INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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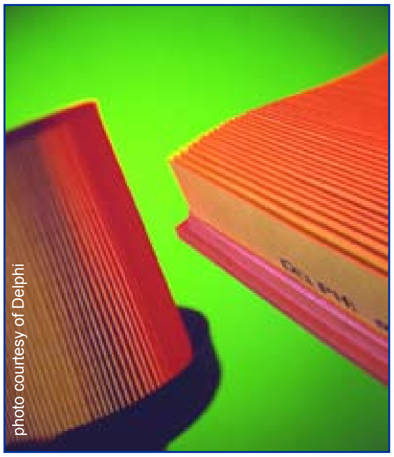

photo courtesy of Delphi

World Filters

Industry Study with Forecasts for **2011 & 2016**

Study #2295 | March 2008 | $5800 | 432 pages

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World Filters

Industry Study with Forecasts for ***2011 & 2016***

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World Filters

Industry Study with Forecasts for ***2011 & 2016***

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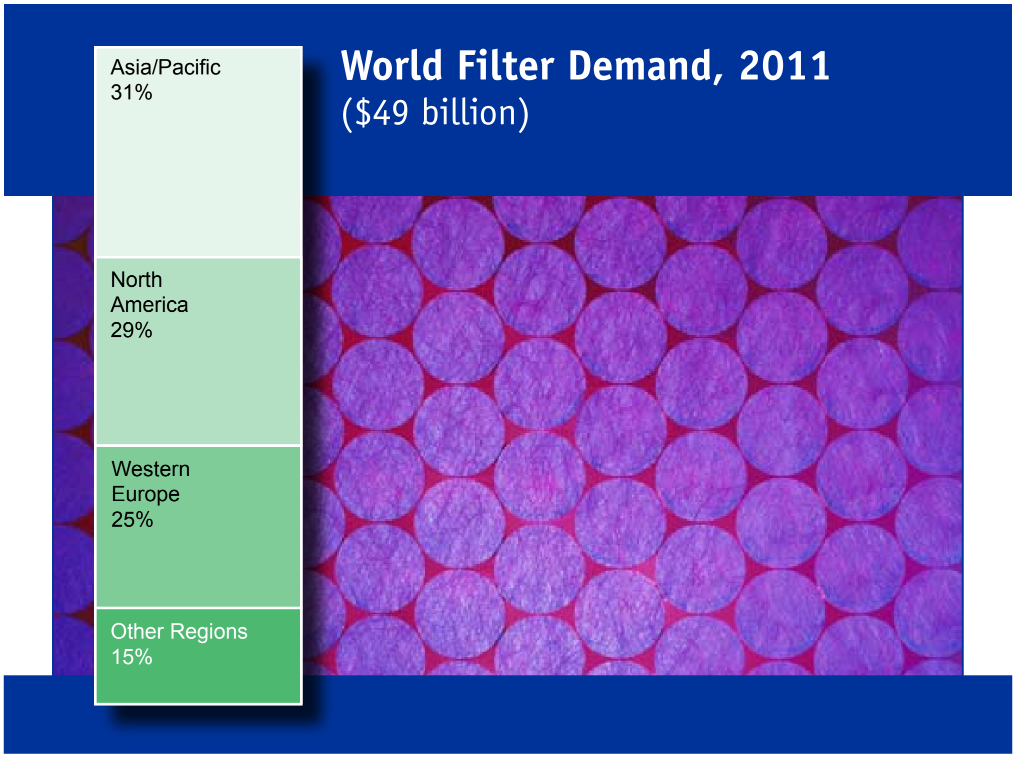
Environmental and other relevant laws and regulations are expected to become stricter and better enforced in a number of developing countries, bolstering associated filter demand.

Global demand to rise 5.6% annually through 2011

World filter demand is projected to climb 5.6 percent annually through 2011 to $49 billion. Market gains in developing regions and countries will outpace demand in the US, Western Europe and Japan. Increases in developing areas will be fueled by higher manufacturing output, building construction expenditures and motor vehicle ownership levels. In addition, environmental laws and regulations are expected to become stricter and better enforced in a number of developing countries, bolstering associated filter demand. China, India and Russia will post some of the strongest sales gains. China alone will account for more than one-quarter of all additional filter demand through 2011 and surpass Japan and Germany to become the second largest market in the world behind the US. Sales advances are also expected to be healthy in lower-volume markets such as Indonesia, Iran, Turkey, Thailand and South Africa.

Filter demand in developed parts of the world will expand as well. Product sales will be stimulated by largely favorable economic climates and higher per capita income levels, resulting in increased manufacturing output and consumer spending, which will boost related filter demand. The implementation of stricter environmental standards (like those for diesel engine particulate emissions) will also contribute to market gains in these areas. However, new housing starts are expected to decline in the US and Japan, and population levels will remain flat or edge down in some European nations, limiting increases in associated filtration product demand.



Air purification filters to be fastest growing product

Air purification filters will record the strongest sales advances through 2011, spurred by growing manufacturing and mining output, rising urban population levels, and the construction of numerous new power plants and waste incinerators, leading to a deterioration in average air quality and the enactment of tougher air pollution control laws and regulations. Growing concerns about indoor air quality will also drive demand for home air filtration products. Fluid filters will register the next strongest gains, stimulated by increases in nonagricultural water withdrawals; an ongoing trend toward urbanization, resulting in greater spending for water and wastewater treatment; and the implementation of more stringent water pollution control standards. Internal combustion engines and related filters will remain the largest product segment in value terms. Demand for these items will be fueled by growth in the number of motor vehicles and other equipment powered by internal combustion engines, increases in global motor vehicle output, and rising demand for products such as cabin air and diesel particulate filters.

World Filters

Industry Study with Forecasts for ***2011 & 2016***

Sample Text, Table & Chart

TABLE VI-9

CHINA FILTER DEMAND BY MARKET
(million dollars)

Item	1996	2001	2006	2011	2016
Filter Demand					
Transportation Equipment					
Utilities					
Manufacturing					
Consumer					
Other					

SAMPLE TABLE

ASIA/PACIFIC

In addition, the number of motor vehicles in use will double
2011, and hundreds of coal-fired power plants will be built t
the country's growing energy requirements, as will numerous
and wastewater treatment plants, and waste incineration facil
government's ongoing efforts to reduce air and water pollution, and improve the average quality of drinking water supplies will also help boost filter sales. Market advances will be constrained to some extent by improvements in the quality and capabilities of domestically made filtration products, limiting replacement sales growth, as well as by intense price competition among suppliers in a number of market segments, dampening future dollar gains.

The strongest increases will be registered by air purification filters, although sales advances for all of the major product types are expected to be healthy. Among major markets, consumer and other, miscellaneous filter demand (including product use in off-road equipment, medical and military/safety force applications) will climb the fastest through 2011. Increases in consumer filter sales will be supported by higher personal income levels and continuing concerns about air and water quality, while expanding construction and mining activity, and higher health care
e population) will bolster
g r sales will also rise at
a n of numerous power
g tment facilities.

SAMPLE TEXT

are forecast to grow at
a billion, outperforming
demand. Output gains will be stimulated by robust local market conditions, further improvements in the average quality of domestically made filtration products and additional investment in Chinese filter plants by foreign companies. In 2007, for instance, Ahlstrom added a new needle-

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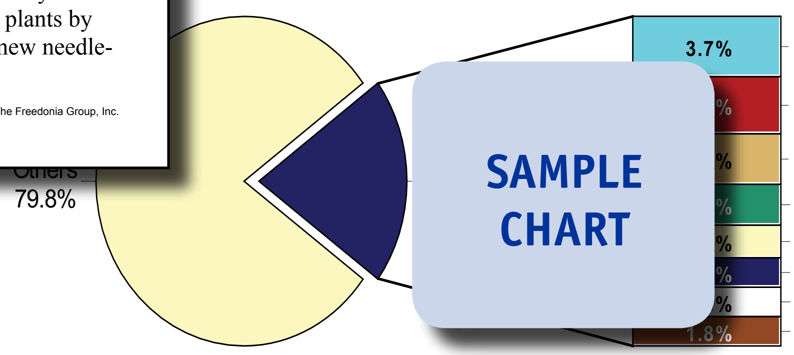
CHART VIII-1

D FILTER MARKET SHARE BY COMPANY, 2006
($37.4 billion)



SAMPLE CHART

World Filters

Industry Study with Forecasts for ***2011 & 2016***

Sample Profile, Table & Forecast

TABLE VI-8

CHINA FILTER SUPPLY & DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Filter Demand					
Internal Combust Engine & Related:					
Oil					
Air Intake					
Other					
Fluid:					
Fluid Power					
Other					
Air Purification:					
Panel & Pocket					
Other					
net exports					
Filter Shipments					
% China					
Asia/Pacific Filter Shipments					

SAMPLE TABLE

COMPANY PROFILES

BRITA GmbH
Heinrich-Hertz-Strasse Four
65232 Taunusst
Germany
49-6128-7460
http://www.brit

Annual Sales: $
Employment: 8

Key Products: v

SAMPLE PROFILE

BRITA is a privately held company and leading producer of household and commercial water filters. The Company's products are sold via mass merchants, home improvement stores, supermarkets, specialty stores and warehouse clubs.

The Company manufactures filter cartridges that are used in household and commercial water filtration units. These cartridges include BRITA CLASSIC, BRITA MAXTRA and BRITA INTENZA models. BRITA CLASSIC cartridges are designed to reduce limescale, chlorine, aluminum, heavy metals, certain pesticides and organic impurities in water. The Company's BRITA MAXTRA cartridges have a four-step filtration process that is intended to provide 20 percent improved limescale reduction compared to BRITA CLASSIC filters. BRITA INTENZA filters, which are designed for espresso and coffee machines, reduce limescale from tap water and protect the whole system against limescale build up.

Other household cartridges include ON TAP and FILL & GO products. For household applications, these cartridges are utilized in

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"Demand for filters in China is expected to expand 16.5 percent annually to $5.6 billion in 2011, continuing to represent one of the fastest growing markets in the world, and the nation will surpass Japan and Germany to become the second largest filter market in the world behind the US. Product sales will be fueled by healthy increases in manufacturing output and building construction spending, and supported by further urbanization of the Chinese population as industrialization efforts continue."
--Section VI, pg. 180

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Other Studies

Filters in China

This study analyzes the Chinese market for filters. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by product type (e.g., internal combustion engine and related filters, fluid filters, air filters); and by market (e.g., transportation equipments, industrial and manufacturing, utilities, consumer). The study also considers market environment factors, reviews filtration technology, details industry structure, evaluates company market share and profiles leading competitors.

#2310 .... 03/2008..................... $5100

Membrane Separation Technologies

This study analyzes the US membrane separation industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by membrane type (e.g., cellulosic, polysulfone, nylon, ceramic); application (e.g., microfiltration, reverse osmosis, ultrafiltration, pervaporation); and market (e.g., water and wastewater treatment, food and beverage processing, pharmaceuticals and health care. The study also reviews technology, evaluates company market share and profiles leading competitors.

#2307 .... 03/2008..................... $4600

World Water Treatment Products

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the $29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.

#2276 .... 01/2008..................... $5800

Automotive Aftermarket in China

The aftermarket for light vehicle components and parts in China will grow 17.9% annually through 2011. Gains will be driven by the dramatic increase in the light vehicle park and increasing aftermarket spending per vehicle. Mechanical products will remain the largest segment while electronics grow the fastest. This study analyzes the ¥33.7 billion automotive aftermarket in China, with forecasts for 2011 and 2016 by product and service performer. It also evaluates market share and profiles major players.

#2262 .... 12/2007..................... $4900

Nonwovens

US demand for nonwoven roll goods will grow 4.5% annually through 2011, driven by healthy gains in key markets such as filtration, construction and wipes. Spunbonded nonwovens will remain the dominant product based on performance advantages, new applications and more demand for composite nonwovens featuring spunbonded webs. This study analyzes the $4.7 billion US nonwovens industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major firms.

#2271 .... 11/2007..................... $4600

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