
photo: Delphi

Filters

US Industry Study with Forecasts for **2015 & 2020**

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US Industry Study with Forecasts for ***2015 & 2020***

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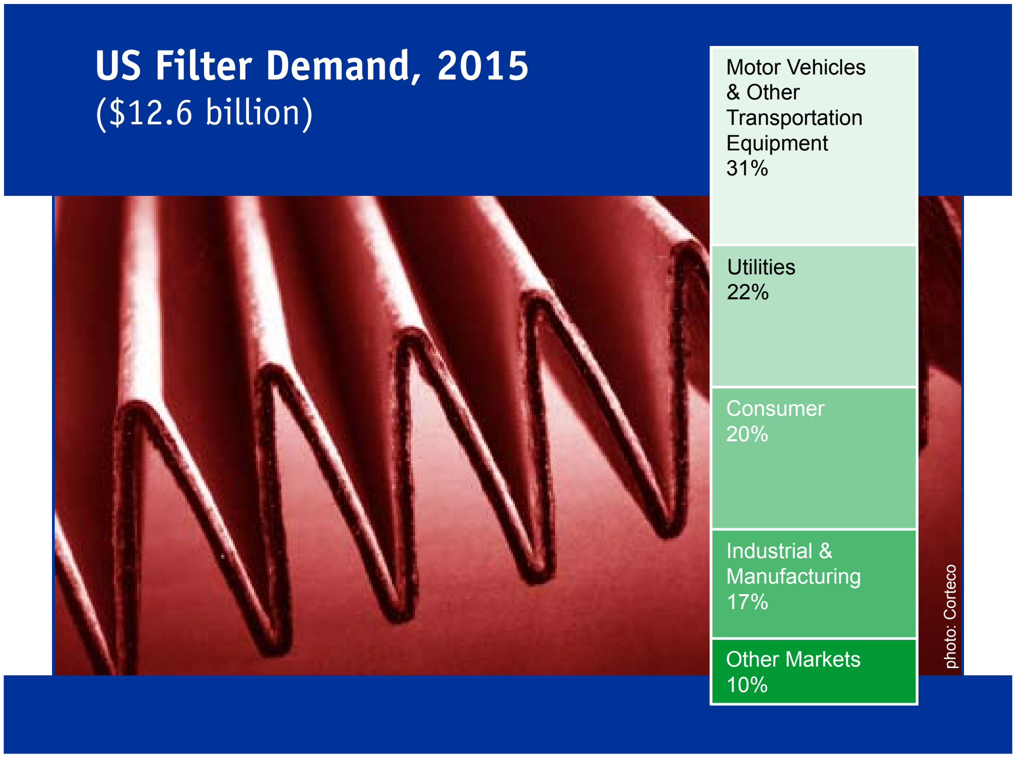
Gains in US filter demand will be driven in part by an ongoing trend toward strengthened environmental regulations and heightened consumer concerns about water and indoor air quality.

US demand to rise 7.1% annually through 2011

Demand for filters in the US is expected to increase 7.1 percent per year to $12.6 billion in 2015. This reflects a turnaround from the declines registered during the 2005-2010 period due to the economic recession that occurred during the latter half of that period. Advances will be spurred by improved manufacturing activity and industrial investment, a recovery in motor vehicle production and sales, and a rebound in consumer spending from a low 2010 base. An ongoing trend toward strengthened environmental regulations -- particularly those involving reduced emissions from electric utilities and diesel engines, and better water quality -- will also aid gains. Additionally, heightened concerns about water and indoor air quality will boost filter demand in the consumer market.



Growing filter penetration to boost aftermarket sales

Ongoing sales in the aftermarket, which accounts for the vast majority of demand, will also drive gains. The growing market penetration of motor vehicle cabin air filters, diesel emissions filters, and home air and water filters will contribute to aftermarket demand gains. As the number of these types of filters in operation increases and awareness among consumers of their recommended replacement schedule improves, demand for replacement filters will also increase. However, growth in the aftermarket will be offset somewhat by users' tendency to replace filters less often than recommended by manufacturers. The ongoing development of filters featuring longer lasting media or other technologies that extend their useful life will also restrain sales.

Internal combustion engine filters to grow fastest

In 2010, fluid filters (e.g., fluid power, municipal water and waste, consumer water and industrial fluid filters) accounted for the largest share of filter shipments. Filters used in internal combustion engines (oil filters, air intake filters, fuel filters, cabin air filters and others) accounted for the second largest share of total shipments and are expected to grow fastest through 2015, albeit from a low 2010 base. Although this is a relatively mature product group, sales will benefit from a rebound in motor vehicle production and sales, as well as the ongoing development of new types of emissions filters, particularly for diesel engines, and the growing aftermarket for cabin air filters. Despite recommended oil change intervals increasing in recent years, high gasoline prices will continue to motivate consumers to replace filters regularly in order to optimize engine performance and fuel efficiency. Shipments of air filters are expected to improve over the 2005-2010 period, benefiting from greater manufacturing activity, and increasing environmental regulations and consumer interest.

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Sample Text, Table & Chart

FILTRATION TECHNOLOGY

Paper

Demand for filters incorporating paper or cellulose med
to increase
SAMPLE TEXT
billion in 2015, albeit
reduced ba
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e is nonetheless belo
industry av
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mand for p
ir intake filters in mo
Although c
rs is expected to outp
the other ty
ncreasingly face greate
petition from nonwoven fabric and other filters for these app
Nonwoven fabric is also gaining popularity in air filtration a
These other types of media typically offer performance adva
as higher efficiency and longer useful lives. However, the di
between paper and wetlaid nonwoven media is becoming inc
blurred as a growing number of paper filters incorporate polymers and glass fibers to improve performance properties. Going forward, growth in the fluid and air filters markets will also support advances in demand for paper filters. Additionally, demand for paper filtration media benefits from paper's relatively low cost and its usefulness in many applications.

Paper filtration media are used in a variety of applications. Many internal combustion engine filters are made using paper media, particularly oil and fuel filters, but also many air intake filters. Additionally, the filters used in applications such as consumer air cleaning systems and vacuum cleaners also primarily feature paper media. Pa
widely used in bacteriological, blood fractionation and othe
based filtration applications. Paper is the filter medium mos
used in the food and beverage, chemical, and pharmaceutica
for clarifying applications. Another key use for paper filters
treatment filter for some other types of media in industrial fi
as well as for primary filtration operations in industries such
ics, flavors, fragrances and personal care products, where pa

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TABLE IV-7

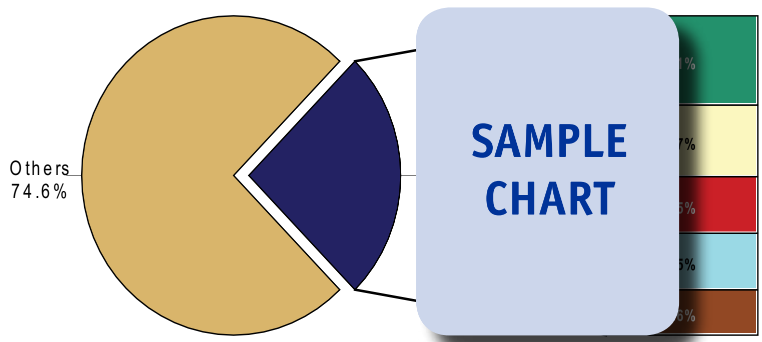
INTERNAL COMBUSTION ENGINE (ICE) & RELATED FILTER SUPPLY & DEMAND (million dollars)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Motor Vehicles in Use (mil)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ ICE filters/vehicle	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
ICE & Related Filter Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
+ net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
ICE & Related Filter Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Oil Filters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Air Intake Filters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fuel Filters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cabin Air Filters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Filters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% ICE & related	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Filter Shipments	7320	9120	8855	11550	13850

CHART VI-1

US FILTER MARKET SHARE, 2010 ($8.9 billion)



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Sample Profile, Table & Forecast

TABLE V-2

MOTOR VEHICLE MARKET FOR FILTERS
(million dollars)

Item	2000	2005	2010	2015	2020
Motor Vehicle Filter Demand					
By Market Segment:					
Aftermarket					
Original Equipment					
By Type:					
Oil & Fuel					
Air Intake					
Cabin Air Filters					
Others					
% motor vehicles					
Filter Demand					

SAMPLE TABLE

COMPANY PROFILES

Culligan International Company
9399 West Higgins Road
Rosemont, IL 60018
847-430-
http://ww

Annual
Employ

Key Pro ... rification systems,
and relat

SAMPLE PROFILE

Culligan International is a producer of water systems that are primarily used to purify water in residential and commercial applications. The Company is a subsidiary of Clayton, Dubilier & Rice Incorporated (New York, New York), a leading global private equity firm.

Culligan competes in the US filters industry via the manufacture of whole-house and drinking water purification systems, and related filters. These products are suitable for various residential, commercial and industrial uses. Culligan maintains a network of over 700 dealers in North America and has operations in over 90 countries worldwide.

Residential whole-house filtration systems made by Culligan are designed to remove such impurities as chlorine, iron, acid, sulfur and sediment that affect the taste, look, smell and feel of water. The Company manufactures whole-house systems under the GOLD, MEDALIST, IRON-CLEER, SULFUR-CLEER, TOTAL HOME and ARSENIC brand names. GOLD and MEDALIST automatic filter systems can be customized to meet homeowner specifications. These systems are suitable for use with such Culligan-made filters as FILTR-CLEER sediment-removing types that collect dirt, silt, clay and other debris;

269

"Demand for filters in the motor vehicle OEM market is forecast to grow 10.5 percent annually to $305 million in 2015, albeit from a significantly reduced 2010 base. Demand declined between 2005 and 2010 due to a sharp drop in motor vehicle production levels in 2008 and 2009. While output improved considerably in 2010, production nonetheless remained well below pre-recession levels. Going forward, ..."

--Section V, pg. 174

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Other Studies

World Nonwovens

This study analyzes the world nonwovens industry. It presents historical demand data for the years 2000, 2005 and 2010, with forecasts for 2015 and 2020 by web formation process (e.g., spunmelt, carded, airlaid, wetlaid), application (disposables, nondisposables), market (e.g., personal hygiene, wipes, construction, filtration, medical/surgical), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2816 .... December 2011 .... $5900

World Water Treatment Products

World demand for water treatment products will rise 6.2 percent annually through 2015. China will remain by far the fastest growing major market. In the US, Japan and Western Europe, gains will favor advanced membrane systems, disinfection and desalination equipment, and industrial wastewater treatment chemicals. This study analyzes the $48.1 billion world water treatment product industry, with forecasts for 2015 and 2020 by product, market, world region and for 30 countries. The study also evaluates company market share and profiles industry players.

#2802 .... September 2011................ $6400

World Membrane Separation Technologies

Global demand for membranes is projected to rise 9.0 percent annually through 2015. The BRIC countries and others with large, developing industrial bases and stressed local water resources will see the fastest growth. The US and China combined will account for nearly half of market gains between 2010 and 2015. This study analyzes the $12.6 billion global membrane industry, with forecasts for 2015 and 2020 by product, market, world region and for 34 countries. The study also evaluates company market share and profiles industry participants.

#2755 .... June 2011 .... $6100

Filters in China

Demand for filters in China is projected to grow 13.5 percent annually through 2014, supported by rapid growth in transportation equipment production and stocks, and by energy conservation and emission reduction regulations. Internal combustion engine filters will remain the dominant product segment and will post the strongest gains. This study analyzes the 35.2 billion yuan filter industry in China, with forecasts for 2014 and 2019 by type and market. The study also evaluates company market share and profiles 36 industry participants.

#2740 .... March 2011................... $5300

Consumer Water Purification & Air Cleaning Systems

US demand for consumer water purification and air cleaning systems will rise 5.2 percent per year through 2014. Conventional filters will remain the dominant water purification system, while higher-value reverse osmosis and distillation systems grow the fastest. Electrostatic cleaners will lead gains in the air segment. This study analyzes the $1.3 billion US consumer water purification and air cleaning system industry, with forecasts for 2014 and 2019 by technology, product and regional market. It also evaluates company market share and profiles industry players.

#2720 .... March 2011................... $5100

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