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# Filters in China

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Industry Study with Forecasts for **2017 & 2022**

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*Filter demand in China will rise at double digit rates due to water treatment plans necessitating better utility filters and a growing motor vehicle park that will lead to a sizable aftermarket.*

## Demand to rise 14% yearly to 90 billion yuan in 2017

Demand for filters in China is projected to grow 14 percent per year to 90.2 billion yuan in 2017. Sales gains will be fueled by growth in the production of motor vehicles and other transportation equipment and rapid growth in the motor vehicle park. Growth in manufacturing output, building construction spending, and other industrial activities will also drive filter sales. The market for consumer filters will be expanded greatly by urbanization. As personal income levels rise, Chinese residents will spend more on their personal health, leading to more home water and air purification equipment purchases. The aftermarket for filters will also benefit from more widespread knowledge about health and the need to replace filters more often.

## Motor vehicles to remain largest filter market

Motor vehicles will continue to represent the largest filter market through 2017. Demand will be supported by a growing motor vehicle park, leading to a rapidly developing aftermarket. The manufacturing sector will remain the second largest filter market through 2017, benefiting from increases in manufacturing activity.

Filter shipments are expected to register double-digit gains through 2017. Besides the impact of expanding demand, the continued entry of foreign suppliers into the Chinese market, continued investments by domestic makers, and higher filter prices will fuel growth of filter shipments. Imports

## Filter Demand in China (90.2 billion yuan, 2017)



Internal Combustion Engine (ICE) & Related Filters

Fluid Filters

Air Filters

photo: Guangzhou Clean-Link Filtration Technology Co.

will continue to account for a sizable share of demand for higher-end filters, though the growth rate is forecast to decelerate.

## ICE engine/related filters to remain largest segment

Internal combustion engine (ICE) and related filters represented the largest product category of filters in China in 2012 and demand for them will rise over 15 percent annually through 2017.

Although growth of motor vehicle and gas motorcycle production will be slow (compared to historical rates), production gains will still support substantial filter consumption. Filter sales will also be stimulated by robust growth in the stock of motor vehicles and other transportation equipment.

Fluid filtration product sales will be driven by rapid industry development. Fluid power filters are indispensable in producing such products as cement and chemicals. Demand for fluid filters will be also fueled by growth in both water and wastewater treatment.

Demand for air filters is expected to grow due to sales gains being fueled by rising output of products equipped with air filters, such as HVAC equipment. Rapid development of industries with air purification requirements will also spur the expansion of the air filter market. Influenced by severe air pollution in China, health concerns will drive consumers to purchase air filtration products.

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## Sample Text, Table & Chart

### MARKETS

#### Manufacturing

Demand for filters in the manufacturing market in China is expected to be the second largest market for filters in 2017, representing 18% of total filter sales in 2012, primarily due to strong demand for nondurable goods production and government-led industrialization.

The manufacturing market includes filters used by manufacturing applications. The first is for the purification of process fluids. Filters are used as pre-treatment in the production of high purity process water for the electronics industry and for use in the production of beverages, pharmaceuticals. Filters are also used as a primary clean-up filter for applications that have lower purity requirements. The primary driver for filters in the manufacturing market is the need to reduce pollution.

The manufacturing market will increase its share of total filter demand in 2017, accounting for 18% of total filter demand. Advances will be fueled primarily by ongoing production growth for most types of manufacturing products, in part due to government initiatives such as the Equipment Reviving Plan and an increase in the export tax refund. Gains will also stem from attention to pollution reduction across the manufacturing sector. In some applications filters are being replaced by high-end purification technologies such as membrane separation and distillation, but somewhat from growth of these specialty purification technologies most require the use of one or more conventional filters to perform pre-treatment stage in order to perform efficiently. Advances are spurred by growing interest in limiting the cost of water and materials by recycling used process fluids back into the system.

152

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TABLE V-2

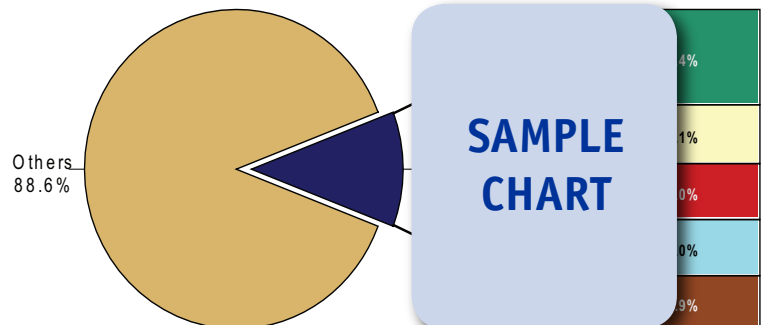
### MOTOR VEHICLE MARKET FOR FILTERS IN CHINA (million yuan)

Item	2002	2007	2012	2017	2022
Motor Vehicle Filter Demand					
By Application:					
Aftermarket					
OEM					
By Type:					
Air Intake					
Oil					
Fuel					
Cabin Air Filters					
Other					
% motor vehicles Filter Demand					

SAMPLE TABLE

CHART VI-1

### FILTER MARKET SHARE IN CHINA (46.8 billion yuan, 2012)



SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE IV-8**  
**FLUID FILTER SUPPLY & DEMAND IN CHINA**  
 (million yuan)

Item	2002	2007	2012	2017	2022
Nonagriculture Water Withdrawal (bil m <sup>3</sup> )					
¥ fluid filters/000 m <sup>3</sup> water					
Fluid Filter Demand					
Fluid Power Filters					
Other Fluid Filters					
+ net exports					
Fluid Filter Shipments					
% fluid filters Filter Shipments					

**SAMPLE  
TABLE**

### COMPANY PROFILES

**Foshan TORA Filter Element Manufacturing Company**  
 No. 23, Guanghe South Road  
 Heshun, Lishui Town, Nanhai District  
 Foshan, Guangdong  
 China  
 86-757-8512-  
<http://www.fil>

Annual Sales:  
 Employment:

Key Products:

**SAMPLE  
PROFILE**

Foshan TORA Filter Manufacturing Company is part of Tora Group Company Limited (China), a privately held umbrella company that is invested and managed by Thailand Taini Group. Affiliated companies include Foshan Zhongtai Automobile Fittings Manufacturing Company Limited, Foshan Baowang Trading Company Limited, Foshan Hetai Rubber Automobile Fittings Company Limited, and Foshan Zhongtai Colour-Printing & Packaging Factory.

The Company participates in the Chinese filter market via the production of oil, fuel, cabin air, and engine air filters for automobiles, passenger buses, and engineering machinery. Oil filters from Foshan TORA Filter Element Manufacturing are designed to remove impurities from engine oil in order to protect critical components, like bearings and crankshafts. The Company's fuel filters, including models for gasoline engines, are used to protect the fuel injector from congestion, wear, and damage. Cabin air filters are engineered to remove harmful air pollutants from the air before it enters the passenger cabin. Likewise, the Company produces engine air filters with high efficiency filter papers that remove impurities from the air before it enters the engine.

### STUDY COVERAGE

This Freedonia study, **Filters in China**, offers historical data (2002, 2007, 2012) plus forecasts (2017, 2022) for demand by type and by market in China. The study also assesses key market environment factors, examines technological developments, evaluates company market share and profiles 35 competitors in the China filter industry.



**OTHER STUDIES**

**Water Treatment Equipment**

Demand for water treatment equipment in the US is expected to rise 5.3 percent annually to \$15.0 billion in 2019. Conventional filtration will remain the largest product segment, while disinfection equipment and membrane systems will be the fastest growing types. The municipal market will remain dominant while resource extraction leads gains. This study analyzes the \$11.6 billion US water treatment equipment industry, with forecasts for 2019 and 2024 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3288 ..... May 2015 ..... \$5300

**Industrial Valves**

Demand for industrial valves in the US will rise 4.9 percent yearly to \$19.8 billion in 2018. The construction market will grow the fastest, as both residential and nonresidential segments rebound at double-digit rates. However, process manufacturing will remain the largest valve market. Demand for automatic valves will outpace standard valve sales. This study analyzes the \$15.6 billion US industrial valve industry, with forecasts for 2018 and 2023 by material, product, and market. The study also evaluates company market share and profiles industry participants.

#3234 ..... January 2015 ..... \$5200

**World Filters**

Global demand for filters is projected to increase a healthy 6.2 percent annually to \$80.0 billion in 2018. Most gains will come from large, developing industrial areas with nascent regulatory schemes, such as China and Indonesia. Manufacturing will be the fastest growing market, with rising production benefitting aftermarket filter demand. This study analyzes the \$59.1 billion world filter industry, with forecasts for 2018 and 2023 by product, market, world region, and for 22 countries. The study also evaluates company market shares and profiles industry players.

#3152 ..... July 2014 ..... \$6500

**World HVAC Equipment**

Global demand for HVAC equipment is forecast to rise 5.7 percent annually to \$120 billion in 2018. The Asia/Pacific region will remain the dominant geographic market, while North America grows the fastest. Heat pumps will lead gains based on lower penetration rates and multiple abilities to heat and cool air, and heat water. This study analyzes the \$91.5 billion world HVAC equipment industry, with forecasts for 2018 and 2023 by product, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3154 ..... May 2014 ..... \$6300

**Filters**

US filter demand will rise 3.6 percent annually to \$14.8 billion in 2018. Motor vehicles will remain the largest market, but will be outpaced by the industrial and manufacturing, consumer and utilities markets. Likewise, air and fluid filters will grow faster than internal combustion engine filters. The filter aftermarket will be aided by newer, more expensive products. This study analyzes the \$12.4 billion US filter industry, with forecasts for 2018 and 2023 by filter medium, product and market. The study also evaluates company market share and profiles industry players.

#3125 ..... March 2014 ..... \$5300

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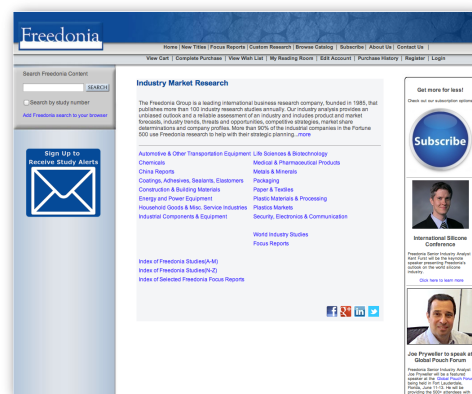
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