World Filters

Industry Study with Forecasts for 2015 & 2020

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General ........................................... 4
World Economic Overview ........................ 5
Recent Economic Performance .................... 5
World Economic Outlook .......................... 7
World Demographic Overview ..................... 11
Population ........................................ 12
Households ........................................ 13
World Personal Income Trends ................. 14
World Manufacturing Outlook ................. 16
World Motor Vehicle Trends .................... 18
Motor Vehicles in Use ............................ 19
Motor Vehicle Production ....................... 20
World Motorcycle Trends ........................ 23
Motorcycles in Use ............................... 24
Motorcycle Production ........................... 25
World Building Construction Trends .......... 27
World HVAC Equipment Outlook ............. 29
World Nonagricultural Water Use ............. 31
Pricing Patterns ................................... 33
Filtration & Separation Technologies .......... 36
Conventional Filtration Technology ........... 37
Filtration Media ................................... 39
Competitive Technologies ...................... 42
Legal & Regulatory Environment .............. 44

OVERVIEW

General ........................................... 48
Regional Overview ................................ 49
Demand .......................................... 49
Production ....................................... 53
International Trade .............................. 56
Demand by Product .............................. 58
Internal Combustion Engine & Related ......... 60
Fluid .............................................. 70
Air .................................................. 76
Demand by Market ............................... 82
Transportation Equipment ........................ 85
Manufacturing .................................... 88
Utilities .......................................... 91
Consumer ......................................... 94
Other ............................................. 96

NORTH AMERICA

Central & South America ......................... 277
Brazil .............................................. 283
Other Central & South America ............... 292
Eastern Europe .................................. 299
Poland ............................................ 305
Russia ............................................. 312
Other Eastern Europe ............................ 321
Africa/Middle East ............................... 329
Turkey ............................................. 335
Other Africa/Middle East ....................... 341

INDUSTRY STRUCTURE

General ........................................... 351
Industry Composition ............................ 352
Market Share ..................................... 356
Competitive Strategies ........................... 361
Research & New Product Development ....... 363
Marketing & Distribution ....................... 365
Mergers & Acquisitions ........................ 367
Cooperative Agreements ....................... 371

COMPANY PROFILES

Affinia Group .................................... 379
Ahlstrom Corporation ............................ 381
Alfa Laval AB ..................................... 385
Bengbu Jinwei Filters ............................ 387
Bosch (Robert) GmbH ............................ 389
BRITA GmbH ...................................... 392
Camfil Farr ....................................... 394
CLARCOR Incorporated .......................... 398
Corning Incorporated ............................ 405
Cummins Incorporated .......................... 407
Daikin Industries .................................. 411
DENSO Corporation .............................. 414
Donaldson Company ............................. 417
Eaton Corporation ................................ 424
Faurecia SA ....................................... 428
Filtration Group ................................... 431
Filtronix plc ...................................... 434
Flanders Corporation ............................. 436
Freedenburg & Company ....................... 439
General Electric ................................... 444
General Motors .................................... 449
Helen of Troy ....................................... 452
Honeywell International ........................ 455
IBIDEN Company ................................. 458
Johnson Matthey .................................. 460
MAHLE International ............................. 463
MANN+HUMMEL GmbH ......................... 468
NGK Insulators .................................... 475
Pall Corporation ................................... 477
Parker-Hannifin Corporation .................... 483
Pentair Incorporated .............................. 488
Procter & Gamble ................................. 494
ROKI Company ..................................... 495
Shanghai BG Industrial Fabric .................... 497
Siemens AG ........................................ 498
Sogefi SpA ......................................... 502
SPX Corporation ................................... 506
Tenneco Incorporated ............................. 510
3M Company ....................................... 512
Toyota Boshoku .................................... 517
UCI International .................................. 519
Xinxian Pingyuan Filter & Purification .......... 522
Other Companies Mentioned in Study ........ 523

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table .................................. 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region .... 11
2 World Population by Region .................... 13
3 World Households by Region ................... 14
4 World Per Capita Gross Domestic Product by Region ......... 16
5 World Manufacturing Value Added by Region ........... 18
6 World Motor Vehicles in Use by Region ........... 20

(continued on following page)
# World Filters

Industry Study with Forecasts for 2015 & 2020

## List of Tables/Charts

(continued from previous page)

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>World Motor Vehicle Production by Region</td>
</tr>
<tr>
<td>8</td>
<td>World Motorcycles in Use by Region</td>
</tr>
<tr>
<td>9</td>
<td>World Motorcycle Production by Region</td>
</tr>
<tr>
<td>10</td>
<td>World Building Construction Expenditures by Region</td>
</tr>
<tr>
<td>11</td>
<td>World HVAC Equipment Demand by Region</td>
</tr>
<tr>
<td>12</td>
<td>World Nonagricultural Water Use by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Price Index</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Country, 2010</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Region, 2010</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Shipments by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Shipments by Region, 2010-2015</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Net Exports by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Product</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Product, 2010-2015</td>
</tr>
<tr>
<td>Cht</td>
<td>World Internal Combustion Engine (ICE) &amp; Related Filter Demand by Product &amp; Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Fluid Filter Demand by Product &amp; Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Air Filter Demand by Product &amp; Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Market</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Market, 2010-2015</td>
</tr>
<tr>
<td>Cht</td>
<td>World Transportation Equipment Filter Demand by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Manufacturing Filter Demand by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Utility Filter Demand by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Consumer Filter Demand by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Demand for Other Filters by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Motor Vehicle Production by Region, 2010</td>
</tr>
<tr>
<td>Cht</td>
<td>World Motorcycles in Use by Region, 2010</td>
</tr>
<tr>
<td>Cht</td>
<td>World Motorcycle Production by Region, 2010</td>
</tr>
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<td>World Building Construction Expenditures by Region, 2010</td>
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<tr>
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<td>World Motorcycle Production by Region</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Supply &amp; Demand</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Type</td>
</tr>
<tr>
<td>Cht</td>
<td>World Filter Demand by Market</td>
</tr>
<tr>
<td>Cht</td>
<td>Western Europe: Filter Demand by Country, 2010</td>
</tr>
</tbody>
</table>

## OVERVIEW

1. World Filter Demand by Region | 52
2. World Filter Demand by Region, 2010-2015 | 53
3. World Filter Shipments by Region | 55
4. World Filter Shipments by Region, 2010-2015 | 56
5. World Filter Net Exports by Region | 58
6. World Filter Demand by Product | 59
7. World Filter Demand by Product, 2010-2015 | 60
8. World Internal Combustion Engine (ICE) & Related Filter Demand by Product & Region | 64
9. World Fluid Filter Demand by Product & Region | 72
10. World Air Filter Demand by Product & Region | 78
11. World Filter Demand by Market | 84
12. World Filter Demand by Market, 2010-2015 | 84
13. World Transportation Equipment Filter Demand by Region | 88
14. World Manufacturing Filter Demand by Region | 91
15. World Utility Filter Demand by Region | 94
16. World Consumer Filter Demand by Region | 96
17. World Demand for Other Filters by Region | 98

## ASIA/PACIFIC

1. Asia/Pacific: Filter Supply & Demand | 199
2. Asia/Pacific: Filter Demand by Type & Market | 201
3. Asia/Pacific: Filter Demand by Country, 2010 | 202
4. Australia: Filter Supply & Demand | 206
5. Australia: Filter Demand by Type | 208
6. Australia: Filter Demand by Market | 210
7. China: Filter Supply & Demand | 217
8. China: Filter Demand by Type | 219
9. China: Filter Demand by Market | 222
10. India: Filter Supply & Demand | 227
11. India: Filter Demand by Type | 229
12. India: Filter Demand by Market | 232
13. Indonesia: Filter Supply & Demand | 236
14. Indonesia: Filter Demand by Type | 238
15. Indonesia: Filter Demand by Market | 240
16. Japan: Filter Supply & Demand | 245
17. Japan: Filter Demand by Type | 247
18. Japan: Filter Demand by Market | 249
19. South Korea: Filter Supply & Demand | 254
20. South Korea: Filter Demand by Type | 256
21. Taiwan: Filter Supply & Demand | 262
22. Taiwan: Filter Demand by Type | 263
23. Taiwan: Filter Demand by Market | 265
24. Other Asia/Pacific: Filter Supply & Demand | 270
25. Other Asia/Pacific: Filter Demand by Type | 271
26. Other Asia/Pacific: Filter Demand by Market | 273
27. Other Asia/Pacific: Filter Demand by Country | 274

## OTHER REGIONS

1. Central & South America: Filter Supply & Demand | 281
2. Central & South America: Filter Demand by Type & Market | 283
3. Brazil: Filter Supply & Demand | 288
4. Brazil: Filter Demand by Type | 290
5. Brazil: Filter Demand by Market | 292
6. Other Central & South America: Filter Supply & Demand | 296
7. Other Central & South America: Filter Demand by Type | 297
8. Other Central & South America: Filter Demand by Market | 298
9. Eastern Europe: Filter Supply & Demand | 302
10. Eastern Europe: Filter Demand by Type & Market | 304
11. Poland: Filter Supply & Demand | 309
12. Poland: Filter Demand by Type | 310
13. Poland: Filter Demand by Market | 312
14. Russia: Filter Supply & Demand | 317
15. Russia: Filter Demand by Type | 318
16. Russia: Filter Demand by Market | 321
17. Other Eastern Europe: Filter Supply & Demand | 325
18. Other Eastern Europe: Filter Demand by Type | 326
19. Other Eastern Europe: Filter Demand by Market | 327
20. Other Eastern Europe: Filter Demand by Country | 329
21. Africa/Mideast: Filter Supply & Demand | 333
22. Africa/Mideast: Filter Demand by Type | 334
23. Turkey: Filter Supply & Demand | 338
24. Turkey: Filter Demand by Type | 339
25. Turkey: Filter Demand by Market | 340
26. Other Africa/Mideast: Filter Supply & Demand | 344
27. Other Africa/Mideast: Filter Demand by Type | 345
28. Other Africa/Mideast: Filter Demand by Market | 347
29. Other Africa/Mideast: Filter Demand by Country | 350

## INDUSTRY STRUCTURE

1. Filter Sales by Company, 2010 | 354
2. World Filter Market Share, 2010 | 357
3. Selected Acquisitions & Divestitures | 369
4. Selected Cooperative Agreements | 373
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.
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 sales. China was the largest single market for these filters in the world that year, representing 14 percent of global sales. This segment is expected to achieve 12 percent annual growth through 2015, driven by growth in the production and stock of motor vehicles and other transportation equipment. Market penetration of new filters such as cabin air and emission control filters, will also be sustained by the growth of newer varieties. However, gains will be restrained by the growth of electric motorcycles, which accounted for 55 percent of motorcycle demand in 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 share 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 13 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 regulations on factory and power plant emissions will boost filter sales. Demand will also be spurred by continued growth in manufacturing outputs, as well as expanding production of goods such as HVAC equipment. Sales include air filters as part of original equipment and of electronic

| TABLE VI-7 |
| CHINA: FILTER DEMAND BY TYPE |
| (million dollars) |

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<td>$ filters/000 $GDP</td>
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<td>0.39</td>
<td>0.56</td>
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<td>Filter Demand</td>
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<td>2300</td>
<td>5700</td>
<td>10100</td>
<td>17000</td>
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<td>Internal Combustion Engine/Related:</td>
<td>600</td>
<td>1275</td>
<td>2980</td>
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<td>Oil</td>
<td>180</td>
<td>355</td>
<td>800</td>
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<td>680</td>
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<td>270</td>
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<td>755</td>
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<td>% China</td>
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<td>22.3</td>
<td>35.2</td>
<td>42.0</td>
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<td>Asia/Pacific Filter Demand</td>
<td>7535</td>
<td>10320</td>
<td>16190</td>
<td>24050</td>
<td>36350</td>
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</tbody>
</table>

CHART VIII-1
WORLD FILTER MARKET SHARE, 2010 
($45.6 billion)
Bengbu Jinwei Filters Company Limited
224 Fengyang Road
Bengbu, Anhui
China
86-55-2301-0464
http://www.bbfilter.com

Annual Sales: $65 million (verified by company, 2/12)
Employment: 2,200 (verified by company, 2/12)
Key Products: air, fuel, oil, water-separated and industrial filters

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.

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
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