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Filters in China

Industry Study with Forecasts for **2014 & 2019**

Study #2740 | March 2011 | \$5300 | 264 pages

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Demand for filters in China will post double-digit gains, led by rapid growth in motor vehicle production, and government policies promoting energy conservation and emission reduction.

Demand to grow 13.5% annually through 2014

Demand for filters in China is projected to grow 13.5 percent annually to ¥66.2 billion in 2014, supported by rapid growth in motor vehicle and other transportation equipment production and stocks, and government policies that promote energy conservation and emissions reductions. Growth in manufacturing output, building construction spending and urbanization of the population as industrialization efforts continue will also all stimulate demand for various types of filters. As income levels grow, more people in China will be able to afford home water and air purification equipment. Moreover, rising demand for higher quality and extended life filters will boost overall market value.

Internal combustion engine filters dominant

Internal combustion engine filters account for the majority of Chinese filter demand and will post the strongest gains at 14 percent annually through 2014, driven by robust growth in the production and stock of motor vehicles and other transportation equipment. Sales of fluid filters will be fueled by growth in non-agricultural water use and expanding urbanization. The implementation of energy saving and emissions reduction policies by the government, especially in wastewater treatment, will also support fluid filter sales. Sales of air filters are projected to rise 13.7 percent per year



through 2014. Demand will be spurred by rising manufacturing output of both durable goods such as HVAC equipment, metal products and building construction materials, and nondurable goods such as chemicals and pharmaceuticals. Many of these manufactured products are either equipped with air filters or produced in manufacturing facilities with high air purification requirements. Heightened concerns about air pollution in China will also spur demand for air filters used in a variety of markets.

Motor vehicles to remain largest market

Motor vehicles will remain the largest filter market through 2014, when sales will reach ¥24.6 billion due to the high

volume of air intake, oil and fuel filters sold at the original equipment manufacturer level and as aftermarket products. Demand for filters in consumer and other markets will be fueled by rising personal income levels and rising concerns about air and water quality. Filter demand in the manufacturing sector will benefit from increases in manufacturing activity, with higher output of beverages, chemicals, pharmaceuticals, metal products, building materials, and food and beverage products helping to boost demand for filters used in their production. Utility filter market gains will be supported by the implementation of stricter air and water pollution regulations, and the construction of numerous new power plants, water and wastewater treatment facilities, and waste incinerators.

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Sample Text, Table & Chart

TECHNOLOGY

Fabric

Demand for filters incorporating nonwoven or woven fabric is forecast to grow to 1.5 billion in 2019. Demand will be driven by higher value applications, sometimes in combination with higher value filter's performance. The way to improve the competitiveness of fabric filters is by the increasing use of paper filters. Fabric filters benefit from the development of new materials for use in such developments include electrospun nanofiber nonwoven feature enhanced filtration capabilities as the nano meshes are to trap more and smaller particles. Moreover, more local governments are requiring the use of fabric bag filters for coal-fired boilers also boost demand.

Fabric media are used in variety of internal combustion engine, fluid and air filters. In the internal combustion engine sector, fabric media are primarily utilized in cabin air filters, exhaust filters and other smaller use applications. In the industrial market, fabric media are used in fabric bag pollution control filters. This type of material is also utilized in conventional and high-efficiency HVAC systems and other air cleaning systems. Similar to paper filters, many nonwoven filters feature pleated media to increase the surface space available for collecting particulates, important to those nonwoven fabrics that operate as surface filter media (others are configured to perform as depth media). Woven and knit fabric filter media have more uniformly sized pores than nonwovens, which are made with fibers that are connected through weaving and other processes.

Among natural fibers, cotton and wool are common woven filter materials, while nylon, acrylic, polyester and rayon are synthetic materials which can be used in either woven or nonwoven.

TABLE V-5

OTHER TRANSPORTATION EQUIPMENT MARKET FOR FILTERS IN CHINA (million yuan)

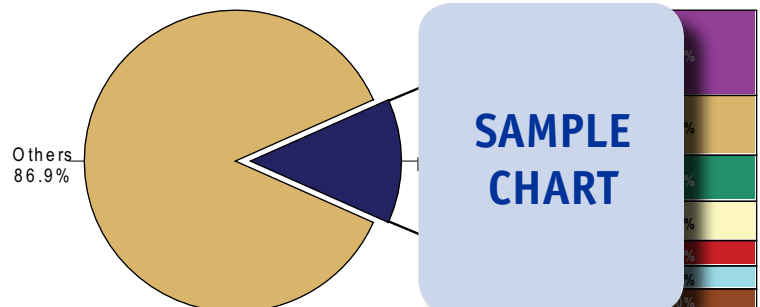
Item	2009	2010	2011	2014	2019
Other Transport Equip Value Added (billions of ¥ filters/000¥ other transport equip)	5650	14300	35200	66200	118000
Other Transport Equip Filter Demand					
By Market:					
Motorcycles					
All Other Transport Equipment					
By Type:					
Oil & Fuel Filters					
Air Intake Filters					
Other Filters					
% other transport equipment Filter Demand	6				

SAMPLE TEXT

SAMPLE TABLE

CHART VI-1

FILTER MARKET SHARE IN CHINA BY COMPANY, 2009 (¥35.2 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
**INTERNAL COMBUSTION ENGINE (ICE) & RELATED
 FILTER SUPPLY & DEMAND IN CHINA**
 (million yuan)

Item	1999	2004	2009	2014	2019
Motor Vehicles in Use (mil units) ¥ ICE filters/vehicle					
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	4400	10820	37270	70400	124500



COMPANY PROFILES

Xiamen Savings Environmental Industrial Company I
 No. 3, Xiangyue Road
 Xiamen Torch Hi-Tech Industry Development Zone
 Xiangan, Xiamen City, Fujian
 China
 86-592-607-0815
 http://www.sav...

Annual Sales
 Employment:
 Key Products
 International Department port and Export

Xiamen Savings Environmental Industrial is a privately held manufacturer of filter bags and filter materials for air and water filtration applications. These products are used by such markets as iron and steel, refuse incineration, utility and industrial boiler, cement, and tobacco. The Company has a plant in Xiamen, Fujian, China.

The Company produces filter bags in numerous configurations, including plain, tubular, envelope, snap band, open corded, sewn-in-disc, flanged, strap, loop, snap ring and compression band types. Filtration materials made by Xiamen Savings Environmental Industrial include several types of PUNATE needle-punched felt composed of such materials as polyethylene terephthalate, polytetrafluoroethylene, polypropylene, aramid, polyphenylene sulfide, and acrylic. PUNATE needle-punched felt is supplied with various surface and chemical treatments and is suitable for a variety of room temperature and high-temperature applications. At its plant in Xiamen, the Company has the annual

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“Light duty fuel filter sales are projected to grow 14.9 percent per year to ¥2.8 billion in 2014. Product sales will be stimulated by growth in the production of light motor vehicles and other transportation equipment powered by ICEs (e.g., low-speed vehicles, gas motorcycles), as well as by growth in the overall number of such vehicles in use. In addition, ...”

--Section IV, pg. 91

OTHER STUDIES

World Water Disinfection Products

World demand for water disinfection products will increase 7.5 percent through 2014. In the developed world, gains will be prompted by efforts to reduce the environmental impact of water disinfection. In developing areas, efforts are underway to increase water treatment rates and quality up to advanced country standards. This study analyzes \$5.7 billion the world water disinfection product industry, with forecasts for 2014 and 2019 by product, market, world region and for 20 countries. It also evaluates company market share and profiles industry participants.

#2723 February 2011 \$5900

World Pumps

World fluid handling pump demand will rise 6.5 percent annually through 2014. The pace of gains will slow in most developing countries, while in industrialized nations pump sales will rebound from depressed 2009 levels. Process manufacturing will be the fastest growing market. This study analyzes the \$50.4 billion global pump industry, with forecasts for 2014 and 2019 by product, market, world region and for 34 countries. The study also evaluates company market share and profiles industry participants.

#2676 November 2010 \$6100

World Aquaculture: Feed, Equipment & Chemicals

Global demand for aquaculture supplies and equipment will grow 11.6 percent annually through 2014. The Asia/Pacific region will continue to dominate both production and consumption. Aquafeed will remain the largest product segment and be the fastest growing. This study analyzes the world aquaculture supplies and equipment industry, with forecasts for 2014 and 2019 by product, species, world region and for 15 countries. It also evaluates company market share and profiles industry participants.

#2680 October 2010 \$5800

World HVAC Equipment

Global demand for HVAC equipment will rise 6.2 percent yearly through 2014. China will be the fastest growing market and comprise about 40 percent of new growth. Despite a modest outlook initially, US demand will rise 8.1 percent yearly. Cooling equipment will continue to outpace heating equipment worldwide. This study analyzes the \$68.9 billion world HVAC equipment industry, with forecasts for 2014 and 2019 by product, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2637 May 2010 \$5900

World Filters

Global demand for filters is forecast to expand 5.1 percent annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the \$45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 November 2009 \$6100

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The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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