipment Corp IL



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Mohr Corp MI See ad page 81 Norstone Inc PA Reed Gunite & Shotcrete Equipment CA

Vacuum Cleaning Systems

Carolina Material Technologies NC Nilfisk-Advance America Inc MN Plasma Etch Inc NV Spencer Turbine Co CT Vector Technologies Inc WI Whirl Air Flow Corp MN

Ventilating Equipment

American Art Clay Co Inc IN Spencer Turbine Co CT

Vibrators

Carman Industries Inc IN Carolina Material Technologies NC Cleveland Vibrator Co OH Martin Engineering IL Rockwell Automation Inc WI

Vibrators, Bin

Carman Industries Inc IN Carolina Material Technologies NC Cleveland Vibrator Co OH Cyclonaire Corp NE Martin Engineering IL

Weighing Equipment

Carolina Material Technologies NC CSC Force Measurement Inc MA Dynamic Air Inc MN Eirich Machines Inc IL Emery Winslow Scale Co CT Hosokawa Micron Powder Systems NJ Mettler-Toledo Inc OH Nol-Tec Systems Inc MN Siemens Process Industries & Drives GA

Wire Cloth

Cambridge Intl MD Cambridge Wire Cloth Co MD Haver & Boecker OHG Germany Hebei Tengfei Wire Mesh Co Ltd China Midwestern Industries Inc OH Russell Finex Inc NC

PLANT CONSTRUCTION, DESIGN, & ENGINEERING

Brick Production

Basic Machinery Co Inc NC Dover Conveyor Inc OH GV Service Inc NY Innovative Processing Solutions LLC IN Laeis GmbH Luxembourg Swindell Dressler Intl Co PA

Casting Plants

Dorst America Inc PA ER Advanced Ceramics Inc OH Lippert Germany Mixer Systems Inc WI

Ceramic Production

Cerinnov France Cerlase France HTI Technologies France Innovative Processing Solutions LLC IN Krautzberger NA LLC VA Lippert Germany Lucideon UK Maryland Ceramic & Steatite Co Inc MD Mixer Systems Inc WI Novadis GmbH Switzerland OPF Enterprises MT Prolec SA de CV Mexico ROmiLL sro Czech Republic Virdis3D LLC MA

Combustion Systems

Air Products & Chemicals Inc PA Elster-Hauck Manufacturing Co PA Swindell Dressler Intl Co PA

Decals & Decorating

Cerinnov France Cerlase France Gwent Electronic Materials Ltd UK Novadis GmbH Switzerland

Drying & Firing

Basic Machinery Co Inc NC Casso-Solar Technologies NY Ceramic Services Inc PA CERIC Technologies France Drayton Beaumont Kilns Ltd UK Elster-Hauck Manufacturing Co PA GV Service Inc NY



BDF Industries Italy Manuland Caramia & Staatite Ca Ing N

Maryland Ceramic & Steatite Co Inc MD

Glass Production BDF Industries Italy

CelSian Glass & Solar BV Netherlands Eglasstrek Patent Promotion & Awarding GmbH Germany General Glass Equipment Co NJ Magnetic Specialities Inc PA Mixer Systems Inc WI Schott North America Inc KY Tri-Mer Corp MI

Inspection Systems

Advanced NDT Ltd UK Cetek Ltd OH CSC Force Measurement Inc MA Fosbel Inc OH Lumetrics Inc NY Rockwell Automation Inc WI Siemens Process Industries & Drives GA Strainoptics Inc PA

Laboratories

Activation Laboratories Ltd Canada Naylor Hathernware UK Presto Stantest Pvt Ltd India

Optical-Fiber Production Mixer Systems Inc WI

Ocean Optics Inc FL

Refractory Production

AK Das, Consultant India ER Advanced Ceramics Inc OH Laeis GmbH Luxembourg Laguna Clay Co CA Mixer Systems Inc WI

Semiconductor Processing Plasma Etch Inc NV

Structural Ceramics Production

CerCo LLC OH Krautzberger NA LLC VA Lippert Germany Manufacturers Equipment Co OH Maryland Ceramic & Steatite Co Inc MD Mixer Systems Inc WI Swindell Dressler Intl Co PA Takasago Industry Co Ltd Japan **TevTech LLC MA**

Tile Production

GV Service Inc NY Laeis GmbH Luxembourg LIXIL Corp Japan Novadis GmbH Switzerland Process Engineering Services TX

Whiteware Production

Krautzberger NA LLC VA Lippert Germany LIXIL Corp Japan Ram Products Inc OH Swindell Dressler Intl Co PA

PORCELAIN ENAMEL

Appliances

Roca Sanitario SA Spain Silico & Chemico Porcelain Works India Zenith China

Architectural Units

Roca Sanitario SA Spain Silico & Chemico Porcelain Works India Zenith China

Ceramic Coatings, Thermal Protection

Cerinnov France Cerlase France Silico & Chemico Porcelain Works India Zenith China

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See ad page 72

OUR UNIQUE MIXING PRINCIPLE

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Aggregate

Christy Minerals LLC MO Furnace Products & Services Inc PA Magneco Metrel Inc IL Maryland Refractories Co OH

Alumina

Able Supply Co TX Advanced Ceramic Technology CA Allied Mineral Products Inc OH AluChem Inc OH Applied Ceramics Inc GA Associated Ceramics & Technology Inc PA Astral Material Industrial Co Ltd China **B&B Refractories Inc CA** Baikowski Malakoff Inc NC Bucher Emhart Glass SA Switzerland See ad page 94 Ceramaterials NY Ceramco Inc NH Ciria India Ltd India Dalmia Inst of Scientific & Industrial Research India Du-Co Ceramics Co PA Dynamic Exim Corp India ER Advanced Ceramics Inc OH ETEC Gesellschaft fuer Technische Keramik GmbH Germany Fame Rise Refractories Co Ltd China Filtros I td NY Foshel Inc OH General Material Industrial Co China **IPS Ceramics LTD UK** Ipsen Ceramics IL Khodiyar Ceramics (India) Pvt Ltd India Magneco Metrel Inc IL Maryland Refractories Co OH Missouri Refractories Co (MORCO) MO Pacific Refractories Ltd India Prairie Ceramics Corp CA Precision Ferrites & Ceramics Inc CA Pryor Giggey Co AL Quartzite Processing Inc MA Rath Inc DE Refractory Minerals Co Inc PA Refractory Specialties Inc OH RHI US I td NY **Riverside Refractories Inc AL** Saint-Gobain Ceramic Materials MA Selee Corp NC Shinagawa Advanced Materials American Inc OH Sunrock Ceramics Co IL Texers Technical Ceramics Inc Canada Togni SA Materiais Refractarios Brazil Whitacre Greer Co OH Wistra France Wistra GmbH Germany Xiamen Innovacera Advanced Materials Co China Xieta Intl SL Spain Zhengzhou Peakland Industrial Co Ltd China Zircar Ceramics Inc NY Zircar Refractory Composites Inc NY

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Arches, Suspended

Fosbel Inc OH Ipsen Ceramics IL Merkle Intl Inc IL Refractory Specialties Inc OH Togni SA Materiais Refractarios Brazil

AZS

Bucher Emhart Glass SA Switzerland See ad page 94 Fosbel Inc OH Magneco Metrel Inc IL Missouri Refractories Co (MORCO) MO Refractory Specialties Inc OH RHI US Ltd NY Zhengzhou Sunrise Refractory Co Ltd China Backwalls Fosbel Inc OH Merkle Intl Inc IL

Merkle Intl Inc IL Zhengzhou Sunrise Refractory Co Ltd China Basic

Allied Mineral Products Inc OH

Alled Minista Floutics into or Ciria India Ltd India Furnace Products & Services Inc PA Luoyang Yilong Refractory Co Ltd China Magneco Metrel Inc IL Missouri Refractories Co (MORCO) MO OCL India Ltd India RHI US Ltd NY Togni SA Materiais Refractarios Brazil Zhengzhou Sunrise Refractory Co Ltd China

Blankets

Associated Ceramics & Technology Inc PA Avkem Intl TN Ceramaterials NY Cetek Ltd OH Ciria India Ltd India Morgan Thermal Ceramics GA Prairie Ceramics Corp CA Promat GmbH Germany Refractory Specialties Inc OH RHI US Ltd NY Simond Intl LLC TX Thermal Products Co Inc GA



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Unifrax I LLC NY

Zhengzhou Peakland Industrial Co Ltd China Zhengzhou Sunrise Refractory Co Ltd China Zircar Ceramics Inc NY Zircar Refractory Composites Inc NY Zircar Zirconia Inc NY

Boards

Agni Fiber Boards Pvt Ltd India Avkem Intl TN Ceramaterials NY Ciria India Ltd India Luoyang Yilong Refractory Co Ltd China Morgan Thermal Ceramics GA Prairie Ceramics Corp CA Promat GmbH Germany Refractory Specialties Inc OH RHI US Ltd NY Saint-Gobain Ceramics & Plastics MA Thermal Products Co Inc GA **Unifrax I LLC NY** See ad page 93 Zhengzhou Sunrise Refractory Co Ltd China



Zircar Ceramics Inc NY Zircar Refractory Composites Inc NY Zircar Zirconia Inc NY Brick

Able Supply Co TX APF Recycling Inc OH Ceramaterials NY Ciria India Ltd India Fame Rise Refractories Co Ltd China General Material Industrial Co China HarbisonWalker Intl PA Insulating Firebrick Inc PA Lam Dong Minerals & Building Materials Joint-Stock Co Vietnam Luoyang Yilong Refractory Co Ltd China Morgan Thermal Ceramics GA Pacific Refractories Ltd India Prairie Ceramics Corp CA RHI US Ltd NY Saint-Gobain Ceramic Materials MA Shinagawa Advanced Materials American Inc OH Sunrock Ceramics Co IL Togni SA Materiais Refractarios Brazil Whitacre Greer Co OH Wistra France Wistra GmbH Germanv

Brick, Acid-Resisting

Dynamic Exim Corp India Khodiyar Ceramics (India) Pvt Ltd India Koch Knight LLC OH Luoyang Yilong Refractory Co Ltd China Pacific Refractories Ltd India Togni SA Materiais Refractarios Brazil Vitcas Ltd UK Zhengzhou Sunrise Refractory Co Ltd China

Brick, Fireclay

Able Supply Co TX Allied Mineral Products Inc OH Alsey Refractories Co MO B&B Refractories Inc CA Burton GmbH & Co KG Germany Ceramaterials NY Cetek Ltd OH Ciria India Ltd India Dynamic Exim Corp India Fame Rise Refractories Co Ltd China Lock 3 Co PA Luoyang Yilong Refractory Co Ltd China Pacific Refractories Ltd India Prism Monolithics Pvt Ltd India Pryor Giggey Co AL RHI US Ltd NY Togni SA Materiais Refractarios Brazil Usen Material Industrial Co Ltd China Vitcas Ltd UK Whitacre Greer Co OH Yangquan Metals & Minerals Import & Export Co Ltd China Zhengzhou Sunrise Refractory Co Ltd China

Carbon

See ad page 93

Applied Ceramics Inc GA Astral Material Industrial Co Ltd China Ceramaterials NY Koch Knight LLC OH Pacific Refractories Ltd India Shinagawa Advanced Materials American Inc OH

Castable

Able Supply Co TX Allied Mineral Products Inc OH Alsey Refractories Co MO Aremco Products Inc NY Capital Refractories Ltd UK Ceramic Oxide Fabricators Pty Ltd Australia Cetek Ltd OH

China Mineral Processing Ltd China Ciria India Ltd India Fame Rise Refractories Co Ltd China Furnace Products & Services Inc PA HarbisonWalker Intl PA Industrial Ceramic Products Inc OH Magneco Metrel Inc IL Missouri Refractories Co (MORCO) MO Mixer Systems Inc WI OCL India Ltd India Pacific Refractories Ltd India Phoenix Coating Resources Inc FL Plibrico Japan Co Ltd Japan Prism Monolithics Pvt Ltd India Promat GmbH Germany Pryor Giggey Co AL Reno Refractories Inc AL RHI US Ltd NY **Riverside Refractories Inc AL** Selee Corp NC Togni SA Materiais Refractarios Brazil Vitcas Ltd UK Yangquan Metals & Minerals Import & Export Co Ltd China Zhengzhou Sunrise Refractory Co Ltd China Zircar Refractory Composites Inc NY

Cements

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Clay Flux

Furnace Products & Services Inc PA Peter Pugger Manufacturing Inc CA RHI US Ltd NY

Coatings

Allied Mineral Products Inc OH Applied Ceramics Inc GA Aremco Products Inc NY Avkem Intl TN Cetek Ltd OH Ciria India Ltd India Cotronics Corp NY Fosbel Inc OH Furnace Products & Services Inc PA Fusion Ceramics Inc OH Gwent Electronic Materials Ltd UK Induceramic Canada Magneco Metrel Inc IL Phoenix Coating Resources Inc FL Plibrico Japan Co Ltd Japan Prism Monolithics Pvt Ltd India Promat GmbH Germany Rath Inc DF Refractory Specialties Inc OH Riverside Refractories Inc AL Saint-Gobain Ceramic Materials MA Starfire Systems Inc NY Thermal Products Co Inc GA **Unifrax I LLC NY** See ad page 93 Vitcas Ltd UK Zibo Guangtong Chemical Co Ltd China

Zircar Refractory Composites Inc NY **ZYP Coatings Inc TN**

Cordierite

Abref Pvt Ltd India Advanced Ceramic Technology CA Akron Porcelain & Plastics Co OH Applied Ceramics Inc GA

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Crucibles

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Dead-Burned

Fluid Energy Processing & Equipment Co PA Togni SA Materiais Refractarios Brazil

Fiber Products

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See ad page 93

Zhengzhou Peakland Industrial Co Ltd China Zhengzhou Sunrise Refractory Co Ltd China



Zircar Ceramics Inc NY Zircar Zirconia Inc NY

Filters, Molten Metal

Akron Porcelain & Plastics Co OH Enterprise Personnel CO Filtros Ltd NY Induceramic Canada Industrial Ceramic Products Inc OH Selee Corp NC

See ad page 55

Foundry Allied Mineral Products Inc OH Avkem Intl TN B&B Refractories Inc CA Blasch Precision Ceramics Inc NY Capital Refractories Ltd UK Fosbel Inc OH HC Starck GmbH Germany Industrial Ceramic Products Inc OH Ipsen Ceramics IL LECO Corp MI Magneco Metrel Inc IL Missouri Refractories Co (MORCO) MO Mixer Systems Inc WI Pryor Giggey Co AL Riverside Refractories Inc AL Saint-Gobain Ceramic Materials MA Sandkuhl Clay Works Inc OH Selee Corp NC Silicon Carbide Products Inc NY Zhengzhou Peakland Industrial Co Ltd China Zircar Refractory Composites Inc NY

Fused Cast

Enterprise Personnel CO Fosbel Inc OH Furnace Products & Services Inc PA Mixer Systems Inc WI Phoenix Coating Resources Inc FL Saint-Gobain Čeramic NY See ad page 53 Zhengzhou Sunrise Refractory Co Ltd China

Fused Spinel

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Glass Furnace

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5360 Enterprise Blvd	Fax: 412-835-6474
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dieauip@dieauip.com	

http://diequip.com

Manufactures ID, OD, and face grinders for small-diameter superabrasive grinding. Supplies diamond and CBN grinding pins and wheels. Distributes precision hand tools, optical comparitors, CMMs, vision systems, toolscopes, and microscopes.

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http://boroncarbide.cn

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rplatt@dynacut.com

http://dynacut.com

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Manufactures masonry and concrete equipment. Product line includes the Grout Hog, Mud Hog Mixer, Booger Hog, and Hog Leg, all registered trademarks of the company.

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Institute for applied research in the field of nonmetallic inorganic materials. Main research divisions are glass, ceramics, and inorganic–organic hybrid polymers.

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Specializes in processing kaolin products, refractory ceramic tubes, refractory bricks, chammot bricks, etc.

LANCASTER PRODUCTS 717-273-2111 920 Mechanic St Fax: 717-273-2967 Lebanon PA US 17046

info@lancasterprd.com

http://www.lancasterprd.com

Produces mixers (rotating pan, countercurrent, high-intensity, and muller mixers (rotating pair, contribution in the interval), with bulk-bag unloader, double-roll crushers, table feeders, AutoBrik molded brickmaking machines, and custom machines.

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856-294-0077

Fax: 856-294-0070

http://www.lanly.com

Established 1938. Designs and builds custom ovens and dryers for an extensive range of industries. Convection systems include integrated material handling for high-volume processing. On-site product development lab.

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Lithoz is a system provider for additive manufacturing of

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Manufactures and sells lab instrum of ceramic and refractory material, equipment, microscopes, hardness analysis equipment.	sample preparation	Manufactures recrystallized silic including kiln furniture, diesel particul filters with membranes for liquid filter	late filters, and ceramic applications.
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leico@leicoind.com		http://littleford.com	

Established 1966. Supplies alumina solid rod, tubing, and double- and four-bore insulators: calcia-stabilized, vttriastabilized, and magnesia-stabilized zirconia; beryllium and thorium oxides in various forms; and clear fused quartz tubing.

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Manufactures electrically heated industrial and lab furnaces, hf/rf mf generators, sample preparation systems for spectroscopy, microwave furnaces and dryers, and precision fine casting machines for jewelry, aerospace, automotive, and dental industries.

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Manufactures ceramic floor, wall, and countertop tile. Also performs custom work.

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http://www.yilongrefractory.com

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Offers minerals for refractories manufacture. Also crushes, blends, screens, and packages materials for third-party refractory companies.

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Manufactures processing equipment, including mixers, granulators, agglomerators, vacuum dryers, liquid dispersers, and pressure reactors. Also provides pilot-plant and lab equipment. Maintains a completely equipped test center to assist customers.

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MANUFACTURERS EQUIPMENT CO 35 Enterprise Middletown OH US 45044-8924	800-642-6326 Fax: 513-424-3576

info@mecoservices.com

http://mecoservices.com

Manufacture brick-cutting, coil, autosetting machine and texturing as well as hard chrome-plated die wires. GESG division is the brick industry's distributor for AccuRate feeders. Hanco controls, Burton refractories. De Boer automated soft-mud systems.

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http://www.kitkatfuse.com

MA

Established in 1989, Maruti Refractories is a manufacturer, supplier, and exporter of electrical porcelain, Kit Kat fuse, and Cutout fuse.

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Manufactures industrial combustion equipment, including combustion air blowers, gas and oil burners, and metal-to-metal seated fuel shut-off valves for most high-temperature furnace applications as well as direct-fired air heating.

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MemPro manufactures ceramic nanofibers, polymetric nanofibers, and catalyst products. It continually works with customers to develop and supply new materials for innovative technologies. MemPro produces the highest quality materials backed by unrivaled know-how.

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Galena IL US 61036	

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St Marys PA US 15857	

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kgrayson@mo-sci.com

http://mo-sci.com

Manufactures microspheres ranging from submicrometer to larger than 150 micrometer in diameter in bioactive and custom glass compositions. Medical-grade glass production. R&D services include development of new glass . compositions.

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Law firm specializing in the drafting and prosecution of patent applications, particularly relating to ceramics, in the U.S. and internationally. Patent attorney Bob Sayre is a member-at-large of the New England Section of ACerS.



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http://www.riotintominerals.com

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s.nelson@stahliusa.com

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strico@strico.ch

http://www.strico.ch

Tracking of work pieces and trays throughout manufacturing areas with high temperatures (up to 1,500°C), chemical or mechanical abuses, e.g., kiln-proof, sequentially numbered bar codes for individual identification of ceramic sanitary ware.

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Structural Ceramic Solutions promotes the use of advanced structural ceramics in providing sustainable solutions for today's challenging problems. The company accomplishes this mission by working with ceramic manufacturers, end users, and industry partners to align component material and part characteristics with application requirements.

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http://super-fine.com

Offers pulverizing technology based on rapid air-pressure changes in a vortex chamber. System enables micronizing and submicronizing of hard and superhard ceramics in a single stage.

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Lake Elmo MN US 55042

info@superconix.com http://superconix.com

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5100 Casteel Dr	Fax: 412-788-7110
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http://www.swindelldressler.com

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http://www.indiamart.com/symphony-tradecomm

Manufactures microsilica and amorphous silica for several uses. Also manufactures rice husk ash tundish covering product for ironmaking and steelmaking as well as a product for super concrete based on rice husk ash.



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Manufacturer of test instruments that aid the understanding of material physical properties, including abrasion and scratch resistance. Test results assist R&D, process control, and quality assurance for ceramics, coatings, and other materials.

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hitoshi ando@takasago-inc.co.jp http://www.takasago-inc.co.jp

Designs and manufactures electric-heated and gas-fired industrial kilns. Specializes in roller hearth kilns, rotary kilns, tunnel kilns, periodic kilns, including shuttle kilns, microwave kilns, microwave-electric or -gas hybrid kilns, and various dryers.

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Established 1983. Consulting services for technical ceramics. specializing in tape-casting technology.

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eo loxz@vahoo.com.cn	

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foundation@tileheritage.org http://tileheritage.org	

Established 1987. Nonprofit historical organization dedicated to research and preservation and to promote an awareness and appreciation of ceramic surfaces in the U.S.

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http://togni.com.br

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Naperville IL US 60563

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nicolas.justeau@toyala.com

http://toyala.com

Producer and distributor of various grades of aluminum nitride for sintering. Also produces silica-coated aluminum nitride with excellent thermal conductivity properties. Offers atomized spherical and conventional aluminum powders.

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41-1 Yokomichi	

Nagakute Aichi Japan 480-1192

http://www.tytlabs.com

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5520 Adamstown Rd	Fax: 301-695-7065
Adamstown MD US 21710	

transtech@skyworksinc.com http://www.trans-techinc.com

Manufactures ceramic components for rf, microwave, and specialty powder applications. Products include dielectric resonators, coaxial resonators, band-pass filters, ferrite phase shifter elements, ferrite circulator and isolator elements, and ferrites.

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Trebol USA is manufacturer and international supplier of raw materials for the ceramic, chemical, and foundry industries. Trebol USA is a recognized supplier of zircon opacifiers, flours, and sands of the highest quality.

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Established 1898. Makes rare earths, rare-earth oxides, and rare-earth oxide compounds for several applications. The product portfolio also includes a broad range of carbide, boride, and nitride powders.

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201 Leverington Ave	Fax: 215-482-9389
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Manufactures electrically heated process equipment for industrial applications. Manufactures furnaces and ovens for the glass and ceramics industries as well as replacement heating elements.

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kevin.moss@tri-mer.com http://www.tri-mer.com

Glass furnace emissions: UltraCat Catalyst Filters are the technology of choice for container and flat glass. Also kilns, ceramic production, and cement. Remove any combination of PM, SOx, and NOx, HCl, HF, and metals to below EPA standards.

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http://trinityceramic.comt

Established 1950. Distributes raw materials and chemicals to the tile, sanitaryware, brick, porcelain enamel, artware, and hobby industries. Inventories include opacifiers, kaolins (foreign and domestic), feldspars, nepheline syenite, and ball clays.

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particle@tsi.com

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Established 1966. Develops aerosol research instrumentation. Offers complete solutions for sizing, counting, characterizing, generating, and dispersing aerosol particles.

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lel@ukam.com

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Manufactures ultrathin and high-precision diamond blades, diamond drills, 0.001-in.- to 48-in.-diameter dicing blades, lab dicing saws, sectioning saws, grinders, and polishers for sample preparation. Manufactures custom industrial diamond tooling.

UMG - UNITED MINERALS GROUP	+38 44 590 6444
Rozy Luxemburg 48b	
Ukraine Ukraine 83050	

info@umgukraine.com.ua

http://umgukraine.com

United Minerals Group is the largest Ukrainian white plastic ball clay extracting group. The clay produced by UMG is considered to be ideally suitable for porcelain tile (gres). It brings high whiteness, strength, and plasticity.



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Manufacture equipment for fine grinding of ceramic products and equipment designed to provide rapid reduction of particles, in some cases, submicron in size. Narrow particle size attainable.

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Universidad Autonoma de Nuevo Leon is a public university with seven campuses across Nuevo Leon. Mexico. It is the oldest and largest university in the state in terms of student population

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Main material R&D of new manufacturing technologies for ceramic components and composites, focused on structural/ functioning ceramics, fiber-reinforced materials, surface/ coating technologies, numerical process simulations, and materials characterization.

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Vanderbilt Minerals LLC specializes in industrial minerals and chemicals, including kaolin clays, pyrophyllite, wollastonite, smectite and hectorite clays, dispersing agents, and xanthan aum.

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Milwaukee WI US 53209	

sales@vector-vacuums.com http://vector-vacuums.com

Designs and manufactures industrial vacuums for brick, clay, and ceramic-tile industries

VELCO GMBH	+49-2051-2087-0
Haberstr 40	Fax: +49-2051-2087-20
Velbert North Rhine-Westo	halia Germany 42551

ELGU GIMBH	+49-2051-2087-0
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info@velco.de http://velco.de

Produces gunning machines, gunning robots for hot repair of EAF, ladle, RH, etc. Pneumatic injection machines for the steel industries. Using the patented GUNMIX system, it is possible to apply LC qualities in dry gunning.



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Fax: 267-757-0358

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http://www.verder-scientific.com

Verder's Scientific Division sets standards in high-tech equipment for quality control, research, and development of solid matter. Fields of activity cover sample preparation of solids as well as analyzing technology.

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Verity provides manufacturing consulting, technical investigations, analysis, reports, and testimony for the resolution of litigation and claims involving failures of glass and ceramic materials, product liability, and industrial workplace accidents.

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vesco@vesco.Ukraine.ua http://vesco.dn.ua

Produces, distributes, and exports clay mixtures of various chemical composition according to customer specification.

VESUVIUS	843-774-6026
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debbie.alexander@us.vesuvius.com

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British manufacturer of refractory cement, fire cement, refractory castables, fire bricks, ceramic fiber products, acid resistant cements, zircon refractory products, coatings, tap hole clays, refractory moldables, taming mix, and high alumina mortars.

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frans.snijkers@vito.be

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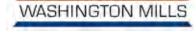
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Mansfield OH US 44902 info@warrenrupp.com

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Manufactures fused synthetic minerals for use in refractory raw materials, abrasives, ceramic raw materials, and industrial applications. Products include silicon carbide, brown fused alumina, white fused alumina, boron carbide, and bubble alumina.

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geles CA US 90032

sales@claymachinery.com

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Established 1912. Represents manufacturers of equipment for the heavy-clay products industry, including extruding, grinding, screening, conveying, automatic handling, burning, and drving equipment.

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WESBON

Established 1976. Develops and manufactures new binding and bonding systems for refractory-fiber shapes and ceramic composites as well as ceramic shell molds for investment castings. Products include colloidal alumina and silica and mullite binders.

WHIRL AIR FLOW CORP	763-262-1200
20055 177th St	Fax: 763-262-1212
Big Lake MN US 55309	

whirlair@whirlair.com http://whirlair.com

Established 1946. Manufactures dry bulk material-handling equipment, storage facilities, batch blenders, and densephase pneumatic conveying equipment. Complete line of central vacuum systems.

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Shangyu Zili Corp New Material Co Ltd (Zili Corp) is a comprehensive company specializing in refractories, chemical materials, and domestic and overseas trade established jointly by Shangyu Dongshun.

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Manufactures special chemical products for the ceramics industry. Plants in U.S., Germany, Italy, Spain, and Brazil.

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