

INTRODUCTION .....	XXV
STUDY GOALS AND OBJECTIVES.....	XXV
REASONS FOR DOING THE STUDY .....	XXVIII
INTENDED READERSHIP .....	XXIX
SCOPE OF REPORT .....	XXX
SCOPE OF REPORT (CONTINUED) .....	XXXI
METHODOLOGY AND INFORMATION SOURCES.....	XXXII
ANALYST CREDENTIALS.....	XXXII
RELATED BCC WORK CREDENTIALS .....	XXXII
BCC RESEARCH ONLINE SERVICES .....	XXXIII
DISCLAIMER .....	XXXIII
SUMMARY.....	XXXIV
<i>SUMMARY TABLE OVERALL VOLUME OF MATERIALS USED IN</i>	
<i>U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, BY MATERIAL</i>	
<i>CATEGORIES, THROUGH 2012 (MILLIONS OF POUNDS).....</i>	<i>XXXV</i>
<i>SUMMARY FIGURE OVERALL VOLUME OF MATERIALS USED IN</i>	
<i>U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, BY MATERIAL</i>	
<i>CATEGORIES, 2007 AND 2012 (MILLION POUNDS) .....</i>	<i>XXXVI</i>
INDUSTRY OVERVIEW.....	1
SOME HISTORICAL BACKGROUND AND PERSPECTIVE .....	1
SOME HISTORICAL BACKGROUND AND ... (CONTINUED).....	2
THERMOSETTING ELASTOMERS (RUBBER COMPOUNDS).....	3
Thermosetting Elastomers ... (Continued).....	4
Thermosetting Elastomers ... (Continued).....	5
Nomenclature/Acronyms .....	6
Nomenclature/Acronyms (Continued).....	7
THERMOPLASTIC RESINS .....	8
THERMOPLASTIC ELASTOMERS .....	9
IMPORTANCE OF HOSE AND TUBING TO THE NATIONAL	
ECONOMY .....	10
IMPORTANCE OF HOSE AND TUBING ... (CONTINUED).....	11
<i>TABLE 1 ANNUAL SHIPMENTS FOR SELECTED U.S.</i>	
<i>MANUFACTURING SECTORS, THROUGH 2006 (BILLION</i>	
<i>DOLLARS).....</i>	<i>12</i>
IMPORTANCE OF HOSE AND TUBING ... (CONTINUED).....	13
PRIMARY MARKETS FOR HOSE AND TUBING.....	14
AUTOMOTIVE HOSE AND TUBING .....	15
Air conditioning (A/C) System Hose .....	16
Cooling System Hose .....	16
Fuel System Hose .....	16

Power Steering System Hose .....	17
Transmission Oil and Engine Oil Coolant Hose .....	17
Vacuum Hose .....	17
Other Automotive System Hose and Tubing.....	18
HYDRAULIC HOSE AND TUBING .....	18
INDUSTRIAL HOSE AND TUBING .....	19
Air Hose/Multipurpose Hose .....	20
Chemical/Petroleum Process and Transfer Hose .....	20
Fire Hose .....	20
Food Handling Hose and Tubing .....	21
Material Handling Hose.....	21
Steam Hose/Industrial Cleaning Hose .....	21
Other Industrial Hose .....	22
Industrial Tubing .....	22
CONSUMER AND HEALTHCARE HOSE AND TUBING .....	23
Garden Hose .....	23
Medical Tubing .....	23
Other Consumer Applications.....	24
MARKETS BY MATERIALS .....	25
INTRODUCTION AND GENERAL OBSERVATIONS .....	25
THERMOSETTING ELASTOMERS.....	26
THERMOPLASTIC RESINS .....	26
THERMOPLASTIC ELASTOMERS (TPES) .....	27
THERMOPLASTIC VS. THERMOSETTING HOSE/TUBING	
MATERIALS .....	27
ELASTOMERS VS. NONELASTOMERIC HOSE/TUBING	
MATERIALS .....	27
OVERALL MARKET EVALUATION AND FORECAST.....	28
<b>TABLE 2 OVERALL VOLUME OF MATERIALS USED IN U.S.</b>	
<b>FLEXIBLE POLYMERIC HOSE AND TUBING, BY MATERIAL</b>	
<b>CATEGORIES, THROUGH 2012 (MILLION POUNDS).....</b>	<b>28</b>
<b>FIGURE 1 OVERALL VOLUME OF MATERIALS USED IN U.S.</b>	
<b>FLEXIBLE POLYMERIC HOSE AND TUBING, BY MATERIAL</b>	
<b>CATEGORIES, 2007 AND 2012 (MILLION POUNDS) .....</b>	<b>29</b>
THERMOSETTING ELASTOMERS .....	30
THERMOSETTING ELASTOMERS (CONTINUED).....	30
THERMOSETTING ELASTOMERS (CONTINUED).....	31
<b>TABLE 3 ASTM OIL EXPOSURE CLASSIFICATION STANDARD FOR</b>	
<b>RUBBER MATERIALS .....</b>	<b>32</b>
EXTENDERS OR DILUENTS .....	33
FILLERS.....	33
PROTECTIVE CHEMICALS.....	33
Protective chemicals (continued) .....	34

<i>TABLE 4 INFORMATION PARAMETERS FOR HOSE/TUBING</i>	
<i>MATERIAL SELECTION</i> .....	35
NATURAL VS. SYNTHETIC RUBBER.....	36
Natural Rubber.....	36
Synthetic Rubber .....	37
Synthetic Rubber (Continued).....	38
<i>TABLE 5 A COMPARISON OF RUBBER PROPERTIES</i> .....	39
THERMOSETTING HOSE/TUBINGMATERIALS: OVERALL	
MARKET EVALUATION AND FORECAST.....	40
<i>TABLE 6 VOLUME OF THERMOSETTING ELASTOMERS USED IN</i>	
<i>U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, BY TYPES OF</i>	
<i>MATERIALS, THROUGH 2012 (MILLION POUNDS)</i> .....	40
ACRYLATE-BASED RUBBERS (ABR, ACM, EAM) .....	41
Market Analysis .....	42
<i>TABLE 7 VOLUME OF ACRYLATE-BASED ELASTOMERS USED IN</i>	
<i>U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012</i>	
<i>(MILLION POUNDS)</i> .....	42
Acrylate-Butadiene Rubber Properties.....	43
<i>TABLE 8 ACRYLATE-BUTADIENE RUBBER PROPERTIES</i> .....	43
BUTYL (ISOBUTENE-ISOPRENE) RUBBER (IIR).....	43
Market Analysis .....	44
<i>TABLE 9 VOLUME OF BUTYL/HALOBUTYL RUBBER USED IN U.S.</i>	
<i>FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012</i>	
<i>(MILLIONS POUNDS)</i> .....	44
Butyl Rubber Properties.....	45
<i>TABLE 10 BUTYL (ISOBUTENE-ISOPRENE) RUBBER PROPERTIES</i> .....	45
<i>TABLE 10 (CONTINUED)</i> .....	46
CHLORINATED POLYETHYLENE ELASTOMER (CPE OR	
CM) .....	46
Market Analysis .....	47
<i>TABLE 11 VOLUME OF CHLORINATED POLYETHYLENE</i>	
<i>ELASTOMER RUBBER USED IN U.S. FLEXIBLE POLYMERIC</i>	
<i>HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	47
CPE Rubber Properties .....	48
<i>TABLE 12 CHLORINATED POLYETHYLENE ELASTOMER</i>	
<i>PROPERTIES</i> .....	48
CHLOROPRENE RUBBER (CR/NEOPRENE).....	48
Market Analysis .....	49
<i>TABLE 13 VOLUME OF CHLOROPRENE (NEOPRENE) RUBBER</i>	
<i>USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING,</i>	
<i>THROUGH 2012 (MILLION POUNDS)</i> .....	49
Chloroprene Rubber Properties .....	50
<i>TABLE 14 CHLOROPRENE RUBBER PROPERTIES</i> .....	50
<i>TABLE 14 (CONTINUED)</i> .....	51

CHLOROSULFONATED POLYETHYLENE RUBBER (CSM/HYPALON) .....	51
Market Analysis .....	51
<i>TABLE 15 VOLUME OF CHLOROSULFONATED POLYETHYLENE RUBBER USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	52
CSM Rubber Properties.....	53
<i>TABLE 16 CHLOROSULFONATED POLYETHYLENE RUBBER PROPERTIES</i> .....	53
ETHYLENE-PROPYLENE RUBBERS (EPR/EPM AND EPDM).....	54
Market Analysis .....	54
<i>TABLE 17 VOLUME OF ETHYLENE-PROPYLENE RUBBERS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	55
EPDM Rubber Properties.....	56
<i>TABLE 18 ETHYLENE-PROPYLENE-DIENE (EPDM) RUBBER PROPERTIES</i> .....	56
<i>TABLE 18 (CONTINUED)</i> .....	57
FLUOROELASTOMERS (CFM, FKM, FFKM) .....	57
CFM Elastomers .....	57
FKM Elastomers.....	58
FFKM Elastomers .....	58
FXM Elastomers .....	58
Market Analysis .....	58
<i>TABLE 19 VOLUME OF FLUOROELASTOMERS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	59
Fluoroelastomer Properties.....	60
<i>TABLE 20 FLUOROELASTOMER PROPERTIES</i> .....	60
<i>TABLE 20 (CONTINUED)</i> .....	61
NATURAL RUBBER (NR).....	61
Market Analysis .....	62
<i>TABLE 21 VOLUME OF NATURAL RUBBER USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	62
Natural Rubber Properties.....	63
<i>TABLE 22 NATURAL RUBBER PROPERTIES</i> .....	63
NITRILE (ACRYLONITRILE-BUTADIENE) RUBBER (NBR) .....	64
Market Analysis .....	64
<i>TABLE 23 VOLUME OF NITRILE RUBBER USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	64
Nitrile Rubber Properties.....	65

<i>TABLE 24 ACRYLONITRILE-BUTADIENE (NITRILE) RUBBER PROPERTIES</i> .....	66
Nitrile/PVC Blends (NBR/PVC) .....	66
<i>TABLE 25 VOLUME OF NITRILE/PVC BLENDS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	67
POLYETHER ELASTOMERS (CO, ECO, ETC.) .....	68
Market Analysis .....	69
<i>TABLE 26 VOLUME OF POLYETHER ELASTOMERS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	69
Polyether Rubber Properties .....	70
<i>TABLE 27 POLYETHER RUBBER PROPERTIES</i> .....	70
SILICONE RUBBER (Q, MQ, VMQ, ETC.) .....	71
Market Analysis .....	71
<i>TABLE 28 VOLUME OF SILICONE RUBBER USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	72
Silicone Rubber Properties .....	73
<i>TABLE 29 SILICONE RUBBER PROPERTIES</i> .....	73
STYRENE-BUTADIENE RUBBER (SBR) .....	73
Market Analysis .....	74
<i>TABLE 30 VOLUME OF STYRENE-BUTADIENE RUBBER USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	74
Styrene-Butadiene Rubber Properties .....	75
<i>TABLE 31 STYRENE-BUTADIENE RUBBER PROPERTIES</i> .....	75
COST/PERFORMANCE COMPARISONS .....	76
<i>TABLE 32 COST-PERFORMANCE HIERARCHY FOR THERMOSETTING ELASTOMERS</i> .....	76
THERMOPLASTIC RESINS (NON-ELASTOMERIC) .....	77
<i>TABLE 33 THERMOPLASTIC VERSUS THERMOSETTING MATERIALS</i> .....	78
THERMOPLASTIC RESIN HOSE/TUBING MATERIALS:	
OVERALL MARKET EVALUATION AND FORECAST .....	79
<i>TABLE 34 VOLUME OF THERMOPLASTIC RESINS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, BY TYPES OF MATERIALS, THROUGH 2012 (MILLION POUNDS)</i> .....	79
FLUOROPOLYMERS .....	80
Market Analysis .....	80
<i>TABLE 35 VOLUME OF FLUOROPOLYMERS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	80
Important Fluoropolymer Hose and Tubing Uses .....	81

Important Fluoropolymer Hose ...(Continued).....	82
Fluoropolymer Properties.....	83
POLYAMIDES (NYLONS) .....	84
Market Analysis .....	85
<i>TABLE 36 VOLUME OF POLYAMIDES (NYLONS) USED IN U.S.</i>	
<i>FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012</i>	
<i>(MILLION POUNDS).....</i>	<i>85</i>
Polyamide Properties .....	86
POLYETHYLENES AND ETHYLENE COPOLYMERS .....	86
Market Analysis .....	87
<i>TABLE 37 VOLUME OF POLYETHYLENES USED IN U.S. FLEXIBLE</i>	
<i>POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION</i>	
<i>POUNDS).....</i>	<i>88</i>
Polyethylene Properties .....	89
<i>TABLE 38 PROPERTIES AND APPLICATIONS OF COMMON GRADES</i>	
<i>OF POLYETHYLENE .....</i>	<i>89</i>
Polyethylene Properties (Continued) .....	90
High Density Polyethylene (HDPE) .....	91
Low Density Polyethylene (LDPE) .....	91
Linear Low Density Polyethylene (LLDPE).....	92
Cross-linked Polyethylene.....	93
Ultra-High Molecular Weight Polyethylene (UHMW-	
HDPE or UHMWPE).....	93
Ethylene-Vinyl Acetate Copolymers (EVA).....	94
POLYPROPYLENE.....	95
Market Analysis .....	95
<i>TABLE 39 VOLUME OF POLYPROPYLENE USED IN U.S. FLEXIBLE</i>	
<i>POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION</i>	
<i>POUNDS).....</i>	<i>96</i>
Polypropylene Properties .....	96
POLYVINYL CHLORIDE.....	97
Market Analysis .....	98
<i>TABLE 40 VOLUME OF POLYVINYL CHLORIDE USED IN U.S.</i>	
<i>FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012</i>	
<i>(MILLION POUNDS).....</i>	<i>98</i>
PVC Properties .....	99
THERMOPLASTIC ELASTOMERS (TPES) .....	100
OVERALL MARKET EVALUATION AND FORECAST .....	101
<i>TABLE 41 VOLUME OF THERMOPLASTIC ELASTOMERS USED IN</i>	
<i>U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, BY TYPES OF</i>	
<i>MATERIALS, THROUGH 2012 (MILLION POUNDS) .....</i>	<i>101</i>
ADVANTAGES AND DISADVANTAGES OF	
THERMOPLASTIC ELASTOMERS.....	102
Advantages and Disadvantages ...(Continued).....	103

<i>TABLE 42 PROCESSING STEPS FOR THERMOPLASTIC ELASTOMERS COMPARED TO THERMOSETS</i> .....	104
TYPES AND GENERAL PROPERTIES OF THERMOPLASTIC ELASTOMERS.....	104
<i>TABLE 43 COMPARISON OF PROPERTIES OF VARIOUS CLASSES OF THERMOPLASTIC ELASTOMERS</i> .....	105
COPOLYESTER TPES (COPES) .....	105
Market Analysis .....	105
<i>TABLE 44 VOLUME OF COPOLYESTER (COPE) TPES USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	106
STYRENE BLOCK COPOLYMERS (SBS, S-EB-S, ETC.).....	107
Market Analysis .....	108
<i>TABLE 45 VOLUME OF STYRENE BLOCK COPOLYMER TPES USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	108
THERMOPLASTIC OLEFINS (TPOS) .....	109
Market Analysis .....	109
<i>TABLE 46 VOLUME OF THERMOPLASTIC OLEFIN TPOS USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	109
THERMOPLASTIC ALLOYS (TPVS AND MPRS) .....	110
Market Analysis .....	110
<i>TABLE 47 VOLUME OF THERMOPLASTIC ALLOY TPES USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLION POUNDS)</i> .....	111
THERMOPLASTIC POLYURETHANES (TPUS).....	112
Market Analysis .....	112
<i>TABLE 48 VOLUME OF THERMOPLASTIC POLYURETHANES (TPUS) USED IN U.S. FLEXIBLE POLYMERIC HOSE AND TUBING, THROUGH 2012 (MILLIONS POUNDS)</i> .....	113
COST/PERFORMANCE COMPARISONS .....	114
<i>TABLE 49 COST-PERFORMANCE HIERARCHY FOR THERMOPLASTIC ELASTOMERS</i> .....	114
MARKETS BY MAJOR APPLICATIONS .....	115
GENERAL OVERVIEW AND MARKET STRUCTURE.....	115
OVERALL MARKET EVALUATION AND FORECAST.....	115
POLYMERIC MATERIALS MARKET VOLUMES.....	116
<i>TABLE 50 OVERALL VOLUME OF POLYMERIC MATERIALS USED IN U.S. FLEXIBLE HOSE AND TUBING, BY MAJOR APPLICATIONS, THROUGH 2012 (MILLION POUNDS)</i> .....	116
<i>FIGURE 2 OVERALL VOLUME OF POLYMERIC MATERIALS USED IN U.S. FLEXIBLE HOSE AND TUBING, BY MAJOR APPLICATIONS, 2007 AND 2012 (MILLION POUNDS)</i> .....	117

HOSE AND TUBING MARKET VALUES .....	118
AUTOMOTIVE/AERONAUTIC HOSE AND TUBING .....	118
AUTOMOTIVE/AERONAUTIC ...(CONTINUED) .....	119
MARKET ANALYSIS .....	120
<i>TABLE 51 VOLUME OF POLYMERIC MATERIALS USED IN U.S.</i>	
<i>FLEXIBLE HOSE AND TUBING: AUTOMOTIVE/AERONAUTICAL</i>	
<i>APPLICATIONS, THROUGH 2012 (MILLION POUNDS).....</i>	
UNDER-THE-HOOD HOSE AND TUBING .....	121
Market Analysis .....	122
<i>TABLE 52 VOLUME OF POLYMERIC MATERIALS USED IN U.S.</i>	
<i>FLEXIBLE HOSE AND TUBING FOR AUTOMOTIVE UNDER-THE-</i>	
<i>HOOD APPLICATIONS, THROUGH 2012 (MILLION POUNDS) .....</i>	
Air Conditioning System .....	123
Cooling System.....	124
Cooling System (continued).....	125
Fuel System.....	126
Power Steering System.....	127
Transmission Oil and Engine Oil Coolant Hose.....	128
Vacuum Systems.....	128
Unclassified/Other Automotive Hose and Tubing.....	129
AIR BRAKE HOSE .....	129
Air Brake Hose (Continued).....	130
AERONAUTICAL APPLICATIONS .....	131
HYDRAULIC HOSE .....	132
HYDRAULIC HOSE (CONTINUED).....	133
MARKET ANALYSIS .....	134
<i>TABLE 53 VOLUME OF POLYMERIC MATERIALS USED IN U.S.</i>	
<i>FLEXIBLE HOSE: HYDRAULIC HOSE APPLICATIONS, THROUGH</i>	
<i>2012 (MILLION POUNDS) .....</i>	
THERMOPLASTIC HYDRAULIC HOSE.....	135
THERMOSET HYDRAULIC HOSE .....	136
INDUSTRIAL HOSE .....	137
MARKET ANALYSIS.....	138
<i>TABLE 54 VOLUME OF POLYMERIC MATERIALS IN U.S. FLEXIBLE</i>	
<i>HOSE FOR INDUSTRIAL HOSE APPLICATIONS, THROUGH 2012</i>	
<i>(MILLION POUNDS) .....</i>	
AIR AND MULTIPURPOSE HOSE.....	138
CHEMICAL/PETROLEUM PROCESS AND TRANSFER HOSE.....	139
Chemical Hose .....	140
Petroleum Hose.....	141
Petroleum Transfer Hose .....	141
Petroleum Dock Hose.....	142
Offshore Well Product Transfer Hose .....	143
Petroleum Dispensing Hose .....	143



FIRE HOSE .....	144
FOOD HANDLING HOSE.....	145
MATERIAL HANDLING HOSE .....	146
STEAM HOSE/EQUIPMENT CLEANING HOSE.....	146
UNCLASSIFIED/OTHER INDUSTRIAL HOSE.....	147
INDUSTRIAL TUBING.....	148
MAJOR MARKETS FOR INDUSTRIAL TUBING .....	148
MARKET ANALYSIS .....	149
<i>TABLE 55 VOLUME OF POLYMERIC MATERIALS USED IN U.S.</i>	
<i>FLEXIBLE TUBING FOR INDUSTRIAL TUBING APPLICATIONS,</i>	
<i>THROUGH 2012 (MILLION POUNDS).....</i>	
THERMOSETTING ELASTOMER INDUSTRIAL TUBING .....	150
THERMOPLASTIC NON-ELASTOMERIC INDUSTRIAL	
TUBING .....	151
THERMOPLASTIC ELASTOMERIC INDUSTRIAL TUBING.....	152
CHEMICAL TUBING .....	152
FOOD AND BEVERAGE TUBING.....	153
Food and Beverage Tubing (Continued).....	154
FUEL AND LUBRICANT TUBING.....	155
HYDRAULIC/PNEUMATIC/PNEUMATIC CONTROL TUBING ...	155
INSTRUMENTATION TUBING.....	156
LABORATORY TUBING .....	157
Commodity Thermoplastic Resins .....	157
Fluoropolymers .....	157
Silicone Rubber Tubing.....	158
Vacuum Tubing .....	158
NATURAL GAS TUBING.....	158
TELECOMMUNICATIONS TUBING .....	158
ULTRAPURE MATERIALS TRANSPORT TUBING .....	159
WATER TUBING (DRAIN LINES, SPRAY TUBING, ETC).....	159
UNCLASSIFIED/OTHER INDUSTRIAL TUBING .....	160
CONSUMER AND HEALTHCARE HOSE AND TUBING .....	160
MARKET ANALYSIS .....	160
<i>TABLE 56 VOLUME OF POLYMERIC MATERIALS USED IN U.S.</i>	
<i>FLEXIBLE HOSE AND TUBING FOR CONSUMER AND</i>	
<i>HEALTHCARE APPLICATIONS, THROUGH 2012 (MILLION</i>	
<i>POUNDS).....</i>	
GARDEN HOSE.....	161
MEDICAL TUBING.....	162
Thermoplastic Medical Tubing .....	163
Thermoplastic Medical Tubing (continued).....	164
Thermosetting Elastomer Medical Tubing.....	165
Catheters.....	166
Drainage, Suction, and Connection tubing.....	167

Tubing for Intravenous (IV) Solution Sets .....	167
Tubing for Other Medical Bags and Systems.....	167
Peristaltic Pump Tubing .....	168
Ventilation and Oxygen Tubing.....	168
Other Medical Tubing .....	169
OTHER CONSUMER APPLICATIONS .....	169
LPG and Natural Gas Hose .....	169
Pool and Spa Hose .....	170
Vacuum Cleaner Hose .....	170
TECHNOLOGY .....	171
OVERVIEW TO TECHNOLOGICAL ISSUES.....	171
MANUFACTURE OF HOSE AND TUBING MATERIALS .....	171
RUBBER MANUFACTURING PROCESSES .....	171
RUBBER MANUFACTURING PROCESSES (CONTINUED).....	172
NATURAL RUBBER MANUFACTURE .....	173
STRUCTURE OF NATURAL RUBBER .....	174
SYNTHETIC RUBBER MANUFACTURE.....	175
EMULSION POLYMERIZATION.....	175
MASS POLYMERIZATION .....	175
SOLUTION POLYMERIZATION.....	175
ACRYLATE-BASED RUBBERS (ABR, ACM, EAM) .....	176
BUTYL (ISOBUTENE-ISOPRENE) RUBBER (IIR).....	176
Halobutyl Rubber .....	177
CHLORINATED POLYETHYLENE ELASTOMER (CPE) .....	178
CHLOROPRENE RUBBER (CR) .....	178
CHLOROSULFONYL POLYETHYLENE RUBBER (CSM).....	179
ETHYLENE-PROPYLENE RUBBERS (EPM/EPR AND EPDM)....	180
FLUROELASTOMERS .....	181
NITRILE (ACRYLONITRILE-BUTADIENE) RUBBER (NBR) .....	181
POLYETHER ELASTOMERS (CO AND ECO).....	182
SILICONE RUBBER .....	182
STYRENE-BUTADIENE RUBBER (SBR) .....	183
RUBBER PRODUCTS MANUFACTURE .....	184
FILLERS AND REINFORCING AGENTS.....	184
SOFTENERS .....	184
ACCELERATORS .....	185
SULFUR .....	185
SYNTHETIC POLYMER MANUFACTURE .....	185
FLUOROPOLYMERS .....	186
TABLE 57 FLUOROPOLYMER NAMES AND ACRONYMS .....	187
TABLE 58 FLUOROPOLYMER RAW MATERIALS AND SYNTHETIC	
ROUTES.....	187
TABLE 58 (CONTINUED).....	188
POLYAMIDES (NYLONS) .....	188

POLYETHYLENES AND ETHYLENE COPOLYMERS .....	188
Low Density Polyethylene (LDPE) .....	189
High Density Polyethylene (HDPE) .....	190
Linear Low Density Polyethylene (LLDPE) .....	190
Ethylene-Vinyl Acetate (EVA) .....	191
POLYPROPYLENE.....	191
Atactic PP.....	191
Isotactic PP .....	191
Syndiotactic PP .....	192
POLYVINYL CHLORIDE.....	192
THERMOPLASTIC ELASTOMER (TPE) MANUFACTURE.....	193
THERMOPLASTIC ELASTOMER ...(CONTINUED).....	194
COPOLYESTER TPES (COPEES OR ETES) .....	195
STYRENIC BLOCK COPOLYMER TPES.....	195
THERMOPLASTIC POLYOLEFIN ELASTOMERS (TPOS).....	196
THERMOPLASTIC POLYOLEFIN ELASTOMERS	
(continued).....	197
THERMOPLASTIC ALLOY ELASTOMERS (TPVS AND MPRS)....	198
Thermoplastic Vulcanizates (TPVs) .....	198
Single Phase Melt Processible Rubber (MPR).....	199
THERMOPLASTIC POLYURETHANE ELASTOMERS (TPUS) .....	199
HOSE AND TUBING MANUFACTURING TECHNIQUES.....	200
HOSE MANUFACTURE .....	201
Non-Mandrel Hose.....	201
Rigid Mandrel Hose .....	202
Flexible Mandrel Hose .....	202
Wrapped Ply Hose (Machine Built) .....	202
Wrapped Ply Hose (Hand Built) .....	203
Circular Woven Hose.....	203
Spiral Ply Hose .....	203
TUBING MANUFACTURE.....	204
TECHNICAL INNOVATIONS AND DEVELOPMENTS .....	205
AUTOMOTIVE HOSE AND TUBING .....	205
HYDRAULIC HOSE AND TUBING .....	206
INDUSTRIAL HOSE .....	206
INDUSTRIAL TUBING .....	206
MEDICAL TUBING .....	206
APPLICATIONS-DRIVEN DEVELOPMENTS.....	207
THERMOPLASTIC ELASTOMER (TPE) MANUFACTURE.....	207
THERMOPLASTIC ELASTOMER ...(CONTINUED).....	208
Hydraulic Hose .....	209
Industrial Hose .....	210
HOSE AND TUBING FABRICATION DEVELOPMENTS.....	210
Automotive Hose and Tubing.....	211

Hydraulic Hose .....	212
THERMOPLASTIC POLYMER DEVELOPMENTS .....	213
Fluoropolymers .....	213
Polyamides (Nylons) .....	214
Polyethylenes and Ethylene Copolymers .....	214
Polypropylene .....	215
Polyvinyl Chloride and Other Vinyl Resins .....	216
THERMOSET POLYMER DEVELOPMENTS.....	217
Chloroprene Rubber .....	217
Chorosulfonated Polyethylene Rubber .....	217
Ethylene-Propylene-Diene Rubber (EPDM).....	218
Fluoroelastomers .....	219
Nitrile Rubber (NBR) .....	219
Polyether Elastomers (CO and ECO) .....	220
Silicone Rubber .....	220
Styrene-Butadiene-Rubber (SBR).....	221
THERMOPLASTIC ELASTOMER DEVELOPMENTS .....	221
ELASTOMERIC POLYMER BLENDS .....	222
INDUSTRY STRUCTURE AND COMPETITIVE FACTORS .....	223
INDUSTRY STRUCTURE .....	223
INDUSTRY CONCENTRATION .....	224
RECENT MERGERS, ACQUISITIONS, AND OTHER CORPORATE CHANGES .....	225
ANCILLARY EQUIPMENT SUPPLIERS .....	226
CUSTOM EXTRUSION .....	227
DISTRIBUTION.....	227
INTERMATERIAL COMPETITION.....	228
SOME INTERNATIONAL ISSUES.....	229
REGULATORY, ENVIRONMENTAL, AND PUBLIC FACTORS .....	230
CLASSES AND TYPES OF RUBBER MATERIALS .....	230
STANDARDS-WRITING AND REGULATORY ORGANIZATIONS .....	231
AUTOMOTIVE SECTOR.....	232
<i>TABLE 59 REPRESENTATIVE SAE STANDARDS FOR AUTOMOTIVE         HOSE AND TUBING .....</i>	<i>233</i>
DRINKING WATER .....	233
FOOD INDUSTRY .....	234
REGULATORY ISSUES.....	235
ENVIRONMENTAL ISSUES.....	236
HYDROCARBON EMISSIONS FROM MOTOR VEHICLES AND FACILITIES.....	236
LEVELS OF EXTRACTABLES.....	237
CHLORINE AND CHLORINATED COMPOUNDS .....	238
CARCINOGENS.....	238

OSHA STANDARDS .....	239
RECYCLING AND USE OF RECYCLED MATERIALS .....	240
PUBLIC PERCEPTIONS .....	240
PUBLIC PERCEPTIONS (CONTINUED).....	241
COMPANY PROFILES .....	242
INTRODUCTION .....	242
SUPPLIER COMPANIES.....	243
ADVANCED ELASTOMER SYSTEMS, L.P.....	243
ARKEMA INC. ....	244
AVON AUTOMOTIVE HOLDINGS INC.....	245
BASF SOCIETAS EUROPEA.....	245
BASF CORPORATION .....	245
BAYER AG/BAYER GROUP .....	246
BAYER CORPORATION .....	246
BUSINESS UNIT TPU NAFTA .....	246
BRIDGESTONE/FIRESTONE INC. ....	247
FIRESTONE POLYMERS, LLC.....	247
CELANESE CORPORATION/TICONA.....	248
CHEMTURA CORPORATION .....	249
COOPER-STANDARD AUTOMOTIVE, INC. ....	250
CRANE RESISTOFLEX .....	250
DAIKIN INDUSTRIES LTD.....	251
DAIKIN AMERICA INC. ....	251
DEXCO POLYMERS LP.....	251
THE DOW CHEMICAL COMPANY .....	252
DOW CORNING CORPORATION.....	253
DSM .....	254
DSM ELASTOMERS AMERICAS.....	254
DSM THERMOPLASTIC ELASTOMERS INC .....	254
E.I. DU PONT DE NEMOURS AND COMPANY .....	255
EASTMAN CHEMICAL COMPANY .....	256
EATON CORPORATION.....	257
ENTEGRIS, INC. ....	258
EXXONMOBIL CORPORATION .....	259
EXXON MOBIL CHEMICAL COMPANY .....	259
FLEXMASTER U.S.A. INC. ....	260
FLEXMASTER CANADA/THE NOVAFLEX GROUP .....	260
FLUORTUBING LLC .....	260
THE GOODYEAR TIRE AND RUBBER COMPANY .....	261
HBD INDUSTRIES/HBD THERMOID, INC.....	262
HITACHI CABLE INDIANA, INC. ....	263
ITT CORPORATION, FLUID TECHNOLOGY .....	264
KEY FIRE HOSE CORPORATION .....	265
KRATON POLYMERS U.S. LLC .....	265

KURARAY CO. LTD .....	266
KURARAY AMERICA, INC.....	266
KURIYAMA OF AMERICA, INC.....	267
LANXESS CORPORATION .....	267
LION COPOLYMER LLC.....	268
THE LUBRIZOL CORPORATION.....	269
LYONDELLBASELL ADVANCED POLYOLEFINS USA INC. ....	270
MARK IV INDUSTRIES, INC.....	270
MINNESOTA MINING & MANUFACTURING COMPANY .....	271
MOMENTIVE PERFORMANCE MATERIALS .....	272
MYTEX POLYMERS U.S. CORP.....	272
NEW AGE INDUSTRIES, INC.....	273
NIPPON ZEON COMPANY, LTD.....	274
ZEON CHEMICALS L.P.....	274
OMEGA ENGINEERING, INC.....	275
PACCAR INC. ....	275
PARKER HANNIFIN CORPORATION.....	276
PLASTIFLEX COMPANY INC. ....	276
POLYONE CORPORATION.....	277
GLS THERMOPLASTIC ELASTOMERS.....	277
GLS Thermoplastic Elastomers (Continued) .....	278
SAINT-GOBAIN PERFORMANCE PLASTICS CORPORATION ...	279
A. SCHULMAN INC. ....	280
SMITHS TUBULAR SYSTEMS .....	280
SNAP-TITE INC./SNAP-TITE HOSE INC.....	281
SOLVAY ADVANCED POLYMERS L.L.C.....	282
SOLVAY SOLEXIS, INC. ....	282
SRI INTERNATIONAL .....	283
TEEL PLASTICS, INC.....	283
TEKNI-PLEX INC.....	284
TEKNOR APEX COMPANY .....	285
TI AUTOMOTIVE .....	286
TOMKINS PLC .....	287
GATES CORPORATION .....	287
TOYODA GOSEI CO., LTD .....	287
TG FLUID SYSTEMS USA CORPORATION.....	287
ZEUS INDUSTRIAL PRODUCTS INC.....	288

APPENDIX: GLOSSARY OF IMPORTANT TERMS, ABBREVIATIONS, ACRONYMS, ETC.....	289
APPENDIX: GLOSSARY OF IMPORTANT TERMS.....	289
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	290
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	291
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	292
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	293

APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	294
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	295
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	296
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	297
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	298
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	299
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	300
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	301
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	302
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	303
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	304
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	305
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	306
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	307
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	308
APPENDIX: GLOSSARY OF IMPORTANT TERMS...(CONTINUED) .....	309