

CHAPTER ONE: INTRODUCTION	1
STUDY GOALS AND OBJECTIVES	1
REASONS FOR DOING THE STUDY	1
SCOPE OF REPORT	1
METHODOLOGY	2
ABOUT THE AUTHOR	2
RELATED BCC REPORTS	2
BCC ONLINE SERVICES	2
DISCLAIMER	2
 CHAPTER TWO: SUMMARY	4
<i>SUMMARY TABLE PROJECTED NORTH AMERICAN ENGINEERING RESIN- POLYMER ALLOY/BLEND MARKET BY RESIN TYPE, THROUGH 2013 (MILLIONS LBS)</i>	4
<i>SUMMARY FIGURE PROJECTED NORTH AMERICAN ENGINEERING RESIN- POLYMER ALLOY/BLEND MARKET BY RESIN TYPE, 2007-2013 (MILLION LBS)</i>	5
 CHAPTER THREE: ENGINEERING RESIN INDUSTRY	6
DEFINITIONS	6
BACKGROUND/HISTORICAL	6
PERFORMANCE AND TECHNICAL ASPECTS	7
<i>TABLE 1 SELECTED PHYSICAL PROPERTIES OF ENGINEERING RESINS</i>	7
<i>TABLE 2 IMPACT OF MORPHOLOGY ON ENGINEERING RESIN PROPERTIES</i>	8
PROCESSING	8
TESTING	8
<i>TABLE 3 SELECTED ENGINEERING RESIN ASTM TESTS</i>	9
PRICING	9
<i>TABLE 4 LIST PRICE RANGES OF SELECTED ENGINEERING RESINS, ALLOYS/BLENDS, 2008 (\$/LB)</i>	10
 CHAPTER FOUR: ENGINEERING RESINS BY TYPE	11
OVERVIEW	11
NYLONS	12
BACKGROUND	12
PROPERTIES	13
MAJOR TYPES OF NYLONS	13
Nylon 66	13
Nylon 6	13
<i>TABLE 5 COMPARISON OF NYLON 6 AND NYLON 66 PROPERTIES</i>	14

Other Nylons.....	14
Overview.....	14
Nylon 46	15
Nylon 6/9	15
Nylon 6/10 and Nylon 6/12	15
Nylon 11	15
Nylon 12	15
Reinforced Nylons.....	16
PROCESSING	16
ALLOYING/BLENDING OF NYLONS.....	17
CLEAR GRADES	17
Background	17
Applications of Clear Grades	17
PRODUCERS AND CAPACITIES	18
TABLE 6 NORTH AMERICAN NYLON PRODUCERS AND ESTIMATED PERCENT OF TOTAL CAPACITIES (%).....	18
SOME NEW NYLON PRODUCER DEVELOPMENTS.....	19
Honeywell Increases Nylon Capacity	19
DSM Adds to Its Nylon Capacity	19
DuPont Plans to Increase Nylon Capacity	19
Rhodia Adds Nylon Production in Asia	20
Lanxess Adds to its Global Capacity	20
Solutia Adds Nylon Capacity	20
EMS Grivory Adds Nylon Capacity	20
BASF Moving Ahead with More Nylon Capacity	21
Ube Increases Nylon Capacity	21
OTHER RECENT NYLON DEVELOPMENTS.....	21
Nylon Corp. of America	21
Lanxess	22
Arkema.....	22
Ube	22
DuPont	22
A Rhodia Nylon for High-Heat Applications	22
Rhodia's Other New Nylons	23
Rhodia's New Technyl SI (Super-Impact) Nylons	23
BASF's New Ultramid Grades	23
BASF Use of Nanoparticles.....	23
DSM Nylons for Connectors	23
Clear Nylons	24
Auto Door Handles	24
Nylons for Air Ducts.....	24
MARKET ESTIMATES AND FORECASTS	24
TABLE 7 PROJECTED NORTH AMERICAN NYLON MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	24

<i>TABLE 8 PROJECTED NORTH AMERICAN NYLON AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS)</i>	25
<i>FIGURE 1 PROJECTED NORTH AMERICAN NYLON AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....</i>	25
<i>POLYPHTHALAMIDES</i>	26
Background	26
Properties and Applications	26
Producers	26
New Developments	27
PPAs for Electrical Circuits/Connectors	27
New PPAs Replace Metals in Vehicles	27
DuPont PPAs in Food Processors	27
New PPAs with High Flows	27
Market Estimates and Forecasts	27
<i>TABLE 9 PROJECTED NORTH AMERICAN PPA MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....</i>	28
<i>POLYCARBONATES.....</i>	28
BACKGROUND	28
GENERAL GRADES.....	28
ALLOYS/BLENDs	29
PROPERTIES.....	29
Overview	29
Property Advantages and Disadvantages	29
APPLICATIONS.....	30
MARKETING	30
PRODUCERS AND CAPACITIES	31
Overview	31
<i>TABLE 10 NORTH AMERICAN POLYCARBONATE PRODUCERS AND CAPACITIES (MILLION LBS/YEAR).....</i>	31
Recent Capacity Developments.....	31
Recent Capacity ... (Continued)	32
NEW COMPANY DEVELOPMENTS	33
Sabic IP	33
Bayer	33
Teijin Chemical.....	33
EMERGING CD/DVD DEVELOPMENTS.....	33
Adding Colors to Optical Discs.....	33
DVD Usage.....	34
The Battle for DVDs	34
NEW PRODUCTS	34
Polycarbonate/Siloxane Resins	34
New Lexan Sheet Products	34
Transparent Glass-Filled Polycarbonates	35
New Medical Grades.....	35

Construction Grade Lexan	35
Electronic Enclosures	35
New Bayer Medical Products	35
Automotive Products	35
Antimicrobial Polycarbonates	36
ON THE DOWNSIDE	36
MARKET ESTIMATES AND FORECASTS	36
Overview	36
TABLE 11 PROJECTED NORTH AMERICAN POLYCARBONATE MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	37
Automotive.....	38
TABLE 12 PROJECTED NORTH AMERICAN POLYCARBONATE AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS).....	38
FIGURE 2 PROJECTED NORTH AMERICAN POLYCARBONATE AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....	39
SOME GLOBAL ASPECTS	39
POLYACETALS	39
BACKGROUND	39
GRADES	40
PROPERTIES.....	40
PROCESSING	41
PRODUCERS	41
PRODUCER ACTIVITIES.....	41
TYPICAL APPLICATIONS	42
TABLE 13 TYPICAL APPLICATIONS OF POLYACETALS	42
NEW PRODUCTS	43
NEW DEVELOPMENTS	43
DuPont	43
Friction Grades	43
Polyacetals with Lower Volatiles	43
Metal-Filled Polyacetals	43
Ticona	43
Polyacetals for Auto Exteriors.....	44
Conductive Polyacetals	44
MARKET ESTIMATES AND FORECASTS	44
TABLE 14 PROJECTED NORTH AMERICAN POLYACETAL MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	45
TABLE 15 PROJECTED NORTH AMERICAN POLYACETAL AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS).....	45
FIGURE 3 PROJECTED NORTH AMERICAN POLYACETAL AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....	46
THERMOPLASTIC POLYESTERS	46

BACKGROUND	46
POLYETHYLENE TEREPHTHALATE	46
Background	46
Major Applications.....	47
Modified PET Resins	47
Properties and Grades.....	48
Glycol-Modified PET Copolyester (PETG).....	48
Engineering-Grade PET	48
Reinforced PET	49
PRODUCERS AND CAPACITIES	49
Background	49
<i>TABLE 16 KEY NORTH AMERICAN PET PRODUCERS AND CAPACITIES (MILLION LBS/YR).....</i>	50
NEW DEVELOPMENTS	51
MARKET ESTIMATES AND FORECASTS	51
<i>TABLE 17 PROJECTED NORTH AMERICAN ENGINEERED PET MARKET BY APPLICATION, THROUGH 2013 (\$ MILLIONS).....</i>	51
<i>TABLE 18 PROJECTED NORTH AMERICAN ENGINEERED PET AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS).....</i>	52
<i>FIGURE 4 PROJECTED NORTH AMERICAN ENGINEERED PET AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....</i>	52
POLYBUTYLENE TEREPHTHALATE	52
Background	52
Properties.....	53
Applications	53
Producers	54
<i>TABLE 19 GLOBAL PBT PRODUCERS AND CAPACITIES (MILLION LBS/YR).....</i>	54
PET and PBT Competitive Scenario.....	54
Market Estimates and Forecasts	55
<i>TABLE 20 PROJECTED NORTH AMERICAN PBT MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....</i>	56
<i>TABLE 21 PROJETCED NORTH AMERICAN PBT AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS)</i>	56
<i>FIGURE 5 PROJETCED NORTH AMERICAN PBT AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....</i>	57
Other PBT Developments	57
Lanxess/DuPont	57
Toray/Lanxess	57
Sabic Ends PBT Venture with BASF.....	58
Sabic Gets New PBT Partner	58
BASF's High-Speed PBT	58
Cyclics Corp.....	58

Lanxess Corp.....	59
PBTs for Headlamp Bezels.....	59
Ticona Corp.	59
Degussa	59
PBTs for Electronic Applications	59
High-Flow PBTs for Automotive Applications	60
Hydrolysis-Resistant PBTs.....	60
GE Plastic's PBT from Recycled PET	60
POLYCYCLOHEXYLDIMETHYLENE TEREPHTHALATE	
(PCT).....	60
Background	60
Properties.....	60
Producers and Applications.....	61
New Developments	61
PCT Usage in Automotive Connectors.....	61
LIQUID CRYSTAL POLYMERS.....	62
BACKGROUND	62
PROPERTIES.....	63
APPLICATIONS.....	63
Background	63
Electrical/Electronics.....	64
PRODUCERS	64
TABLE 22 ESTIMATES OF GLOBAL LIQUID CRYSTAL POLYMER CAPACITIES (MILLION LBS/YR).....	65
NEW DEVELOPMENTS AND PRODUCTS	65
Ticona	65
Sumitomo Chemical Moves Ahead With its LCPs	66
DuPont	66
Increased Usage in Automotive and Home Electronics	66
Usage in LEDs	66
MARKET ESTIMATES AND FORECASTS	66
TABLE 23 PROJECTED NORTH AMERICAN LIQUID CRYSTAL POLYMER MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	67
POLYSULFONES.....	68
BACKGROUND	68
TYPES OF POLYSULFONES	68
APPLICATIONS.....	69
PRODUCER SCENARIO	69
RECENT DEVELOPMENTS	70
BASF	70
Solvay	70
Sumitomo Chemical.....	70
MARKET ESTIMATES AND FORECASTS	71

TABLE 24 PROJECTED NORTH AMERICAN POLYSULFONE MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	71
POLYPHENYLENE SULFIDE.....	72
BACKGROUND	72
PROPERTIES.....	72
ADVANTAGES AND DISADVANTAGES.....	73
APPLICATIONS.....	73
OTHER TECHNOLOGY CONSIDERATIONS	74
PRODUCERS	74
MARKET ESTIMATES AND FORECASTS	75
TABLE 25 PROJECTED NORTH AMERICAN POLYPHENYLENE SULFIDE MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	75
NEW DEVELOPMENTS	76
Chevron Phillips Product Line Expansion	76
Thermoforming PPS.....	76
POLYIMIDES/PEI/PAI.....	76
BACKGROUND	76
PROPERTIES.....	77
EARLY E/E APPLICATIONS.....	77
VESPEL PARTS.....	78
POLYETHERIMIDES (PEIs).....	78
Background	78
Applications	79
POLYAMIDEIMIDES	79
Background	79
Properties.....	79
Applications	80
Competitive Scenario.....	80
Producers	81
NEW POLYIMIDE DEVELOPMENTS	81
Sabic IP	81
DuPont	81
New PEI Polymers.....	82
Sabic IP Extem Line.....	82
MARKET ESTIMATES AND FORECASTS	82
TABLE 26 PROJECTED NORTH AMERICAN POLYIMIDE MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	83
POLYKETONES	83
BACKGROUND	83
PROPERTIES.....	83
APPLICATIONS.....	84
PRODUCERS	84
Overview	84

Victrex Activities	84
Other PEEK Producers	85
MAJOR APPLICATIONS	85
NEW PEEK DEVELOPMENTS.....	85
PEEK for Thinwall Parts	85
Asian Sources for PEEK.....	85
PEEK for Lead-Free Soldering	86
Long-Fiber PEEK	86
High-Flow PEEK	86
PEEK Blends With PBI Fibers	86
PEEK Products Meet FDA Specifications	86
PEEK Films Introduced	87
PEEK Blends	87
Degussa Buys Polyaryl Ethyl Ketones (PAEK) from Ticona.....	87
MARKET ESTIMATES AND FORECASTS.....	87
CYCLIC OLEFIN COPOLYMERS.....	88
BACKGROUND	88
OTHER CYCLIC OLEFIN THERMOPLASTICS.....	89
RECENT DEVELOPMENTS	89
BROADENING OF COC APPLICATIONS.....	89
NEW COC FILM GRADES.....	90
MITSUI EXPANSION	90
COCS FOR BLU-RAY LENSES	90
SYNDIOTACTIC POLYSTYRENE.....	90
BACKGROUND	90
APPLICATIONS.....	91
HISTORY.....	91
OTHER NEWSWORTHY EVENTS	92
CBT RESINS.....	92
POLYBENZIMIDAZOLE	92
POLYBENZIMIDAZOLE (CONTINUED).....	93
CHAPTER FIVE: POLYMER ALLOYS/BLENDS	94
BACKGROUND	94
PPO/HIPS.....	94
OVERVIEW	94
MARKET ESTIMATES AND FORECASTS	95
<i>TABLE 27 PROJECTED NORTH AMERICAN PPO/HIPS MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....</i>	95
<i>TABLE 28 PROJECTED NORTH AMERICAN PPO/HIPS AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS).....</i>	96
<i>FIGURE 6 PROJECTED NORTH AMERICAN PPO/HIPS AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....</i>	96

PPO/NYLON	97
BACKGROUND AND PROPERTIES	97
GRADES AND APPLICATIONS.....	97
MARKET ESTIMATES AND FORECASTS	97
TABLE 29 PROJECTED NORTH AMERICAN PPO/NYLON MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	98
TABLE 30 PROJECTED NORTH AMERICAN PPO/NYLON AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS).....	98
FIGURE 7 PROJECTED NORTH AMERICAN PPO/NYLON AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....	99
PC/ABS	99
BACKGROUND	99
PROPERTIES.....	100
NEW PRODUCTS	100
Upgraded PC/ABS for Instrument Panels.....	100
PC/ABS for Medical Products	100
PC/ABS Grades for Auto Dashboards.....	101
PC/ABS for Other Auto Applications.....	101
Teijin's Products	101
MARKET ESTIMATES AND FORECASTS	101
TABLE 31 PROJECTED NORTH AMERICAN PC/ABS MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	101
TABLE 32 PROJECTED NORTH AMERICAN PC/ABS AUTOMOTIVE MARKET BY SEGMENT, THROUGH 2013 (MILLION LBS)	102
FIGURE 8 PROJECTED NORTH AMERICAN PC/ABS AUTOMOTIVE MARKET BY SEGMENT, 2007-2013 (MILLION LBS).....	102
INTERESTING DEVELOPMENTS.....	103
Thinwalling.....	103
Portable Fuel Cells Utilize PC/ABS.....	103
EMI Shielding PC/ABS Products	103
PC/PBT	103
BACKGROUND	103
PROPERTIES.....	104
CYCLICS CORP. ACTIVITIES	104
MARKET ESTIMATES AND FORECASTS	104
TABLE 33 PROJECTED NORTH AMERICAN PC/PBT MARKET BY APPLICATION, THROUGH 2013 (MILLION LBS).....	105
NEW DEVELOPMENTS	105
PolyOne Introduces New PC/PBT Alloys	105
OTHER ALLOYS/BLENDs.....	105
LCP TEAMS UP WITH POLYCARBONATES AND PET	105
PEI/POLYCARBONATE BLENDS	106
NYLON/ABS BLENDS	106

LCP/PPS ALLOYS	106
PEEK/PBI BLENDS	107
ENGINEERING RESIN AND POLYMER ALLOY/BLEND MARKET SUMMARIES.....	107
<i>TABLE 34 SUMMARY OF NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOY/BLEND MARKET PROJECTIONS, THROUGH 2013 (MILLION LBS).....</i>	107
<i>TABLE 34 (CONTINUED).....</i>	108
<i>TABLE 35 SUMMARY OF ENGINEERING RESINS AND POLYMER ALLOYS/BLEND MARKETS, 2007 (\$ MILLIONS).....</i>	109
CHAPTER SIX: APPLICATIONS.....	110
OVERVIEW	110
<i>TABLE 36 ETP END-USE APPLICATIONS AND SELECTED SPECIFIC EXAMPLES.....</i>	110
AUTOMOTIVE.....	111
OVERVIEW	111
<i>TABLE 37 HISTORICAL, CURRENT AND PROJECTED U.S. AUTOMOTIVE SALES (MILLION UNITS)</i>	111
CAFE ISSUES	112
ROLE OF PLASTICS	112
AUTOMOTIVE PLASTIC USAGE.....	113
ANOTHER LOOK AT THE IMPACT OF PLASTICS IN THE AUTOMOTIVE SECTOR	114
HYBRIDS.....	115
<i>TABLE 38 ESTIMATED U.S. HYBRID SALES (THOUSANDS OF UNITS).....</i>	116
NEW AUTOMOTIVE DEVELOPMENTS	116
General Motors	116
Volkswagen	116
Dow and DuPont Plan to Increase Presence with Japanese Auto Manufacturers.....	117
Plastic Auto Roofs.....	117
UTH AUTOMOTIVE SEGMENT.....	117
Background	117
Key Factors of UTH Resin Market	117
<i>TABLE 39 SELECTED AUTOMOTIVE UNDER-THE HOOD RESINS/ELASTOMERS BY PART.....</i>	118
Electric/Electronic Components	119
Background	119
Connectors	119
Bobbins	120
Switches/Sockets	120
Sensors	120
Ignition Components	120

Plastic Rocker Covers	121
Catalytic Converters.....	121
Valve Covers	121
Intake Manifolds.....	121
Expanded Use of Encapsulated Components	122
Heating/Air-Conditioning Equipment	122
Reservoirs	123
Trends and Developments.....	123
New Products	123
Increase in LCP Usage	123
New Nylon UTH Parts.....	123
New PPS Product.....	124
New PBT Products.....	124
MARKET ESTIMATES AND FORECASTS	124
TABLE 40 PROJECTED NORTH AMERICAN AUTOMOTIVE UTH MARKET BY ENGINEERING RESINS AND POLYMER ALLOYSBLENDs, THROUGH 2013 (MILLION LBS).....	124
AUTOMOTIVE EXTERIOR AUTOMOTIVE SEGMENT.....	125
Background.....	125
TABLE 41 RESINS USED FOR SPECIFIC EXTERIOR AUTOMOTIVE PARTS.....	125
TABLE 41 (CONTINUED).....	126
Body Panels.....	126
Fenders.....	127
Background	127
Thermoplastics in Fenders	127
Bumper Systems.....	127
Background	127
Bumper System and Products.....	127
Bumper Beams.....	128
Side Molding/Trim	128
Radiator/Grilles	129
Transparent Automotive Exteriors and Housings	129
Background	129
Light Reflector Housings	129
Taillights and Rear Brake Lights	130
Headlights and Front-End Lenses	130
Advantages and Disadvantages	130
New/Upcoming Technologies.....	131
• HID (“Xenon”) Headlamps	131
• LED Headlights.....	131
• Headlamp Bezels May Move to PBT	131
• New Resins Challenge Polycarbonates in Headlights.....	132

Automotive Glazing	132
Background	132
Criteria for Replacing Glass	133
Market Opportunities	133
Critical Issues	133
DuPont Activities	134
Solutia's Efforts with Glass	134
Bayer-GE Plastics Joint Project	134
• Background	134
• Technology	135
• Market Aspects	135
NHTSA Activities	135
New Developments in Auto Glazing	136
• Overview	136
• More Details on Auto Clear Sun Roofs.....	137
Other Interesting Auto Exterior Developments.....	137
New Federal Agency Ruling May Open the Way for Additional Plastic Auto Glazing	137
GE Plastics Buys Exatec	137
Market Estimates and Forecasts	138
TABLE 42 PROJECTED NORTH AMERICAN AUTOMOTIVE EXTERIOR MARKET BY ENGINEERING RESINS AND POLYMER ALLOY BLENDS, THOUGH 2013 (MILLION LBS).....	138
AUTOMOTIVE INTERIOR AUTOMOTIVE SEGMENT.....	138
Background	138
Overview of Resins Used in Automotive Interiors	139
TABLE 43 RESINS USED FOR SPECIFIC INTERIOR AUTOMOTIVE PARTS.....	139
Seat-Related Auto Interior Parts	139
Background	139
Seat Backs	140
Airbags	140
Background	140
Tough Resins Needed for Airbag Doors	140
A New Development	141
Knee Air Bags	141
Instrument Panels	141
Overview.....	141
Resin Selection.....	142
Knee Bolsters	143
Background	143
Resins Used.....	143
New Headrest Developments	143
Interior Automotive Lenses	143

Background	143
LEDs Move into Automotive Interiors.....	144
MARKET ESTIMATES AND FORECASTS	144
TABLE 44 PROJECTED NORTH AMERICAN AUTOMOTIVE INTERIOR MARKET BY ENGINEERING RESINS AND POLYMER ALLOYS/BLENDs, THROUGH 2013 (MILLION LBS)	144
AUTOMOTIVE MARKET SUMMARY	145
TABLE 45 PROJECTED NORTH AMERICAN OVERALL AUTOMOTIVE MARKET BY ENGINEERING RESINS AND POLYMER ALLOYS/BLENDs, THROUGH 2013 (MILLION LBS)	145
ELECTRICAL/ELECTRONIC.....	145
OVERVIEW	145
END-USE MARKET SCENARIO	146
CONSUMER ELECTRONIC TRENDS	146
CDS/DVDS.....	147
Overview	147
Market Dynamics	147
Compact Discs	147
Polycarbonate Supplier's Response.....	148
DVD Plastic Materials.....	148
Polycarbonates	148
New Polycarbonates Geared for DVDs	149
New Developments	149
Background	149
HD-DVDs.....	149
Blu-ray Discs.....	149
• Background.....	149
• Technologies.....	149
• Transparent Plastic Scenario	150
PRINTED CIRCUIT BOARDS	151
Background	151
Technologies.....	151
PCB Substrates.....	151
Overview.....	151
Current Material Usage	152
• Standard FR-4 Epoxy Resin	152
• Higher-Performance Epoxies	152
• Polyimides.....	152
Issues That Will Impact Types of Resins Used in PCBs.....	153
FLEXIBLE PRINTED CIRCUIT BOARDS	153
Background	153
Technology	154
Materials Used.....	154
Overview.....	154

Polyimides	154
Polyesters	154
Liquid Crystal Polymers.....	155
Aramids	155
Epoxy Resins	155
Adhesiveless Laminates	155
MOLDED ELECTRONIC PRODUCTS.....	155
Overview	155
Background	156
Resins Used.....	156
Connectors	156
Background	156
Trends.....	157
Resin Selection.....	157
Automotive Industry.....	158
• Background.....	158
• Resin Scenario	158
Other Markets.....	159
Switches	159
Bobbins.....	160
Relays.....	160
Capacitors	160
Background	160
Applications.....	160
New High-Heat Electric/Electronic Parts	161
MARKET ESTIMATES AND FORECASTS	161
TABLE 46 NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOYS/BLEND ELECTRIC/ELECTRONIC MARKETS, THROUGH 2013 (MILLION LBS).....	161
ELECTRONIC PACKAGING.....	162
OVERVIEW	162
SURFACE-MOUNT TECHNOLOGY.....	162
Background	162
Resin and Material Usage.....	162
Competitive Resin Scenario	163
ENCAPSULANTS	163
Definitions and Background	163
Organic Encapsulants	163
BUILDING/CONSTRUCTION.....	164
OVERVIEW	164
ENGINEERING RESIN USAGE	164
GLAZING.....	164
Background	164
Properties.....	165

TABLE 47 SELECTED PROPERTIES OF PLASTIC SHEET FOR OUTDOOR APPLICATIONS	165
Acrylic Sheet	165
Polycarbonate Sheet	166
Use in Greenhouses	167
Overview.....	167
A New Development	167
Recent Development.....	167
PLUMBING/HARDWARE.....	168
Overview	168
Polyacetals	168
PPO/HIPS	168
PBT.....	168
PET.....	169
Thermoset Polyesters	169
SKYLIGHTS.....	169
Overview	169
Use of Glass.....	169
Use of Plastics	170
• Background.....	170
• Plastic Types.....	170
• Glass and Plastic Combinations	170
LIGHTING PRODUCTS.....	170
Background	170
Type of Lighting Products	171
Resins Used.....	171
Lighting Lenses	172
Overview.....	172
Resin Usage.....	172
Polycarbonates	173
SIGNS/DISPLAYS	173
Background	173
Outdoor Sign Market.....	174
MARKET ESTIMATES AND FORECASTS	174
TABLE 48 PROJECTED NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOYS/BLEND BUILDING/CONSTRUCTION MARKET, THROUGH 2013 (MILLION LBS)	174
MEDICAL DEVICES	175
STATUS OF THE HEALTHCARE INDUSTRY	175
OVERALL PLASTIC USAGE.....	175
MEDICAL DEVICE CATEGORY CRITERIA	175
Nondisposables	175
Disposables	176
POLYMERS USED	176

Overview	176
Specific Examples	177
EXAMPLES OF NON-DISPOSABLE MEDICAL DEVICE	177
Implants and Prosthetic Devices	177
Overview.....	177
Thermoplastic Materials Used	177
New Development with PEEK Products.....	178
DISPOSABLE MEDICAL DEVICES	178
Overview	178
Resins Used.....	179
Background	179
Commodity Thermoplastics.....	179
Engineering Resins	179
Thermoset Resins.....	180
TABLE 49 SELECTED RESIN USAGE BY TYPE OF MEDICAL DEVICE ...	180
SPECIFIC ENGINEERING RESIN/ALLOY-BLENDs USAGE	
IN MEDICAL APPLICATIONS	181
Nylons	181
Polycarbonates.....	181
Overview.....	181
Specific Examples	182
• Renal Dialysis.....	182
• Surgical Instruments	182
• Cardiac Surgery Products	182
New Polycarbonate Medical Products.....	183
• Heart Attack Treatment Device	183
• Several New Sabic IP Lexan Polycarbonates for Medical Applications	183
• New Bayer Medical Grade Polycarbonates.....	183
Polyester Medical Applications	184
Overview.....	184
New Clear Polyester Medical Parts	184
New Polyacetal Medical Products.....	185
Ticona	185
Westlake Plastics	185
Polysulfone Medical Products	185
Overview.....	185
New Developments	186
Polyimide Medical Products	186
Overview.....	186
New Polyimide Medical Products.....	187
Polyketone Medical Products	187
Overview.....	187
PEEK Implants	187

Other PEEK Medical Usage	188
New Polyketone Medical Products	188
Liquid Crystal Medical Products	188
MARKET ESTIMATES AND FORECASTS	189
TABLE 50 PROJECTED NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOYS/BLEND MEDICAL MARKET BY RESIN TYPE, THROUGH 2013 (MILLION LBS).....	189
APPLIANCES	189
OVERVIEW	189
NEW DEVELOPMENTS	190
APPLIANCE USAGE IN U.S. HOUSEHOLDS.....	190
KEY APPLICATIONS FOR PLASTICS IN APPLIANCES	191
TABLE 51 SELECTED MAJOR APPLICATIONS FOR POLYMERS IN APPLIANCES	192
RECENT CHANGES IN RESIN CHOICES	192
NYLON USAGE	193
POLYCARBONATE USAGE	193
PBT USAGE	193
PET USAGE	193
COMMODITY THERMOPLASTIC USAGE.....	194
MARKET ESTIMATES AND FORECASTS	194
TABLE 52 PROJECTED NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOY/BLEND APPLIANCE MARKET, THROUGH 2013 (MILLION LBS).....	194
TABLE 52 (CONTINUED).....	195
ELECTRONIC ENCLOSURES.....	195
DEFINITIONS	195
OVERVIEW	195
DOWNSIZING.....	196
STILL A COMPETITIVE SCENARIO	196
EFFECTS ON PERFORMANCE REQUIREMENTS AND DESIGN.....	197
MATERIAL AND PROCESS SELECTION	198
SIGNIFICANCE OF THINWALLING ON RESIN SELECTION.....	198
Significance of Thinwalling...(Continued).....	199
COSTS	200
TESTING AGENCIES AND REQUIREMENTS	200
MARKET ESTIMATES AND FORECASTS	201
TABLE 53 PROJECTED NORTH AMERICAN ENGINEERING RESIN AND POLYMER ALLOYS/BLEND ELECTRONIC ENCLOSURES MARKET, THROUGH 2013 (MILLION LBS)	201
RIGID FOOD PACKAGING	201
OVERVIEW	201
POLYCARBONATES.....	202

Background	202
Health Concerns	202
Overview.....	202
BPA-Free Bottles	202
Water Bottles	203
PREPARED FOOD CONTAINER PACKAGING	203
Overview	203
Types of Food Packaging Structures	204
TABLE 54 PLASTIC USAGE IN PREPARED FOOD CONTAINERS	205
Market Estimates and Forecasts	205
OPTICAL LENSES	205
Refractive Index.....	205
Abbe Values	205
ADVANTAGES OF PLASTICS	206
CLEAR PLASTICS USED	206
Background	206
Polycarbonates.....	206
Overview.....	206
Advantages and Disadvantages	207
OPTICAL LENS MARKET CHARACTERISTICS.....	207
Background	207
MARKET SEGMENTS	208
MARKET ESTIMATES AND FORECASTS	208
AIRCRAFT	209
OVERVIEW	209
EXAMPLES OF GLASS PRODUCTS	209
IMPORTANCE OF IMPACT RESISTANCE	209
CLEAR PLASTIC PREFERENCES	210
COMMERCIAL AIRCRAFT TRANSPARENCIES.....	211
RECENT DEVELOPMENTS	211
AIRCRAFT INTERIORS.....	212
MARKET ESTIMATES AND FORECASTS	212
TOYS	213
OVERVIEW	213
BACKGROUND	213
USE OF PLASTICS IN TOYS	213
Background	213
Polystyrene	214
ABS.....	214
SBCs	214
Polycarbonates.....	215
CONSUMER PRODUCT SAFETY COUNCIL	215
MARKET ESTIMATES AND FORECASTS	215
MISCELLANEOUS APPLICATIONS	215

SPORT/RECREATIONAL EQUIPMENT	215
LAWN/GARDEN EQUIPMENT	216
Overview	216
TABLE 55 CURRENT AND FORECASTED OUTLOOK FOR METAL AND PLASTIC USAGE IN LAWN/GARDEN EQUIPMENT, THROUGH 2013 (AS A PERCENT OF TOTAL)	216
Resins Used.....	216
HOUSEWARES.....	217
Background.....	217
MARKET ESTIMATES AND FORECASTS	218
TABLE 56 PROJECTED NORTH AMERICAN MARKET FOR MISCELLANEOUS APPLICATIONS OF ENGINEERING RESINS AND POLYMER ALLOYS/BLENDs, THROUGH 2013 (MILLION LBS).....	218
CHAPTER SEVEN: OTHER TECHNOLOGIES/PRODUCT AREAS EMPLOYING ENGINEERING RESINS AND/OR POLYMER ALLOYS/BLENDs 219	
OVERVIEW	219
CONDUCTIVE PLASTICS.....	219
BACKGROUND	219
FUNCTIONS	219
CONDUCTIVE ADDITIVE SELECTION.....	220
TABLE 57 SURFACE RESISTIVITY FOR ELECTRONIC DEVICE SUBSTRATES (OHMS/SQ).....	220
STATIC-DISSIPATIVE POLYMERS	220
Static-Dissipative Polymers (Continued)	221
ELECTROSTATIC PAINTABLE PLASTICS.....	222
BACKGROUND	222
OVERVIEW	222
APPLICATIONS.....	222
AUTOMOTIVE INDUSTRY ASPECTS	223
CONCEPT OF COMPLIANCE COATINGS	223
UV-CURED COATINGS.....	224
MOLDED-IN-COLOR AUTOMOTIVE EXTERIORS.....	225
DRY PAINT	225
Background	225
Technology	225
NEW ELECTROSTATICALLY PAINTABLE PLASTIC PRODUCTS.....	226
Bayer	226
Rhodia	226
MAJOR PRODUCERS/SUPPLIERS AND TRADE-NAMED PRODUCTS	226
SEGMENTATION BY TRADE NAME	226

<i>TABLE 58 MAJOR TRADE-NAMED ENGINEERING RESINS AND POLYMER ALLOYS/BLENDS BY TRADE NAME</i>	226
<i>TABLE 58 (CONTINUED)</i>	227
<i>TABLE 58 (CONTINUED)</i>	228
SEGMENTATION BY PRODUCER	228
<i>TABLE 59 MAJOR TRADE-NAMED ENGINEERING RESINS AND POLYMER ALLOYS/BLENDS BY PRODUCER</i>	229
<i>TABLE 59 (CONTINUED)</i>	230
APPENDIX	231
ACRONYMS	231
ACRONYMS (CONTINUED)	232
ACRONYMS (CONTINUED)	233