

High Performance Plastics – A Global Market Overview

https://marketpublishers.com/r/H294E222DC0EN.html

Date: November 2016

Pages: 560

Price: US\$ 6,300.00 (Single User License)

ID: H294E222DC0EN

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.



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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 Huaao 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

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

Commercial Aircraft Interiors



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 DYNEON 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 Biocompability 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 Invibio 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

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