Worldwide Automotive Filtration

Description: This Report comprises two parts:

PART I - ENGINE FILTRATION (AIR, OIL FUEL)

PART II - CABIN AIR FILTRATION

This extensive report deals in Part I with engine filtration. Cabin air filtration, a fast growing, relatively new application is discussed in Part II. This report is available as Part I, respectively Part II** separately, and also at a reduced price, as a complete report (Part I and II together - 167 pages).

- air induction, engine oil, inline fuel

- Part II has been updated in July 2006

We truly believe that this “older” report is still very meaningful to acquaint someone with the “basics” and little has changed regarding the application, major markets and technology with regard to Part I. This market is still 90% based on “cellulose” and cellulose/synthetic filter media worldwide.

Part I (air induction, engine oil, inline fuel filters) represents a $460 million filter media market worldwide. Ninety percent of this material is based on cellulose wet laid paper and wet laid nonwovens (cellulose/synthetic fiber mixture). For air induction, a few engine oil and heavy duty fuel filtration applications, also synthetic nonwovens such as needled felts/composites and non-paper media are being used. The trend to more open heavier synthetic nonwovens is apparent; however, the much higher price will influence the conversion ratio from conventional paper-based to synthetic nonwoven media.

AHLSTROM is the undisputed No. 1 worldwide leader with 45% - 50% market share in most markets around the world. We believe that future mergers in the automotive industry such as MERCEDES/CHRYSLER will continue and will have impact on future media developments, global pricing to be one of the new aspects. Manufacturing presence in all major markets (Japan is crucial), today a convenience, tomorrow is an absolute requirement and will give global players an edge. Platform policy and system suppliers create a 6 - 8 year cycle which is crucial for any company to supply standard equipment for new cars. The OES (spare parts/service divisions) business is substantial. In addition there is the so-called ‘free’ aftermarket.

Part II - This report has been updated in July 2006. Cabin air filtration worldwide was a $115 million business in 1998 for filters and at least $70 million worldwide for filter media. Particle filters and combination filters (particle and odor removal in one pleated concept) are the most common systems in Europe. In North America, now also in Japan and Korea, particle and combination filters are being used. In addition Australia, Brazil and Mexico are evolving markets.

The worldwide market in 1997 amounted to approximately 30 - 32 million units. In 1998 we expect 38 million units. There are only 5 major fabricators in Europe, 3 - 4 in North America and 3 in Japan. Of the 12 companies active worldwide, 2 are represented virtually in all major markets. FREUDENBERG is the world leader, No. 1 with varying market shares from 70% - 80% in Korea, Brazil and Mexico to 50% plus in Europe and North America.

The trend to combination filters is very obvious. We expect 3 - 4 million units in Europe in 1998 and possibly as many as 200,000 combination filters in North America in 1999. Prices are extremely competitive. Combination filters are being sold in Europe for large platforms at a current price of 2 - 2.5 times that of particle filters. By the year 2003 at least 25% of all particle filters will be converted to combination filters. In Europe the conversion could be as much as 50% - 60% (combination) of all cabin air filters installed in new cars in the year 2003.

Here again we emphasize, this was the situation in 1998. A brand new report reflects the 2006 market.
US IMPORT MARKET
EUROPEAN MARKET
MANUFACTURERS OF CABIN AIR FILTERS
FREUDENBERG
3M COMPANY
HELSA WERKE GMBH
MHB FILTRATION GMBH
KNECHT FILTERWERKE GMBH
FILTRAUTO/LABINAL
PURIFICATION PRODUCTS LTD
FRAM FILTER FRANCE
HENGST FILTERWERKE GMBH
REFURBISHING OLDER CAR MODELS
ASIAN MARKET
JAPAN
SOUTH KOREA
BRAZIL
MEXICO
AUSTRALIA
OTHER COUNTRIES
- WORLDWIDE MARKET FOR CABIN FILTERS (Units & Sales)
BRIEF BACKGROUND
EUROPE IN MM UNITS AND $ SALES
FORECAST EUROPE 1999 - 2003 in MM UNITS
SALES IN $MM
EUROPE 1997 SALES IN $ BY COMPANIES
USA IN MM UNITS AND $ SALES
FORECAST USA 1999 - 2003 in MM UNITS & SALES
USA 1997 SALES IN $ BY COMPANIES
JAPAN CURRENT AND FUTURE MARKETS (Units & Sales)
ROW - KOREA
AUSTRALIA, BRAZIL
MEXICO
- GRAND TOTAL IN MM UNITS WORLDWIDE
- GRAND TOTAL IN MM $ WORLDWIDE
FILTER MEDIA REQUIREMENTS FOR CABIN AIR FILTERS
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