Air Filter Market: Key Findings 2010

Research Outline

Yano Research Institute has conducted a study on the air filter market as described below.
1. Research period: January to March 2010
2. Research targets: Enterprises and trade organizations in the air filter market in Japan
3. Research methodologies:
   - Face-to-face interviews with relevant personnel, supplemented by interviews via telephone and e-mail, and literature researches.

<What is air filter market?>
In this research, the air filter market is defined to include HEPA/ULPA filter market, mid/high performance filter market, dust filter market and bag filter market.

Key Findings

♦ Air filter market in fiscal 2008 was 50.6 billion yen, shrunk by 7% from the preceding fiscal year
The air filter market in fiscal 2008 was 50.6 billion yen in value, based on the shipment from the manufacturers (93.0% against the preceding year), which is made up as follows. HEPA/ULPA filter market was 9 billion yen (accounting for 17.8%), mid/high performance filter market 14 billion yen (27.7%), dust filter market 8.1 billion yen (16.0%), chemical filter market 4.5 billion yen (8.9%) and bag filter market 15 billion yen (29.6%).

♦ Air filter market in fiscal 2009 is projected to be 45.2 billion yen, with noteworthy activities to stimulate the demand, such as the introduction of environment-friendly products.
Due to the decrease in demand impacted by the recession, the air filter market in fiscal 2009 is estimated to shrink by 10.7% from the previous year, to 45.2 billion yen.
For the recovery of the market, it will become important to stimulate the demand by developing environment-friendly products with lower pressure loss, energy saving and waste reduction, and by creating new demand in new industries and applications, in addition to enhanced sales and promotional activities.

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Research Summary

1. Market overview

The air filter market in fiscal 2008 was 50.6 billion yen in value, based on the shipment from the manufacturers (93.0% against the preceding year), which is made up as follows. HEPA/ULPA filter market was 9 billion yen (accounting for 17.8%), mid/high performance filter market 14 billion yen (27.7%), dust filter market 8.1 billion yen (16.0%), chemical filter market 4.5 billion yen (8.9%) and bag filter market 15 billion yen (29.6%).

Although it may vary depending on the applications, the market in general has been impacted by the reduced demand in new facilities as capital investment has been suppressed. In repeat and replacement demands as well, the market has been shrinking due to the fact that the air filter price has dropped considerably, and the air filter replacement cycle has been extended for reducing the user side cost.

Note: HEPA filter stands for “High Efficiency Particulate Air Filter”, indicating high efficiency filter used for eliminating microscopic dust in the air. ULPA filter stands for “Ultra Low Penetration Air Filter”, indicating an enhanced version of HEPA filter with increased filter element density.

2. Noteworthy trends

For reducing the wastes in view of environment protection, the extension of service life, reduction of volume and miniaturization have been pursued on the air filters. Further, there is an increasing demand for re-use and recycling of air filters. In case of the products designed for the resource recycling system, the LCA (Life Cycle Assessment) method has been implemented for objective and quantitative assessment of the environmental impacts of such product in all steps of its life cycle from resource procurement, manufacture, use, disposal and transportation. Although environment-friendly air filters are not yet price competitive at the moment, the needs for filtering materials suitable for recycling and CO2 reduction is gradually increasing. Thus, future trend in demand needs to be watched.

3. Future prospects

As the sluggish demand under the economic recession will continue, the air filter market in fiscal 2010 is expected to shrink by 4.4% from the previous year to 43.2 billion yen. The domestic demand for commonly-used, general-purpose air filters is becoming mature, and it is difficult to expect substantial increase in demand. Also, as there is a strong desire for low price air filters among the users, the competitions might be intensified, and might possibly lead to further drops in unit price.

It is difficult to differentiate an air filter in performance for the same application. Therefore, the focus will be placed on the development of environment-friendly products, such as energy-saving, low pressure loss air filters, for creating demands in new industrial fields and applications, in addition to the reinforcement of sales and promotional activities.
Fig. 1: Air Filter Market Size Transition

Fig. 2: Air Filter Market Breakdown by Product Type (FY 2008)

Note: Figures based on the shipment in value from the manufacturers