Global demand for internal combustion engine (ICE) and related filters is expected to expand 4.7 percent per year to $34.0 billion in 2020. Growth in this market is largely determined by trends in the automotive industry, and rising numbers of motor vehicles in use and expanded industry production levels will be the primary factors supporting ICE filter sales growth through 2020.

China to surpass US by 2025

The largest national markets for ICE filters in 2015 were the United States and China, representing 17 and 12 percent of global demand, respectively. The Chinese market for these products will post robust advances through 2020, as economic development in the country leads to an expansion in motor vehicle production and park. By 2025, China is expected to surpass the US to become the largest ICE filter-using country in the world.

India to post fastest ICE filter gains

The strongest growth in ICE filter demand through 2020 is expected to occur in India. In 2015, the country had just 28 motor vehicles in use per 1,000 people, but this number will increase to 40 vehicles per 1,000 by 2020. Although this will still be well below the world average, it will lead to robust expansion in related ICE filter demand. India also has more ICE motorcycles in use than any other country in the world, and the nation's motorcycle park will climb faster than its motor vehicle park.

Motor vehicle market to remain dominant worldwide

The motor vehicle market accounted for 74 percent of total ICE filter sales in 2015 and will remain the dominant market through 2020, increasing 4.4 percent annually. Growth will be supported by an expansion of the world motor vehicle park, growing production levels, and greater use of products such as cabin air filters and diesel particulate filters. However, price increases in this market will be restrained by the pricing pressures exerted by automotive manufacturers and the growing portion of ICE filters produced in countries with lower labor costs, which will limit overall value gains. Furthermore, the small, but growing, numbers of electric vehicles produced and in use will dampen filter sales to some degree.

Study coverage

This Freedonia study analyzes the $27.0 billion global internal combustion engine and related filter market. It presents historical demand and shipment data (2005, 2010, and 2015) as well as forecasts (2020 and 2025) on a country-by-country basis. Demand is broken out by product (oil filters, air intake filters, fuel filters, and other filter types) and by market (motor vehicles, other transportation equipment, and off-highway equipment and other key markets). This study also analyzes the industry structure, evaluates company market share and lists global competitors.
Contents Summary

Introduction

Executive Summary

Market Environment

Overview
Factors Influencing Regional Internal Combustion Engine & Related Filter Markets
Regional Overview
Demand
Production
International Trade
Demand by Product
Oil Filters
Air Intake Filters
Fuel Filters
Other Internal Combustion Engine & Related Filters
Demand by Market
Motor Vehicles
Other Transportation Equipment
Off-Highway Equipment & Other

North America
Economic Overview
ICE & Related Filter Supply & Demand
ICE & Related Filter Demand by Type & Market
United States
Canada
Mexico

Western Europe
Economic Overview
ICE & Related Filter Supply & Demand
ICE & Related Filter Demand by Type & Market
Germany
France
Spain
Italy
United Kingdom
Other Western Europe
Netherlands
Belgium
Sweden
All Other

Asia/Pacific
Economic Overview
ICE & Related Filter Supply & Demand

ICE & Related Filter Demand by Type & Market
China
India
Japan
Indonesia
South Korea
Australia
Taiwan
Other Asia/Pacific

Other Regions
Central & South America
Economic Overview
ICE & Related Filter Supply & Demand
ICE Filter Demand by Type & Market
Brazil
Other Central & South America
Eastern Europe
Economic Overview
ICE Filter Supply & Demand
ICE Filter Demand by Type & Market
Russia
Poland
Other Eastern Europe
Africa/Mideast
Economic Overview
ICE Filter Supply & Demand
ICE Filter Demand by Type & Market
Turkey
Other Africa/Mideast

Industry Structure
Factors Influencing the Internal Combustion Engine & Related Filters Industry
Industry Composition
Market Share
Competitive Strategies
Research & New Product Development
Marketing & Distribution
Cooperative Agreements
Mergers & Acquisitions
Company Profiles

Tables & Charts

Executive Summary
1 Summary Table

Overview
1 Global Internal Combustion Engine & Related Filter Demand by Region

Industry Structure
1 Global ICE Filter Sales by Company, 2015
Cht World ICE Filter Market Share, 2015
2 Selected Acquisitions & Divestitures
3 Selected Cooperative Agreements

... plus macroeconomic indicators
This study can help you:

• Determine your market & sales potential
• Learn more about industry competitors
• Assess new products & technologies
• Identify firms to merge with or acquire
• Complement your research & planning
• Gather data for presentations
• Confirm your own internal data
• Make better business decisions

Global Internal Combustion Engine & Related Filters Market
Industry study with forecasts for 2020 & 2025

Table 6-10 | Indonesia: Internal Combustion Engine & Related Filter Demand by Type & Market (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
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<tr>
<td>Motor Vehicles in Use (mil)</td>
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<tr>
<td>$ mv filter/mv in use</td>
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<tr>
<td>ICE &amp; Related Filter Demand</td>
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<tr>
<td>By Type:</td>
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<td>Oil Filters</td>
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<td>Air Intake Filters</td>
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<td>Fuel Filters</td>
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<td>Other Filters</td>
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<td>By Market:</td>
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<td>Motor Vehicles</td>
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<td>Other Transportation Equipment</td>
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<td>Off-Highway Equipment &amp; Other</td>
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<td>% Indonesia</td>
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<tr>
<td>Asia/Pacific ICE/Related Filter Demand</td>
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</tbody>
</table>

Source: The Freedonia Group

Table 7-11 | Poland: Internal Combustion Engine & Related Filter Supply & Demand (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
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</thead>
<tbody>
<tr>
<td>Gross Domestic Product (bil 2014$)</td>
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<td>$ filters/000$ GDP</td>
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<td>ICE &amp; Related Filter Demand</td>
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<td>ICE &amp; Related Filter Shipments</td>
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<td>% Poland</td>
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<tr>
<td>Eastern Europe ICE &amp; Related Filter Shipments</td>
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</tbody>
</table>

Source: The Freedonia Group

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Global Internal Combustion Engine & Related Filters Market
Industry Study with Forecasts for 2020 & 2025

Study #3481
January 2017
$6400

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World demand for gaskets and seals will rise 5.3 percent per annum to $70.8 billion in 2019. Growth in the machinery market will outpace motor vehicles. India will be the fastest growing national market, while China will post by far the largest advances in value terms. This study analyzes the $54.7 billion world gasket and seal industry, with forecasts for 2019 and 2024 by market and application for six world regions and 18 major countries. Total demand is given for an additional 9 countries. The study also evaluates company market share and profiles leading competitors.
#3480.............. December 2016 .............. $5200

World Gaskets & Seals
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#3345.............. December 2015 .............. $6200

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#3282..................June 2015 ...................$6500

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• Employing in-house analysts who meet stringent quality standards
• Interviewing key industry participants, experts & end users
• Researching a proprietary database that includes trade publications, government reports & corporate literature

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