

Oil Filter & Fuel Filter Market by Vehicle Type (Passenger Cars, LCVs & HCVs), Market Type (OE & Aftermarket), Filter Type (Oil & Fuel), Fuel Type (Gasoline & Diesel) & Geography - Industry Trends & Forecast to 2018

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Abstracts

Emerging green initiatives, emphasis on energy security & sustainability by reducing dependency on non-renewable energy resources and tougher environmental policies and regulations have been changing the overall dynamics of the fuel industry. For instance, introduction of biofuels derived from organic matter such as animals, plants or sometimes even algae is posing new challenges in filtration of soft organics and water from the fuel. Evolving engine designs need high levels of oil and fuel cleanliness. As automobile engine technologies across the world became more and more sophisticated, providing clean oil & fuel to these complex engines also have become very critical thus, making oil filter and fuel filter an integral part of modern automobiles. Strict emission standards and engine efficiency norms enforced by governments and legislative bodies all over the world has forced automotive manufacturers to look for various avenues to meet these standards, ending up driving the demand for automotive oil filter & fuel filter.

This report covers the market for two types of filters - automotive oil filter & fuel filter in terms of volume and revenue. The OE market volume is provided in terms of '000 units; while the replacement market volume is provide in terms of million units and revenue for the market segments have been provided in terms of \$million from 2011 to 2018. The market for oil and fuel filters is broadly segmented by OE and Aftermarket. Both the type of markets are segmented by-Vehicle Type (Passenger cars, LCVs and HCVs), Filter Type (Oil and Fuel), Fuel Type (Gasoline and Diesel), and Geography (Asia-Pacific, Europe, North America & Rest of the World). The OE Filter Type segmentation provides a country-level analysis for each region considered in this report.

Automotive Oil Filter & Fuel Filter Market Revenue by Geography, 2011 - 2018 (\$Million)

Automotive Oil & Fuel Filters Market

Source: MarketsandMarkets Analysis

This report classifies and defines the oil filter & fuel filter market volume and revenue in the automotive industry. It also provides qualitative data about the filters/components. The report also provides a comprehensive review of market drivers, restraints, opportunities, challenges and key issues in the automotive oil filter & fuel filter market. The key players in the market for both the technologies have also been identified and profiled.

The major players in the automotive filtration market are identified as Mann+Hummel (Germany), Affinia Group Inc. (U.S.), Fram/UCI (U.S.), Cummins Inc. (U.S.), Sogefi SpA (Italy), Donaldson Co. Inc. (U.S.), Mahle GmbH (Germany), and Clarcor Inc. (U.S.)

Advancements In Filtration Technology: Changing Buyer Preference

The developments in the field of filtration technology have been affected by the type of fuel used in a vehicle. Earlier, gasoline was the most dominant fuel across the passenger car and LCV segments, but with the development of ultra-low sulfur diesel, vehicles running on gasoline have been reducing across the world; which even includes the countries of U.S. and Japan where gasoline was the primary fuel use in vehicles. Diesel although is more efficient, but is not a clean fuel and requires high level of filtration than gasoline. Considering these developments, filtration technology manufacturers have been concentrating and manufacturing filters, which would make this fuel much cleaner, inturn increasing the efficiency and life of an engine and decreasing the level of emissions. The introduction of such high performance and efficient diesel filters have led to increasing preference of diesel vehicles over gasoline vehicles across various regions. The growing gasoline prices have been adding fuel to this growth and thus, in the coming years the global share of diesel vehicles is expected to show continuous rise.

Scope of the report

The automotive oil filter and fuel filter market have been analyzed in terms of volume

Oil Filter & Fuel Filter Market by Vehicle Type (Passenger Cars, LCVs & HCVs), Market Type (OE & Aftermarket),...

and revenue based on the segmentation given below.

By Market Type

OE

By Vehicle Type

Passenger cars

LCVs

HCVs

By Filter Type

Oil

Fuel

By Fuel Type

Gasoline

Diesel

By Geography

Asia-Pacific

Europe

North America

ROW

Replacement Market

By Vehicle Type

Passenger cars

LCVs

HCVs

By Filter Type

Oil

Fuel

By Fuel Type

Gasoline

Diesel

By Geography

Asia-Pacific

Europe

North America

ROW

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About

The future of the automotive oil and fuel filters market will be determined by factors such as reduction of carbon footprint, energy independence, invention of low sulfur diesel, growing interest in diesel powered vehicles, better engine design, and implementation of stringent environmental norms. These parameters will significantly influence how business is going to be conducted in the filtration segment.

Market Revenue Estimates

In 2013, the automotive oil filter market is expected to be led by the Asia-Pacific region with revenue of \$XX million, which is projected to reach \$XX million in 2018 at a highest CAGR of XX%. Europe would follow Asia-Pacific with revenue of \$XX million in 2018 from \$XX million in 2013, growing at a CAGR of XX%. The North American region is estimated to grow at a CAGR of XX% with revenues reaching \$XX million and \$XX million in 2013 and 2018 respectively. The ROW oil filter market revenue is expected to grow at a promising CAGR of XX% over the forecast period. In the fuel filter market too, Asia-Pacific is expected to lead the way with revenue of \$XX million and \$XX million in 2013 and 2018, growing at a CAGR of XX%. Europe would be the second largest market for these filters with revenues reaching \$XX million in 2018 from \$XX million in 2013 at a CAGR of XX%. The North American fuel filter market is expected to show the highest CAGR of XX% with revenues reaching \$XX million in 2018. As many automotive manufacturers are setting up their bases in countries such as Brazil and Russia, the fuel filter market in the ROW region is estimated to generate revenue of \$XX million in 2018 from \$XX million in 2013, growing at a CAGR of XX%.

Country Level Market Revenue Estimates, By Filter Type

In the Asia-Pacific region, China is expected to lead the oil filter market with revenue of \$XX million and \$XX million in 2013 and 2018 at a CAGR of XX%, whereas Japan is expected to generate revenue of \$XX million in 2018 from \$XX million in 2013 at a CAGR of XX%. India and South Korea would follow Japan with revenues reaching \$XX million and XX million in 2018 from \$XX million and \$XX million in 2013 at CAGRs of XX% and XX% respectively during the projected period. This can be owed to the high vehicle production levels in the countries of China and Japan when compared to that of India and South Korea. The filter consumption is directly dependent on the number of vehicles produced.

In the case of fuel filters, China is expected to generate revenue of \$XX million in 2018 from \$XX million in 2013, at a growth rate of XX% compounded annually; whereas Japan would generate revenue of \$XX million in 2013 and \$XX million in 2018 at a CAGR of XX%. Japan would be followed by India with revenue of \$XX million in 2013, which is projected to reach \$XX million in 2018 at a CAGR of XX% over the forecast period. South Korea is expected to show the highest CAGR of XX% over the five years with revenues increasing from \$XX million in 2013 to \$XX million in 2018.

Automotive Oil & Fuel Filters: Market Revenue Share, By Filter Types & Revenue, By Vehicle Types

The overall revenue from automotive oil and fuel filters is expected to rise from \$XX million to \$XX million at a CAGR of XX%. The oil filter segment is expected to account for \$XX million in 2013 and \$XX million in 2018, while the fuel filter segment would account for \$XX million and \$XX million respectively for the same period. The CAGR over the years 2013 to 2018 for oil and fuel filters segments are expected to be XX% and XX% respectively. The major reason for the wide disparity between the two types of filters is the cost difference between them. The oil filter which has a smaller life comes at lower prices than the fuel filter. The rapidly growing passenger car segment is expected to grow at a CAGR of XX% to generate revenues of \$XX million and \$XX million in 2013 and 2018 respectively. The oil filter segment is expected to account for \$XX million and \$XX million, while the fuel filter segment would account for \$XX million and \$XX million in 2013 and 2018 respectively, segmental CAGRs being XX% and XX% for the oil and fuel filters. The LCVs segment is expected to account for \$XX million and \$XX million in 2013 and 2018 respectively, growing at a CAGR of XX%. Oil filters are estimated to generate \$XX million and \$XX million in 2013 and 2018 growing at a CAGR of XX%, while their fuel filter counterparts are expected to account for \$XX million and \$XX million in 2013 and 2018, giving the segment a CAGR of XX% over the five years. For 2013, the oil filter segment is expected to generate \$XX million, while fuel filters are expected to generate \$XX million which are expected to grow at CAGRs of XX% and XX% over the five year period to reach \$XX million and \$XX million in 2018. The HCVs segment is expected to generate \$XX million and \$XX million in the years 2013 and 2018 respectively, at a CAGR of XX%.

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