

Global Internal Combustion Engine & Related Filters Market

Industry Study with Forecasts for 2020 & 2025

Study #3481 | January 2017 | \$6400



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,

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... plus macroeconomic indicators

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EASTERN EUROPE

Poland: ICE Filter Supply & Demand -- Demand for ICE filters in Poland totaled \$388 million in 2015, representing the second largest market in Eastern Europe behind Russia. Poland has higher per capita income levels than most of Eastern Europe, bolstering demand for ICE filters. The country also has a sizable motor vehicle manufacturing industry, further boosting overall ICE filter sales. ICE filter demand in the country rose 1.2% in 2015, exceeding regional growth.

ICE filter demand is expected to grow at a rate of 1.2% per annum to \$400 million by 2020, subject to EU emissions regulations. The country is expected to utilize the replacement of ICE filters through 2020. The replacement of ICE filters in Poland is expected to be 1.2% of EU countries' total ICE filter sales.

Commodity-type ICE filters account for the largest share of total output from facilities in Poland, although local manufacturing capabilities are improving. In 2015, industry shipments were \$398 million, and the country maintained a modest trade surplus. Poland primarily exports ICE filters to other parts of Eastern Europe, as well as to Africa and the Middle East. The major West European manufacturing countries -- such as France, Germany, Italy, and the United Kingdom -- are the leading external sources of supply, although Poland also imports ICE filters from other parts of Eastern Europe, the US, China, and South Korea.

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

Item	2005	2010	2015	2020	2025
Motor Vehicles in Use (mil)					
\$ mv filter/mv in use					
ICE & Related Filter Demand					
By Type:					
Oil Filters					
Air Intake Filters					
Fuel Filters					
Other Filters					
By Market:					
Motor Vehicles					
Other Transportation Equipment					
Off-Highway Equipment & Other					
% Indonesia					
Asia/Pacific ICE/Related Filter Demand					

Source: The Freedonia Group

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

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil 2014\$)					
\$ filters/000\$ GDP					
ICE & Related Filter Demand					
net exports					
ICE & Related Filter Shipments					
% Poland					
Eastern Europe ICE & Related Filter Shipments					

Source: The Freedonia Group

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

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Related Studies

Global Air & Fluid Filters Market

Global demand for air and fluid filters will grow 5.4 percent per year to almost \$45 billion in 2020. The US was the largest national market for such products in 2015, but more than one-fourth of new growth will occur in China during the forecast period. The study assesses the \$34.5 billion global air and fluid filters market, with historical data plus forecasts for 2020 and 2025 for supply and demand, plus demand by product and market, in 6 regions and 19 countries. The study also analyzes company market share and profiles global competitors.

#3443..... January 2017 \$6400

Gasket & Seal Market in the US

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

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.

#3345..... December 2015 \$6200

World Construction Machinery

World demand for construction machinery is forecast to advance 3.9 percent annually through 2019 to \$218 billion. China will be the fastest growing national market and surpass the US as the largest. Demand for excavators and loaders will advance at the fastest pace, fueled by rising construction and surface mining activity. This study analyzes the \$180 billion world construction machinery industry, with forecasts for 2019 and 2024 by product for six world regions and 23 major countries. The study also evaluates company market share and profiles industry participants.

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

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- 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

About The Freedonia Group

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