

FIBERS AND NEEDLED FELTS FOR BAGHOUSE SYSTEMS- AND LIQUID FILTRATION WORDLWIDE

March 2008

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SUMMARY & HIGHLIGHTS

This report is the most extensive and detailed report on this subject we have ever published during the last 28 years. For the first time we have listed fibers (Polyester, Homopolymer Acrylic, meta-aramid, PPS, P84, PTFE, Fiberglass) and fiber prices in all major markets – NORTH AMERICA, EUROPE, ASIA/PACIFIC, CHINA and ROW – the consumption of all fibers in tons, we have listed prices for needled felts worldwide. The total market size in sq yd. respectively in m² for each major market is the center of this publication.

The market for needled felts – worldwide – representing **roll goods** consumed in 2003 approx. 29,000 tons of fiber. In late 2005 that had increased to approx. 000 tons, mainly because of significant growth in China. By the end of 2007 we expected 000 tons. In 2003 we frankly 'underestimated' the Chinese market.

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The total worldwide filter media roll good market - in this segment - represented approximately 65 MMm² filter area (2003). In late 2005 that had increased to approx. ... MM m², in late 2007 to m²- the most dramatic increase in China.

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The sales value of worldwide filter media roll goods in 2003 amounted to \$ 000 MM for baghouse filtration. In late 2005 we concluded that the total media market for baghouse filtration had grown to \$ 000 MM. China was the main reason for the increase. In 2007 that number is according to our findings now \$ 000 MM. China is the key.

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Needled felt in baghouse filtration will be challenged by spun-bonded nonwoven media for pleated bag configurations and in addition by Durapex™ type fabrics. That has not changed in 2005 – 2007, but the jury is still out. In 2007 the total market for all needled felts – dry and liquid filtration - worldwide amounted to \$ 000 MM.

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The overall growth worldwide is tied into Government Legislation and **enforcement**, but we believe 3% to 5%/year until 2013 is reasonable except for China. We have detailed the Chinese baghouse market for 2007.

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Needled felts in - 2003 – were offered at prices below 1995 levels, and we were afraid – at that time – that this trend might have continued (if oil prices had stayed at \$30.00/barrel). **Oil Prices as of mid 2005 were \$ 55.00+ /barrel, as of August \$ 67.00/barrel. They had settled in the mid \$50’s/barrel by early November 2005. In mid 2007 however prices are up to \$71.00/barrel, changing everything. In November 2007 – as we now know – and again in late February 2008 – prices were close and above \$100/barrel. This must have consequences in 2008 regarding all fiber prices.**

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All needled felts worldwide for dry/dust and liquid filtration amounted in 2003 to \$564MM. By the end of 2007 we have concluded that the needled felt market for dry and liquid filtration media represented \$ 740.8 MM. China is the single largest reason for the tremendous increase.

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