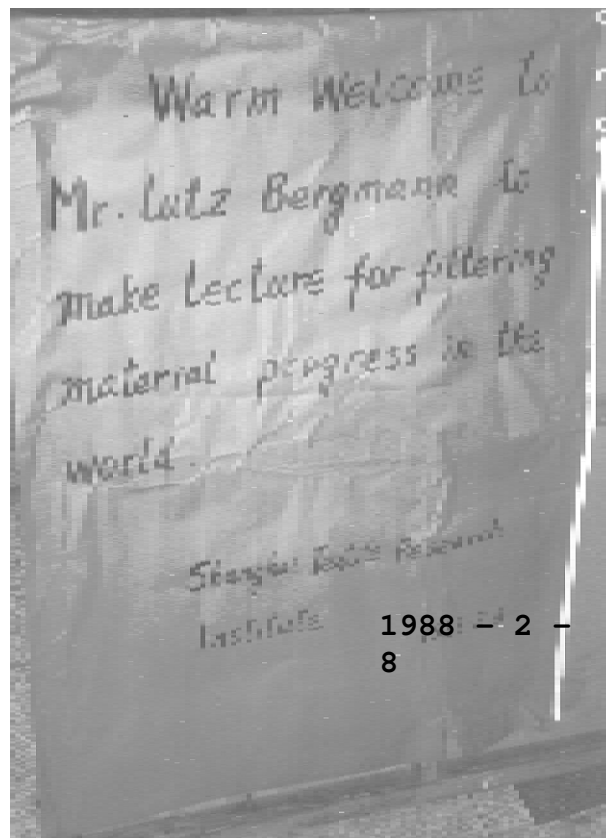


# CHINA 2006 – 2012 MEDIA FILTRATION

BY: FILTER MEDIA CONSULTING, INC.  
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## Table of Contents

	<u>Pages</u>
• Summary & Highlights.....	4
• Personal Notes.....	5
• Background Information.....	6
• Pollution Control.....	8
• Baghouse / Fabric Filtration.....	10
• Energy Market In China.....	11
• Steel Industry.....	14
• Cement Industry.....	16
• Incineration.....	18
• Aluminum Industry.....	18
• Road Building.....	20
• Filter Media for Baghouse Filtration.....	21
Meta-Aramid.....	22
PPS.....	22
P84.....	23
PTFE.....	23
ePTFE Membrane.....	24
Brief Overview/Summary of China Baghouse Market.....	25
OEM Original Baghouse Manufacturer.....	27
( address list with 14 complete Chinese companies )	
• Filter Media Manufacturer/Filter Bag Fabricator.....	28
- ( list with 62 media manufacturer and filter bag fabricator )	
• Woven Fiberglass.....	31
- ( list with 16 fiberglass fabric weaver )	
• Spunbonded Nonwovens.....	32
- ( 29 spunbonded nonwoven producer )	

- Wet-Laid Nonwovens, Cellulose Media.....33
  - ( 16 manufacturer of wet-laid nonwovens )
- Meltblown Nonwovens.....34
  - ( 20 of the largest meltblown nonwoven manufacturer )
- Vacuum Cleaner.....35
- Face Mask, Respirator.....36
  - ( 11 face mask/media manufacturer )
- HAVAC, HEPA-ULPA.....37
  - ( list of 31 fabricator of HVAC and HEPA filters )
- Automotive Filtration.....39
  - ( 38 companies offering automotive filters )
- Pleated Dust Cartridges and Pleated Bags.....41
- Liquid Filtration.....43
  - ( 7 companies offering liquid filtration elements )
- Media Manufacturer of Woven Fabrics.....45
  - ( list of 31 companies offering woven fabrics incl. metal screens)
- Metal Media.....46
- Disclaimer.....47
- Additional Reading

## **Summary & Highlights**

China has the largest filter media market for baghouse filtration with approximately 30million (MM) m<sup>2</sup> sold in 2005; 26 MM m<sup>2</sup>; polyester and 3 ½ - 4 MM m<sup>2</sup> of high temperature fabrics. In 2006 35 MM m<sup>2</sup> needled felts and 15 MM m<sup>2</sup> woven fabrics including `woven fiberglass`. This market is expected to `explode` into 100 MM m<sup>2</sup> by 2010 – 2012.

We further expect significant growth in HVAC in filtration due to new buildings of industrial and commercial complexes as well as central systems in 30 stories high apartment buildings. Companies like JOHNS MANVILLE and HOLLINGSWORTH & VOSE are participants against an increasing number of domestic suppliers.

HEPA and ULPA filtration will increase due to the fact that China is expected to be #1 in new semi-conductor plant build up within the next 3 to 5 years. Domestic manufacturer have to face new plant capacity from H&V and others coming on stream in 2007.

There is also growth in liquid filtration with regard to industrial and waste water plants but also tap water and over the counter filter for the growing middle class in coming years.

Automotive Filtration is fast growing – notably for air intake filters – with needled felts and composites. Cellulose media for engine oil and fuel filters will also grow. Cabin air filters are expected to represent strong growth applications in years to come (FREUDENBERG, JAPAN VILENE). (Specialty report available for worldwide consumption of cabin air filters )

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