Filters

US Industry Study with Forecasts for 2018 & 2023

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# Filters
US Industry Study with Forecasts for 2018 & 2023

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US demand to rise 3.6% annually through 2018

US demand for filters will advance 3.6 percent annually to $14.8 billion in 2018. Filters are installed in a wide range of equipment and vehicles as original equipment; however, replacement (or aftermarket) demand accounts for the vast majority of filter sales. The filter aftermarket will be aided by the increasing penetration of newer products, particularly motor vehicle cabin air filters, diesel emissions filters, and many varieties of home air and water filters, as well as rising end user awareness of their recommended service lives.

However, consumers continue to replace certain filters less often than recommended, limiting aftermarket sales to an extent. The development of filters featuring technologies that extend their useful life will have a mixed impact on demand, boosting sales since they are priced at a premium, but also restraining demand in volume terms.

Both the original equipment and replacement filter markets will be aided by regulatory changes -- particularly regarding potable water quality, diesel engine emissions, and pollution from electric utilities -- supporting sales of existing filters and the development of new products. The improved outlook for manufacturing and capital investment will also support filter demand in light of greater purchases of equipment that requires filters.

Motor vehicles to remain largest market for filters

The motor vehicle market will continue to account for the largest portion of total demand, with a 27 percent share in 2018, owing to the high volume of filters sold both as original equipment and in the aftermarket. Motor vehicle filter demand will be supported by a rising number of vehicles in use and increasingly strict standards for vehicle emissions. Value growth will also be supported by the introduction and increasing adoption of newer products, such as cabin air filters and other specialty and high value vehicle filters. Demand for filters in the industrial and manufacturing, consumer, and utilities markets will all see above average growth. The industrial and manufacturing market will be driven by the improved outlook for manufacturing as well as continued interest in pollution reduction and sustainability. In addition, a rebound in industrial investment, particularly for pollution control equipment to ensure that facilities meet evolving pollution standards, will support increases. Consumer sales are aided by concerns about the quality of indoor air and home tap water supplies. The utilities market will be driven by evolving regulations regarding potable water quality, wastewater treatment, and air pollution from electric power companies.
Demand for filters in the consumer air filtration markets, including original and replacement filters used in residential and light commercial HVAC systems and air cleaners, is expected to increase 4.0% per year to $1.2 billion in 2018. The market will be supported by rising consumer concern about the quality of indoor air as well as the growing number of allergy sufferers who seek to treat the source of their symptoms. These trends will support increased use of air systems with HEPA filters and installation of systems for further air treatment in specific rooms.

Demand for consumer air filters will also be supported by the increasing use of multiple filters in a single system. For instance, an air cleaner may include a HEPA filter to remove most airborne contaminants, an electrostatically treated filter to eliminate very small particles, and a carbon filter to treat foul odors. Rising consumer interest in high-end electrostatic media air filters, which are better able to collect dust and other contaminants than conventional fiberglass media, will support value increases. However, more basic conventional filters are still the most widely used types.

Further advances will be restrained by the popularity of home air cleaning systems that have washable filter media or electrostatic plates instead of conventional, disposable filters. The market will also be limited by the tendency among consumers to replace the disposable filters less frequently than manufacturers recommend. However, the inclusion of filter performance indicators and automatic shut-off features in the growing number of air cleaning systems is likely to help enhance timely filter replacement.

Environmental conditions are a key factor behind the growth of consumer air filters. Indoor air can include levels of pollutants lower than outside air, even in urban settings. This can be particularly true in poorly ventilated and insufficiently filtered buildings.

### Table IV-7

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicles in Use (mil)</td>
<td>225.9</td>
<td>249.8</td>
<td>254.5</td>
<td>267.5</td>
<td>279.0</td>
</tr>
<tr>
<td>$ filters/vehicle</td>
<td>14.5</td>
<td>15.2</td>
<td>16.9</td>
<td>18.3</td>
<td>19.7</td>
</tr>
<tr>
<td>ICE &amp; Related Filter Demand</td>
<td>3267</td>
<td>3793</td>
<td>4300</td>
<td>4900</td>
<td>5500</td>
</tr>
<tr>
<td>Oil Filters</td>
<td>1298</td>
<td>1485</td>
<td>1685</td>
<td>1880</td>
<td>2060</td>
</tr>
<tr>
<td>Air Intake Filters</td>
<td>1082</td>
<td>1286</td>
<td>1435</td>
<td>1640</td>
<td>1860</td>
</tr>
<tr>
<td>Fuel Filters</td>
<td>491</td>
<td>540</td>
<td>600</td>
<td>690</td>
<td>775</td>
</tr>
<tr>
<td>Cabin Air Filters</td>
<td>107</td>
<td>162</td>
<td>230</td>
<td>310</td>
<td>400</td>
</tr>
<tr>
<td>Other Filters</td>
<td>289</td>
<td>320</td>
<td>350</td>
<td>380</td>
<td>405</td>
</tr>
<tr>
<td>+ net exports</td>
<td>38</td>
<td>314</td>
<td>180</td>
<td>150</td>
<td>100</td>
</tr>
<tr>
<td>ICE &amp; Related Filter Shipments</td>
<td>3305</td>
<td>4107</td>
<td>4480</td>
<td>5050</td>
<td>5600</td>
</tr>
<tr>
<td>% ICE &amp; related Filter Shipments</td>
<td>39.1</td>
<td>38.0</td>
<td>37.5</td>
<td>36.2</td>
<td>34.7</td>
</tr>
<tr>
<td>Filter Shipments</td>
<td>8452</td>
<td>10806</td>
<td>11960</td>
<td>13950</td>
<td>16150</td>
</tr>
</tbody>
</table>

### Chart VI-1

US FILTER MARKET SHARE, 2013 ($12.4 billion)

<table>
<thead>
<tr>
<th>Market Segment</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Leader</td>
<td>24.0%</td>
</tr>
<tr>
<td>Others</td>
<td>76.0%</td>
</tr>
</tbody>
</table>
COMPANY PROFILES

Flanders Corporation
531 Flanders Filters Road
Washington, NC 27889
252-946-8081
http://www.flanderscorp.com

Annual Sales: $260 million (estimated)
Employment: 2,600 (estimated)
Key Products: residential and industrial air filters

Flanders Corporation designs, manufactures, and markets air filters and related products for the residential and industrial markets. The Company’s products are used in residential and commercial heating, ventilation, and air conditioning (HVAC); semiconductor production; biotechnology; pharmaceutical; and nuclear power generating applications, among others. The majority of Flanders’ revenues are derived from the sale of aftermarket replacement filters. In May 2012, Flanders was acquired by Insight Equity Holdings LLC (Southlake, Texas), a private equity firm.

The Company’s filters comprise types for residential and industrial applications. Among Flanders’ residential air filters are ENERGY AIRE, AIRPURE, EZ FLOW, and NATURAL AIRE types, as well as FLANDERS air filters. Flanders’ ENERGY AIRE filters are produced with synthetic polyester filtration media that collect household dust, lint and other large-particle contaminants. The AIRPURE product line is designed to collect common household contaminants, including dust mites, mold, pet dander, and pollen in residential HVAC systems. These filters are electrostatically charged and feature wire-backed filtration media. Flanders makes EZ FLOW air filters with chipboard frames.

TABLE V-9
CONSUMER MARKET FOR FILTERS (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households (million)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$ filters/household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer Filter Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Market:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OEM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aftermarket</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% consumer Filter Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<td>____________________________</td>
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<td>American Express</td>
</tr>
<tr>
<td>Credit Card #</td>
<td>MM</td>
</tr>
<tr>
<td>Signature</td>
<td>____________________________</td>
</tr>
</tbody>
</table>

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World Activated Carbon

World demand for activated carbon is projected to rise 8.1 percent per year to 2.1 million metric tons in 2018, driven by tightening pollution regulations and rising manufacturing activity. North America will remain the largest activated carbon market, while the Asia/Pacific region will slightly outpace and overtake North America by 2023. This study analyzes the global activated carbon industry, with forecasts for 2018 and 2023 by type, application, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3172 ... May 2014 ............... $6400

World Consumer Water Treatment Systems

World demand for consumer water treatment systems will jump 12.4% annually, led by the BRIC (Brazil, Russia, India, China) and other countries with poor public treatment infrastructure. Gains will be driven by rising incomes and increasing awareness of water contamination. This study analyzes the $7.5 billion world consumer water treatment system industry, with forecasts for 2017 and 2022 by type, aftermarket component, technology, world region, and for 21 countries. The study also evaluates company market share and profiles industry participants.

#3110 ... January 2014 ............... $6100

World Water Treatment Equipment

World demand for water treatment equipment is expected to grow 6.9 percent per year to $53.4 billion in 2017. Developing areas will show strong growth based on improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems. This study analyzes the $38.3 billion world water treatment equipment industry, with forecasts for 2017 and 2022 by product, market, world region and major country. The study also evaluates company market share and profiles industry players.

#3103 ... December 2013 ............... $6100

Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 6.9 percent yearly to $2.3 billion in 2017. Whole-house air treatment systems will be the fastest growing segment, while point-of-use water treatment systems will remain the largest. Water filters and membranes will remain the largest consumables category. This study analyzes the $1.6 billion US consumer market for water and air treatment systems, with forecasts for 2017 and 2022 by technology, product, and region. The study also evaluates company market share and profiles industry players.

#3032 ... May 2013 ............... $5300

World Membrane Separation Technologies

World demand for membranes will rise 9.2 percent yearly to $25.7 billion in 2017. Water treatment will remain the top market and will benefit from expansions or upgrades of water treatment infrastructures and a rebound in manufacturing. BRIC and other countries with large, developing industrial bases and stressed water resources will lead gains. This study analyzes the $16.5 billion global membrane industry, with forecasts for 2017 and 2022 by product, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#3006 ... May 2013 ............... $6300

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