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# World Filters

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

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Study #2856 | March 2012 | \$6300 | 567 pages

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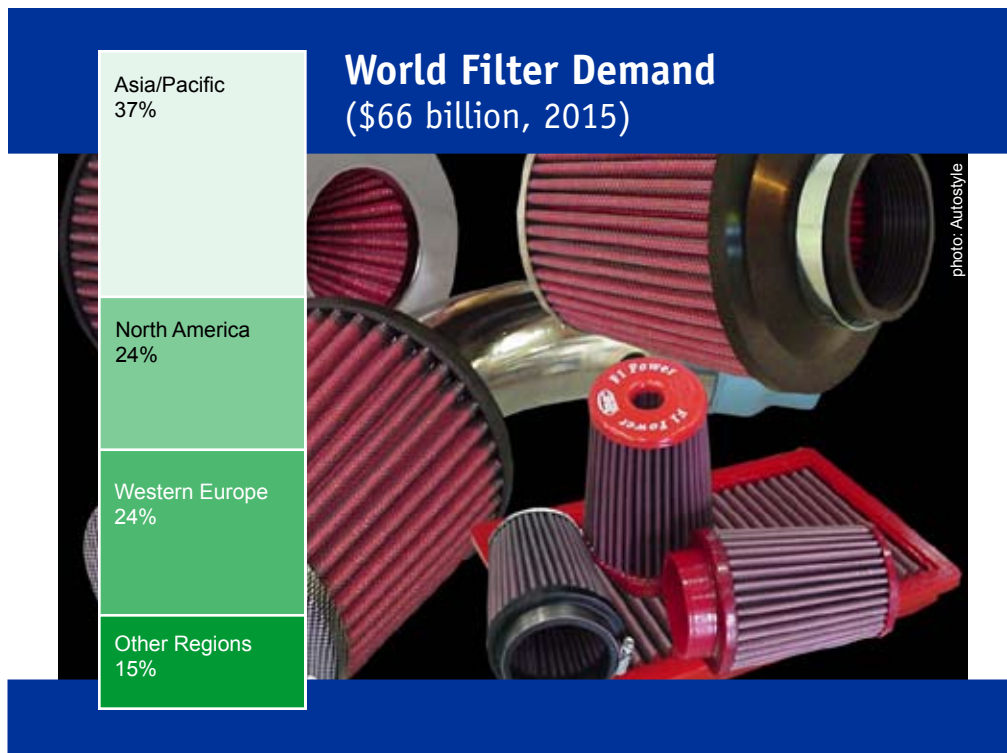
*Manufacturing and utilities will be the fastest growing markets through 2015, benefiting from an improvement in manufacturing activity and rising global demand for water and electric utility services.*

## US demand to rise 7.6% annually through 2015

Global demand for filters is projected to increase a healthy 7.6 percent annually to \$65.9 billion in 2015. This growth rate is an acceleration from the gains of the 2005-2010 period, reflecting in part the reduced 2010 bases of the developed countries. Economic recovery in several key markets through 2015 will boost gains as the global recession of 2009 restrained manufacturing activity and capital investments.

## China, India among fastest growing markets

Countries such as China, India, Indonesia and others with large, developing industrial bases and nascent regulatory schemes are expected to see the fastest growth. Filter sales in developing areas will be driven by rising per capita incomes, which will bolster key filter markets such as motor vehicles and motorcycles. Rising environmental standards and increased attention paid to food and beverage safety regulations, along with better enforcement, will require additional investment in filters. Fast growing economic activity in developing areas will result in the increased need to tap poor quality water resources, and rising investment in modernizing water, wastewater and power generation infrastructure, all to the benefit of filter demand. However, in many of the least developed countries, especially in Africa and parts of Asia,



growth will be limited by lack of adequate funding and local corruption that impedes progress.

In 2010, the US was the largest national market with 20 percent of global sales, followed by China and Japan, with 12 and 9 percent of global sales, respectively. China is projected to post the biggest growth of any national market, with 22 percent of projected global filter gains between 2010 and 2015.

Filter demand in developed countries will be fueled by improving economic conditions, higher income levels, and relatively stringent and well-enforced environmental standards. North America and Western Europe will record similar

gains through 2015, rebounding from low 2010 bases. Although representing mature markets, these regions will remain the most intensive users of filters in per capita terms, reflecting the advanced nature of their economies. The large numbers of filter-containing equipment in use will further support substantial aftermarket filter demand. North America, Western Europe and Japan are fairly comparable in terms of the maturity of their water and power generation infrastructures, regulatory oversight, and the technological sophistication of local manufacturing, all of which will boost sales of aftermarket filters. In addition, ongoing emphasis on water conservation and air pollution control will aid filter sales growth.

## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Filter Demand by Type

Internal combustion engine and related filters accounted for the majority of Chinese filter demand in 2010 with 52 percent of total sales. This segment is expected to continue to be the largest single market for these filters in the world through 2015, driven by growth in motor vehicles and other transportation equipment. Market penetration of new models such as cars, trucks, and motorcycles, will also be supported by the growth of motorcycle control filters, will also be supported by the growth of motorcycle control filters. However, the growth of motorcycle control filters, will also be supported by the growth of motorcycle control filters. China in 2010, since these versions compete with internal combustion engine motorcycles but do not require the related filters.

In contrast, sales of fluid filters in China represent a small portion of global sales -- 11 percent in 2010 -- since the market is still developing. Sales of fluid filters will rise somewhat faster at a yearly rate of 4.5 percent through 2015, fueled by factors such as increasing nonagricultural water use and expanding urbanization throughout China. The implementation of government policies promoting improved water quality and more modern wastewater treatment will also support fluid filter sales. In addition, gains will be fueled by ongoing development of key processing and water-intensive industries that are comparatively heavy users of fluid filters, including chemicals, and food and beverages.

Sales of air filters are projected to increase at a similar rate through 2015. Rising concerns about air pollution and government policies to improve air quality, particularly in urban areas, through regulation of factory and power plant emissions will boost filter sales. Demand will also be spurred by continued growth in manufacturing output, as well as expanding production of goods such as HVAC equipment. Air filters include air filters as part of original equipment and of electronic

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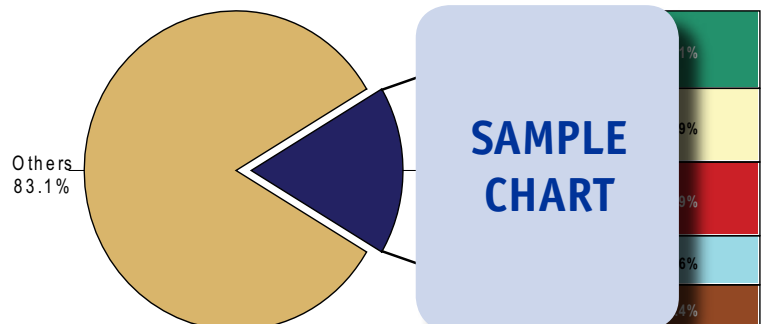
TABLE VI-7

CHINA: FILTER DEMAND BY TYPE  
(million dollars)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009\$)	10,200	15,200	16,190	24,050	30,350
\$ filters/000\$ GDP	0.000	0.000	0.000	0.000	0.000
Filter Demand					
Internal Combustion Engine/Related	5.0	7.5	10.0	12.5	15.0
Oil	0.0	0.0	0.0	0.0	0.0
Air Intake	5.0	7.5	10.0	12.5	15.0
Other	0.0	0.0	0.0	0.0	0.0
Fluid:	5.0	7.5	10.0	12.5	15.0
Fluid Power	5.0	7.5	10.0	12.5	15.0
Other	0.0	0.0	0.0	0.0	0.0
Air:	0.0	0.0	0.0	0.0	0.0
Panel & Pocket	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0
% China	0.8	1.8	2.8	3.8	4.8
Asia/Pacific Filter Demand	755	10520	16190	24050	30350

CHART VIII-1

WORLD FILTER MARKET SHARE, 2010  
(\$45.6 billion)



## Sample Profile, Table & Forecast

**TABLE VI-8**  
**CHINA: FILTER DEMAND BY MARKET**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Manufacturing Value Added (bil 2009\$) \$ filters/000\$ MVA					
Filter Demand					
Transportation Equipment					
Manufacturing					
Utilities					
Consumer					
Other					



**COMPANY PROFILES**

**Bengbu Jinwei Filters Company Limited**  
 224 Fengyang Road  
 Bengbu, Anhui  
 China  
 86-55-2301-04  
 http://www.bb

Annual Sales:  
 Employment:

Key Products: al filters

**SAMPLE PROFILE**

Bengbu Jinwei Filters produces filters for use in automobiles, engineering and agricultural equipment, internal combustion engines, gas turbines, generators, compressors and other machinery. The Company is privately held.

The Company is active in the world filters industry through the manufacture of air, fuel, oil, water-separated and industrial filters. These products are marketed under the BB tradename. Bengbu Jinwei Filters' air filters are engineered to filter impurities from air entering the engines in automobiles and other machinery. The Company makes fuel filters that are used in engines to filter impurities and water from the fuel. These filters feature high filtration efficiency, high separating efficiency and long service life. Oil filters from Bengbu Jinwei Filters are used in engines to provide high-efficiency filtration and low flow resistance. Specific oil filters from the Company include full-flow spin-on and by-pass spin-on models. Bengbu Jinwei Filters' water-separated filters are designed to filter impurities from engine coolant, as well as prevent engine scaling and erosion. Industrial filters from the Company include air filters for use in generators, compressors and other industrial equipment.

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"Filter demand in China is forecast to rise just over 12 percent per year through 2015 to \$10.1 billion, representing the fastest growth rate of any major national market. Sales will be stimulated by increases in manufacturing output, building construction activity and urbanization of the population as industrialization efforts continue. The number of motor vehicles in use, for instance, will expand more than 15 percent annually through 2015, and the size of the motorcycle park will expand 6.0 percent annually."  
 --Section VI, pg. 213



**OTHER STUDIES**

**World Water Infrastructure Equipment**

World demand for water infrastructure equipment will rise 6.5 percent per year to \$101.7 billion in 2016. In less developed nations, gains will be prompted by expansion of water supply services. In most developed nations, gains will result from upgrades and repairs to aging sewer and water pipe networks. This study analyzes the \$74.2 billion world water supply equipment industry, with forecasts for 2016 and 2021 by product, application, world region and for 22 major countries. The study also evaluates company market share and profiles industry competitors.

#2881 ..... May 2012 ..... \$6100

**Membrane Separation Technologies**

Demand for membranes in the US is expected to increase 7.7 percent per year to \$5.4 billion in 2016, driven by water and wastewater regulations. Polymeric membranes will remain the dominant material. Microfiltration membranes will continue as the largest product segment, while reverse osmosis and ultrafiltration membranes will grow the fastest. This study analyzes the \$3.7 billion US membrane industry, with forecasts for 2016 and 2021 by product type, application and market. The study also evaluates company market shares and profiles industry players.

#2872 ..... March 2012 ..... \$5100

**World Filters**

Global demand for filters is projected to increase 7.6 percent annually to \$65.9 billion in 2015. China, India, Indonesia and other countries with large, developing industrial bases and nascent regulatory schemes will see the fastest growth. Manufacturing will be the fastest growing market, while transportation equipment remains the largest. This study analyzes the \$45.6 billion world filter industry, with forecasts for 2015 and 2020 by product, market, world region and for 23 countries. The study also evaluates company market shares and profiles industry players.

#2856 ..... March 2012 ..... \$6300

**World Geosynthetics**

Global demand for geosynthetics is projected to increase 8.3 percent annually to 4.5 billion square meters in 2015. Advances will be driven by increasing use of geosynthetics and the large-scale construction plans in place in many developing countries. China will surpass the US as the world's largest geosynthetics market by 2015. This study analyzes the three billion square meter world geosynthetics industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry players.

#2825 ..... December 2011 ..... \$5900

**World Industrial Valves**

Global demand for industrial valves will rise 5.4 percent annually through 2015. Growth will be driven by continuing robust gains in the Asia/Pacific region, as well as strong recovery in the US and West European markets. Automatic valves will outpace conventional types. The oil and gas industry will see strong growth in valve demand. This study analyzes the \$71.8 billion world industrial valve industry, with forecasts for 2015 and 2020 by product, world region and for 34 major countries. The study also evaluates company market share and profiles industry competitors.

#2809 ..... November 2011 ..... \$5900

**About The Freedonia Group**

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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