

Construction Machinery Filter Market - Forecasts from 2020 to 2025

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Abstracts

The construction machinery filter market is expected to grow at a CAGR of 6.69% over the forecast period to reach a total market size of US\$1,304.347 billion by 2025, increasing from US\$884.404 million in 2019. Construction machinery filters protect the system components from the damage caused due to contamination. The work of each type of filter used in construction machinery is to enable flows and catch impurities such as dust (contaminants in the air), impurities in the fuel. Expanding construction activities in various parts of the world coupled with increasing investment in infrastructure is expected to drive the growth of the market during the forecast period.

Growing road construction

The growth of the market is attributed due to the increasing road and paving construction which uses heavy machinery. The use of construction machinery filter reduces the maintenance costs, therefore a significant increase in the efficiency of construction machinery for road construction across the various developing economies due to the fact the heavy investments are being done in countries such as China, India, and Indonesia for the construction of highly advanced and durable road transport networks. In addition, the development of rural areas in major developed economies like the United States has led to the construction of new roads and highways networks for the connection of rural and urban communities. For instance, recently, the U.S. Transportation Secretary announced the availability of US\$900 million in an infrastructure grant for the better connection of rural and urban communities and will facilitate the development of roads, rails, bridges, and transits, among others (Source: U.S. Department of Transportation). Simultaneously, according to United States Census Bureau, the value of annual total construction spending of highway and street was projected to increase from US\$87.823 million in 2018 to US\$100,220 million By 2019,

this trend is expected to increase, thereby anticipated to significantly drive the growth of the construction machinery filter market.

High investment in infrastructure across countries

Growing infrastructure investment across countries is expected to boost the demand for Structural Health Monitoring (SHM) systems due to the benefits they add pertaining to the sustainability of structures and low cost in maintenance and inspection after being built. Emphasis on superior infrastructure is a key policy factor in both the developing and the developed world as a robust infrastructure forms the base for overall economic growth and high productivity in public as well as private sectors. Be it the building of bridges, dams, buildings, stadiums, flyovers, railway stations, and shopping malls, or be it applications such as diagnosing vessels and platforms in marine industries, aircraft frames in aerospace and defense, and inspection of large machines, heavy investments are being made in all the above, hence, likely to give a push to the adoption of premium quality construction machines filters at an even larger scale.

By 2040, the global population is expected to grow by almost two billion people which shows an increase of twenty percent. Rural to urban migration will continue with the urban population growing by 46%, triggering massive demand for infrastructure support (source: The Global Infrastructure Outlook, GIHub). Besides, it is also estimated that the global infrastructure investment needs will reach nearly US\$94 trillion by the end of 2040 to keep pace with profound economic and demographic changes in various parts of the world (source: The Global Infrastructure Outlook, GIHub). Over half of the global infrastructure needs are in the Asia Pacific region and the United States of America is projected to witness the largest gap between actual and expected investment. These trends and projections are going to spur a massive wave of infrastructure spending from both public and private players across the world, which, in turn, is anticipated to drive the market for sustainable infrastructure using advance construction machinery which will further drive the demand for machinery filters in the coming years.

The North American and European region is holding a significant share in the market

The increasing need for capital investment in upgrading the existing old structures in the developed economies like the United States, Germany, UK, and France is expected to drive the growth of the market for construction machinery filter market during the forecast period. For instance, according to the National Bridge inventory report of the United States conducted by Federal highway administration in 2015, there are about 58,495 structurally deficient bridges in the United States which have advanced

corrosion, deterioration, cracking, or chipping to the deck and erosion of concrete bridge piers. Moreover, in its latest assessment of the United States infrastructure, the American Society of Civil Engineers (ASCE) gave the US a D+ estimating it would cost nearly \$3.6 trillion to upgrade infrastructure by 2020. In addition, rising construction investment in the region is anticipated to increase the demand for construction machines such as Wheeled Loader, Bulldozer, and Off-Highway Trucks among many others which will further boost the growth of the filter market. For instance, according to the United States Department of Commerce, the annual value of construction put in place has increased from US\$788332 million in 2011 to US\$1293982 million in 2018 showing a compound annual growth rate of 8.610%.

Competitive Insights

Prominent key market players in the Construction machinery filter market include Groupe HIFI, Donaldson, Bosch Rexroth, Parker Hannifin, Hydac, Eaton PLC, Baldwin, Caterpillar, Mahle, UFI Filter, and Pall Corporation among others. The number of players in the construction machinery filter market is large and growing with the opportunity to generate significant revenues because of increasing construction activities around the globe. The players in the global construction machinery filter market are implementing various growth strategies to gain a competitive advantage over their competitors in this market and are shifting their production plants in the Asia Pacific region due to the availability of raw material at lower prices and presence of large consumer base and better scope of the construction business in the region.

Segmentation:

By Type

Hydraulic fluid filters

Return filters

Line filters

Others

Transmission filters

Engine oil filters

Fuel filters

By Construction Machine

Excavator

Backhoe Loader

Crawler loader

Skid Steer Loader

Wheeled Loader

Bulldozer

Off-Highway Trucks

By Application

New Market

Replacement Market

By Geography

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

Spain

United Kingdom

France

Others

Middle East and Africa

Saudi Arabia

UAE

Others

Asia Pacific

China

Japan

India

Indonesia

Vietnam

Others

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