

Global Filters Market Forecast

Industry Study with Forecasts for 2020 & 2025

Study #3490 | March 2017 | \$6000



Growth in global demand for filters is predicated upon several macroeconomic factors. Increases in motor vehicle production and use, and regulations impacting vehicle emissions will have a key impact on the filters market, as vehicle filters total one-third of global filters demand. In addition, gains will be fueled by ongoing investments in water, wastewater, and power generation infrastructure.

Dominant Asia/Pacific region to endure more regulation

The Asia/Pacific region's position will continue to be bolstered by a large and growing manufacturing sector, particularly in the production of filter-containing products (e.g., motor vehicles, off-road equipment, and HVAC equipment) and in processes that use filters for product purity (e.g., beverages and pharmaceuticals). Increases in construction spending, the expansion of utilities infrastructure, and the enactment and enforcement of emissions regulations will further support filter sales, primarily as more governments become concerned with how air and water pollutants impact their manufacturing sectors and the health of their citizenry.

ICE & related filters will remain larger product category

Internal combustion engine (ICE) and related filters accounted for 44% of total global filter sales in 2015, and will remain the larger product category through 2020.

Growth in ICE and related filter sales will be bolstered by a healthy outlook for the global motor vehicle park, primarily in China and India. Growth in motor vehicle production will also contribute to gains in ICE and related filter sales. However, air and fluid filters will post more rapid gains.

Opportunities to exist in Africa/Mideast region

The Africa/Mideast region is forecast to achieve the fastest growth of all regions. Expanding from a small base, filter demand in the Africa/Mideast region will primarily benefit from advances in manufacturing output and construction spending. For example, the expansion of water and wastewater treatment infrastructure will provide opportunities for fluid filters designed to purify drinking water and reduce the amount of pollutants in wastewater streams.

Study coverage

This Freedonia industry study analyzes the global filters market. The study presents historical demand data (2005, 2010, and 2015) plus forecasts for 2020 and 2025 on a country-by-country basis. Demand is broken out by product (ICE and related filters, and air and fluid filters) and by market (motor vehicles, manufacturing, consumer and other). This study also analyzes company market share and provides competitive analysis on industry participants including CLARCOR, DENSO, Donaldson, MAHLE, and MANN+HUMMEL.

OVERVIEW

Air & Fluid Filters

Global demand for air and fluid filters is forecast to increase per year to \$ million. Pollution has on and fluid filters impact a considerable amount. Globally, new prolonged indoor air circulation. Up to 90% bodies of water. Up to 70% developing.

Fluid filters will remain the larger product category through 2020. Drivers in product demand include:

- increases in annual water use
- an expansion of water and wastewater treatment systems, particularly in developing countries
- stricter environmental regulations regarding water pollution
- increases in manufacturing activity, particularly in the beverage, chemicals, and pharmaceutical industries that need purified process fluids

Arising from a relatively smaller base, air filters are projected to expand the fastest through 2020 among all major filter product categories. Several factors supporting gains in air filter sales include:

- increases in manufacturing output, as the potential for noxious indoor air or the release of air pollutants outside increases when plants run for more hours or the number of operating plants expand
- stricter environmental regulations regarding air pollution

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Table 8-3 | Russia: Filters Demand by Product & Market, 2005 - 2025 (million dollars)

Item	2005	2010	2015	2020	2025
Russia Filters Demand					
By Product:					
Internal Combustion Engine/Related Air & Fluid					
By Market:					
Motor Vehicles					
Manufacturing					
Consumer					
Other Markets					

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

Table 5-1 | Western Europe: Filters Demand by Product & Market, 2005 - 2025 (million dollars)

Item	2005	2010	2015	2020	2025
Western Europe Filters Demand					
By Product:					
Internal Combustion Engine/Related Air & Fluid					
By Market:					
Motor Vehicles					
Manufacturing					
Consumer					
Other Markets					

Source: The Freedonia Group

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Related Studies

Global Air & Fluid Filters Market

Global demand for air and fluid filters is forecast to 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

Air & Fluid Filters

Sales of air and fluid filters in the US will expand 3.8 percent annually to \$9.7 billion in 2020. Advances will be fueled by a positive economic outlook and increasing consumer attention to domestic indoor air quality and tap water purity. The utilities and consumer segments will be the fastest growing markets. Air filters will slightly outpace the dominant fluid filters segment. This study analyzes the \$8.1 billion US filter industry, with forecasts for 2020 and 2025 by filter medium, product, and market. The study also evaluates company market share and profiles industry players.

#3379..... April 2016 \$5500

World Industrial Valves

World demand for industrial valves will rise 4.3 percent annually through 2019 to \$98.5 billion. Market growth in developing areas will outpace product demand in developed countries. The expansion and upgrading of water infrastructures will help sales increases. This study analyzes the \$80 billion world industrial valve industry, with forecasts for 2019 and 2024 by product and market for six world regions and 25 major countries. Total demand is given for an additional seven countries. The study also evaluates company market share and profiles industry players.

#3369..... January 2016 \$6300

World Pumps

Global demand for fluid handling pumps is projected to increase 5.5 percent annually to \$84 billion in 2018. The Asia/Pacific region will remain the largest market and the second fastest growing, behind Central and South America. The key positive displacement and centrifugal pump segments will offer the best growth opportunities. This study analyzes the \$64.4 billion world pump industry, with forecasts for 2018 and 2023 by product, market, world region, and for 35 countries. The study also evaluates company market share and profiles industry participants.

#3231..... January 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

The Freedonia Group 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 and other world markets. Industries analyzed by Freedonia include:

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