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Global Carbon-impregnated Pleated Filter Market Growth 2026-2032

https://marketpublishers.com/r/GB71E7ABFF1EEN.html
Date: October 2026
Pages: 148
Price: US$ 3,660.00 (Single User License)
ID: GB71E7ABFF1EEN

Abstracts

The global Carbon-impregnated Pleated Filter market size is predicted to grow from US$ 951 million in 2025 to US$ 1486 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

Carbon-impregnated Pleated Filter refers to a pleated air filtration product in which activated carbon is impregnated, coated, loaded or otherwise incorporated into fibrous filtration media to provide particulate filtration together with adsorption of gaseous contaminants. The filter typically uses synthetic fiber, fiberglass or composite nonwoven substrates formed into pleats and combined with activated carbon powder, fine carbon particles or carbon-loaded layers, supported by paperboard, plastic or metal frames and optional reinforcing mesh. The pleated structure increases effective filtration area while the activated-carbon phase adsorbs odors, volatile organic compounds and selected gaseous pollutants. Depending on product design, activated-carbon loading can range from relatively light odor-control coatings to high-loading molecular-filtration media exceeding 500 g/m?. Commercial products include standard pleated, deep-pleated, mini-pleated and composite-media configurations and cover pre-filtration, fine filtration and high-efficiency filtration grades. Key performance parameters include particulate efficiency, pressure drop, activated-carbon loading, adsorption capacity, basis weight, pleat depth, media thickness, air velocity and service life. Carbon-impregnated pleated filters are used in residential air purification, commercial HVAC systems, industrial ventilation and air treatment, automotive cabin filtration and other applications requiring simultaneous particle and gas-phase contaminant control.

Key Findings

Carbon-impregnated pleated filters combine particulate filtration and gas-phase

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adsorption within a compact replaceable filter format

Commercial HVAC remains a major application because carbon pleats can replace conventional pleated filters without major system modification

Activated-carbon loading varies significantly by application and directly influences adsorption capacity, pressure drop and filter cost

Composite and higher-efficiency carbon filters are gaining adoption where particulate and odor control must be achieved in a single stage

VOC control, indoor air quality and automotive cabin-air protection remain important long-term demand drivers

Market Trends

The Carbon-impregnated Pleated Filter industry is evolving from basic odor-control pleated filters toward multifunctional filtration products that combine higher particulate efficiency, greater activated-carbon loading and application-specific gas adsorption. Conventional products commonly use polyester or synthetic nonwoven media coated or filled with activated carbon and formed into standard pleats, enabling direct replacement of conventional panel or pleated filters. AAF's PREpleat AC, for example, combines pleated synthetic media with activated carbon and provides particulate filtration together with light-to-moderate odor control, while its higher-performance AmAir/C M13 incorporates approximately 200 g/m? of activated carbon together with MERV 13 particulate efficiency. Product development is increasingly focused on higher carbon utilization, improved bonding of carbon particles, reduced shedding and lower pressure drop. High-density carbon-loaded media and three-dimensional pleated structures also allow filters to remove broader groups of volatile organic compounds and molecular contaminants without the space requirements of traditional deep-bed carbon systems. Camfil's GigaPleat range illustrates this direction by embedding adsorbents within pleated three-dimensional nonwoven media for removal of VOCs and other airborne molecular contaminants. In automotive filtration, activated-carbon composite media increasingly combine coarse-particle, fine-particle and gas-removal layers, extending cabin filters from particulate protection toward multi-pollutant control. MANN+HUMMEL describes activated-carbon combination filters as providing particle filtration together with adsorption of odors, sulfur dioxide, nitrogen oxides, hydrocarbons and ozone. Longer term, the market is likely to move toward higher carbon surface utilization, thinner composite media, lower airflow resistance, specialized impregnation chemistry

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and greater integration of particulate and molecular filtration in a single replaceable element.

Market Dynamics

Drivers

Demand is driven primarily by rising indoor air-quality requirements, greater awareness of volatile organic compounds and odors, and the need to improve air-cleaning performance without substantially increasing HVAC system size. Carbon-impregnated pleated filters provide a practical upgrade path because many products can directly replace conventional disposable or pleated panel filters in existing air-handling systems. AAF specifically positions its activated-carbon pleated products as direct replacements where only a single filter stage is available, enabling both particle removal and odor control without expensive system modification. Commercial buildings, hospitals, schools, hotels and data centers increasingly require control of both particulate matter and gaseous contaminants, supporting adoption of multifunctional filters. Automotive cabin-air filtration provides another important demand base as vehicle occupants expect protection from exhaust gases, odors, fine particles and ozone. Industrial facilities also use carbon-loaded pleated filters where moderate concentrations of solvents, fumes or process odors must be controlled without installing large granular-carbon beds. The replacement nature of air filters further supports recurring demand, since adsorption capacity gradually declines as activated-carbon sites become saturated.

Restraints

The principal limitation is that thin carbon-loaded pleated media cannot provide the same adsorption capacity as large granular activated-carbon beds under severe gas-phase contamination. Carbon quantity is constrained by pleat geometry, airflow resistance, media strength and the requirement to keep filters compatible with standard HVAC housings. Increasing activated-carbon loading can improve adsorption capacity but also increases filter weight, material cost and potentially pressure drop. Performance also varies substantially with contaminant concentration, relative humidity, temperature, residence time and activated-carbon chemistry. In some applications, customers may incorrectly treat all carbon pleated filters as interchangeable even though adsorption performance differs materially between light carbon coatings and high-loading embedded media. Carbon dust shedding, uneven media loading and poor adhesion can also affect product quality in lower-end filters. In addition, activated carbon eventually becomes saturated, requiring periodic replacement even if particulate

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pressure drop remains acceptable, which can complicate maintenance scheduling.

Opportunities

Major opportunities are emerging in higher-efficiency combination filters, cleanroom molecular filtration, automotive cabin filtration and specialized chemically treated carbon media. HVAC customers increasingly seek single-stage filters capable of achieving meaningful particulate efficiency together with odor and VOC control, creating opportunities for products combining MERV 11–13 or equivalent particle performance with higher carbon loading. Cleanrooms, semiconductor facilities, laboratories and sensitive manufacturing environments offer a higher-value market for pleated adsorbent media targeting airborne molecular contaminants. Camfil's GigaPleat products, for example, use activated carbon, ion-exchange materials and chemically impregnated carbon to target VOCs, acids, bases and ozone. Automotive filtration offers additional opportunities as manufacturers move from conventional pollen filters toward activated-carbon and multifunctional cabin filters. Greater use of bio-based or coconut-shell activated carbon, lower-emission binders and recyclable frame materials can also support sustainability-focused product differentiation. Longer term, tailored activated-carbon surface chemistry and hybrid adsorbent systems will allow manufacturers to develop filters optimized for specific contaminants rather than relying primarily on generic odor-removal claims.

Challenges

A major industry challenge is standardizing gas-phase performance. Particulate filters can be evaluated through widely recognized efficiency and pressure-drop standards, while the adsorption capacity of carbon-loaded filters is strongly dependent on test gas, concentration, humidity and exposure conditions. This makes direct comparison between products difficult. Manufacturers must optimize several conflicting parameters simultaneously: higher carbon loading generally improves adsorption but increases mass and can affect airflow resistance; deeper pleats increase media area but may reduce effective spacing; stronger binders improve carbon retention but can block adsorption sites. Maintaining uniform carbon distribution across large production volumes is therefore an important manufacturing requirement. Another challenge is matching filter replacement intervals to actual gas loading, because odor breakthrough may occur before particulate pressure-drop limits are reached. For customers, this increases the importance of application-specific filter selection and lifecycle-cost evaluation.

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Industry Chain Analysis

The upstream of the Carbon-impregnated Pleated Filter industry includes activated carbon derived from coconut shell, coal, wood and other carbonaceous feedstocks; synthetic fibers, fiberglass, meltblown and nonwoven filtration materials; adhesives and binders; impregnation chemicals; wire or polymer support mesh; paperboard, plastic and metal frame materials; and pleating, coating, laminating and filter-assembly equipment. Midstream manufacturers coat, impregnate or thermally bond activated carbon onto fibrous substrates, laminate multiple functional layers, pleat the media, assemble frames and perform filtration and adsorption testing. Core value creation is concentrated in activated-carbon quality, loading uniformity, carbon-media adhesion, adsorption kinetics, pleat geometry, pressure-drop control, particulate efficiency and contamination-specific media formulation. Downstream customers include HVAC equipment manufacturers, building operators, air-purifier brands, industrial ventilation companies, automotive manufacturers, filtration distributors and replacement-filter service providers. The recurring replacement cycle means value extends beyond initial filter manufacturing to aftermarket distribution, building-maintenance contracts and vehicle replacement channels.

Segment Insights

By filter structure, standard pleated carbon filters represent the broadest conventional format because they can fit existing panel-filter housings and offer an economical combination of particle filtration and odor control. Deep-pleated products provide greater media area and can accommodate higher adsorbent loading, making them suitable for applications with higher airflow or longer required service life. Mini-pleated filters use tightly spaced pleats to maximize filtration area within compact dimensions and are increasingly relevant in high-performance HVAC, cleanroom and equipment-integrated applications. Carbon composite pleated filters combine multiple layers, such as coarse prefiltration media, fine-particle media, activated-carbon layers and support layers, and therefore provide broader pollutant control. MANN+HUMMEL's automotive combination-filter construction, for example, combines prefilter, primary filtration, activated-carbon and support layers in one composite medium.

By activated-carbon loading, filters below 200 g/m? primarily address light odor control and applications where low pressure drop and economical replacement are priorities. The 200–500 g/m? range provides a stronger balance between adsorption capacity, filter weight and airflow performance and is suitable for many commercial HVAC and industrial-air applications. Products above 500 g/m? target applications requiring higher

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gas-phase capacity or longer service intervals, although filter structure and airflow resistance become increasingly important at these loading levels. Carbon loading should therefore not be interpreted independently of carbon type, particle size, pore structure and contact time.

By filtration grade, pre-filtration carbon filters combine coarse particulate capture with odor adsorption and are often installed upstream of finer filtration stages. Fine-filtration carbon filters provide improved particle removal together with gaseous-contaminant control and represent an important mainstream segment in commercial HVAC and cabin-air filtration. High-efficiency carbon filters integrate higher-performance particulate media with activated-carbon or molecular-filtration layers and are used where a single compact filter must address both fine particulate matter and gaseous contaminants. AAF's AmAir/C M13 demonstrates this higher-efficiency combined approach by pairing MERV 13 particulate filtration with high-density activated carbon.

Downstream Market Opportunities

Commercial HVAC systems represent one of the strongest downstream opportunities because offices, hotels, hospitals, schools, retail facilities and data centers require continuous ventilation and frequently have limited space for separate particulate and gas-phase filtration stages. Activated-carbon pleated products can often be installed directly in standard filter housings, lowering retrofit barriers. AAF specifically lists hospitals, hotels, schools, universities, data centers and multi-use properties among applications for its carbon pleated filters. Residential air purification provides high-volume demand through replacement filters for air cleaners and HVAC return systems, although unit prices are generally lower than specialized commercial products. Industrial air treatment offers higher-value opportunities in facilities handling solvents, odors or process emissions at moderate concentrations. Automotive cabin filtration is another major volume application, supported by demand for removal of road dust, exhaust gases, odors and ozone. Future opportunities are strongest where customers value compact multi-function filtration, frequent replacement cycles and improved indoor or cabin air quality.

Regional Insights

North America is a mature market for carbon-loaded pleated HVAC filters, supported by a large commercial-building stock, widespread use of standardized replaceable HVAC filter dimensions and established suppliers such as AAF International, Donaldson, Parker Hannifin, 3M, Columbus Industries, Glasfloss Industries and Smith Filter. The

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ability to replace conventional panel filters with activated-carbon pleated products supports aftermarket demand in offices, hospitals, hotels, schools and data centers. Europe also represents an important high-value market, with strong suppliers including Camfil, MANN+HUMMEL and Freudenberg Filtration Technologies. Demand is supported by building energy-efficiency requirements, indoor-air-quality management, automotive cabin filtration and industrial air treatment. European manufacturers are particularly active in multifunctional media and molecular-filtration technologies.

Asia-Pacific combines large manufacturing capacity with rapidly expanding demand. China has developed a broad air-filtration supply chain and domestic producers such as Yitong Filter, Hangzhou Darlly Filtration Equipment, Whalesens Technology, Succeeder and Guangzhou Sun Holy Wind Air Cleaning Products participate in pleated, activated-carbon and HVAC filtration markets. Growth is supported by commercial HVAC installation, air-purification equipment, electronics manufacturing, industrial ventilation and automotive production. Japan remains an important advanced-filtration market through companies such as Daikin/AAF, Toyobo and Nippon Muki, with strengths in filtration media, cleanroom applications and high-performance air filtration. The region's combination of large HVAC equipment production, automotive manufacturing and electronics industries is expected to support continued development of higher-performance carbon composite filters.

Competitive Landscape Analysis

The Carbon-impregnated Pleated Filter market is fragmented across global filtration groups, specialist HVAC-filter manufacturers, automotive-filtration suppliers and regional producers. AAF International has a broad and clearly differentiated activated-carbon pleated portfolio covering products such as PREpleat AC, FCP Carbon Pleat, AmAir/C and AmAir/C M13. Its product range extends from economical odor-control pleats to higher-efficiency combined particulate and gas-phase filtration, providing strong coverage across commercial HVAC applications. Camfil competes strongly in molecular filtration and specialized pleated adsorbent media, including deep-pleat and GigaPleat structures targeted at VOC and airborne molecular contamination control. MANN+HUMMEL participates through both HVAC and automotive filtration, with its Carboactiv Panel using pleated synthetic media coated with activated carbon and its automotive combination filters integrating particulate and gas-removal functions. Competition increasingly centers on carbon loading, adsorption efficiency, particulate filtration grade, pressure drop, carbon retention, product life and customization for specific contaminants. Large multinational companies benefit from application engineering, standardized testing and global distribution, while regional manufacturers

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compete through cost, flexible dimensions, OEM customization and rapid delivery. As customers place greater emphasis on simultaneous particle and gas-phase control, competition is expected to shift from basic carbon-coated filters toward engineered composite media and application-specific adsorbent formulations.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Carbon-impregnated Pleated Filter Industry Forecast” looks at past sales and reviews total world Carbon-impregnated Pleated Filter sales in 2025, providing a comprehensive analysis by region and market sector of projected Carbon-impregnated Pleated Filter sales for 2026 through 2032. With Carbon-impregnated Pleated Filter sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Carbon-impregnated Pleated Filter industry.

This Insight Report provides a comprehensive analysis of the global Carbon-impregnated Pleated Filter landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Carbon-impregnated Pleated Filter portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Carbon-impregnated Pleated Filter market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Carbon-impregnated Pleated Filter and breaks down the forecast by Filter Structure Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Carbon-impregnated Pleated Filter.

This report presents a comprehensive overview, market shares, and growth opportunities of Carbon-impregnated Pleated Filter market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Filter Structure Type:

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Standard Pleated Carbon Filter

Deep Pleated Carbon Filter

Mini-Pleated Carbon Filter

Others

Segmentation by Activated Carbon Loading:

Low Carbon Loading Filter (<200 g/m?)

Medium Carbon Loading Filter (200–500 g/m?)

High Carbon Loading Filter (>500 g/m?)

Segmentation by Filtration Grade:

Pre-filtration Carbon Filter

Fine Filtration Carbon Filter

High-efficiency Carbon Filter

Others

Segmentation by Application:

Residential Air Purification

Commercial HVAC Systems

Industrial Air Treatment

Automotive Cabin Filtration

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Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

AAF International (Daikin Industries)

Camfil

Mann+Hummel

Donaldson Company

Parker Hannifin

3M

Freudenberg Filtration Technologies

Toyobo Co., Ltd.

Bosch

Columbus Industries

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Glasfloss Industries

Smith Filter Corporation

Permatron

RoboVent

Airex Filter Corporation

Leiman Filter

Reliable Filter Solutions

Oransi

Wood's Air Quality

Yitong Filter

Hangzhou Darlly Filtration Equipment

Nippon Muki Co., Ltd.

Whalesens Technology Co., Ltd.

Succeeder (Shanghai) Co.,Ltd.

Guangzhou Sun Holy Wind Air Cleaning Products Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Carbon-impregnated Pleated Filter market?

What factors are driving Carbon-impregnated Pleated Filter market growth,

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globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Carbon-impregnated Pleated Filter market opportunities vary by end market size?

How does Carbon-impregnated Pleated Filter break out by Filter Structure Type, by Application?

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