

HVAC Filters Market by Material (Fiberglass, Synthetic Polymer, Carbon, Metal), Technology (HEPA, Electrostatic Precipitator, Activated Carbon), End-use Industry (Building & Construction, Pharmaceutical, Food & Beverage) & Region - Global Forecast to 2026

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Abstracts

The global HVAC filters market is estimated to be USD 3.5 billion in 2021 and is projected to reach USD 4.5 billion by 2026, at a CAGR of 5.0% from 2021 to 2026. The driving factor for the HVAC filters market is increasing demand for HVAC systems, growing awareness about indoor air quality, and government regulations and policies for efficient filtration. Further, increasing investments in the construction sector and technological advancements in HVAC filters are expected to offer significant growth opportunities to manufacturers.

“Synthetic polymer is expected to be the fastest-growing material segment in the HVAC filters market during the forecast period.”

Synthetic polymers are used for efficient filtration in residential and industrial HVAC systems. Polytetrafluoroethylene (PTFE), polyester, poly-vinylidene fluoride (PVDF), polyethylene, and polypropylene are used for the manufacturing of filter materials. The filtration of air in a synthetic polymer material occurs on its surface, whereas in fiberglass, the filtration happens within the filters. This property makes synthetic polymers suitable for application in industries such as pharmaceutical, food & beverage, automotive, and electronics & semiconductor. Synthetic polymer filter materials are available in the form of pleats or stretched films, which are either made from spun-bond or melt-blown manufacturing processes. The pleats increase the surface area and make the filters more efficient at capturing airborne particles in the HVAC systems. Pleated synthetic polymer air filters, with a rating of 7-13, can provide more efficiency as

compared to high-efficiency particulate air (HEPA) filters but at a lower cost. Due to their durability, these filters can be washed and reused. Pleated synthetic polymer air filters are abundantly available, have lesser airflow resistance compared to HEPA filters, and support the silent operation of the blower fan of the HVAC system.

“HEPA segment is expected to be the largest technology in the HVAC filters market during the forecast period.”

HEPA technology consists of a filter that forces air through a thin mesh, which traps harmful particles such as pollens, molds, pet dander, bacteria, and dust mite debris to prevent them from entering the ambient environment. According to the US Department of Energy (DOE) and the US National Institute for Occupational Safety and Health (NIOSH), to meet the HEPA standard, a filter must trap 99.97% dust particles that are 0.3 microns or larger in size. HEPA filters have diverse application areas, including residential buildings, pharmaceutical production, food & beverages, and clean rooms in the electronics & semiconductor industry, among others. In the pharmaceutical industry, HEPA filters are installed in the production spaces, which are required to be free from contaminants. These filters also protect patients from infection and employees and visitors from airborne organisms. The only disadvantage of the HEPA filter technology is that it generates a barrier for smooth airflow, which may result in the failure or low performance of HVAC systems.

“APAC is the largest market for HVAC filters”

APAC accounted for the largest share of the HVAC filters market in 2020. Improved economic conditions of developing countries and rising global warming have contributed to the growth of the HVAC filters market in the region.

The HVAC filters market in APAC has been segmented into China, Japan, India, South Korea, Indonesia, Australia, and the Rest of APAC. China is projected to dominate the market during the forecast period, owing to the growing commercial building construction in the country. On the other hand, the market in India is projected to register the highest growth rate owing to rapid urbanization & industrialization, growing disposable incomes, and increasing building and construction activities in the country.

In APAC, several associations, including the Indian Society of Heating, Refrigerating and Air Conditioning Engineers (ISHRAE), Australian Institute of Refrigeration Air-conditioning and Heating (AIRAH), Air Conditioning and Mechanical Contractors Association of Australia (AMCA), Japan Refrigeration and Air Conditioning Industry

Association (JRAIA), and Air Conditioning Engineering Association of Thailand (ACAT), support the adoption of efficient HVAC systems. This support drives the market for HVAC filters in the region.

This study has been validated through primaries conducted with various industry experts worldwide. These primary sources have been divided into 3 categories, namely by company, by designation, and by region.

By Company Type- Tier 1- 40%, Tier 2- 30%, and Tier 3- 30%

By Designation- C Level- 20%, Directors – 10%, and Others - 70%

By Region- North America- 30%, Europe- 30%, Asia Pacific- 20%, Middle East – 10%, and South America - 10%

3M Company (US), Parker-Hannifin Corporation (US), Camfil AB (Sweden), Mann+Hummel (Germany), American Air Filter Company, Inc. (US), Donaldson Company, Inc. (US), among others, are the leading HVAC filters manufacturers, globally. The study includes an in-depth competitive analysis of these key players in the HVAC filters market, with their company profiles, and key market strategies.

Research Coverage:

The report covers the HVAC filters market based on material, technology, end-use industry, and region. This study aims at estimating the size and future growth potential of the market across various segmentation types. It also includes an in-depth competitive analysis of the key market players, along with their profiles and key growth strategies.

Key Benefits of Buying the Report:

Comprehensive coverage and analysis of the HVAC filters market in Asia Pacific, Europe, North America, South America and Middle East & Africa

Competitive landscape of major players and their developments in HVAC filters market

Identifying high-potential opportunities for HVAC filters

Identifying and targeting high-growth application segments

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*Details on Business overview, Products offered, Recent developments, SWOT analysis, Winning imperatives, Current focus and strategies, Threat from competition, and Right to win not be captured in case of unlisted companies.

13 APPENDIX**13.1 DISCUSSION GUIDE****13.2 KNOWLEDGE STORE: MARKETSDANDMARKETS SUBSCRIPTION PORTAL****13.3 AVAILABLE CUSTOMIZATIONS****13.4 RELATED REPORTS****13.5 AUTHOR DETAILS**

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