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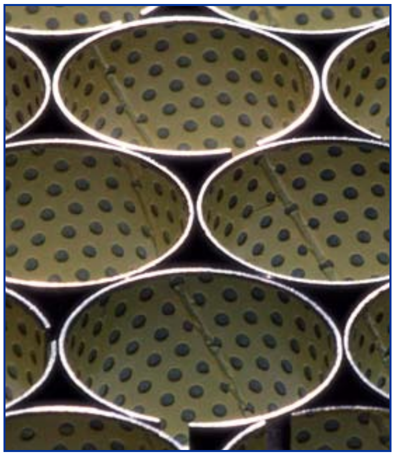

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Sales will be driven by healthy economic growth in developing areas, as well as by stricter and better-enforced environmental and product purity rules in a number of these countries.

Global demand to expand 5.1% yearly through 2013

Global demand for filters is forecast to expand 5.1 percent per year to $58.3 billion in 2013. Market advances in the Africa/Mideast region, developing parts of the Asia/Pacific region, Eastern Europe and Latin America will considerably outpace increases in the US, Western Europe and Japan. Product sales in developing areas will be driven by healthy economic growth, ongoing industrialization efforts and rising per capita incomes, all of which will bolster manufacturing output, building construction spending, and motor vehicle and internal combustion engine (ICE) motorcycle ownership levels. Stricter and better-enforced environmental and product purity rules in a number of these countries will also contribute to increases in filter demand, as will new household formations and additional population growth. China will post the biggest gains of any national market, and the country will surpass Japan to become the second largest filter market in the world behind the US in 2013. Sales growth is also expected to be strong in the other BRIC nations as well as in Indonesia, Turkey, Iran and South Africa.

World Filter Demand, 2008
($45.5 billion)

Product demand will climb at a more moderate rate in developed countries, fueled by generally favorable economic conditions, higher income levels and the implementation of more stringent environmental standards (such as those for diesel engine particulate emissions), boosting associated filter sales. North America will record the fastest market gains among developed parts of the world, followed by Western Europe and Japan. Although representing mature markets, these areas will remain the most intensive users of filters in per capita terms in 2013, reflecting the advanced nature of their economies, as well as the large numbers of filter-containing equipment in use, supporting substantial aftermarket filter demand.

Air purification filters to be fastest growing types

Sales of air purification filters will increase 5.8 percent annually through 2013. Demand will be stimulated by rising manufacturing and mining activity, a worldwide trend toward urbanization, the construction of additional power generation and waste incineration facilities, and the enactment of tougher pollution control regulations in a number of areas. The market for fluid filters will climb at a 4.9 percent annual pace, spurred by growth in nonagricultural water withdrawals as the global economy continues to expand, the implementation of stricter water pollution control standards and an ongoing trend toward urbanization, resulting in greater spending for water and wastewater treatment. However, ICE and related filters will remain by far the largest product segment, expanding 4.8 percent per annum through 2013.

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Sample Text, Table & Chart

TABLE VI-8

CHINA FILTER SUPPLY & DEMAND
(million dollars)

Item	1998	2003	2008	2013	2018
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

ASIA/PACIFIC

China: Filter Outlook & Suppliers

China's filter ... 1 percent per through 2013 to $... test growth any major nationa... ss Japan to b the second largest ... e world. Sa stimulated by incr... building co activity and urban... dustrializatio continue. The nu... for instance, at an 11.9 percent ... the size of motorcycle park w... ly. In additio of power plants will be constructed over the next decade to h country's huge energy requirements, as will numerous water water treatment plants, and waste incineration facilities.

SAMPLE TEXT

Government efforts to alleviate air and water pollution, ... prove the quality of drinking water supplies by enacting more stringent regulations and standards, will also contribute to future filter sales gains. For example, China is implementing Euro 4 emissions standards for light and heavy-duty vehicles on a nationwide basis in 2010 and stricter Euro 5 emissions standards for heavy-duty trucks and buses in 2012. Market growth through 2013 will be dampened to some degree by greater use of longer lasting filtration products, which will negatively impact aftermarket demand, and by price competition among suppliers, which will limit value gains.

Sales advances for all of the major product types will be healthy, but the strongest gains will be registered by fluid filters, and air purification demand will grow at a modestly slower rate. Although increases for ICE and related filters are not expected to be as robust, it will remain the largest product segment, accounting for over half of all sales in dollar terms in 2013. Among major market segments, transportation equipment applications will continue to dominate overall filter demand, though the

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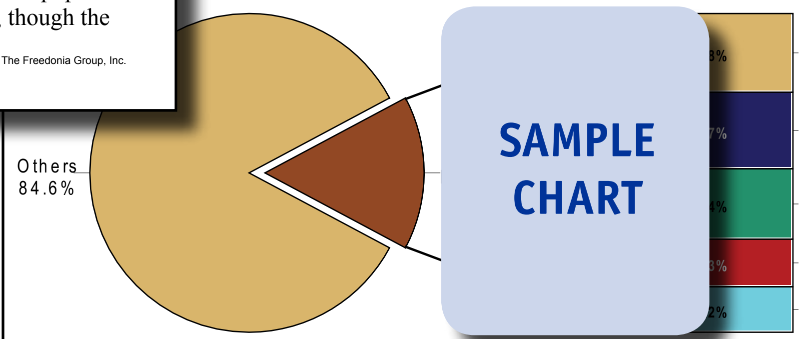
CHART VIII-1

FILTER MARKET SHARE BY COMPANY, 2008
($45.5 billion)



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Sample Profile, Table & Forecast

TABLE VI-9

CHINA FILTER DEMAND BY MARKET
(million dollars)

Item	1998	2003	2008	2013	2018
Filter Demand					00
Transportation Equipment					50
Manufacturing					30
Utilities					10
Consumer					70
Other					40

SAMPLE TABLE

COMPANY PROFILES

Filtration Group Incorporated
912 East Washington Street
Joliet, IL 60433
815-726-4600
http://www.filt

Annual Sales:
Employment:
Key Products:

SAMPLE PROFILE

Filtration ... er of filtration products for th ... g (HVAC); gas phase; turbine; cleanroom; paint; and filter media markets. The Company is privately held.

The Company is active in the global filter industry through the production of air filters and filter media, as well as filter housings. Among Filtration Group's air filters are types intended for multipurpose, HVAC, cleanroom, power systems, and paint and finishing applications. For example, the Company's multipurpose filters include AEROSTAR high-efficiency particulate air (HEPA) and GEOPLEAT types. Specifically, AEROSTAR HEPA filters are designed to remove a wide variety of airborne contaminates, including smoke, pollen, fine dust and soot in final filter applications. In addition, AEROSTAR HEPA filters can be used as prefilters in cleanroom environments.

GEOPLEAT air filters can be used in most standard applications, as well as in harsher and more demanding environments where moisture is present. GEOPLEAT filters employ a thermal embossing pleating and glue media separation technique to create a three-dimensional pleat in the media. The pleating allows a more gentle transition and even distribution of the air stream throughout the media.

376

"Filter shipments by facilities in China are projected to increase 12.7 percent annually through 2013 to $6.6 billion, outperforming domestic demand and leading to a narrowing of the country's trade deficit in these products. By 2018, imports and exports of filters are expected to be roughly in balance. Industry output gains will be fueled by favorable domestic market conditions, further improvements in the average quality of locally made goods and additional investment in Chinese manufacturing operations by multinational producers."
--Section VI, pg. 198-9

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Other Studies

Nonwovens

This study analyzes the US nonwovens industry. It presents historical demand data for 1998, 2003 and 2008 and forecasts for 2013 and 2018 by nonwoven product (e.g., spunbonded, carded, meltblown, wet laid, air laid, web bonded), market (e.g., disposables, nondisposables) and material (e.g., fibers, binder resins, additives). The study also considers market environment factors, details industry structure, evaluates company market share and profiles nonwoven industry competitors.

#2559 .... 11/2009 .... $4900

Filters

US demand for filters will rise 3.3% yearly through 2013, spurred in part by stricter environmental laws and more reclamation and recycling of production inputs to cut costs. Air filters will outpace fluid and internal combustion engine filters. Motor vehicles will remain the largest market while the utilities segment grows the fastest. This study analyzes the $10.5 billion US filters industry, with forecasts for 2013 and 2018 by media, product and market. It also evaluates market share and profiles industry players.

#2524 .... 08/2009 .... $4800

Medium- & Heavy-Duty Truck Aftermarket

The US aftermarket for medium- and heavy-duty (MD/HD) truck parts will grow 3.8% annually through 2013. Exterior and structural components such as tires will remain the largest segment, while electrical and electronic components see the fastest gains. Outsourced service providers will continue to dominate, led by tire dealers. This study analyzes the $14.2 billion US MD/HD aftermarket, with forecasts for 2013 and 2018 by product and service performer. It also evaluates market share and profiles industry players.

#2481 .... 04/2009 .... $4600

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 markets. North America will remain the largest outlet and post strong advances. This study analyzes the $10 billion world membrane industry, with forecasts for 2012 and 2017 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

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

World Nonwovens

Global demand for nonwoven fabrics is forecast to rise 6.9% yearly through 2012. Gains in developing parts of Asia/Pacific, Eastern Europe, Africa/Mideast and Latin America will outpace demand in developed countries. Spunmelt nonwovens, the largest segment, will also grow the fastest. This study analyzes the $21.2 billion world nonwovens industry, with forecasts for 2012 and 2017 by formation process, application, market, world region and for 19 national markets. It also evaluates market share and profiles industry players.

#2482 .... 03/2009 .... $5600

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