US demand for filters to reach $12.4 billion in 2013

Demand for filters in the US is forecast to grow 3.3 percent per year to $12.4 billion in 2013. Advances will be spurred by pending changes in environmental regulations, particularly those involving reduced emissions from power plants and diesel engines, as well as improved operational efficiency of motor vehicle engines. Demand will also be boosted by the increasing interest of manufacturers in reclaiming production inputs from process water and investing in water recycling processes to reduce costs.

In addition, advances will be driven by ongoing sales in the aftermarket, which accounts for the vast majority of demand. However, growth in the aftermarket will be offset to a degree by users' tendency to replace filters less often than recommended by the manufacturers, and the ongoing development of filters featuring longer lasting media or other technologies that extend their useful life. Original equipment filter sales will benefit from a projected rebound in new vehicle production and the increasing penetration of newer filter products, particularly in the motor vehicle and consumer markets.

Air filters will hold best growth prospects

In 2008, internal combustion engine filters (e.g., oil filters, air intake filters, fuel filters, cabin air filters and others) accounted for the largest share of filter shipments in 2008 with 39 percent. Although this is a relatively mature product group, sales will benefit from the ongoing development of new types of emissions filters, particularly for diesel engines, and the rising aftermarket for cabin air filters. Shipments of fluid filters (e.g., municipal water and waste, fluid power, consumer water and industrial fluid filters) had the second largest share of total shipments with 35 percent. Although they compete with high-end membrane separation technologies, fluid filters will also benefit from their use as pre-treatment steps for these technologies. Shipments of air filters are expected to see the best growth through 2013, stimulated primarily by changes in environmental regulations and advances in the consumer market.

Motor vehicles to remain leading market

The motor vehicle market will continue to account for the largest portion of total demand, with a 27 percent share in 2013, despite below average growth. Advances will be driven by the high volume of these filters sold both as original equipment and in the aftermarket; however, gains are restrained by the price competitive nature of this market. Demand for filters in the utilities market is forecast to see the most rapid gains, powered by current and pending regulations, as well as concerns about the quality of potable water supplies and the air.

Study coverage

Filters, a new Freedonia industry study, is priced at $4800. It presents historical demand data (1998, 2003 and 2008) plus forecasts for 2013 and 2018 by filtration technology, product and market. This US study also considers market environment factors, evaluates company market share and profiles 38 industry competitors.
**US Industry Study with Forecasts for 2013 & 2018**

**Filters**

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- Demographics
- Manufacturing Environment
- Consumer Spending Environment
- Building Construction Trends
- Motor Vehicle Outlook
- Water Use Trends
- Pollution Abatement & Control
- Pricing
- Environmental & Regulatory Considerations
- Water & Industrial Effluent Regulations
- Air Regulations
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      - Light Duty Oil Filters
      - Heavy Duty Oil Filters
    - Air Intake Filters
      - Light Duty Air Intake Filters
      - Heavy Duty Air Intake Filters
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      - Light Duty Fuel Filters
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    - Motor Vehicle Aftermarket Filter Users
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**Company Profiles**
This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

**COMPANY PROFILES**
Profiles for 38 companies such as Affinia Group, CLARCOR, Cummins, Donaldson, General Motors, Honeywell, Parker-Hannifin and 3M

**PRODUCTS**

**Air Filters**
Air purification filters include filters used in panel and pocket filters, fan filters, air pollution filters, cartridge filters, electrostatic air filters, air washer filters and others. US demand for air purification filters is forecast to post annual gains through 2018 of 4.7% to more than $3.7 billion. In the nonresidential market, the OEM market is because several types, particularly oil, fuel, air intake and cabin air filters, are designed to be replaced on a regular basis, often one or more times per year. Additionally, the total number of vehicles in use far outweighs the number of vehicles produced in the US each year. However, the OEM market will post faster growth through 2012, as motor vehicle production levels recover from the sharp declines posted between 2003 and 2008. In general, sales of new types of filters are greater in the OEM market than in the replacement market. This is partly because many consumers are often unaware both that they have the new type of filter and the recommended schedule for replacement. In contrast, total aftermarket filter sales will be restrained by a shift toward longer-lasting filters which may feature more durable or more efficient media or may be grouped with a pre-cleaner that will slow the build-up of contaminants on the filter itself.

**SAMPLE TABLE**

<table>
<thead>
<tr>
<th>Item</th>
<th>1998</th>
<th>2003</th>
<th>2008</th>
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<th>2018</th>
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<td>By Market Segment:</td>
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<td></td>
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<tr>
<td>Original Equipment</td>
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<tr>
<td>Aftermarket</td>
<td></td>
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<td>By Type:</td>
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<td>Cabin Air</td>
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<tr>
<td>Filler Demand</td>
<td></td>
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</tr>
</tbody>
</table>

**MARKETS**

OEM market is because several types, particularly oil, fuel, air intake and cabin air filters, are designed to be replaced on a regular basis, often one or more times per year. Additionally, the total number of vehicles in use far outweighs the number of vehicles produced in the US each year. However, the OEM market will post faster growth through 2012, as motor vehicle production levels recover from the sharp declines posted between 2003 and 2008. In general, sales of new types of filters are greater in the OEM market than in the replacement market. This is partly because many consumers are often unaware both that they have the new type of filter and the recommended schedule for replacement. In contrast, total aftermarket filter sales will be restrained by a shift toward longer-lasting filters which may feature more durable or more efficient media or may be grouped with a pre-cleaner that will slow the build-up of contaminants on the filter itself.

Freedonia’s methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

**SAMPLE TEXT**
Explanations that support each table’s data and forecasts

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**TABLE V-2**

MOTOR VEHICLE MARKET FOR FILTERS
(million dollars)

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### World Water Desalination

This study analyzes the global water desalination industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by desalination product (e.g., equipment and systems, membranes, filters, evaporators, pumps and valves), service, source water, market (e.g., municipal, industrial), energy source, world region (e.g., Africa/Mideast, Asia/Pacific) and for 16 national markets. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2523.............. 07/2009.............. $5700

### Industrial Valves

This study analyzes the US industrial valve industry. It presents historical demand data (1998, 2003 and 2008) and forecasts for 2013 and 2018 by industrial valve product (e.g., application-specific, quarterturn, multitum, safety and relief, control, regulator, automatic actuators) and market (e.g., process manufacturing, utilities, resource extraction industries). The study also considers market environment factors, details industry structure, evaluates company market share and profiles competing industrial valve producers.

#2521.............. 07/2009.............. $4700

### World Membrane Separation Technologies

Global membrane demand is projected to grow 8.6% annually through 2012, driven in part by concerns about water quality and waste stream disposal. Large, developing countries with stressed local water resources will be the fastest growing major market. This study analyzes the US gasket and seal industry, with forecasts for 2012 and 2017 by technology, product and end-use market. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by desalination product (e.g., equipment and systems, membranes, filters, evaporators, pumps and valves), service, source water, market (e.g., municipal, industrial), energy source, world region (e.g., Africa/Mideast, Asia/Pacific) and for 16 national markets. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2468 ............. 04/2009 ............. $5700

### Gaskets & Seals

US demand for gaskets and seals will reach $6.8 billion by 2012, driven by a rebound in end-use markets and rising demand for more expensive sealing products made from advanced materials. Expanded graphite gaskets, plastic gaskets and body seals will post the fastest sales increases. Aerospace uses will be the most rapidly growing major market. This study analyzes the US gasket and seal industry, with forecasts for 2012 and 2017 by type and market. It also evaluates market share and profiles industry players.

#2416............... 11/2008............. $4700

### Consumer Water Purification & Air Cleaning Systems

US consumer water purification and air cleaning system demand will increase 4.4% annually through 2012. Reverse osmosis and distillation types will be the fastest growing water purification systems. Electrostatic air cleaners will outpace conventional air filtration systems. This study analyzes the $1.2 billion US purification and cleaning system industry, with forecasts for 2012 and 2017 by technology, product and regional market. It also evaluates market share and profiles industry players.

#2419............... 10/2008............. $4700

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