

# High Performance Plastics – A Global Market Overview

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## Abstracts

High performance plastics are used in applications demanding higher requirements than standard and engineering plastics because of their high strength, good chemical resistance, low coefficient of friction, performance at high temperatures, high quality electrical resistance. Major demand driver for the consumption of high performance plastics is the metal and other low performance materials replacement in demanding applications such as automotive, aerospace, electronics and medical, where high temperature resistance and strength is required. In the automotive & transportation industry including aerospace, growth is supported by metal replacement to reduce weight, while thinner and smaller components in electrical & electronics.

This global report analyzes the high performance plastics comprising Fluoropolymers (PTFE, PVDF, FEP, PCTFE, PFA, PVF, ECTFE and ETFE), High Performance Polyamides (PA 11, PA12, PA 46, PA 9T, PPA and PARA), Sulfone Polymers (PESU, PSU and PPSU), Polyphenylene Sulphide (PPS), Liquid Crystal Polymers (LCP), Polyetherimide (PEI) and Polyetheretherketone (PEEK). The study also analyzes the key end-use sectors of high performance plastics including Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Others (such as Medical etc.).

The global markets for the above-mentioned plastic types and end-use sectors are analyzed in terms of volume in metric tons and value in USD for 2012-2022 analysis period. The global market for High Performance Plastics is segmented into four major regions namely, the United States, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 8 more independent countries across Europe – France, Germany, Italy and the United Kingdom; Asia-Pacific – China, India, Japan and South Korea. The market is analyzed in all of these major regions by key countries and by

major end-use sectors in terms of both volume and value. This report also provides the comprehensive market analysis of each High Performance Plastics type by end-use sector. The global market for High Performance Plastics is likely to maintain a moderately faster, compared to volume consumption, CAGR of 6.1% during the same period and reach a projected US\$15.9 billion by 2022 from a forecast US\$11.15 billion in 2016.

Fluoropolymers are the most widely consumed High Performance Plastics on a global basis, forecast to be 281.6 thousand metric tons (38% share) in 2016, which are anticipated to post the above average growth of CAGR of 6.1% between 2016 and 2022 and reach a projected 402 thousand metric tons by 2022. High Performance Polyamides are the second largest high Performance Plastics with an estimated share of 29.3% (217.4 thousand MTs) in 2016 followed by Polyphenylene Sulphide (PPS) with a share of 16.4% (121.3 thousand MTs) in the same year. The report also examines the major global players for their production capacities by product type and location.

This 560 page global high performance plastics market report includes 642 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. This report profiles 33 key global players and 21 major players across Japan – 4; China – 16; and India – 1. The research also provides the listing of the companies engaged in manufacturing, compounding and processing of high performance plastics. The global list of companies covers the address, contact numbers and the website addresses of 414 companies.

## Contents

### PART A: GLOBAL MARKET PERSPECTIVE

#### 1. INTRODUCTION

##### 1.1 Product Outline

###### 1.1.1 High Performance Plastics Types

###### 1.1.1.1 Fluoropolymers

###### 1.1.1.1.1 Types of Fluoropolymers

###### 1.1.1.1.1.1 Polytetrafluoroethylene (PTFE)

###### 1.1.1.1.1.1.1 Structure and Properties of PTFE

###### 1.1.1.1.1.1.2 Production of Polytetrafluoroethylene (PTFE)

###### 1.1.1.1.1.1.3 PTFE Forms and Applications

###### 1.1.1.1.1.2 Fluorinated Ethylene Propylene (FEP)

###### 1.1.1.1.1.2.1 Structure and Properties of FEP

###### 1.1.1.1.1.2.2 Production of Fluorinated Ethylene Propylene (FEP)

###### 1.1.1.1.1.2.3 FEP Forms and Applications

###### 1.1.1.1.1.3 Polyvinylidene Fluoride (PVDF)

###### 1.1.1.1.1.3.1 Structure and Properties of PVDF

###### 1.1.1.1.1.3.2 Production Processes of PVDF

###### 1.1.1.1.1.3.3 Applications and End-Use Sectors of PVDF

###### 1.1.1.1.1.4 Perfluoroalkoxy (PFA/MFA)

###### 1.1.1.1.1.4.1 Structure and Properties of PFA/MFA

###### 1.1.1.1.1.4.2 Production Process of PFA/MFA

###### 1.1.1.1.1.4.3 Applications and End-Use Sectors of PFA/MFA

###### 1.1.1.1.1.5 Polyvinyl Fluoride (PVF)

###### 1.1.1.1.1.5.1 Structure and Properties of PVF

###### 1.1.1.1.1.5.2 Production Process of PVF

###### 1.1.1.1.1.5.3 Applications and End-Use Sectors of PVF

###### 1.1.1.1.1.6 Ethylene Tetrafluoroethylene (ETFE)

###### 1.1.1.1.1.6.1 Structure and Properties of ETFE

###### 1.1.1.1.1.6.2 Production Process of ETFE

###### 1.1.1.1.1.6.3 Applications and End-Use Sectors of ETFE

###### 1.1.1.1.1.7 Ethylene Chlorotrifluoroethylene (ECTFE)

###### 1.1.1.1.1.7.1 Structure and Properties of ECTFE

###### 1.1.1.1.1.7.2 Production Process of ECTFE

###### 1.1.1.1.1.7.3 Applications and End-Use Sectors of ECTFE

###### 1.1.1.1.1.8 Polychlorotrifluoroethylene (PCTFE)

- 1.1.1.1.1.8.1 Structure and Properties of PCTFE
- 1.1.1.1.1.8.2 Production Process of PCTFE
- 1.1.1.1.1.8.3 Applications and End-Use Sectors of PCTFE
- 1.1.1.2 High Performance Polyamides
  - 1.1.1.2.1 Polyamide 11 (PA 11)
    - 1.1.1.2.1.1 Applications of Polyamide
  - 1.1.1.2.2 Polyamide 12 (PA 12)
    - 1.1.1.2.2.1 Applications of Polyamide
  - 1.1.1.2.3 Polyamide 46 (PA 46)
    - 1.1.1.2.3.1 Applications of Polyamide
  - 1.1.1.2.4 Polyarylamide (PARA) or Polyamide MXD6 (PA MXD6)
    - 1.1.1.2.4.1 Applications of Polyarylamide
  - 1.1.1.2.5 Polyphthalamide (PPA)
    - 1.1.1.2.5.1 Applications of Polyphthalamides
  - 1.1.1.2.6 Polyamide 9T (PA9T)
    - 1.1.1.2.6.1 Applications of Polyamide 9T
- 1.1.1.3 Sulfone Polymers
  - 1.1.1.3.1 Polysulfone (PSU)
    - 1.1.1.3.1.1 Structure and Properties of PSU
    - 1.1.1.3.1.2 Applications of Polysulfone
  - 1.1.1.3.2 Polyethersulfone (PESU)
    - 1.1.1.3.2.1 Structure and Properties of PESU
    - 1.1.1.3.2.2 Applications of Polyethersulfone
  - 1.1.1.3.3 Polyphenylsulfone (PPSU)
    - 1.1.1.3.3.1 Structure and Properties of PPSU
    - 1.1.1.3.3.2 Applications of Polyphenylsulfone
  - 1.1.1.3.4 Sulfone Polymers Synthesis
- 1.1.1.4 Polyphenylene Sulfide (PPS)
  - 1.1.1.4.1 Properties of Polyphenylene Sulfide (PPS)
  - 1.1.1.4.2 Polyphenylene Sulfide (PPS) Product Types
  - 1.1.1.4.3 Applications of Polyphenylene Sulfide
- 1.1.1.5 Liquid Crystal Polymers (LCP)
  - 1.1.1.5.1 Types of Liquid Crystal Polymers
  - 1.1.1.5.2 Structure and Properties of LCP
  - 1.1.1.5.3 Polymerization of Liquid Crystal Polymers
  - 1.1.1.5.4 Applications of Liquid Crystal Polymers
- 1.1.1.6 Polyetherimide (PEI)
  - 1.1.1.6.1 Structure and Properties of PEI
  - 1.1.1.6.2 Applications of Polyetherimide (PEI)

- 1.1.1.6.3 Manufacturing Process of PEI
- 1.1.1.7 Polyetheretherketone (PEEK)
  - 1.1.1.7.1 Structure and Properties of PEEK
  - 1.1.1.7.2 Manufacturing Process of PEEK
  - 1.1.1.7.3 Applications of Polyetheretherketone

## **2. KEY MARKET TRENDS**

- 2.1 Medical Device Industry Fuelling Demand for Fluoropolymers
- 2.2 Demand for PTFE to Gain Further Momentum from Products with Improved Properties
- 2.3 New Energy Markets to Take PVDF in a Big Way
- 2.4 Demands of Membrane Market Being Addressed by PVDF
- 2.5 ETFE's Progress in Architectural Applications Gains Prominence
- 2.6 Bright Opportunities for Fluoropolymers in the Radiant Solar Modules Market
- 2.7 High Performance Polyamides Market Trends & Growth Drivers
- 2.8 Sulfone Polymers Market Trends & Growth Drivers
- 2.9 Auto Industry Acts as Bedrock for Propelling PPS Demand
- 2.10 PPS Thermoplastics Usage Continue to Grow in Aerospace Industry
- 2.11 Above Average Growth for PPS to be Driven by Filter Bag Industry in Asia-Pacific
- 2.12 Liquid Crystal Polymers Market Trends & Growth Drivers

## **3. INDUSTRY LANDSCAPE**

- 3.1 High Performance Plastics Production Capacities
  - 3.1.1 Fluoropolymers Producers and Production Capacities
    - 3.1.1.1 Polytetrafluoroethylene (PTFE)
    - 3.1.1.2 Fluorinated Ethylene Propylene (FEP)
    - 3.1.1.3 Polyvinylidene Fluoride (PVDF)
    - 3.1.1.4 Ethylene tetrafluoroethylene (ETFE)
    - 3.1.1.5 Perfluoroalkoxy (PFA/MFA)
    - 3.1.1.6 Polychlorotrifluoroethylene (PCTFE)
    - 3.1.1.7 Polyvinyl fluoride (PVF)
    - 3.1.1.8 Ethylene chlorotrifluoroethylene (ECTFE)
  - 3.1.2 High Performance Polyamides Producers and Production Capacities
    - 3.1.2.1 Polyamide
    - 3.1.2.2 Polyamide
    - 3.1.2.3 Polyamide 9T
    - 3.1.2.4 Polyarylamide/Polyamide MXD6

3.1.2.5 Polyamide

3.1.2.6 Polyphthalamide/Polyamide 6T

3.1.3 Sulfone Polymers Producers and Production Capacities

3.1.4 Polyphenylene Sulfide Producers and Production Capacities

3.1.5 Liquid Crystal Polymer Producers and Production Capacities

3.1.6 Polyetherimide (PEI) Producers and Production Capacities

3.1.7 Polyetheretherketone (PEEK) Producers and Production Capacities

3.2 Key Global Players

3M COMPANY (UNITED STATES)

Arkema Group (France)

Asahi Glass Co Ltd (Japan)

BASF SE (Germany)

Celanese Corporation (United States)

Daikin Industries Ltd (Japan)

DIC Corporation (Japan)

Dongyue Group Limited (China)

E. I. Du Pont De Nemours and Company (United States)

EMS-Chemie Holding AG (Switzerland)

Evonik Industries AG (Germany)

Fortron Industries LLC (United States)

Gujarat Fluorochemicals Limited (India)

Halopolymer OJSC (Russia)

Honeywell International Inc. (United States)

Jiangsu Meilan Chemical Co Ltd (China)

Kuraray Co., Ltd. (Japan)

Kureha Corporation (Japan)

Mitsubishi Gas Chemical Company, Inc. (Japan)

Mitsui Chemicals, Inc. (Japan)

Polyplastics Co., Ltd. (Japan)

Royal DSM N.V. (The Netherlands)

Saudi Basic Industries Corporation (SABIC) (Saudi Arabia)

Shanghai 3F New Material Co Ltd (China)

SK Chemicals Co Ltd (INITZ) (South Korea)

Solvay SA (Belgium)

Sumitomo Chemical Company, Limited (Japan)

The Chemours Company (United States)

Toray Industries, Inc. (Japan)

UBE Industries, Ltd. (Japan)

Victrex PLC (United Kingdom)

Zhejiang Juhua Co Ltd (China)  
Zhejiang NHU Special Materials Co Ltd (China)  
Zhonghao Chenguang Research Institute Chemical Industry (China)

### 3.3 Other Major Players

Changshu Xinhua Chemical Co., Ltd (China)  
Chengdu Letian Plastics Co., Ltd (China)  
China Lumena New Materials Corp. (China)  
Fuxin Hengtong Fluorine Chemicals Co., Ltd. (China)  
Guangzhou LiChang Fluorine Plastic Co Ltd (China)  
Haohua Honghe Chemical Co Ltd. (China)  
Hindustan Fluorocarbons Limited (India)  
Jiangmen Youju New Materials Co., Ltd (China)  
Jiangsu Huao High-Tech Development Co., Ltd. (China)  
Jilin Zhongyan High Performance Plastic Co., Ltd. (China)  
Jinhua Yonghe Fluorochemical Co Ltd (China)  
JX Nippon Oil & Energy Corporation (Japan)  
Kingfa Science & Technology Co., Ltd. (China)  
Panjin Zhongrun High Performance Polymers Co., Ltd (China)  
Shandong Huafu Fluoro-Chemical Co., Ltd (Jinan 3F) (China)  
Shanghai Ofluorine Chemical Technology Co., Ltd (China)  
Shanghai PRET Composites Co., Ltd. (China)  
Shenzhen Wote Advanced Materials Co., Ltd. (China)  
Tosoh Corporation (Japan)  
Toyobo Co., Ltd. (Japan)  
Ueno Fine Chemicals Industry, Ltd. (Japan)

## 4. KEY BUSINESS & PRODUCT TRENDS

Solvay Offered its Ryton PPS for the Polimotor 2 Engine's Water Pump Components  
Solvay Plans to Rise its Sulfone Polymer Production Capacity by 35 Percent  
Celanese to Takeover SO.F.TER. Group  
DIC's LP-150-LDS is the World's First PPS Compound Suited for 3D LDS  
SkyTender Chose VICTREX PEEK Polymer for Use in its Mobile Drinks Dispenser  
Shanghai Reach Developed Lighter, More Ergonomic and Highly Cost-Effective Spinal Surgery Instrument Kit Using Solvay's KetaSpire PEEK and AvaSpire PAEK  
Kureha Renewed its PPS Business Alliance with Polyplastics  
Establishment of BASF's New Ultrason Polyarylsulfone Facility in Korea  
New Single-Use Electrocautery Instrument for Adenoid and Tonsil Surgeries Used  
Solvay's Ixef GS-1022 PARA Resin



Arkema Invested \$10 Million to Broaden its Specialty Polyamides Production Capacities  
DSM NHU's Xytron PPS Compounds Complemented DSM's High Temperature Performance Engineering Plastics Portfolio

VICTREX PAEK Polymers Used in the Development of COMAC's Jet ARJ21 Aircraft Floor Brackets

Sumitomo Chemical to Build Second Polyethersulfone (PESU) Plant in Japan  
Impossible Objects to Produce PEEK-based Composite Parts Using New 3D Printing Process

Apollo Broadens its line of Extruded Microtubes for Healthcare Applications  
Dacon Systems Selected Solvay's KetaSpire PEEK for Hardest Wire and Cable Coating Applications

Construction of Sumitomo Chemical's Second Commercial PES Production Facility in Chiba

Nippon's Electric Wire Binding Bands Used Daicel-Evonik's VESTAKEEP-J ZV7801 PEEK Resin

Japan's First Injection-Molded ESD Bolts are the First to Use VESTAKEEP-J PEEK Resin

Addition of Three Ryton PPS Grades to Solvay's Product Line for Food and Beverage Use

World's First Integrated PPS Plant Sited in Gunsan City, Korea

Development of AvaSpire AV-651 CF30 PAEK based Structural Components for Polimotor 2 Engine's Oil Pump Housing

AOI's PS-fit Resin Joints Utilized Daicel-Evonik's VESTAKEEP PEEK Resin

Inauguration of New European PPS Technical Centre by Sun Chemical and the DIC Corporation

Solvay Offered its Ryton XK-2340 PPS Reinforced Resin for the Polimotor 2 Engine's Fuel Rail

Extension of Pan-European Distribution Pact between Solvay and Biesterfeld Plastic

Solvay Broadened Deal with Nevicolor for Distributing the Complete Line of Ryton PPS in Italy

Arkema and HP form 3D Printing Materials Development Pact

Toska-Bano'k Chose VESTAKEEP-J PEEK Resin to Develop Colored Tag Pins for Medical Laboratory Specimens

Nippon Chemical Adopted Daicel-Evonik's VESTAKEEP PEEK Resin for Use in ANSI Bolts

DuPont Established its Largest Compounding Facility

Launch of Royal DSM's Stanyl HGR1 for Frictional Torque Reduction in Automobile Engine Timing Systems

UJU Signed an Exclusive Deal with Conventus to Meet Polysulfone Crisis in North



America

The Largest and Longest Ever VICTREX PEEK-based m-pipe Subsea Intervention Line by Magma

Use of KetaSpire PEEK in BGISEQ-500 Sequencer

Launch of Evonik's VESTAKEEP Dental at MedTec Europe

Solvay's Ultra High Performance, Aromatic Polyketones to Coat Optacore's OptaGuide HT Optical Fiber Systems

Solvay Showcases Extensive Line of High-Performance Polymers for Electric Vehicle Battery and Battery Packs

Solvay Offered its Amodel PPA for the Polimotor 2 Water Inlet / Outlet Application

Solvay's New Deal with ResMart to Distribute Eight Radel PPSU Resin Grades

Solvay's TegraCore PPSU Foam Received Airbus Qualification

Toho Tenax Introduces New Polyethersulfone Impregnated Thermoplastic Textile Prepreg

China FDA Approval for Zeniva PEEK

Solvay's New Deal with ResMart to Distribute KetaSpire PEEK Resin Grades

Solvay Offered Zeniva PEEK for Use in Instratek's ToeTac Implant

SABIC's ULTEM PEI Resin is a Material of Choice for ZoffSMART Glasses Frame

Polymem Develops Production Line for Hollow Fiber Membranes Made from Arkema's Kynar

European Plastics Innovation Award received by Evonik's Resource Efficiency Segment  
50% RISE IN THE ANNUAL PRODUCTION CAPACITY OF EVONIK'S VESTOSINT PA12 POWDER

New Veradel HC A-301 PESU for Challenging Healthcare Applications Unveiled by Solvay

Biorep Technologies Employed Radel R-5000 PPSU to Enhance its Ricordi Chamber

Solvay's Veradel HC A-301 PESU Used as an Alternative for PEI in ASTi's Sensors

Surface Dynamics Validated VESTAKEEP PEEK for Titanium Coating Processes

Invibio in Collaboration with Maxx Orthopedics Developed PEEK-OPTIMA Femoral Knee Replacement Technology

Drake Plastics Enhanced its Product Line with the Addition of AvaSpire PAEK Products  
DuPont Tedlar Films to be Distributed by American Durafilm

New Line of Rilsan Fine Powders Added to Arkema's Bio-based Polyamide Coating Powders Portfolio for Outdoor Furniture

Establishment of DuPont's First Zytel HTN Polymer Production Unit in Europe

Selection of DSM's Stanyl PA46 for Use in New Turbocharged Petrol Engine Components

EMS-GRIVORY Offered Grilamid L20A HL NZ Special PA12 Grade for Ski Sports  
Industry's first PPS resin particles for powder bed fusion 3D printing developed by

Toray

Production Capacity of Polyplastics' Facility in Malaysia Increased by 9,000 Tons

BIOTEK Received CE Mark Certificate and Indian FDA Approval for its VESTAKEEP PEEK-based Arthroscopy Implants

Polimotor 2 Automotive Engine Project Selected Solvay's KetaSpire PEEK for Oil Scavenger Line

Arkema Expands Scope of Use for Patent-Pending Kynar Foam Extrusion

Arkema and PPG Celebrate Half a Century of Association

Kureha Takes Over Kureha Battery Materials Japan

Grivory HT2VS-HH, Novel range of High Heat Polyamides from EMS-GRIVORY

Valeo Schalter und Sensoren GmbH Selected Evonik's VESTAMID L1930 PA12 for the Gear Drive of the Steering Angle Sensor

DSM Engineering Plastics Solidified its Position in the EMEA Market

Strong Compatibility with Ford's New ULV 25 ATF Exhibited by Solvay High Performance Polymer Grades

USB Type-C Connectors Molded Using DuPont Zytel HTN FR52 NH Polyamide Resin

Polyphenylene Sulfide Fiber TORCON and Polyacrylonitrile-base Flame Resistant Yarn Utilized to Develop High Performance Flame Shielding Paper

Solvay's KetaSpire PEEK Demonstrated Strong Compatibility with Ford's new ULV 25 ATF

Solvay's KetaSpire PEEK Selected for Polimotor 2's 3D-Printed Fuel Intake Runner

VICTREX Pipes Replaced Metal Tubing in High Voltage Cable Conduits

Automotives Installed with Plastic-rubber Technology-based Cooling Components Made of Special PPA VESTAMID HTplus R1033 and HNBR Elastomer

Solvay's New Deal with Chase Plastics to Distribute High-Performance Amodel PPA Resins

Introduction of Solvay's Pre-Colored Radel R-7159 Series Resins for Use in Commercial Aircraft Interiors

Hankuk Carbon Selected Virantage PESU Tougheners to Produce Enhanced Thermoset Composite Prepregs

Celanese to Launch Two Premium Industrial PEEK Grades in the Second Half of 2016

CFDA Approval for Invibio's PEEK-OPTIMA HA Enhanced for Spinal Fusion Implants

Broadening of PEEK Polymers Production Capacity at Evonik's China Site

Arkema's High Performing Kynar Flex Grade for the Wire and Cable Sector Launched

Addition of Five New Glass Fiber-Reinforced Grades of Amodel AE-8900 Series by Solvay for Automotive Electronics Use

Addition of LFT Technology Complemented Solvay Specialty Polymers' High Performance Lightweight Materials Portfolio

Introduction of VICTREX AE250 Composites for Aircrafts

Vertera Spine Selected Solvay's Zeniva PEEK for the Development of PEEK Scoria Technology

VESTAKEEP 5000 HCM Micro Granules Enhanced Production Efficiency of Customized PEEK Seals

Innov'spine Received CE Mark Approval for its New PEEK Polymer-based Spinal Rods

AGC Introduces Fluon LM-ETFE LH-8000 for New Applications

Arkema Launches Additional PVDF Polymer Process Aids

Instratek's STAPIX Staple Fixation System Components Molded Using Solvay's Ixef 1022 PARA Resin

VESTAMID HTplus M1933 PPA Outperformed Other Competitive Polymers with Outstanding Electrical RTI

Medical Illumination Used Solvay's Medical-Grade Polymers in its New MI-750 LED Lighting System

Launch of Celanese PPS Grades in Japan

VICTREX PEEK 90HMF40 Replaced Aluminum in Making the Airbus A350-900 Aircraft Door Fitting

Toyota MIRAI FCV Component Used Kuraray's GENESTAR PA 9T Resin

Evonik's VESTAMID HTplus PPA Used in the Manufacture of HELLA Laser-Welded Actuator Housing Components

Launch of Evonik's VESTAMID HTplus M1035 P1 for Automotive Use

Solvay Signed a New Licensing Deal with RTP Company to Broaden the Supply of its Radel R-7000 PPSU Resins to Global Aerospace Market

3M DYNELON COMPOUND NST 1111R LAUNCHED

The Chemours Company Spun Off from DuPont

Solvay to Commence PVDF Production at its Chinese Plant by 2017

Solvay Specialty Polymers' ECTEF Resin Films Used in Amcor's Flexible Solar Front Sheets

Acquisition of Kleiss Gears Enhanced Victrex's Potential to Offer Complete Integrated Solutions

Morphix Selected Solvay Radel PPSU Resins to Replace Metals in its Tattoo Needle Grips

Sumitomo Chemical Increases the Capacity of Polyethersulfone (PESU) at its Ehime Plant

Denroy Formed Pact with Bombardier and Victrex to Deploy its Brackets in Commercial Aircraft

EU Intends to Ban PFOA

AGC Chemicals Enters Brazilian Fluoropolymer Market

Solvay's New Veradel 3300 SL 30 PESU Launched at the CTI Symposium

Strategic Alliance with NHU Reinforces the High Performance Engineering Plastics

## Portfolio of DSM

Development of the Polimotor 2 All-Plastic Automotive Engine by Solvay

SK Chemicals and INITZ to Exhibit Super Engineering Plastics at Chinaplas 2015

Tulip, a PEEK-OPTIMA Polymer based Spinal Stabilisation System from Weigao

Evonik's VESTAKEEP i-Grade PEEK Passed Biocompatibility Test in China

Establishment of Victrex's New PAEK Facility Opens Up New Possibilities

ATO's Semi-Finished Tubes Made of KetaSpire PEEK Resin Compliant with Norsok M-710 Standard for Oil & Gas

National Nonwovens Used ULTEM PEI to Develop the First Fire Blocker for All Aircraft Seating Dress Covers

Shanghai 3F New Materials' PTFE Capacity Expanded

NSF Certification Enabled the Use of Amodel PPA Resin Grades of Solvay in Food Service Industry

Construction of New Production Line to Broaden DIC's PPS Polymer Production Capacity

New TECATEC Product Series Exemplified the Close Collaboration of Ensinger and Victrex

US FDA Offered 510(k) Clearance for Meditech Spine's Talos-C (HA) Cervical IBF Devices

NSF Certified Solvay's KetaSpire PEEK Resin for Highly Demanding Food Processing and Household Appliance Applications

SABIC to Increase Production Capacity of Ultem PEI Resin by 30%

AGC FluoroCompounds Group Inaugurates Pilot Plant

DuPont Increased its Zytel HTN PPA Production to Meet the Rising Global Market Demand

ELITechGroup Selected Solvay's Radel PPSU as an Alternative to Transparent PC Resin for Injection Molding Two Redesigned Slide Stainer Carousels

Solvay Named Infinity LTL an Authorized Color Compounder of Amodel PPA, Udel PSU and Xydar LCP Resins

Victrex and Lenorplastics to form PAEK Distribution Pact

HuanTian to Use VICTREX PEEK Valve Plates in Reciprocating Compressors

Evonik's VESTAKEEP PEEK Used in the Production of High Precision One-Inch Sized Screws

CE Mark for Osimplant's Cervical Expandable Bladed HA PEEK Cage Line of Spinal Implants

Arkema's New Grade of Kynar PVDF Resin Launched

Strong Compatibility exhibited by Radel PPSU based Instrument Trays with STERIZONE VP4 Sterilizer

Solvay to Raise Total PEEK Production Capacity to over 2,500 Metric Tons Globally

Victrex to Construct a Polymer Innovation Centre in Northern England

Launch of EMS-GRIVORY's New Grivory HT Products with Outstanding Hydrolysis Resistance

Ryton PPS Acquired by Solvay

Solvay Launched Xydar MG-850 LCP to Meet the Demands of New 12-Gigabyte Connectors

Infinity Joined Forces with LTL to Form Infinity LTL Engineered Compounds

Karmed's Superfusion Line of Spinal Implants Granted with CE Mark

RelaxBogen Developed a New Treatment Alternative for Bruxism and TMD

Solvay to Raise Ultra-Polymer Resin Production Capacity in India by 25%

New Semi-Rigid PEEK-OPTIMA Polymer Based Spinal Rod Components Bridge Treatment Gap

Victrex to Open its \$90 Million PEEK Production Unit in Early 2015

BoneBac TLIF Spacer from Thompson MIS Received the US 510(k) Clearance

New Invivio Trauma Device Technology based on PEEK-OPTIMA Ultra Reinforced Polymer for Healing Fractures

Evonik's VESTAMID Molding Compounds for Rail and Automotive Industry

Osram Chose Royal DSM's Stanyl TC PA 46 in the Heat Sinks of its LED Downlights

First Supply Deal of SK Chemicals with a Major International Company for Super Engineering Plastic Materials

Launch of Solvay's New 30% Glass-Reinforced AvaSpire AV-652 PAEK

COMAC Qualified Five of Solvay's KetaSpire PEEK Grades for Use in its C919 Aircraft

Medshine Launched AvaSpire PAEK-based Locally-Produced Surgical Sterilization Cases

Victrex and Tri-Mack Joined Forces to Develop New Hybrid-Molded VICTREX PAEK-based Composite Aerospace Bracket

PEEK-based JUVORA Dental Disc is a Time-Saving Non-Metal Alternative to Metal-based Removable Partial Denture

DuPont Fluoropolymer Solutions Consolidates Chinese Operations

Solvay Launches Two New ECTFE Film Grades for PV Front Sheet Applications

Launch of Two Novel Grades of Ryton PPS for Food Contact Applications

VICTREX PEEK-based Diamould Connectors for Deepwater, HPHT Wellhead and Downhole Applications

3M INTRODUCES 3M DYNEON PTFE DISPERSION TF 5035GZ WITHOUT APEO AND APFO

Kureha Completes Construction of PVDF Plant in China

Zhejiang Juhua Co Ltd to Build PVDF Facility

Distribution Pacts Formed by DSM to Reinforce its Footprint in Mexico

World's First High-Heat Plastic Air Intake Manifold with Integrated Charge Air Cooler



Utilized DSM's Stanyl Diablo PA46

Establishment of DIC Corporation's First PPS Compounds Facility in the PRC

Arkema Expands Kynar PVDF Portfolio with New Grade for Drinking Water Systems

Honeywell's Brazilian Operations See Growth

Evonik Increased PA12 Production Capacity at its Marl Facility by 5,000 MTs

US FDA Offered 510 (k) Clearance for Extremity Medical's New HammerFiX IP Fusion System Produced Using Solvay's Zeniva PEEK Resin

Zeus Offered its New PEEK Engineered Surface Tubing with Enhanced Lubricity for Medical Use

Broadening of Celanese's Kentucky Compounding Production Facility

Solvay's KetaSpire KT-825 Provided 50% Greater Stiffness than Standard Neat PEEK Grades

KetaSpire PEEK-based Ketron PEEK Stock Shapes Compliant with Norsok M-710 Standards for Oil and Gas

Solvay Introduces Novel Grades of Halar ECTFE Film

Korean Researchers Develop Novel Technology for Manufacturing VDF

Arkema Showcases Kynar Aquatec CRX Latex

Solvay High Performance Polymers Earned Regulatory Approvals for Use in Food Contact and Drinking Water Applications

Celanese to Expand Compounding Capabilities at Nanjing Integrated Chemical Complex

Development of Halogen-free Fortron PPS CES50 for Consumer Electronics Device Housings

Use of Celanese's Fortron ICE PPS in Making Allied Series VX-Mid HT UHF RFID Tag

PolyOne to Launch LubriOne PEEK Solutions for Use in Electrical Power Tools

AvaSpire PAEK-based Structural Components in Technifab's New High-Performance Polymeric Foam Ducting System

Airbus Qualified Three of Solvay's KetaSpire PEEK Grades

AS9100C/ISO9001:2008 Aerospace Certification for VICTREX Pipes

Greene, Tweed Adds ARLON 3000 XT as Substitute

CE Mark Certification for VESTAKEEP PEEK based Cage System

Evonik's VESTAKEEP PEEK Implant Product Line Receives FDA 510(k) Clearance

Evonik Clears Norsok M-710 Test for VESTAKEEP PEEK 5000 G

DuPont Fluoropolymer Solutions Expands Melt-Processable Fluoroplastic Resin Capacity

UL Plastics Component Database Certifies DuPont Fluoroplastic's ECCtreme ECA 3000 as Having the Highest Temperature Rating

Victrix Supplies VICTREX PEEK Polymers Solutions to COMAC

Inauguration of BASF's Ultrason Production Facility in South Korea

## 5. GLOBAL MARKET OVERVIEW

### 5.1 Global High Performance Plastics Market Overview by End-use Sector

#### 5.1.1 High Performance Plastics End-use Sector Market Overview by Global Region

##### 5.1.1.1 Automotive & Transportation

##### 5.1.1.2 Building & Construction

##### 5.1.1.3 Consumer Goods

##### 5.1.1.4 Electrical & Electronics

##### 5.1.1.5 Mechanical/Industrial

##### 5.1.1.6 Other Sectors

### 5.2 Global High Performance Plastics Market Overview by Plastic Type

#### 5.2.1 Fluoropolymers

##### 5.2.1.1 Global Fluoropolymers Market Overview by Fluoropolymer Type

##### 5.2.1.2 Global Fluoropolymers Market Overview by Geographic Region

##### 5.2.1.3 Global Fluoropolymers Market Overview by End-use Sector

#### 5.2.2 High Performance Polyamides

##### 5.2.2.1 Global High Performance Polyamides Market Overview by Polyamide Type

##### 5.2.2.2 Global High Performance Polyamides Market Overview by Geographic

#### Region

##### 5.2.2.3 Global High Performance Polyamides Market Overview by End-use Sector

#### 5.2.3 Sulfone Polymers

##### 5.2.3.1 Global Sulfone Polymers Market Overview by Polymer Type

##### 5.2.3.2 Global Sulfone Polymers Market Overview by Geographic Region

##### 5.2.3.3 Global Sulfone Polymers Market Overview by End-use Sector

#### 5.2.4 Polyphenylene Sulphide (PPS)

##### 5.2.4.1 Global Polyphenylene Sulphide (PPS) Market Overview by Geographic

#### Region

##### 5.2.4.2 Global Polyphenylene Sulphide (PPS) Market Overview by End-use Sector

#### 5.2.5 Liquid Crystal Polymers (LCP)

##### 5.2.5.1 Global Liquid Crystal Polymers (LCP) Market Overview by Geographic

#### Region

##### 5.2.5.2 Global Liquid Crystal Polymers (LCP) Market Overview by End-use Sector

#### 5.2.6 Polyetherimide (PEI)

##### 5.2.6.1 Global Polyetherimide (PEI) Market Overview by Geographic Region

##### 5.2.6.2 Global Polyetherimide (PEI) Market Overview by End-use Sector

#### 5.2.7 Polyetheretherketone (PEEK)

##### 5.2.7.1 Global Polyetheretherketone (PEEK) Market Overview by Geographic Region

##### 5.2.7.2 Global Polyetheretherketone (PEEK) Market Overview by End-use Sector



## **PART B: REGIONAL MARKET PERSPECTIVE**

Global High Performance Plastics Market Overview by Geographic Region

### **REGIONAL MARKET OVERVIEW**

#### **1. THE UNITED STATES**

1.1 United States High Performance Plastics Market Overview by End-use Sector

1.2 United States High Performance Plastics Market Overview by Plastic Type

1.2.1 Fluoropolymers

1.2.1.1 United States Fluoropolymers Market Overview by End-use Sector

1.2.1.2 United States Fluoropolymers Market Overview by Fluoropolymer Type

1.2.2 High Performance Polyamides

1.2.2.1 United States High Performance Polyamides Market Overview by End-Use Sector

1.2.2.2 United States High Performance Polyamides Market Overview by Polyamide Type

1.2.3 Sulfone Polymers

1.2.3.1 United States Sulfone Polymers Market Overview by End-Use Sector

1.2.3.2 United States Sulfone Polymers Market Overview by Polymer Type

1.2.4 Polyphenylene Sulphide

1.2.4.1 United States Polyphenylene Sulphide (PPS) Market Overview by End-use Sector

1.2.5 Liquid Crystal Polymers

1.2.5.1 United States Liquid Crystal Polymers (LCP) Market Overview by End-use Sector

1.2.6 Polyetherimide

1.2.6.1 United States Polyetherimide (PEI) Market Overview by End-use Sector

1.2.7 Polyetheretherketone

1.2.7.1 United States Polyetheretherketone (PEEK) Market Overview by End-use Sector

#### **2. EUROPE**

2.1 European High Performance Plastics Market Overview by Geographic Region

2.2 European High Performance Plastics Market Overview by End-use Sector

2.3 European High Performance Plastics Market Overview by Plastic Type

### 2.3.1 Fluoropolymers

2.3.1.1 European Fluoropolymers Market Overview by Geographic Region

2.3.1.2 European Fluoropolymers Market Overview by End-use Sector

2.3.1.3 European Fluoropolymers Market Overview by Fluoropolymer Type

### 2.3.2 High Performance Polyamides

2.3.2.1 European High Performance Polyamides Market Overview by Geographic Region

2.3.2.2 European High Performance Polyamides Market Overview by End-Use Sector

2.3.2.3 European High Performance Polyamides Market Overview by Polyamide Type

### 2.3.3 Sulfone Polymers

2.3.3.1 European Sulfone Polymers Market Overview by Geographic Region

2.3.3.2 European Sulfone Polymers Market Overview by End-Use Sector

2.3.3.3 European Sulfone Polymers Market Overview by Polymer Type

### 2.3.4 Polyphenylene Sulphide

2.3.4.1 European Polyphenylene Sulphide (PPS) Market Overview by Geographic Region

2.3.4.2 European Polyphenylene Sulphide (PPS) Market Overview by End-use Application

### 2.3.5 Liquid Crystal Polymers

2.3.5.1 European Liquid Crystal Polymers (LCP) Market Overview by Geographic Region

2.3.5.2 European Liquid Crystal Polymers (LCP) Market Overview by End-use Sector

### 2.3.6 Polyetherimide

2.3.6.1 European Polyetherimide (PEI) Market Overview by Geographic Region

2.3.6.2 European Polyetherimide (PEI) Market Overview by End-use Sector

### 2.3.7 Polyetheretherketone

2.3.7.1 European Polyetheretherketone (PEEK) Market Overview by Geographic Region

2.3.7.2 European Polyetheretherketone (PEEK) Market Overview by End-use Sector

## 2.4 European High Performance Plastics Market Overview by Country

### 2.4.1 France

2.4.1.1 French High Performance Plastics Market Overview by End-use Sector

2.4.1.2 French High Performance Plastics Market Overview by Plastic Type

2.4.1.2.1 French Fluoropolymers Market Overview by Fluoropolymer Type

2.4.1.2.2 French High Performance Polyamides Market Overview by Polyamide

Type

2.4.1.2.3 French Sulfone Polymers Market Overview by Polymer Type

## 2.4.2 Germany

2.4.2.1 German High Performance Plastics Market Overview by End-use Sector

2.4.2.2 German High Performance Plastics Market Overview by Plastic Type

2.4.2.2.1 German Fluoropolymers Market Overview by Fluoropolymer Type

2.4.2.2.2 German High Performance Polyamides Market Overview by Polyamide

Type

2.4.2.2.3 German Sulfone Polymers Market Overview by Polymer Type

## 2.4.3 Italy

2.4.3.1 Italian High Performance Plastics Market Overview by End-use Sector

2.4.3.2 Italian High Performance Plastics Market Overview by Plastic Type

2.4.3.2.1 Italian Fluoropolymers Market Overview by Fluoropolymer Type

2.4.3.2.2 Italian High Performance Polyamides Market Overview by Polyamide Type

2.4.3.2.3 Italian Sulfone Polymers Market Overview by Polymer Type

## 2.4.4 The United Kingdom

2.4.4.1 UK High Performance Plastics Market Overview by End-use Sector

2.4.4.2 UK High Performance Plastics Market Overview by Plastic Type

2.4.4.2.1 United Kingdom Fluoropolymers Market Overview by Fluoropolymer Type

2.4.4.2.2 UK High Performance Polyamides Market Overview by Polyamide Type

2.4.4.2.3 UK Sulfone Polymers Market Overview by Polymer Type

## 2.4.5 Rest of Europe

2.4.5.1 Rest of Europe High Performance Plastics Market Overview by End-use

Sector

2.4.5.2 Rest of Europe High Performance Plastics Market Overview by Plastic Type

2.4.5.2.1 Rest of Europe Fluoropolymers Market Overview by Fluoropolymer Type

2.4.5.2.2 Rest of Europe High Performance Polyamides Market Overview by

Polyamide Type

2.4.5.2.3 Rest of Europe Sulfone Polymers Market Overview by Polymer Type

## 3. ASIA-PACIFIC

3.1 Asia-Pacific High Performance Plastics Market Overview by Geographic Region

3.2 Asia-Pacific High Performance Plastics Market Overview by End-use Sector

3.3 Asia-Pacific High Performance Plastics Market Overview by Plastic Type

### 3.3.1 Fluoropolymers

3.3.1.1 Asia-Pacific Fluoropolymers Market Overview by Geographic Region

3.3.1.2 Asia-Pacific Fluoropolymers Market Overview by End-use Sector

3.3.1.3 Asia-Pacific Fluoropolymers Market Overview by Fluoropolymer Type

### 3.3.2 High Performance Polyamides

3.3.2.1 Asia-Pacific High Performance Polyamides Market Overview by Geographic

## Region

### 3.3.2.2 Asia-Pacific High Performance Polyamides Market Overview by End-Use

## Sector

### 3.3.2.3 Asia-Pacific High Performance Polyamides Market Overview by Polyamide

## Type

### 3.3.3 Sulfone Polymers

#### 3.3.3.1 Asia-Pacific Sulfone Polymers Market Overview by Geographic Region

#### 3.3.3.2 Asia-Pacific Sulfone Polymers Market Overview by End-Use Sector

#### 3.3.3.3 Asia-Pacific Sulfone Polymers Market Overview by Polymer Type

### 3.3.4 Polyphenylene Sulphide

#### 3.3.4.1 Asia-Pacific Polyphenylene Sulphide (PPS) Market Overview by Geographic

## Region

#### 3.3.4.2 Asia-Pacific Polyphenylene Sulphide (PPS) Market Overview by End-use

## Sector

### 3.3.5 Liquid Crystal Polymers

#### 3.3.5.1 Asia-Pacific Liquid Crystal Polymers (LCP) Market Overview by Geographic

## Region

#### 3.3.5.2 Asia-Pacific Liquid Crystal Polymers (LCP) Market Overview by End-use

## Sector

### 3.3.6 Polyetherimide

#### 3.3.6.1 Asia-Pacific Polyetherimide (PEI) Market Overview by Geographic Region

#### 3.3.6.2 Asia-Pacific Polyetherimide (PEI) Market Overview by End-use Sector

### 3.3.7 Polyetheretherketone

#### 3.3.7.1 Asia-Pacific Polyetheretherketone (PEEK) Market Overview by Geographic

## Region

#### 3.3.7.2 Asia-Pacific Polyetheretherketone (PEEK) Market Overview by End-use

## Sector

## 3.4 Asia-Pacific High Performance Plastics Market Overview by Country

### 3.4.1 China

#### 3.4.1.1 Chinese High Performance Plastics Market Overview by End-use Sector

#### 3.4.1.2 Chinese High Performance Plastics Market Overview by Plastic Type

##### 3.4.1.2.1 Chinese Fluoropolymers Market Overview by Fluoropolymer Type

##### 3.4.1.2.2 Chinese High Performance Polyamides Market Overview by Polyamide

## Type

##### 3.4.1.2.3 Chinese Sulfone Polymers Market Overview by Polymer Type

### 3.4.2 India

#### 3.4.2.1 Indian High Performance Plastics Market Overview by End-use Sector

#### 3.4.2.2 Indian High Performance Plastics Market Overview by Plastic Type

##### 3.4.2.2.1 Indian Fluoropolymers Market Overview by Fluoropolymer Type

3.4.2.2.2 Indian High Performance Polyamides Market Overview by Polyamide Type

3.4.2.2.3 Indian Sulfone Polymers Market Overview by Polymer Type

### 3.4.3 Japan

3.4.3.1 Japanese High Performance Plastics Market Overview by End-use Sector

3.4.3.2 Japanese High Performance Plastics Market Overview by Plastic Type

3.4.3.2.1 Japanese Fluoropolymers Market Overview by Fluoropolymer Type

3.4.3.2.2 Japanese High Performance Polyamides Market Overview by Polyamide

Type

3.4.3.2.3 Japanese Sulfone Polymers Market Overview by Polymer Type

### 3.4.4 South Korea

3.4.4.1 South Korean High Performance Plastics Market Overview by End-use Sector

3.4.4.2 South Korean High Performance Plastics Market Overview by Plastic Type

3.4.4.2.1 South Korean Fluoropolymers Market Overview by Fluoropolymer Type

3.4.4.2.2 South Korean High Performance Polyamides Market Overview by

Polyamide Type

3.4.4.2.3 South Korean Sulfone Polymers Market Overview by Polymer Type

### 3.4.5 Rest of APAC

3.4.5.1 Rest of APAC High Performance Plastics Market Overview by End-use Sector

3.4.5.2 Rest of APAC High Performance Plastics Market Overview by Plastic Type

3.4.5.2.1 Rest of Asia-Pacific Fluoropolymers Market Overview by Fluoropolymer

Type

3.4.5.2.2 Rest of Asia-Pacific High Performance Polyamides Market Overview by

Polyamide Type

3.4.5.2.3 Rest of Asia-Pacific Sulfone Polymers Market Overview by Polymer Type

## 4. REST OF WORLD

4.1 Rest of World High Performance Plastics Market Overview by End-use Sector

4.2 Rest of World High Performance Plastics Market Overview by Plastic Type

### 4.2.1 Fluoropolymers

4.2.1.1 Rest of World Fluoropolymers Market Overview by End-use Sector

4.2.1.2 Rest of World Fluoropolymers Market Overview by Fluoropolymer Type

### 4.2.2 High Performance Polyamides

4.2.2.1 Rest of World High Performance Polyamides Market Overview by End-Use Sector

4.2.2.2 Rest of World High Performance Polyamides Market Overview by Polyamide Type

### 4.2.3 Sulfone Polymers

4.2.3.1 Rest of World Sulfone Polymers Market Overview by End-Use Sector

4.2.3.2 Rest of World Sulfone Polymers Market Overview by Polymer Type

4.2.4 Polyphenylene Sulphide

4.2.4.1 Rest of World Polyphenylene Sulphide (PPS) Market Overview by End-use Sector

4.2.5 Liquid Crystal Polymers

4.2.5.1 Rest of World Liquid Crystal Polymers (LCP) Market Overview by End-use Sector

4.2.6 Polyetherimide

4.2.6.1 Rest of World Polyetherimide (PEI) Market Overview by End-use Sector

4.2.7 Polyetheretherketone

4.2.7.1 Rest of World Polyetheretherketone (PEEK) Market Overview by End-use Sector

## **PART C: GUIDE TO THE INDUSTRY**

### **1. HIGH PERFORMANCE PLASTICS PRODUCERS**

### **2. INDEPENDENT HIGH PERFORMANCE PLASTICS COMPOUNDERS AND PROCESSERS**

## **PART D: ANNEXURE**

### **1. RESEARCH METHODOLOGY**

### **2. FEEDBACK**

## **CHARTS & GRAPHS**

### **PART A: GLOBAL MARKET PERSPECTIVE**

Chart 1: Global High Performance Plastics Market 2012, 2016 and 2022

Chart 2: Global High Performance Plastics Market 2016 and 2022 by Geographic Region

Chart 3: Global High Performance Plastics Market 2016 and 2022 by Plastic Type

Chart 4: 2015 Global Polytetrafluoroethylene (PTFE) Estimated Capacities (Metric Tons/Year) by Company

Chart 5: 2015 Global Polytetrafluoroethylene (PTFE) Estimated Capacities (Metric Tons/Year) by Country/Region

Chart 6: Polytetrafluoroethylene (PTFE) Producers' Plant-wise Production Capacities



Chart 7: 2015 Global Fluorinated Ethylene Propylene (FEP) Estimated Capacities (Metric Tons/Year) by Company

Chart 8: 2015 Global Fluorinated Ethylene Propylene (FEP) Estimated Capacities (Metric Tons/Year) by Country/Region

Chart 9: Fluorinated Ethylene Propylene (FEP) Producers' Plant-wise Production Capacities

Chart 10: 2015 Global Polyvinylidene Fluoride (PVDF) Estimated Capacities (Metric Tons/Year) by Company

Chart 11: 2015 Global Polyvinylidene Fluoride (PVDF) Estimated Capacities (Metric Tons/Year) by Country

Chart 12: Polyvinylidene Fluoride (PVDF) Producers' Plant-wise Production Capacities

Chart 13: 2015 Global Ethylene tetrafluoroethylene (ETFE) Estimated Capacities (Metric Tons/Year) by Company

Chart 14: 2015 Global Ethylene tetrafluoroethylene (ETFE) Estimated Capacities (Metric Tons/Year) by Country/Region

Chart 15: Ethylene tetrafluoroethylene (ETFE) Producers' Plant-wise Production Capacities

Chart 16: 2015 Global Perfluoroalkoxy (PFA) Estimated Capacities (Metric Tons/Year) by Company

Chart 17: 2015 Global Perfluoroalkoxy (PFA) Estimated Capacities (Metric Tons/Year) by Country/Region

Chart 18: Perfluoroalkoxy (PFA/MFA) Producers' Plant-wise Production Capacities

Chart 19: 2015 Global Polychlorotrifluoroethylene (PCTFE) Estimated Capacities (Metric Tons/Year) by Company

Chart 20: 2015 Global Polychlorotrifluoroethylene (PCTFE) Estimated Capacities (Metric Tons/Year) by Country/Region

Chart 21: Global Polyamide 12 (PA 12) Installed Capacities by Manufacturer in Metric Tons

Chart 22: Global Polyarylamide (PARA)/Polyamide MXD6 (PA MXD6) Installed Capacities by Manufacturer in Metric Tons

Chart 23: 2015 Global Sulfone Polymers Neat Resin Installed Capacity by Manufacturer in Metric Tons

Chart 24: Global Sulfone Polymers Neat Resin Installed Capacity by Country in Metric Tons

Chart 25: Global Sulfone Polymers Neat Resin Installed Capacity by Manufacturer and Country in Metric Tons

Chart 26: Global Polyphenylene Sulfide (PPS) Installed Capacities by Country in Metric Tons

Chart 27: Global Polyphenylene Sulfide (PPS) Installed Capacities by Manufacturer and



Country in Metric Tons

Chart 28: 2015 Global Liquid Crystal Polymer (LCP) Installed Capacity by Manufacturer in Terms of Neat Resin and Compounds in Metric Tons

Chart 29: Global Liquid Crystal Polymer (LCP) Neat Resin Installed Capacities by Country in Metric Tons

Chart 30: Global Liquid Crystal Polymer (LCP) Neat Resin Installed Capacities by Manufacturer and Country in Metric Tons

Chart 31: Global Polyetheretherketone (PEEK) Installed Capacities by Manufacturer and Country in Metric Tons

Chart 32: Global Polyetheretherketone (PEEK) Installed Capacities by Country in Metric Tons

Chart 33: Global High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 34: Global High Performance Plastics Market Analysis (2012-2022) by End-use Sector – Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 35: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) by End-use Sector – Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 36: Global High Performance Plastics Market Analysis (2012-2022) by End-use Sector – Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 37: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) by End-use Sector – Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 38: Global Market for High Performance Plastics in Automotive & Transportation Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 39: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Automotive & Transportation Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 40: Global Market for High Performance Plastics in Automotive & Transportation Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 41: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Automotive & Transportation Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 42: Global Market for High Performance Plastics in Building & Construction Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 43: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Building & Construction Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 44: Global Market for High Performance Plastics in Building & Construction Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 45: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Building & Construction Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 46: Global Market for High Performance Plastics in Consumer Goods Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 47: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Consumer Goods Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 48: Global Market for High Performance Plastics in Consumer Goods Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 49: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Consumer Goods Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 50: Global Market for High Performance Plastics in Electrical & Electronics Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 51: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Electrical & Electronics Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 52: Global Market for High Performance Plastics in Electrical & Electronics Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 53: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Electrical & Electronics Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 54: Global Market for High Performance Plastics in Mechanical/Industrial Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 55: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Mechanical/Industrial Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 56: Global Market for High Performance Plastics in Mechanical/Industrial Sector (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 57: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Mechanical/Industrial Sector by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 58: Global Market for High Performance Plastics in Other Sectors (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 59: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) in Other Sectors by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 60: Global Market for High Performance Plastics in Other Sectors (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 61: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) in Other Sectors by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 62: Global High Performance Plastics Market Analysis (2012-2022) by Plastic Type – Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 63: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) by Plastic Type – Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 64: Global High Performance Plastics Market Analysis (2012-2022) by Plastic Type – Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 65: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) by Plastic Type – Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 66: Global Fluoropolymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 67: Global Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type – PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 68: Glance at 2012, 2017 and 2022 Global Fluoropolymers Volume Market Share (%) by Fluoropolymer Type – PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 69: Global Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type – PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 70: Glance at 2012, 2017 and 2022 Global Fluoropolymers Value Market Share (%) by Fluoropolymer Type – PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 71: Global Fluoropolymers Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 72: Glance at 2012, 2017 and 2022 Global Fluoropolymers Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 73: Global Fluoropolymers Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 74: Glance at 2012, 2017 and 2022 Global Fluoropolymers Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 75: Global Fluoropolymers Market Analysis (2012-2022) by End-use Sector – Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in Metric Tons

Chart 76: Glance at 2012, 2017 and 2022 Global Fluoropolymers Volume Market Share (%) by End-use Sector – Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 77: Global Fluoropolymers Market Analysis (2012-2022) by End-use Sector – Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in USD Million

Chart 78: Glance at 2012, 2017 and 2022 Global Fluoropolymers Value Market Share (%) by End-use Sector – Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 79: Global High Performance Polyamides Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 80: Global High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 81: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 82: Global High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46,

Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 83: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 84: Global High Performance Polyamides Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 85: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 86: Global High Performance Polyamides Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 87: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 88: Global High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 89: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Volume Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 90: Global High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 91: Glance at 2012, 2017 and 2022 Global High Performance Polyamides Value Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 92: Global Sulfone Polymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 93: Global Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 94: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 95: Global Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million



Chart 96: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 97: Global Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 98: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 99: Global Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 100: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 101: Global Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in Metric Tons

Chart 102: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Volume Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 103: Global Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in USD Million

Chart 104: Glance at 2012, 2017 and 2022 Global Sulfone Polymers Value Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 105: Global Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 106: Global Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 107: Glance at 2012, 2017 and 2022 Global Polyphenylene Sulphide (PPS) Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 108: Global Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD

Million

Chart 109: Glance at 2012, 2017 and 2022 Global Polyphenylene Sulphide (PPS) Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 110: Global Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 111: Glance at 2012, 2017 and 2022 Global Polyphenylene Sulphide (PPS) Volume Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 112: Global Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 113: Glance at 2012, 2017 and 2022 Global Polyphenylene Sulphide (PPS) Value Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 114: Global Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 115: Global Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 116: Glance at 2012, 2017 and 2022 Global Liquid Crystal Polymers (LCP) Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 117: Global Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 118: Glance at 2012, 2017 and 2022 Global Liquid Crystal Polymers (LCP) Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 119: Global Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Others in Metric Tons

Chart 120: Glance at 2012, 2017 and 2022 Global Liquid Crystal Polymers (LCP) Volume Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Others

Chart 121: Global Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Others in USD Million



Chart 122: Glance at 2012, 2017 and 2022 Global Liquid Crystal Polymers (LCP) Value Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Others

Chart 123: Global Polyetherimide (PEI) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 124: Global Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 125: Glance at 2012, 2017 and 2022 Global Polyetherimide (PEI) Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 126: Global Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 127: Glance at 2012, 2017 and 2022 Global Polyetherimide (PEI) Value Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 128: Global Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in Metric Tons

Chart 129: Glance at 2012, 2017 and 2022 Global Polyetherimide (PEI) Volume Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 130: Global Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in USD Million

Chart 131: Glance at 2012, 2017 and 2022 Global Polyetherimide (PEI) Value Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 132: Global Polyetheretherketone (PEEK) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 133: Global Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 134: Glance at 2012, 2017 and 2022 Global Polyetheretherketone (PEEK) Volume Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 135: Global Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 136: Glance at 2012, 2017 and 2022 Global Polyetheretherketone (PEEK) Value

Market Share (%) by Geographic Region – United States, Europe, Asia-Pacific and Rest of World

Chart 137: Global Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in Metric Tons

Chart 138: Glance at 2012, 2017 and 2022 Global Polyetheretherketone (PEEK) Volume Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

Chart 139: Global Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in USD Million

Chart 140: Glance at 2012, 2017 and 2022 Global Polyetheretherketone (PEEK) Value Market Share (%) by End-use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

## **PART B: REGIONAL MARKET PERSPECTIVE**

Chart 141: Global High Performance Plastics Market Analysis (2012-2022) by Geographic Region - United States, Europe, Asia-Pacific and Rest of World in Metric Tons

Chart 142: Glance at 2012, 2017 and 2022 Global High Performance Plastics Volume Market Share (%) by Global Region - United States, Europe, Asia-Pacific and Rest of World

Chart 143: Global High Performance Plastics Market Analysis (2012-2022) by Global Region - United States, Europe, Asia-Pacific and Rest of World in USD Million

Chart 144: Glance at 2012, 2017 and 2022 Global High Performance Plastics Value Market Share (%) by Global Region - United States, Europe, Asia-Pacific and Rest of World

## **REGIONAL MARKET OVERVIEW**

### **THE UNITED STATES**

Chart 145: United States High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 146: United States High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 147: Glance at 2012, 2017 and 2022 United States High Performance Plastics

Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 148: United States High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 149: Glance at 2012, 2017 and 2022 United States High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 150: United States High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 151: Glance at 2012, 2017 and 2022 United States High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 152: United States High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 153: Glance at 2012, 2017 and 2022 United States High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 154: United States Fluoropolymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 155: United States Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in Metric Tons

Chart 156: Glance at 2012, 2017 and 2022 United States Fluoropolymers Volume Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 157: United States Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in USD Million

Chart 158: Glance at 2012, 2017 and 2022 United States Fluoropolymers Value Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics,

Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others  
Chart 159: United States Fluoropolymers Market Analysis (2012-2022) by  
Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in  
Metric Tons

Chart 160: Glance at 2012, 2017 and 2022 United States Fluoropolymers Volume  
Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF,  
PCTFE and ECTFE

Chart 161: United States Fluoropolymers Market Analysis (2012-2022) by  
Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD  
Million

Chart 162: Glance at 2012, 2017 and 2022 United States Fluoropolymers Value Market  
Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and  
ECTFE

Chart 163: United States High Performance Polyamides Market Analysis (2012-2022) in  
Volume (Metric Tons) and Value (USD Million)

Chart 164: United States High Performance Polyamides Market Analysis (2012-2022)  
by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and  
Other in Metric Tons

Chart 165: Glance at 2012, 2017 and 2022 United States High Performance  
Polyamides Volume Market Share (%) by End-Use Sector - Automotive, Electrical &  
Electronics, Mechanical/Industrial and Other

Chart 166: United States High Performance Polyamides Market Analysis (2012-2022)  
by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and  
Other in USD Million

Chart 167: Glance at 2012, 2017 and 2022 United States High Performance  
Polyamides Value Market Share (%) by End-Use Sector - Automotive, Electrical &  
Electronics, Mechanical/Industrial and Other

Chart 168: United States High Performance Polyamides Market Analysis (2012-2022)  
by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide  
46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 169: Glance at 2012, 2017 and 2022 United States High Performance  
Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12,  
Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and  
Polyarylamide/Polyamide MXD6

Chart 170: United States High Performance Polyamides Market Analysis (2012-2022)  
by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide  
46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 171: Glance at 2012, 2017 and 2022 United States High Performance  
Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12,

Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 172: United States Sulfone Polymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 173: United States Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in Metric Tons

Chart 174: Glance at 2012, 2017 and 2022 United States Sulfone Polymers Volume Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 175: United States Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in USD Million

Chart 176: Glance at 2012, 2017 and 2022 United States Sulfone Polymers Value Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 177: United States Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 178: Glance at 2012, 2017 and 2022 United States Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 179: United States Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 180: Glance at 2012, 2017 and 2022 United States Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 181: United States Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 182: United States Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications in Metric Tons

Chart 183: Glance at 2012, 2017 and 2022 United States Polyphenylene Sulfide (PPS) Volume Market Share (%) by End-use Application – Automotive, Electricals &



Electronics, Mechanical/Industrial and Other Applications

Chart 184: United States Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications in USD Million

Chart 185: Glance at 2012, 2017 and 2022 United States Polyphenylene Sulfide (PPS) Value Market Share (%) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications

Chart 186: United States Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 187: United States Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others in Metric Tons

Chart 188: Glance at 2012, 2017 and 2022 United States Liquid Crystal Polymers (LCP) Volume Market Share (%) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others

Chart 189: United States Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others in USD Million

Chart 190: Glance at 2012, 2017 and 2022 United States Liquid Crystal Polymers (LCP) Value Market Share (%) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others

Chart 191: United States Polyetherimide (PEI) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 192: United States Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in Metric Tons

Chart 193: Glance at 2012, 2017 and 2022 United States Polyetherimide (PEI) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 194: United States Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in USD Million

Chart 195: Glance at 2012, 2017 and 2022 United States Polyetherimide (PEI) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 196: United States Polyetheretherketone (PEEK) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 197: United States Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical &



Healthcare, Aerospace & Military and Others in Metric Tons

Chart 198: Glance at 2012, 2017 and 2022 United States Polyetheretherketone (PEEK) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

Chart 199: United States Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in USD Million

Chart 200: Glance at 2012, 2017 and 2022 United States Polyetheretherketone (PEEK) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

## **EUROPE**

Chart 201: European High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 202: European High Performance Plastics Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 203: Glance at 2012, 2017 and 2022 European High Performance Plastics Volume Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 204: European High Performance Plastics Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 205: Glance at 2012, 2017 and 2022 European High Performance Plastics Value Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 206: European High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 207: Glance at 2012, 2017 and 2022 European High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 208: European High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 209: Glance at 2012, 2017 and 2022 European High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building &

Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 210: European High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 211: Glance at 2012, 2017 and 2022 European High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 212: European High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 213: Glance at 2012, 2017 and 2022 European High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 214: European Fluoropolymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 215: European Fluoropolymers Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 216: Glance at 2012, 2017 and 2022 European Fluoropolymers Volume Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 217: European Fluoropolymers Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 218: Glance at 2012, 2017 and 2022 European Fluoropolymers Value Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 219: European Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in Metric Tons

Chart 220: Glance at 2012, 2017 and 2022 European Fluoropolymers Volume Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 221: European Fluoropolymers Market Analysis (2012-2022) by End-use Sector -

Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in USD Million

Chart 222: Glance at 2012, 2017 and 2022 European Fluoropolymers Value Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 223: European Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 224: Glance at 2012, 2017 and 2022 European Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 225: European Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 226: Glance at 2012, 2017 and 2022 European Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 227: European High Performance Polyamides Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 228: European High Performance Polyamides Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 229: Glance at 2012, 2017 and 2022 European High Performance Polyamides Volume Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 230: European High Performance Polyamides Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 231: Glance at 2012, 2017 and 2022 European High Performance Polyamides Value Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 232: European High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 233: Glance at 2012, 2017 and 2022 European High Performance Polyamides Volume Market Share (%) by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 234: European High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 235: Glance at 2012, 2017 and 2022 European High Performance Polyamides

Value Market Share (%) by End-Use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 236: European High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 237: Glance at 2012, 2017 and 2022 European High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 238: European High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 239: Glance at 2012, 2017 and 2022 European High Performance Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 240: European Sulfone Polymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 241: European Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 242: Glance at 2012, 2017 and 2022 European Sulfone Polymers Volume Market Share (%) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 243: European Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 244: Glance at 2012, 2017 and 2022 European Sulfone Polymers Value Market Share (%) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 245: European Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in Metric Tons

Chart 246: Glance at 2012, 2017 and 2022 European Sulfone Polymers Volume Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 247: European Sulfone Polymers Market Analysis (2012-2022) by End-Use

Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in USD Million

Chart 248: Glance at 2012, 2017 and 2022 European Sulfone Polymers Value Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 249: European Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 250: Glance at 2012, 2017 and 2022 European Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 251: European Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 252: Glance at 2012, 2017 and 2022 European Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 253: European Polyphenylene Sulphide Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 254: European Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in Metric Tons

Chart 255: Glance at 2012, 2017 and 2022 European Polyphenylene Sulfide (PPS) Volume Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 256: European Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 257: Glance at 2012, 2017 and 2022 European Polyphenylene Sulfide (PPS) Value Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 258: European Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications in Metric Tons

Chart 259: Glance at 2012, 2017 and 2022 European Polyphenylene Sulfide (PPS) Volume Market Share (%) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications



Chart 260: European Polyphenylene Sulfide (PPS) Market Analysis (2012-2022) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications in USD Million

Chart 261: Glance at 2012, 2017 and 2022 European Polyphenylene Sulfide (PPS) Value Market Share (%) by End-use Application – Automotive, Electricals & Electronics, Mechanical/Industrial and Other Applications

Chart 262: European Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 263: European Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 264: Glance at 2012, 2017 and 2022 European Liquid Crystal Polymers (LCP) Volume Market Share (%) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 265: European Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 266: Glance at 2012, 2017 and 2022 European Liquid Crystal Polymers (LCP) Value Market Share (%) by Geographic Region – France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 267: European Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Automotive, Electrical & Electronics, Industrial and Others in Metric Tons

Chart 268: Glance at 2012, 2017 and 2022 European Liquid Crystal Polymers (LCP) Volume Market Share (%) by End-use Sector –Automotive, Electrical & Electronics, Industrial and Others

Chart 269: European Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector –Automotive, Electrical & Electronics, Industrial and Others in USD Million

Chart 270: Glance at 2012, 2017 and 2022 European Liquid Crystal Polymers (LCP) Value Market Share (%) by End-use Sector –Automotive, Electrical & Electronics, Industrial and Others

Chart 271: European Polyetherimide (PEI) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 272: European Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 273: Glance at 2012, 2017 and 2022 European Polyetherimide (PEI) Volume Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom



and Rest of Europe

Chart 274: European Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 275: Glance at 2012, 2017 and 2022 European Polyetherimide (PEI) Value Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 276: European Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in Metric Tons

Chart 277: Glance at 2012, 2017 and 2022 European Polyetherimide (PEI) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 278: European Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in USD Million

Chart 279: Glance at 2012, 2017 and 2022 European Polyetherimide (PEI) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 280: European Polyetheretherketone (PEEK) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 281: European Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in Metric Tons

Chart 282: Glance at 2012, 2017 and 2022 European Polyetheretherketone (PEEK) Volume Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 283: European Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe in USD Million

Chart 284: Glance at 2012, 2017 and 2022 European Polyetheretherketone (PEEK) Value Market Share (%) by Geographic Region - France, Germany, Italy, The United Kingdom and Rest of Europe

Chart 285: European Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in Metric Tons

Chart 286: Glance at 2012, 2017 and 2022 European Polyetheretherketone (PEEK) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

Chart 287: European Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in USD Million

Chart 288: Glance at 2012, 2017 and 2022 European Polyetheretherketone (PEEK) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others  
France

Chart 289: French High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 290: French High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 291: Glance at 2012, 2017 and 2022 French High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 292: French High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 293: Glance at 2012, 2017 and 2022 French High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 294: French High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 295: Glance at 2012, 2017 and 2022 French High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 296: French High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 297: Glance at 2012, 2017 and 2022 French High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 298: French Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 299: Glance at 2012, 2017 and 2022 French Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 300: French Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 301: Glance at 2012, 2017 and 2022 French Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 302: French High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 303: Glance at 2012, 2017 and 2022 French High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 304: French High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 305: Glance at 2012, 2017 and 2022 French High Performance Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 306: French Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 307: Glance at 2012, 2017 and 2022 French Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 308: French Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 309: Glance at 2012, 2017 and 2022 French Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Germany

Chart 310: German High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 311: German High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods,

Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 312: Glance at 2012, 2017 and 2022 German High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 313: German High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 314: Glance at 2012, 2017 and 2022 German High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 315: German High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 316: Glance at 2012, 2017 and 2022 German High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 317: German High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 318: Glance at 2012, 2017 and 2022 German High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 319: German Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 320: Glance at 2012, 2017 and 2022 German Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 321: German Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 322: Glance at 2012, 2017 and 2022 German Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 323: German High Performance Polyamides Market Analysis (2012-2022) by

Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 324: Glance at 2012, 2017 and 2022 German High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 325: German High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 326: Glance at 2012, 2017 and 2022 German High Performance Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 327: German Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 328: Glance at 2012, 2017 and 2022 German Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 329: German Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 330: Glance at 2012, 2017 and 2022 German Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Italy

Chart 331: Italian High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 332: Italian High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 333: Glance at 2012, 2017 and 2022 Italian High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 334: Italian High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 335: Glance at 2012, 2017 and 2022 Italian High Performance Plastics Value



Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 336: Italian High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 337: Glance at 2012, 2017 and 2022 Italian High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 338: Italian High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 339: Glance at 2012, 2017 and 2022 Italian High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 340: Italian Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 341: Glance at 2012, 2017 and 2022 Italian Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 342: Italian Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 343: Glance at 2012, 2017 and 2022 Italian Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 344: Italian High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 345: Glance at 2012, 2017 and 2022 Italian High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 346: Italian High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 347: Glance at 2012, 2017 and 2022 Italian High Performance Polyamides Value



Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 348: Italian Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 349: Glance at 2012, 2017 and 2022 Italian Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 350: Italian Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 351: Glance at 2012, 2017 and 2022 Italian Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

The United Kingdom

Chart 352: UK High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 353: UK High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 354: Glance at 2012, 2017 and 2022 UK High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 355: UK High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 356: Glance at 2012, 2017 and 2022 UK High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 357: UK High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 358: Glance at 2012, 2017 and 2022 UK High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 359: UK High Performance Plastics Market Analysis (2012-2022) by Plastic Type

- Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 360: Glance at 2012, 2017 and 2022 UK High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 361: UK Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 362: Glance at 2012, 2017 and 2022 UK Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 363: UK Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 364: Glance at 2012, 2017 and 2022 UK Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 365: UK High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 366: Glance at 2012, 2017 and 2022 UK High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 367: UK High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 368: Glance at 2012, 2017 and 2022 UK High Performance Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 369: UK Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 370: Glance at 2012, 2017 and 2022 UK Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 371: UK Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 372: Glance at 2012, 2017 and 2022 UK Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

## Rest of Europe

Chart 373: Rest of Europe High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 374: Rest of Europe High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 375: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 376: Rest of Europe High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 377: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 378: Rest of Europe High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 379: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 380: Rest of Europe High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 381: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 382: Rest of Europe Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in Metric Tons

Chart 383: Glance at 2012, 2017 and 2022 Rest of Europe Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 384: Rest of Europe Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE in USD Million

Chart 385: Glance at 2012, 2017 and 2022 Rest of Europe Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PVF, PCTFE and ECTFE

Chart 386: Rest of Europe High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 387: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Polyamides Volume Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 388: Rest of Europe High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 389: Glance at 2012, 2017 and 2022 Rest of Europe High Performance Polyamides Value Market Share (%) by Polyamide Type - Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 390: Rest of Europe Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 391: Glance at 2012, 2017 and 2022 Rest of Europe Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 392: Rest of Europe Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 393: Glance at 2012, 2017 and 2022 Rest of Europe Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

## **ASIA-PACIFIC**

Chart 394: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 395: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in Metric

Tons

Chart 396: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Volume Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 397: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in USD Million

Chart 398: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Value Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 399: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 400: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 401: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 402: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 403: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 404: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 405: Asia-Pacific High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 406: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers,



Polyetherimide and Polyetheretherketone

Chart 407: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 408: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Region - China, Japan, India, South Korea and Rest of Asia-Pacific in Metric Tons

Chart 409: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Volume Market Share (%) by Region - China, Japan, India, South Korea and Rest of Asia-Pacific

Chart 410: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Region - China, Japan, India, South Korea and Rest of Asia-Pacific in USD Million

Chart 411: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Value Market Share (%) by Region - China, Japan, India, South Korea and Rest of Asia-Pacific

Chart 412: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in Metric Tons

Chart 413: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Volume Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 414: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in USD Million

Chart 415: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Value Market Share (%) by End-use Sector - Chemical Processing, Electricals & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 416: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 417: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 418: Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 419: Glance at 2012, 2017 and 2022 Asia-Pacific Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 420: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 421: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in Metric Tons

Chart 422: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides



Volume Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 423: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 424: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides Value Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 425: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 426: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides Volume Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 427: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 428: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides Value Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 429: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 430: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 431: Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 432: Glance at 2012, 2017 and 2022 Asia-Pacific High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 433: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 434: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – China, Japan, South Korea and Rest of Asia-Pacific in Metric Tons

Chart 435: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Volume

Market Share (%) by Geographic Region – China, Japan, South Korea and Rest of Asia-Pacific

Chart 436: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Geographic Region – China, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 437: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Value Market Share (%) by Geographic Region – China, Japan, South Korea and Rest of Asia-Pacific

Chart 438: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in Metric Tons

Chart 439: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Volume Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 440: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others in USD Million

Chart 441: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Value Market Share (%) by End-Use Sector – Aerospace & Military, Automotive, Building & Construction, Electrical & Electronics, Food & Household, Mechanical/Industrial, Medical & Healthcare and Others

Chart 442: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 443: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 444: Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 445: Glance at 2012, 2017 and 2022 Asia-Pacific Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 446: Asia-Pacific Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 447: Asia-Pacific Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in Metric Tons

Chart 448: Glance at 2012, 2017 and 2022 Asia-Pacific Polyphenylene Sulphide (PPS) Volume Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 449: Asia-Pacific Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in USD Million

Chart 450: Glance at 2012, 2017 and 2022 Asia-Pacific Polyphenylene Sulphide (PPS) Value Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 451: Asia-Pacific Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 452: Glance at 2012, 2017 and 2022 Asia-Pacific Polyphenylene Sulphide (PPS) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 453: Asia-Pacific Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 454: Glance at 2012, 2017 and 2022 Asia-Pacific Polyphenylene Sulphide (PPS) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 455: Asia-Pacific Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 456: Asia-Pacific Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Region – China, Japan, South Korea and Rest of Asia-Pacific in Metric Tons

Chart 457: Glance at 2012, 2017 and 2022 Asia-Pacific Liquid Crystal Polymers (LCP) Volume Market Share (%) by Region – China, Japan, South Korea and Rest of Asia-Pacific

Chart 458: Asia-Pacific Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by Region – China, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 459: Glance at 2012, 2017 and 2022 Asia-Pacific Liquid Crystal Polymers (LCP) Value Market Share (%) by Region – China, Japan, South Korea and Rest of Asia-Pacific

Chart 460: Asia-Pacific Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others in Metric Tons

Chart 461: Glance at 2012, 2017 and 2022 Asia-Pacific Liquid Crystal Polymers (LCP) Volume Market Share (%) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others

Chart 462: Asia-Pacific Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others in USD Million

Chart 463: Glance at 2012, 2017 and 2022 Asia-Pacific Liquid Crystal Polymers (LCP) Value Market Share (%) by End-use Sector – Electrical & Electronics, Automotive, Industrial and Others

Chart 464: Asia-Pacific Polyetherimide (PEI) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 465: Asia-Pacific Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in Metric Tons

Chart 466: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetherimide (PEI) Volume Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 467: Asia-Pacific Polyetherimide (PEI) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in USD Million

Chart 468: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetherimide (PEI) Value Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 469: Asia-Pacific Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in Metric Tons

Chart 470: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetherimide (PEI) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 471: Asia-Pacific Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others in USD Million

Chart 472: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetherimide (PEI) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Consumer Goods, Aerospace & Military and Others

Chart 473: Asia-Pacific Polyetheretherketone (PEEK) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 474: Asia-Pacific Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in Metric Tons

Chart 475: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetheretherketone (PEEK) Volume Market Share (%) by Geographic Region - China, India, Japan, South Korea

and Rest of APAC

Chart 476: Asia-Pacific Polyetheretherketone (PEEK) Market Analysis (2012-2022) by Geographic Region - China, India, Japan, South Korea and Rest of APAC in USD Million

Chart 477: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetheretherketone (PEEK) Value Market Share (%) by Geographic Region - China, India, Japan, South Korea and Rest of APAC

Chart 478: Asia-Pacific Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in Metric Tons

Chart 479: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetheretherketone (PEEK) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others

Chart 480: Asia-Pacific Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others in USD Million

Chart 481: Glance at 2012, 2017 and 2022 Asia-Pacific Polyetheretherketone (PEEK) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare, Aerospace & Military and Others  
China

Chart 482: Chinese High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 483: Chinese High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 484: Glance at 2012, 2017 and 2022 Chinese High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 485: Chinese High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 486: Glance at 2012, 2017 and 2022 Chinese High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 487: Chinese High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and



Polyetheretherketone in Metric Tons

Chart 488: Glance at 2012, 2017 and 2022 Chinese High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 489: Chinese High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 490: Glance at 2012, 2017 and 2022 Chinese High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 491: Chinese Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 492: Glance at 2012, 2017 and 2022 Chinese Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 493: Chinese Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 494: Glance at 2012, 2017 and 2022 Chinese Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 495: Chinese High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 496: Glance at 2012, 2017 and 2022 Chinese High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 497: Chinese High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 498: Glance at 2012, 2017 and 2022 Chinese High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 499: Chinese Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric



## Tons

Chart 500: Glance at 2012, 2017 and 2022 Chinese Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 501: Chinese Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 502: Glance at 2012, 2017 and 2022 Chinese Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

## India

Chart 503: Indian High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 504: Indian High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 505: Glance at 2012, 2017 and 2022 Indian High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 506: Indian High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 507: Glance at 2012, 2017 and 2022 Indian High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 508: Indian High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 509: Glance at 2012, 2017 and 2022 Indian High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 510: Indian High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 511: Glance at 2012, 2017 and 2022 Indian High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 512: Indian Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA and ECTFE in Metric Tons

Chart 513: Glance at 2012, 2017 and 2022 Indian Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA and ECTFE

Chart 514: Indian Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA and ECTFE in USD Million

Chart 515: Glance at 2012, 2017 and 2022 Indian Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA and ECTFE

Chart 516: Indian High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 517: Glance at 2012, 2017 and 2022 Indian High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 518: Indian High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 519: Glance at 2012, 2017 and 2022 Indian High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 520: Indian Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 521: Glance at 2012, 2017 and 2022 Indian Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 522: Indian Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 523: Glance at 2012, 2017 and 2022 Indian Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Japan

Chart 524: Japanese High Performance Plastics Market Analysis (2012-2022) in

Volume (Metric Tons) and Value (USD Million)

Chart 525: Japanese High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 526: Glance at 2012, 2017 and 2022 Japanese High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 527: Japanese High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 528: Glance at 2012, 2017 and 2022 Japanese High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 529: Japanese High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 530: Glance at 2012, 2017 and 2022 Japanese High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 531: Japanese High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 532: Glance at 2012, 2017 and 2022 Japanese High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 533: Japanese Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 534: Glance at 2012, 2017 and 2022 Japanese Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 535: Japanese Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 536: Glance at 2012, 2017 and 2022 Japanese Fluoropolymers Value Market

Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 537: Japanese High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 538: Glance at 2012, 2017 and 2022 Japanese High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 539: Japanese High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 540: Glance at 2012, 2017 and 2022 Japanese High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 541: Japanese Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 542: Glance at 2012, 2017 and 2022 Japanese Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 543: Japanese Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 544: Glance at 2012, 2017 and 2022 Japanese Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

South Korea

Chart 545: South Korean High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 546: South Korean High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 547: Glance at 2012, 2017 and 2022 South Korean High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 548: South Korean High Performance Plastics Market Analysis (2012-2022) by

End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 549: Glance at 2012, 2017 and 2022 South Korean High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 550: South Korean High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 551: Glance at 2012, 2017 and 2022 South Korean High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 552: South Korean High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 553: Glance at 2012, 2017 and 2022 South Korean High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 554: South Korean Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 555: Glance at 2012, 2017 and 2022 South Korean Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 556: South Korean Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 557: Glance at 2012, 2017 and 2022 South Korean Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 558: South Korean High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 559: Glance at 2012, 2017 and 2022 South Korean High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12,



Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 560: South Korean High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 561: Glance at 2012, 2017 and 2022 South Korean High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 562: South Korean Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 563: Glance at 2012, 2017 and 2022 South Korean Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 564: South Korean Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 565: Glance at 2012, 2017 and 2022 South Korean Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Rest of APAC

Chart 566: Rest of APAC High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 567: Rest of APAC High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 568: Glance at 2012, 2017 and 2022 Rest of APAC High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 569: Rest of APAC High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 570: Glance at 2012, 2017 and 2022 Rest of APAC High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 571: Rest of APAC High Performance Plastics Market Analysis (2012-2022) by

Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 572: Glance at 2012, 2017 and 2022 Rest of APAC High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 573: Rest of APAC High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 574: Glance at 2012, 2017 and 2022 Rest of APAC High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 575: Rest of Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in Metric Tons

Chart 576: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 577: Rest of Asia-Pacific Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE in USD Million

Chart 578: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE, PFA, PCTFE and ECTFE

Chart 579: Rest of Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 580: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 581: Rest of Asia-Pacific High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6 in USD Million

Chart 582: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12,

Polyphthalamide/Polyamide 6T, Polyamide 46, Polyamide 9T and Polyarylamide/Polyamide MXD6

Chart 583: Rest of Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in Metric Tons

Chart 584: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

Chart 585: Rest of Asia-Pacific Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU) in USD Million

Chart 586: Glance at 2012, 2017 and 2022 Rest of Asia-Pacific Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU), Polyphenylsulfone (PPSU) and Polyethersulfone (PESU)

## **REST OF WORLD**

Chart 587: Rest of World High Performance Plastics Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 588: Rest of World High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 589: Glance at 2012, 2017 and 2022 Rest of World High Performance Plastics Volume Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 590: Rest of World High Performance Plastics Market Analysis (2012-2022) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 591: Glance at 2012, 2017 and 2022 Rest of World High Performance Plastics Value Market Share (%) by End-use Sector - Automotive & Transportation, Building & Construction, Consumer Goods, Electrical & Electronics, Mechanical/Industrial and Other

Chart 592: Rest of World High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in Metric Tons

Chart 593: Glance at 2012, 2017 and 2022 Rest of World High Performance Plastics Volume Market Share (%) by Plastic Type - Fluoropolymers, High Performance

Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 594: Rest of World High Performance Plastics Market Analysis (2012-2022) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone in USD Million

Chart 595: Glance at 2012, 2017 and 2022 Rest of World High Performance Plastics Value Market Share (%) by Plastic Type - Fluoropolymers, High Performance Polyamides, Sulfone Polymers, Polyphenylene Sulphide, Liquid Crystal Polymers, Polyetherimide and Polyetheretherketone

Chart 596: Rest of World Fluoropolymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 597: Rest of World Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in Metric Tons

Chart 598: Glance at 2012, 2017 and 2022 Rest of World Fluoropolymers Volume Market Share (%) by End-use Sector - Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 599: Rest of World Fluoropolymers Market Analysis (2012-2022) by End-use Sector - Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others in USD Million

Chart 600: Glance at 2012, 2017 and 2022 Rest of World Fluoropolymers Value Market Share (%) by End-use Sector - Chemical Processing, Electrical & Electronics, Mechanical/Industrial, Automotive & Transportation, Building & Construction and Others

Chart 601: Rest of World Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE and PFA in Metric Tons

Chart 602: Glance at 2012, 2017 and 2022 Rest of World Fluoropolymers Volume Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE and PFA

Chart 603: Rest of World Fluoropolymers Market Analysis (2012-2022) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE and PFA in USD Million

Chart 604: Glance at 2012, 2017 and 2022 Rest of World Fluoropolymers Value Market Share (%) by Fluoropolymer Type - PTFE, FEP, PVDF, ETFE and PFA

Chart 605: Rest of World High Performance Polyamides Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 606: Rest of World High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 607: Glance at 2012, 2017 and 2022 Rest of World High Performance Polyamides Volume Market Share (%) by End-Use Sector – Automotive, Electrical &

Electronics, Mechanical/Industrial and Other

Chart 608: Rest of World High Performance Polyamides Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 609: Glance at 2012, 2017 and 2022 Rest of World High Performance Polyamides Value Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 610: Rest of World High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46 and Polyarylamide/Polyamide MXD6 in Metric Tons

Chart 611: Glance at 2012, 2017 and 2022 Rest of World High Performance Polyamides Volume Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46 and Polyarylamide/Polyamide MXD6

Chart 612: Rest of World High Performance Polyamides Market Analysis (2012-2022) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46 and Polyarylamide/Polyamide MXD6 in USD Million

Chart 613: Glance at 2012, 2017 and 2022 Rest of World High Performance Polyamides Value Market Share (%) by Polyamide Type – Polyamide 11 & 12, Polyphthalamide/Polyamide 6T, Polyamide 46 and Polyarylamide/Polyamide MXD6

Chart 614: Rest of World Sulfone Polymers Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 615: Rest of World Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare and Others in Metric Tons

Chart 616: Glance at 2012, 2017 and 2022 Rest of World Sulfone Polymers Volume Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare and Others

Chart 617: Rest of World Sulfone Polymers Market Analysis (2012-2022) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare and Others in USD Million

Chart 618: Glance at 2012, 2017 and 2022 Rest of World Sulfone Polymers Value Market Share (%) by End-Use Sector – Automotive, Electrical & Electronics, Mechanical/Industrial, Medical & Healthcare and Others

Chart 619: Rest of World Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU) and Polyethersulfone (PESU) in Metric Tons

Chart 620: Glance at 2012, 2017 and 2022 Rest of World Sulfone Polymers Volume Market Share (%) by Polymer Type – Polysulfone (PSU) and Polyethersulfone (PESU)

Chart 621: Rest of World Sulfone Polymers Market Analysis (2012-2022) by Polymer Type – Polysulfone (PSU) and Polyethersulfone (PESU) in USD Million



Chart 622: Glance at 2012, 2017 and 2022 Rest of World Sulfone Polymers Value Market Share (%) by Polymer Type – Polysulfone (PSU) and Polyethersulfone (PESU)

Chart 623: Rest of World Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 624: Rest of World Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in Metric Tons

Chart 625: Glance at 2012, 2017 and 2022 Rest of World Polyphenylene Sulphide (PPS) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 626: Rest of World Polyphenylene Sulphide (PPS) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other in USD Million

Chart 627: Glance at 2012, 2017 and 2022 Rest of World Polyphenylene Sulphide (PPS) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Other

Chart 628: Rest of World Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 629: Rest of World Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Industrial and Others in Metric Tons

Chart 630: Glance at 2012, 2017 and 2022 Rest of World Liquid Crystal Polymers (LCP) Volume Market Share (%) by End-use Sector – Electrical & Electronics, Industrial and Others

Chart 631: Rest of World Liquid Crystal Polymers (LCP) Market Analysis (2012-2022) by End-use Sector – Electrical & Electronics, Industrial and Others in USD Million

Chart 632: Glance at 2012, 2017 and 2022 Rest of World Liquid Crystal Polymers (LCP) Value Market Share (%) by End-use Sector – Electrical & Electronics, Industrial and Others

Chart 633: Rest of World Polyetherimide (PEI) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 634: Rest of World Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others in Metric Tons

Chart 635: Glance at 2012, 2017 and 2022 Rest of World Polyetherimide (PEI) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others

Chart 636: Rest of World Polyetherimide (PEI) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others in USD Million

Chart 637: Glance at 2012, 2017 and 2022 Rest of World Polyetherimide (PEI) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others

Chart 638: Rest of World Polyetheretherketone (PEEK) Market Analysis (2012-2022) in Volume (Metric Tons) and Value (USD Million)

Chart 639: Rest of World Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others in Metric Tons

Chart 640: Glance at 2012, 2017 and 2022 Rest of World Polyetheretherketone (PEEK) Volume Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others

Chart 641: Rest of World Polyetheretherketone (PEEK) Market Analysis (2012-2022) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others in USD Million

Chart 642: Glance at 2012, 2017 and 2022 Rest of World Polyetheretherketone (PEEK) Value Market Share (%) by End-use Sector - Automotive, Electrical & Electronics, Mechanical/Industrial and Others

## List Of Tables

### LIST OF TABLES:

Table 1: Thermal Properties of High Performance Plastics

Table 2: Fluoropolymers Types

Table 3: Typical Properties of PTFE

Table 4: Typical Properties of FEP

Table 5: Typical Properties of PVDF

Table 6: Typical Properties of PFA

Table 7: Typical Properties of ETFE

Table 8: Typical Properties of ECTFE

Table 9: Typical Properties of PCTFE

Table 10: Properties of Polyamide

Table 11: Properties of Polyamide

Table 12: Properties of Polyamide

Table 13: Properties of Polyarylamide (PARA)/PA MXD6

Table 14: Selected Properties of Polyphthalamides

Table 15: Properties of Polyamide 9T

Table 16: Properties of PSU

Table 17: Properties of PSU

Table 18: Properties of PPSU

Table 19: Performance Properties of PPS

Table 20: Comparison of Performance Properties of Select Commercial 40% Glass Fiber Filled PPS Grades

Table 21: Comparison of Storage Modulus ( $E'$ ) Between Cross-Linked and Linear PPS

Table 22: Classification Commercial Grades of LCP

Table 23: Typical Properties of Ultem Polyetherimide

Table 24: Typical Properties of Polyetheretherketone

## List Of Figures

### LIST OF FIGURES:

- Figure 1: Plastics Performance Pyramid
- Figure 2: TFE Polymerization
- Figure 3: Preparation of FEP
- Figure 4: Chemical Structure of PVDF
- Figure 5: Chemical Structure of PFA
- Figure 6: Chemical Structure of PVF
- Figure 7: Polymerization of VF
- Figure 8: Chemical Structure of ETFE
- Figure 9: ETFE Preparation Process
- Figure 10: Chemical Structure of ECTFE
- Figure 11: ECTFE Preparation Process
- Figure 12: Chemical Structure of PCTFE
- Figure 13: CTFE Polymerization Process
- Figure 14: Chemical Structure of Rilsan PA
- Figure 15: Chemical Structure of PA
- Figure 16: Chemical Structure of PA
- Figure 17: Chemical Structure of PA MXD6
- Figure 18: Repeating unit of Polyphthalamide (PPA)
- Figure 19: Chemical Structure of Terephthalic acid (TPA) & isophthalic acid (IPA)
- Figure 20: PPA's 6T-Segment
- Figure 21: PPA's DT-Segment
- Figure 22: Chemical structures of three common PPAs
- Figure 23: Chemical Structure of Genestar PA 9T
- Figure 24: Production Process of Genestar PA 9T
- Figure 25: Chemical Structure of PSU
- Figure 26: Chemical Structure of PESU
- Figure 27: Chemical Structure of PPSU
- Figure 28: Polyphenylene Sulfide (PPS) Chemical Formula
- Figure 29: Comparison of Cross-Linked and Linear PPS
- Figure 30: Types of Liquid Crystal Polymers
- Figure 31: Chemical Structure of Liquid Crystal State Generator
- Figure 32: Conventional Design of Liquid Crystal Polymer
- Figure 33: Chemical Structure of LCPs
- Figure 34: Monomers used in the Synthesis of LCPs
- Figure 35: Standard Polymerization Process of LCP

Figure 36: Chemical Structure of PEI

Figure 37: Ultem high temperature solution polymerization

Figure 38: Reaction of activated bisnitroimide monomer with bisphenoxide

Figure 39: Chemical Structure of PEEK

Figure 40: Synthesis of Polyetheretherketone



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