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Automotive Filters Market by Filters Type (Air, Fuel, Oil, Cabin, Coolant, Brake Dust, Oil Separator, Transmission, Steering, EMI/EMC, Coolant, DPF, GPF, Urea), Vehicle Type, Electric & Hybrid Type, Aftermarket & Region - Global Forecast to 2030

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Abstracts

The global automotive filter market is projected to grow from USD 12.9 billion in 2024 to USD 14.6 billion by 2030 at a CAGR of 2.1%. The global brake dust particle filter market is expected to grow at a CAGR of 24.5%. With increasing stringency in emission norms, the new standards also address particulate emissions from brakes and tires. For instance, Euro 7 regulations include provisions for addressing brake and tire dust emissions by setting limits on brake particle emissions for cars and vans, with specific limits of 7mg/km for Electric Vehicles (EVs) till 2025. Then, further, it should be reduced to 3 mg/km by 2035. Other than EU countries, benchmark EU regulations may also include these dust emissions in later years. This would further drive the demand for these brake and tire dust filters.

Secondly, with growing EV sales, the demand for new filter types like EMI filters and battery coolant filters is projected to increase in the coming years. Regions like China and Europe are aggressively moving towards electrification of vehicles. 22% of passenger cars sold in 2022 by China consisted of EVs and countries such as Norway and Netherlands are fastly adopting electric vehicles over ICE vehicles. This will result in a growing market demand for EMI and battery coolant filters.

'The Gasoline Particulate filters are the largest market in the fuel type segment.'

The gasoline particulate filter market holds the largest share in the fuel type segment. Countries are shifting from diesel vehicles to gasoline vehicles. For instance, in 2018,

over half of all newly registered passenger cars in the EU were powered by petrol (56.7%, up from 50.3% in 2017), with diesel representing 35.9% of the market. In December 2023, the diesel car market in the EU continued its decline, shrinking by 9.1%. This reduction was observed across various significant markets, including three of the largest: Spain (-26.5%), France (-22.2%), and Italy (-19.7%). Meanwhile, the petrol car market in the EU expanded by 5.1%, with notable contributions from significant markets such as Italy (+24.9%) and Germany (+16.1%). The automotive industry also shifted from MPFI (Multiple Point Fuel Injection) to GDI (Gasoline Direct Injection) as GDI engines potentially produce lower emissions of certain pollutants like nitrogen oxides (NOx) due to cooler and more precise combustion.

GDI engines are prone to emit suit; hence, with the growing demand for GDI engines, the newer emission regulations account for gasoline particulate emissions. In accordance with European Emission Standards (Euro 6c), the particulate matter limit for vehicles equipped with Gasoline Direct Injection (GDI) engines is set at 0.0045 grams per kilometer (g/km). Under the Euro 7 standard, regulations are established for particles exceeding 10 nanometers (PN10), indicating a broader scope encompassing smaller pollutants and a more comprehensive range of pollutant types. Hence, with growing demand for GDI engines and stringency in emission regulations, the demand for GPF is estimated to increase in passenger cars.

Europe is the second largest market for automotive filters.

Europe is the second-largest market for automotive filters due to stringent emission regulations, a large automotive industry, and a vast aftermarket network. The European Union (EU) enforces some of the world's strictest emission regulations for vehicles, such as Euro 6 and the upcoming Euro 7, which will bring mandates for brake dust emission, creating the market for brake dust particle filters. These standards also mandate significant reductions in harmful pollutants like particulate matter (PM), nitrogen oxides (NOx), and hydrocarbons (HC) from vehicle exhaust. Europe is fastly moving towards the electrification of vehicles; the EU aims to increase the presence of electric vehicles (EVs) from approximately 8 million to 40 million by 2030. Norway leads with electric vehicles constituting 80% of passenger vehicle sales in 2022, followed by Iceland (41%), Sweden (32%), the Netherlands (24%), and China (22%), rounding out the top countries with the highest proportion of EV sales in Europe. Policy changes and decreasing battery costs will drive the extensive adoption of electric vehicles (EVs), resulting in battery-powered vehicles reaching price parity with internal combustion engine vehicles across all major car markets and segments by 2030. With the growing adoption of EVs, the demand for EMI and battery coolant filters will also rise. EMI

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(Electromagnetic Interference) filters are necessary to mitigate the effects of electromagnetic interference on electronic components within battery systems. They help ensure the smooth operation and reliability of electric vehicle (EV) electronics by reducing or eliminating electromagnetic noise that can interfere with sensitive equipment. Battery coolant filters are essential components in EV battery systems to maintain the cleanliness and efficiency of the cooling system. They help prevent contaminants such as dirt, debris, and particles from entering the coolant, which could otherwise lead to clogging, corrosion, and reduced cooling performance.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.

By Company Type: Automotive Filter Manufacturers-80%, OEMs- 20%

By Designation: C Level Executives- 50%, Director level- 20%, and Others – 30%

By Region: North America-20%, Europe-30%, Asia Pacific-40%, RoW- 10%

The key players in the automotive filters market are MANN+HUMMEL (Germany), Donaldson Corporation (US), Robert Bosch GmbH (Germany), Denso Corporation (Japan), Parker Hannifin (US), Sogefi S.p.A (Italy), Cummins Inc. (US), MAHLE GmbH (Germany), Toyota Boshoku (Japan), and AHLSTROM-MUNKSJO (Sweden). Major companies' key strategies to maintain their position in the global automotive filters market are vital global networking, mergers and acquisitions, partnerships, and technological advancement.

Research Coverage

The study segments the automotive filters market by volume and value, based on region (Asia Pacific, Europe, North America, and Rest of the World (ROW), By ICE vehicles filter type (air filters, fuel filters, oil filters, cabin filters, brake dust filters, transmission filters, coolant filters, oil separators, urea filters, diesel particulate filters, crankcase ventilation filters, gasoline particulate filters, and steering filters), By media type (cellulose media and synthetic media), By fuel type (Gasoline fuel filters and diesel fuel filters), By material type (particle, activated carbon, and electrostatic), By ICE vehicle type (passenger cars, light commercial vehicles (LCV), trucks, and buses), by electric and hybrid vehicle type (BEV and PHEV), by off-highway equipment type (agricultural tractors and construction equipment) and by aftermarket filter type (air filters, fuel filters, oil filters, cabin filters, coolant filters, and transmission oil filters).

The study also includes an in-depth competitive analysis of the significant automotive filter manufacturers, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall automotive filters market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increase in stringency in emission regulations and fuel economy norms, Increasing electric and hybrid vehicle sales, Replacement demand created by increasing vehicle parc and miles driven), restraints (Use of washable/non-replaceable filters to restrain aftermarket demand, the surge in adoption of battery electric vehicles (BEVs)), opportunities (Advancements in Filtration Media Technology, rising demand of electric & hybrid cars), and challenges (Availability of local products to hinder demand for OE Filters, fluctuating raw material) influencing the growth of the automotive filters market.

Product Development/Innovation: Detailed insights on upcoming technologies and new product & service launches in the automotive filters market.

Market Development: Comprehensive market information – the report analyses the authentication and brand protection market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive filters market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like MANN+HUMMEL (Germany), Donaldson Corporation (US), Robert Bosch GmbH (Germany), Denso Corporation (Japan), and MAHLE GmbH (Germany) among others in automotive filters market.

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