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Filters in China

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

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

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Filters in China

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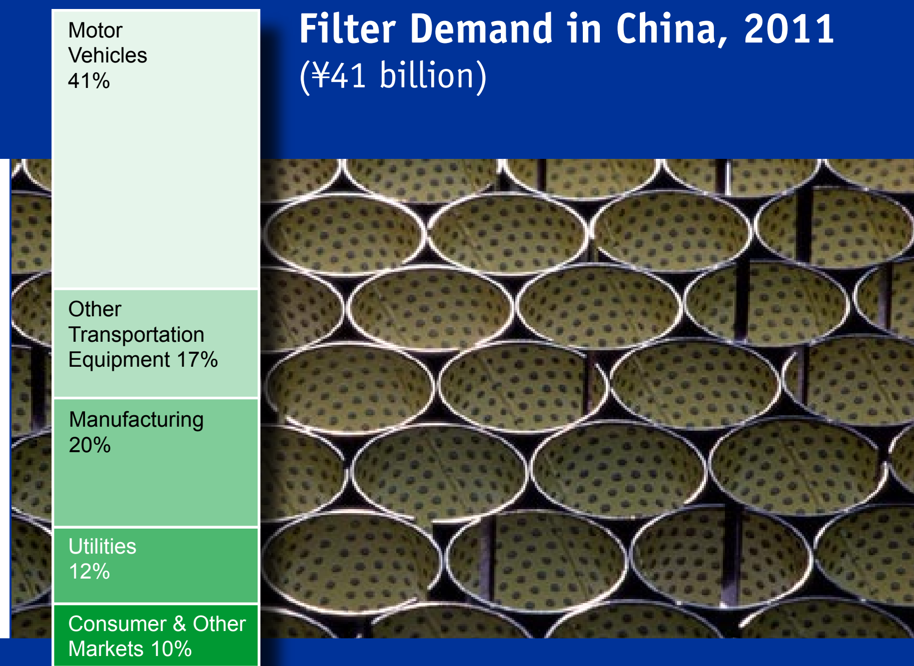
Solid growth in motor vehicle production in China, together with a growing vehicle park, will drive both OEM and replacement filter demand in the key motor vehicle market for filters.

Demand to grow 14.4% annually through 2011

Demand for filters in China is projected to increase 14.4 percent per year through 2011 to ¥41 billion. Advances will be stimulated by solid growth in motor vehicle production in China, which together with a growing vehicle park, will drive both OEM and replacement filter demand. In addition, growth in manufacturing output, building construction spending and urbanization of the population will all stimulate demand for various types of filters. Government efforts to alleviate air and water pollution, and to improve the quality of drinking water by enacting more stringent regulations and standards, will also contribute to gains. Growth will also be aided by increased demand for newer products, such as motor vehicle cabin air filters and many varieties of household air and water filters, and the development of a significant aftermarket within these segments.



Filter Demand in China, 2011
(¥41 billion)

Air filters to be fastest growing product segment

Demand for air filters is expected to post the fastest growth of the three major product types through 2011. Advances will be spurred by rising manufacturing output of durable goods such as HVAC equipment and electronics, and nondurable goods such as chemicals and pharmaceuticals. Many of these products are either equipped with air filters or produced in facilities with high air purification requirements. Rising concerns about air pollution in China will also boost demand for air filters used in a variety of markets. The internal combustion engine and related filters segment (e.g., air intake, oil, fuel and cabin air) accounted for 62 percent of total demand in 2006, and will climb at a double-digit annual rate through 2011. Advances will be buoyed by continuing growth in automobile production and the number of motor vehicles in use, the ongoing development of new products and growing aftermarket sales. Sales of fluid filters will be fueled by an acceleration in nonagricultural water use and ongoing urbanization. The implementation of tougher water and wastewater treatment regulations will also spur filter sales. Fluid filter sales will also be driven by the expected growth in production of industrial machinery and equipment, which often use fluid power filters.

Motor vehicle market to remain largest filter outlet

The motor vehicle market will continue to account for the largest portion of demand through 2011. The high volume of air intake, oil and fuel filters sold at the OEM level and in the large aftermarket will more than offset their relatively low unit prices. The water and waste treatment segment of both the utilities and consumer markets is projected to post the fastest gains.

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Sample Text, Table & Chart

TABLE IV-2

INTERNAL COMBUSTION ENGINE (ICE) & RELATED FILTER SUPPLY & DEMAND IN CHINA
(million yuan)

Item	1997	2002	2007	2012	2017
Motor Vehicle & Part Prdn (bil ¥)					
¥ filters/000¥ prdn					
ICE & Related Filter Demand					
Air Intake Filters					
Oil Filters					
Fuel Filters					
Cabin Air Filters					
Other Filters					
+ net exports					
ICE & Related Filter Shipments					
% ICE & related Filter Shipments					

SAMPLE TABLE

PRODUCTS

Internal Combustion Engine & Related Filters

Demand for internal combustion engine and related filte is expected to advance … billion This rate is largely base … number vehicles in use, as well … utput. mentation of increasing … gulation emissions levels will fu … er emis as well as prompting th … ming pr creasing penetration of n… cabin ai also contribute to sales gains.

SAMPLE TEXT

Further gains will be restrained by technologies that res increased filter life, which will continue to have a dampening the aftermarket, a key area for engine filter sales. For instanc ventional paper-based filters need to be replaced regularly si tend to become clogged and ineffective in a relatively short period of time. However, newer nonwoven and other high-tech media offer longer useful life span, a greater capacity to filter out finer particulates, higher flow rates or some combination of these benefits. Pricing pressure will continue to slow growth for filter sales in value terms.

Air intake filters account for the largest share of demand for internal combustion engine filters and related products, with 49 percent of total sales in 2006. Oil and fuel filters followed with shares of 27 percent and 18 percent, respectively. Demand for other types of internal combustion engine-related filters -- including smaller volume types such as products for filtering transmission fluid, engine coolant and brake fluid; and emission-control filters -- will advance at a below average annual rate. In general, these other types of filters are not available on as large a variety of internal combustion engine-powered equipment and are not replaced as often as air intake and oil filters. Sales of cabin air filters are projected to advance as an increasing number of motor vehicle producers include

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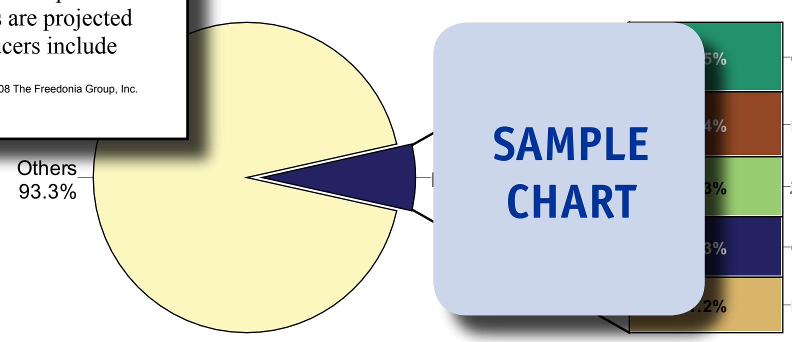
CHART VI-1

MARKET SHARE IN CHINA BY COMPANY, 2006
(¥20.9 billion)



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Sample Profile, Table & Forecast

TABLE V-2

MOTOR VEHICLE MARKET FOR FILTERS IN CHINA (million yuan)

Item	1997	2002	2007	2012	2017
Motor Vehicles in Use (000 units)	11				500
¥ filters/vehicle					43
Motor Vehicle Filter Demand	1				00
By Market Segment:					
Aftermarket	1				00
Original Equipment					00
By Type:					
Air Intake					00
Oil					00
Fuel					70
Cabin Air Filters					60
Others					70
% motor vehicles					.6
Filter Demand	60				200

SAMPLE TABLE

COMPANY PROFILES

Watsun Filters Shenzhen Company Limited
Number 86, East Road
Tenth Industry, Longhua
Shenzhen, Guangdong 518109
China
86-755-2813-4938
http://www.w

Annal Sales d)
Employment:

Key Products ration, air, spin-
on fuel, spin-

International ger

SAMPLE PROFILE

Watsun Filters Shenzhen is a manufacturer of filters for the transportation, power equipment, air purification, gas turbine, chemical and environmental protection sectors. The Company is privately held.

Among the filters produced by Watsun Filters Shenzhen are premium automobile, oil, industrial oil separation, air, spin-on fuel, spin-on oil, hydraulic and water varieties. These products are marketed to customers in China, Malaysia, Korea, the US, the United Kingdom and elsewhere worldwide.

Manufacturing operations for Watsun Filters Shenzhen are conducted in China at facilities in Shenzhen, Guangdong; Shanghai; and Yulin, Guangxi. Combined, these facilities have the capacity to produce over ten million filters per year. Additionally, the Company maintains nine branch offices across Asia..

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"Demand for filters in the motor vehicle OEM market is forecast to grow 14.2 percent annually to ¥1.3 billion in 2011, supported by sustained growth in motor vehicle production. Additionally, growth will be driven by the increased penetration of newer products such as cabin air filters. The motor vehicle OEM industry faces competing trends on the pricing side. Although OEMs are increasingly using higher value filters with greater filtration capabilities, suppliers are faced with stiff pricing pressure from the OEMs themselves."

--Section V, pg. 133

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Other Studies

Water Treatment in China

Demand for water treatment products in China will soar 15.5% annually through 2012. Filters and membranes will be the fastest growing segments, although all types will see double-digit gains. The industrial sector will remain the largest market, but will be outpaced by municipal and other end uses. The study analyzes the ¥20.4 billion water treatment product industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates company market share and profiles leading industry players.

#2329 .... 04/2008..................... $5100

World Filters

Global filter demand will climb 5.6% annually through 2011. Developing areas will lead gains based on faster-growing economies and the enactment of stricter environmental laws. China, India and Russia will post some of the strongest sales growth. Air and fluid filters will be the fastest growing types. This study analyzes the $37 billion world filter industry, with forecasts for 2011 and 2016 by product, market, world region and for 26 countries. It also evaluates company market share and profiles major players.

#2295 .... 03/2008..................... $5800

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

Filters

US filters demand will grow 4.2% yearly through 2011. Gains will be driven by ongoing sales in the dominant aftermarket, pending laws for cleaner air and reduced emissions, as well as increasing penetration of motor vehicle cabin air filters and home air and water filters. Fluid filters will remain the largest segment while air filters will grow the fastest. This study analyzes the $9.8 billion US filter industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading competitors.

#2164 .... 04/2007..................... $4500

Air Pollution Control in China

Demand for air pollution control equipment in the world's leading emitter of sulfur dioxide and other air pollutants will grow 18% annually through 2010. Particulate removal equipment will remain the largest product category and grow the fastest. Manufacturing and utilities will stay the top markets. This study analyzes the ¥30 billion Chinese air pollution control industry for 2010 and 2015 by product, market and region. The study also evaluates company market share and profiles leading industry players.

#2163 .... 04/2007..................... $4900

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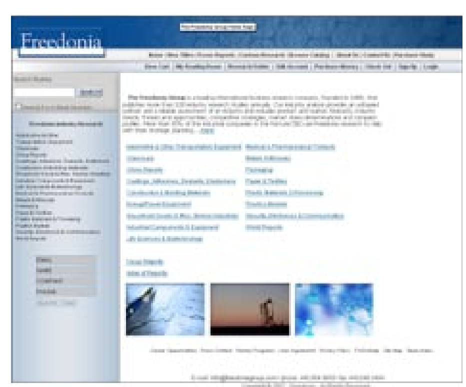

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