

1. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS

Study Reliability and Reporting Limitations

Disclaimers

Data Interpretation & Reporting Level

Quantitative Techniques & Analytics

Product Definitions and Scope of Study

Product Segments Definitions

Polycarbonates (PC)

ABS (Acrylonitrile-Butadiene-Styrene)

Polyacetal

Nylon

Thermoplastic Polyesters

Others

End-Use Segments

Automotive

Electrical and Electronics

Appliances

Miscellaneous

2. MARKET OVERVIEW

A Quick Primer

Current Market Scenario

Growth Slips Amid a Cooling Economy

The World Beyond Recession

Outlook

Noteworthy Market Trends

Demand Conditions Brighten up for Polycarbonate

Far Eastern Countries Represent Roaring Market for Polycarbonate

Healthy Growth Projected in Thermoplastic Polyesters and Other Low Volume Resins

‘Comply and Survive’ Forms the Environmental Dictum

Thermoset Resins Need to Disown Hazardous Chemicals to Survive in the Market

Challenges

High Performance Features Drive Growth Potential

Thermosets All Set to Enter New Niche Markets

Review Of Plastics Industry

Medical Plastics Demand Set to Rise

Medical Components Segment to Overtake Medical Packaging Applications

Commodity Resins Poised to Dominate the Medical Plastics Market

Fast-paced Growth Predicted for Engineered Plastics

Automotive Applications to Boost PC Demand

Construction and Medical Industries Drive PC Demand

PC Preferred for Water Bottles

Polypropylene to Offer Good Competition to ABS

North America to be the Manufacturing Hub for Larger Appliances

Electronics and Information Storage to Boost Market

Growing Demand for Engineered Plastics in Engine Parts

Booming Market for Microsphere Fillers in North America

Other Expanding Applications in Automotive Industry
Heat-Resistant Engineered Plastics Replace Steel in Hot Water Tanks
China and India: Burgeoning Markets for Engineered Plastics
India Set to Become Hot Destination for Foreign Investment
Blends - Gaining Ground

3. PRODUCT OVERVIEW

Introduction to Engineered Plastics
Plastics
The Beginning
World War II - a Boon for the Plastic Industry
Monomers and Polymers
The Final Product
Types of Engineered Plastics
ABS (Acrylonitrile-Butadiene-Styrene)
Polycarbonate
Nylon
Nylon 6/6
Gas-Filled Nylon
Nylon 6
Blue Nylon
Moly-Filled Nylon
Oil-Filled Nylon
Thermoplastic Polyesters
Polyacetal (PA)/Acetal Polymers
Others
PEEK (Polyetheretherketone)
PEI (Polyetherimide)
Phenolics
Polyimide
PPO (Polyphenylene Oxide)
PPS (Polyphenylene Sulfide)
PPSU (Polyphenylsulfone)
Polysulfone
Styrene Acrylonitrile

4. END-USE MARKET ANALYSIS

Automotive
Key Players in the Industry
Electrical and Electronics
Audio and Video Equipment
Electric Lighting and Wiring Equipment
Motors and Generators
Semiconductors
Appliances
Miscellaneous
(i) Building/Construction
(ii) Medical

5. PRODUCT LAUNCHES

Styron Launches CALIBRE™ 1060 DVD Polycarbonate Resin
DSM Engineering Plastics to Introduce Arnitel® Eco
DSM Engineering Plastics Launches Akulon RC
BASF Rolls Out Flame-Retardant Engineering Plastics
Quadrant Engineering Plastic Products Introduces Semitron® MP370 and Duratron D7000 PI
Tekra Corporation Launches New ProTek® Flame Retardant Clear Polycarbonate Film
Rhodia Group Rolls Out Technyl® eXten
RadiciGroup Introduces New Radilon® and Radiflam® Engineering Plastics
Royal DSM Rolls Out EcoPaXX and Palapreg ECO Bioplastic Resins
Nylacast Launches New Eco PA6 Nylon Engineering Plastic
IRPC Introduces Five New Polymer Additives and Styrene Plastic Resin
Bayer MaterialScience Launches Bayblend® M
FR Polycarbonate
DSM Engineering Plastics Unveils Brand Name Stanyl® ForTii™
RTP Unveils New Bio-based Materials
Deposition Sciences Rolls Out Optical Coatings
Interstate Specialty Products Launches Fabricated Plastic Components
Bayer Materialscience Unveils New Makrolon® LED2243 Polycarbonate Resin
Uponor Rolls Out Engineered Plastic Heating Manifold
SABIC Innovative Plastics Introduces Lexan ULG 1120Q Polycarbonate
DuPont Launches New Engineering Thermoplastic Delrin 300CP
Dotmar Safeguard Polycarbonate Introduces SAFEGUARD UVX and SAFEGUARD HARD
RedEye RPM Unveils New Ready Part™ Premium Service
Eastman Chemical Introduces New Medical-Grade Polymer Family
Momentive Performance Materials to Unveil SHP 470 FT 2050
A Raymond Selects Ultramid® T KR4357 G6 to Generate Quick Connectors
Polyplastics Develops DURACON M90LP
Polyplastics Develops Fortron 1140A66
Solvay Launches SEQUEL 1828 with Lowest CLTE
Memry Corporation Introduces Putnam Plastics Plus
3D Systems Corp. Launches Accura 55 Plastic as alternative to ABS
GE Plastics Introduces New Lightweight Polycarbonate
Eastman Unveils ParaStar PET Resins
3D Systems Introduces Accura® 60 Plastic for Use in Solid-State Laser Systems
J&A Plastics Launches New Functional Polycarbonate (PC) Blends
3D Systems Launches Accura®25 Plastic
Rochling Engineered Plastics Offers a New Formulation of Polystone
Thixomat Unleashes Thixomolding, New Injection Molding Technology
ATP Engineers a New Medical Device

6. RECENT INDUSTRY ACTIVITY

Celanese Takes Over LFT Business of FACT
Citadel Plastic Holdings Acquires QTR

Bain Capital Partners Takes Over Styron
Ticona Engineering Polymers Purchases Two Product Lines from DuPont
DSM Engineering Plastics and Mitsubishi Chemical Corporation Exchange Business Units
Royal DSM Shaw Industries Group Acquires PA polymerization Unit from Nylon Polymer Company
A. Schulman Takes Over ICO
DSM Engineering Plastics Inks Agreement with RESINEX Group
South Asia Petrochem to Construct Polyethylene Unit
Quadrant Engineering Plastic Products Enters into Joint Venture with Solidur Plasticos Industriais
Eastman Chemical Company Starts New Plant
Lanxess Divests with Lanxess Yaxing Chemicals
Wacker Chemie Establishes Technical Centre
Hitachi Plant Technologies Enters into Contract with Sinopec
Korea Kumho Petrochemical to Establish Plant in China
Citadel Plastic Acquires Fiberfil Engineered Plastics
CNOOC and LG Chemical Enters into Joint Venture
CNPC to Expand Jilin Petrochemical
DuPont Selects PolyOne as Primary Distributor for Thermoplastic Products in North America
Clondalkin Group Acquires Cleveland Plastic Films
Invista to Enter Nylon-6,6 Engineering Polymers Business
Albis Extends Partnership with Lanxess and Bayer
Trexel and Engel Machinery Collaborate
DSM Engineering Commissions Pune Plant
Mitsubishi Extends Cooperation with Sinopec
SK Capital Partners Takes Over Nylon Business of Solutia
Uponor Expands Engineered Plastic
Ube Industries Merges its Subsidiaries
Mitsubishi Plastics Acquires Quadrant
Nilit Takes Over Nylstar
Wiman Corporation Acquires OMNOVA Solutions
National Methanol to Build New Facility
Bayer MaterialScience Signs Agreement with Kyowa Industrial and MHIPTCL
Bayer MaterialScience and Malibu Plastica (P) Limited Ink Agreement
Mitsubishi Chemical Corporation to Construct Bio- polycarbonate Pilot Facility
Braskem to Close PET Unit
Arkema Purchases Oxford Performance Materials
China XD Acquires Favor Sea Limited
FRX Polymers and Uhde Inventa-Fischer Enter into Joint Agreement
Sterling Containers Expands Manufacturing Capacity of PET Bottles
Lubrizol Purchases Dow Thermoplastic Polyurethane Business
Roehling Establishes a Production Plant
JSR to Acquire Techno Polymer
Steller Kunststofftechnik Establishes New Plant

Ultrapolymers Distributes Sabic Innovative Plastics
Saint-Gobain to Expand Research & Development Center
Zamil Industries Enters into Joint Venture with Armacell International
Clariant Establishes Specialty Chemical Facility
Alloy Polymers to Acquire Schulman's Manufacturing Plant
Winco Expands Nylon Plastic Hand Knobs
Shaw Group Bags Contract from Tianjin Dagou Chemical Industry
DyStar Textilfarben Inks Cooperation Agreement with BASF
Sika Automotive Chooses BASF
Daimler and Bayer MaterialScience Enter into Cooperative Agreement
DuPont India Launches DuPont Photovoltaic Solutions
DuPont to Increase Capacity in China
DuPont Establishes Fluoropolymer Production Plant in China
Eastman Chemical Company Enters into Agreement with Plaskolite
Aladdin® and Eastman Chemical Company Enter Partnership
Royal DSM Established Polymerization Plant in Geleen
DSM Unveils Akulon® Polyamide 6 Facility in China
Royal DSM Takes Over The Polymer Technology Group
DSM Takes Over Soluol
SABIC Innovative Plastics Collaborates with LPKF Laser & Electronics
Teijin Chemicals to Increase Production Capacity
Ticona Starts Construction of Hostaform Polyacetal and Celstran Plant
DuPont to Increase Compounding Capacity of Nylon Resins
BASF SE Secures Contract for Ludwigshafen Plant
Bayer MaterialScience Introduces New Facilities in China
Ticona Enters Into Partnership with K.D. Feddersen in North Europe
Röchling to Expand in Gastonia Technology Park
BASF to Reinforce Automotive Business in India
Poly-Pacific Inks Definitive Joint Venture Agreement with Zhejiang Siecheng Plastic Company
Ashland Distribution Inks Agreement with BASF
Satyam Computer Services Signs MoU with Central Institute of Plastics Engineering & Technology
The Conair Group and Husky Injection Molding Systems Enter into Agreement
Chem Polymer Repositions Engineering Plastics Production to Teknor Apex
Evonik Acquires Complete Stake in Degussa Engineered Carbons
SABIC Acquires GE Plastics
Bayer MaterialScience Acquires Ure-Tech
LANXESS and DuPont's Joint-Venture Boosts Production of PBT Polymer
Eastman Divests PET Manufacturing Assets
DSM Acquires Pamako AG
SAUDI KAYAN Inks Two Contracts to Construct PP and LDPE Plants
Ticona to Construct New LFRT Plant at Nanjing
Sintex Acquires Dominant Stake in WCI of USA
Polynt Acquires Plasticizer Business of DSM Composite Resins
NILIT Acquires FRISETTA Polymer

Röchling Engineering Plastics Acquires Glastic Corporation
 Röchling Acquires Symplastics
 BASF Inaugurates Plastics Compounding Plant in China
 Unigel Plastics Merges Policarbonatos and Resarbras to Form Unigel Plasticos
 Rohm and Haas to Form JinHaas with Weihai
 DSM to Construct Engineering Plastics Compounds Plant in India
 DSM Engineering to Build Greenfield Plant in India
 Kuibyshevazot Commences Operations
 Plastal Inks an Agreement with Polytec to Sell Menzolit-Fibron Mouldings
 Audax Group Acquires UTEX
 Radici Forms a Joint Venture with MK Modi Group
 Röchling Acquires Three Companies
 Toray and BASF Commence Commercial Production of PBT Resin
 DSM Initiates Construction of New Polymer Factory in China
 DSM Opens a New Manufacturing Facility for Engineering Plastics in China
 Solvay Acquires Gharda Chemical's Polymers Division
 TriStar Plastics Acquires CJ Composite Bearings Division
 Matrix Acquires Atco Plastics
 Jacobs Secures Contract for the "UH2" Venture of DSM
 IDEX Concludes Acquisition of Eastern Plastics
 Lanxess Steps Up Engineering Plastics Capacity
 BASF Acquires North American EP Venture of LATI Industria
 Fiberfil Acquires DSM's Polypropylene Business
 DSM's Arnitel COPE Collaborates with SpecialChem
 Calico Propels Capacity of Auto Parts
 Applied Tech Products Forms Joint Venture with Wellmei Industrial Co. Ltd.
 China National Chemical Corp. Takes Over Australian Qenos
 BASF Acquires Leuna-Miramid
 Centroplast Acquires Semiplas
 Teijin Completes First Phase of Polycarbonate Project
 Aker Kvaerner Constructs New POM Plant
 MGC Commissions New Polyacetal Facility
 Silon Purchases Suzhou Constab Engineering Plastics
 Bayer ABS Changes Name

7. FOCUS ON SELECT GLOBAL PLAYERS

BASF SE (Germany)
 Bayer AG (Germany)
 Chi Mei Corporation (Taiwan)
 Dow Chemical (US)
 DuPont (US)
 Eastman Chemical Company (US)
 Evonik Degussa GmbH (Germany)
 LG Chem (Korea)
 Polyplastics Co. (Japan)
 Royal DSM NV (The Netherlands)
 SABIC (Saudi Arabia)

SABIC Innovative Plastics US LLC (US)
TICONA Engineering Polymers (Germany)
Teijin Limited (Japan)
Toray Industries Inc. (Japan)
Wintech Polymer Ltd. (Japan)

8. GLOBAL MARKET PERSPECTIVE

Table 1: World Recent Past, Current & Future Market Analysis for Engineered Plastics by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Middle East and Latin American Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Worldwide Engineered Plastics Market by Product Category

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Table 5: World Historic Review for Polycarbonate (PC) by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Middle East and Latin American Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2001 through 2006 (includes corresponding Graph/Chart)

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Table 7: World Recent Past, Current & Future Market Analysis for Acrylonitrile-Butadiene-Styrene by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Middle East and Latin American Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Table 10: World Recent Past, Current & Future Market Analysis for Polyacetal (PA) by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Middle East and Latin American Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Worldwide Engineered Plastics Market by End Use Segment

Table 22: World Recent Past, Current & Future Market Analysis for Engineered Plastics in Automotive Applications by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Middle East and Latin American Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Current & Future Analysis

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11. JAPAN

A. Market Analysis

Current & Future Analysis

Key Player

Mitsubishi Engineering Plastics Corp.

B. Market Analytics

Table 49: Japanese Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene- Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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12. EUROPE

A. Market Analysis

Current & Future Analysis

Solvay (Belgium) - A Key Player

B. Market Analytics

Table 55: European Recent Past, Current & Future Market Analysis for Engineered Plastics by Geographic Region - France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Table 59: European Recent Past, Current & Future Market Analysis for Engineered Plastics by End Use Segment - Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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12a. FRANCE

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Table 64: French Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene- Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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Table 69: French 11-Year Perspective for Engineered Plastics by End Use Segment - Percentage Breakdown of Unit Sales for Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets for 2005, 2010 & 2015 (includes corresponding Graph/Chart)

12b. GERMANY

Market Analysis

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Table 72: German Recent Past, Current & Future Market Analysis for Engineered Plastics by End Use Segment - Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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12c. ITALY

Market Analysis

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Market Analysis

Table 82: UK Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene-Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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12e. SPAIN

Market Analysis

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12f. RUSSIA

Market Analysis

Table 94: Russia Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene-Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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12g. REST OF EUROPE

Market Analysis

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Market Analysis

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13a. CHINA

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Current & Future Analysis

An Overview of Engineered Plastics Market

B. Market Analytics

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13b. REST OF ASIA-PACIFIC

A. Market Analysis

Current & Future Analysis

End Use Market Analysis

Automobiles

Business Machines and Computers

Machinery Components

Building Materials

Telecom

White Goods/Consumer Durables

Consumer Electronics

Key Players

DuPont India (India)

INEOS ABS (India) Ltd. (India)

Korea Engineering Plastics Co., Ltd. (Korea)

Korea Kumho Petrochemical Co., Ltd. (Korea)

Reliance Industries Limited (India)

Shinkong Synthetic Fibers Corporation (Taiwan)

B. Market Analytics

Table 121: Rest of Asia-Pacific Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile- Butadiene-Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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14. THE MIDDLE EAST

Market Analysis

Table 127: Middle East Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene-Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

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15. LATIN AMERICA

Market Analysis

Table 133: Latin American Recent Past, Current & Future Market Analysis for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene-

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Table 134: Latin American Historic Review for Engineered Plastics by Product Category - Polycarbonate, Acrylonitrile-Butadiene-Styrene (ABS), Polyacetal, Nylon, Thermoplastic Polyesters (PBT/PET), and Others Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2001 through 2006 (includes corresponding Graph/Chart)

Table 135: Latin American Recent Past, Current & Future Market Analysis for Engineered Plastics by End Use Segment - Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2007 through 2015 (includes corresponding Graph/Chart)

Table 136: Latin American Historic Review for Engineered Plastics by End Use Segment - Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets Independently Analyzed with Annual Sales Figures in Thousand Metric Tons for Years 2001 through 2006 (includes corresponding Graph/Chart)

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Table 138: Latin American 11-Year Perspective for Engineered Plastics by End Use Segment - Percentage Breakdown of Unit Sales for Automotive, Electrical and Electronics, Appliances, and Miscellaneous Markets for 2005, 2010 & 2015 (includes corresponding Graph/Chart)

214 Total Companies Profiled: 148 (including Divisions/Subsidiaries - 194) Region/Country Players

COMPETITIVE LANDSCAPE

The United States 59

Canada 1

Japan 14

Europe 77

France 12

Germany 18

The United Kingdom 17

Italy

Spain

Rest of Europe 19

Asia-Pacific (Excluding Japan) 39

Latin America 1

Middle-East 3