

CHAPTER ONE: INTRODUCTION	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
INTENDED AUDIENCE.....	2
SCOPE OF REPORT	3
METHODOLOGY	3
INFORMATION SOURCES	3
RELATED BCC REPORTS	4
ANALYST'S CREDENTIALS.....	4
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	5
EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL MARKET FOR NONWOVEN FILTER MEDIA, THROUGH 2015 (\$ MILLIONS).....</i>	6
<i>SUMMARY FIGURE GLOBAL MARKET FOR NONWOVEN FILTER MEDIA, 2005–2015 (\$ MILLIONS).....</i>	7
 CHAPTER THREE: TECHNICAL OVERVIEW	8
<i>FIGURE 1 TYPES OF NONWOVEN FILTER MEDIA</i>	
<i>MANUFACTURING PROCESSES</i>	8
<i>FILTRATION OVERVIEW</i>	9
<i>SEPARATION BY NONWOVEN FIBERS</i>	10
Impingement.....	10
Coalescence	11
Entrapment.....	11
<i>FILTRATION TYPES</i>	11
Surface Filtration	11
Deep-Bed or Depth Filtration	12
Comparison of Types of Filtrations.....	12
<i>TABLE 1 COMPARISON OF FILTRATION TYPES.....</i>	13
NONWOVEN MATERIALS OVERVIEW.....	13
TYPES OF NONWOVEN FILTER MEDIA.....	14
<i>PHYSICAL AND CHEMICAL PROPERTIES</i>	14
<i>TABLE 2 RAW MATERIALS USED BY THE NONWOVEN FILTER MEDIA INDUSTRY.....</i>	14
Chemical Properties and Fiber Sources	14
Natural Fibers	15
Cellulose or Cotton.....	15
Wool	16
Other Natural Fibers.....	16
Synthetic Fibers.....	16
Acrylic Fibers	16

Aromatic Polyaramide	17
Fluorocarbon Polymer.....	17
Melamine Polymer	18
Polyester.....	18
Polyimide.....	18
Polyolefins and Polypropylene	19
Polyphenylene Sulfide	19
Glass	20
Bicomponent Fibers	20
Rayon.....	20
SUMMARY OF PHYSICAL AND CHEMICAL PROPERTIES	21
TABLE 3 KEY PHYSICAL PROPERTIES OF COMMERCIAL FIBERS USED IN NONWOVEN FILTER MEDIA INDUSTRY	21
TABLE 4 OPERATING PARAMETERS FOR FIBERS USED IN NONWOVEN FILTER MEDIA FOR LIQUID FILTRATION	22
TABLE 5 OPERATING PARAMETERS FOR FIBERS IN NONWOVEN FILTER MEDIA FOR GAS FILTRATION	23
Key Physical Properties and Testing of Filter Media	23
TABLE 6 PHYSICAL PROPERTIES OF FIBERS THAT INFLUENCE FILTRATION PERFORMANCE.....	23
Key Physical Properties and ... (Continued)	24
Key Physical Properties and ... (Continued)	25
TABLE 7 STANDARD TEST METHODS FOR NONWOVEN FILTER MEDIA.....	26
TABLE 8 CLASSIFICATION OF NONWOVEN FILTER MEDIA PROPERTIES	26
Triboelectric Effects in Filter Media	27
TABLE 9 TRIBOELECTRIC NATURE OF FIBERS USED IN NONWOVEN FILTER MEDIA	27
COMPARISON OF MEMBRANES AND NONWOVEN FILTER MEDIA.....	28
TABLE 10 COMPARISON OF MEMBRANE AND NONWOVEN FILTER MEDIA.....	29
MANUFACTURING OF NONWOVEN FILTER MEDIA	30
AIRLAID PROCESS	31
Fiber Selection and Preparation	31
Airlaying	32
Web Layering.....	32
Carding.....	32
WETLAID PROCESS.....	33
Process Equipment	34
SPUNBOND PROCESS.....	35
Manufacturing Process.....	35
Polymer Melt Preparation	35

Filament Extrusion, Spinning, and Drawing	36
DuPont's Flash-Spinning Process.....	37
Web Forming.....	38
Bonding	38
Product Characteristics	39
TABLE 11 CHARACTERISTICS OF SPUNBOND NONWOVEN FILTER MEDIA.....	39
Commercial Spunbonding Processes.....	39
Lutravil Process	40
Docan Process.....	40
Reicofil Process.....	40
Meltblown Process	41
Meltblowing Operation	41
Meltblowing ... (Continued)	42
Process and Property Relationships	43
TABLE 12 CHARACTERISTICS OF MELTBLOWN FILTER MEDIA.....	44
Limitations of Meltblown Technology	44
TABLE 13 COMPARISON OF SPUNBONDING AND MELTBLOWN TECHNOLOGIES FOR NONWOVEN FILTER MEDIA.....	44
Apertured Films Process	45
Hybrids and Combination Composites	46
Composites	46
Emerging Technology	46
Dual-Density Nonwoven Composites	47
COMMON DOWNSTREAM OPERATIONS IN NONWOVEN FILTER MEDIA MANUFACTURING	48
Layering	48
Needle Punching.....	49
Spunlacing	49
Bonding	49
Stitch Bonding	49
Chemical Bonding.....	50
Thermal Bonding	50
Finishing	51
SUMMARY OF THE NONWOVEN FILTER MEDIA MANUFACTURING PROCESSES.....	51
TABLE 14 COMPARISON OF BASIC NONWOVEN TECHNOLOGIES USED IN NONWOVEN FILTER MEDIA MANUFACTURING.....	52
PRODUCT FORMS OF NONWOVEN FILTER MEDIA	52
AIR AND GAS FILTRATION	53
WATER AND LIQUID FILTRATION PRODUCTS	53
TABLE 15 PRODUCT FORMS OF NONWOVEN FILTER MEDIA.....	54
CHAPTER FOUR: COMMERCIAL APPLICATIONS	55

TABLE 16 GLOBAL MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (\$ MILLIONS)	55
FIGURE 2 GLOBAL MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2005-2015 (\$ MILLIONS).....	56
TABLE 17 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2010 (%).....	56
FIGURE 3 GLOBAL MARKET SHARE OF NONWOVEN FILTER MEDIA, BY APPLICATION, 2010 (%).....	57
TABLE 18 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA, BY FILTRATE TYPE, 2010 (%).....	57
FIGURE 4 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA, BY FILTRATE TYPE	58
WATER FILTRATION	58
DRINKING WATER	59
Membrane-based Separations Applications	59
PROCESS INDUSTRY APPLICATIONS	60
Boiler Feed Water Filtrations	60
Process Filtration Applications	61
WASTEWATER TREATMENT APPLICATIONS.....	61
Industrial Treatment Applications	61
Industrial Treatment ... (Continued).....	62
Municipal Treatment Applications	63
SWIMMING POOLS APPLICATIONS	63
SEAWATER DESALINATION.....	64
NONWOVEN FILTER MEDIA GROWTH IN WATER	
FILTRATION INDUSTRY	64
Potable Water	64
Wastewater	65
Domestic Wastewater	65
Industrial Wastewater.....	66
Process Water	67
Desalination.....	68
TABLE 19 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA ON WATER FILTRATION, THROUGH 2015 (\$ MILLIONS)	69
FIGURE 5 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA ON WATER FILTRATION, 2005-2015 (\$ MILLIONS).....	70
TABLE 20 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN WATER TREATMENT, BY MEDIA TYPE, 2010.....	71
FIGURE 6 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN WATER TREATMENT, BY MEDIA TYPE, 2010 (%)	71
HVAC INDUSTRY	71
HVAC INDUSTRY (CONTINUED).....	72
VENTILATION FILTERS	73
Commercial HVAC Filters	73

The 52.2 ASHRAE Standards	74
Air Filtration in Commercial Buildings	75
BIOCIDE LOADED FILTER MEDIA	76
ADSORBENT IMPREGNATED FILTER MEDIA FOR ODOR REMOVAL	76
VACUUM CLEANER BAGS	77
NONWOVEN FILTER MEDIA GROWTH IN THE HVAC INDUSTRY.....	77
TABLE 21 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE HVAC INDUSTRY, THROUGH 2015 (\$ MILLIONS).....	78
FIGURE 7 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE HVAC INDUSTRY, 2005-2015 (\$ MILLIONS)	79
TABLE 22 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN THE HVAC INDUSTRY, BY MEDIA TYPE, 2010 (\$ MILLIONS, %).....	79
FIGURE 8 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN HVAC APPLICATIONS, BY MEDIA TYPE, 2010 (\$ MILLIONS).....	80
TRANSPORTATION INDUSTRY.....	80
FUEL AND LUBE OIL FILTERS	81
Filter Media Customization for End Use Application	82
AIR INDUCTION FILTERS	82
Freudenburg's Evolon Technology	83
Donaldson Co. Engine Air Filter Media Based On EON Technology	83
CABIN AIR FILTERS	84
California Vehicle Compartments Pollutants Study	85
Automobile Applications	85
Technostat Filter Media	86
3M's Filtrete Products for Cabin Air Filtration.....	86
Donaldson's Ultra-Web Nanofiber Technology for Cabin Air Filtration.....	86
Humidity's Effect on Cabin Air Filtration Systems.....	87
AVIATION INDUSTRY	87
NONWOVEN FILTER MEDIA GROWTH IN THE TRANSPORTATION INDUSTRY.....	88
Nonwoven Filter Media ... (Continued).....	89
TABLE 23 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN TRANSPORTATION APPLICATIONS, THROUGH 2015 (\$ MILLIONS)	90
FIGURE 9 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN TRANSPORTATION APPLICATIONS, 2005-2015 (\$ MILLIONS)	90

TABLE 24 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN TRANSPORTATION APPLICATIONS, BY MEDIA TYPE, 2010 (\$ MILLIONS, %)	91
FIGURE 10 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN TRANSPORTATION APPLICATIONS, BY MEDIA TYPE, 2010 (\$ MILLIONS)	91
FOOD AND BEVERAGE PROCESSING	91
BEVERAGE MANUFACTURING	92
Beverage Manufacturing (Continued)	93
Brewing Industry Applications	94
Bottled Water Industry Applications.....	94
Oils and Fermentation Products Industry Applications.....	94
COFFEE FILTERS AND TEA BAGS	95
NONWOVEN FILTER MEDIA GROWTH IN FOOD PROCESSING INDUSTRY	95
Nonwoven Filter Media ...(Continued).....	96
TABLE 25 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN FOOD AND BEVERAGE PROCESSING, THROUGH 2015 (\$ MILLIONS)	97
FIGURE 11 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN FOOD AND BEVERAGE PROCESSING, 2005–2015 (\$ MILLIONS)	97
TABLE 26 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN FOOD AND BEVERAGE PROCESSING, BY MEDIA TYPE, 2010 (\$ MILLIONS/%)	98
FIGURE 12 MARKET SHARE FOR NONWOVEN FILTER MEDIA IN FOOD AND BEVERAGE PROCESSING, BY MEDIA TYPE, 2010 (\$ MILLIONS)	98
MANUFACTURING INDUSTRY	99
DUST COLLECTION APPLICATIONS	99
Textile Mills	100
POWER GENERATION	100
Turbomachinery Applications.....	100
TABLE 27 SURVEY OF COMMON AIRBORNE CONTAMINANT CONCENTRATION AND SIZES.....	101
Hot Gas Filtration Applications.....	102
Coal Power Plant Applications	102
Water Filters for Generators.....	103
FILTER MEDIA FOR WATER JET CUTTING MACHINES.....	103
CHEMICAL PROCESS INDUSTRY	104
Petrochemicals Industry	105
Fiber Manufacturing Applications.....	105
METAL PROCESSING INDUSTRY	106
MINING INDUSTRY APPLICATIONS.....	107

Hydraulic Fluid Filtration	107
Mine Air Filtration	108
PAINTS AND COATINGS INDUSTRY APPLICATIONS.....	108
Filler Particle Removal from Effluents.....	109
Ink Filtration Applications	109
Gels Removal	109
PERFUMES AND COSMETICS INDUSTRY APPLICATIONS	110
PERSONAL PROTECTION EQUIPMENT	110
Electrostatic Nonwoven Filter Media for Removal of Microbial Spores and Bacteria.....	111
HIGH TEMPERATURE FILTRATION IN CEMENT AND ASPHALT MANUFACTURING	111
BIOFILTRATION APPLICATIONS	112
NONWOVEN FILTER MEDIA GROWTH IN MANUFACTURING INDUSTRIES	113
TABLE 28 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN MANUFACTURING INDUSTRIES, THROUGH 2015 (\$ MILLIONS)	114
FIGURE 13 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN MANUFACTURING INDUSTRIES, 2005–2015 (\$ MILLIONS)	114
TABLE 29 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN MANUFACTURING, BY MEDIA TYPE, 2010 (\$ MILLIONS %)	115
FIGURE 14 GLOBAL SHARE FOR NONWOVEN FILTER MEDIA IN MANUFACTURING, BY MEDIA TYPE, 2010 (\$ MILLIONS)	115
HEALTHCARE INDUSTRY	116
HEPA AND ULPA FILTRATION	116
Emerging Technologies for HEPA Filtration	117
PHARMACEUTICAL INDUSTRY	117
Pharmaceutical Industry (Continued)	118
AIR FILTRATION IN HEALTHCARE FACILITIES.....	119
TABLE 30 AVERAGE SIZE OF COMMON CONTAMINANTS IN HOSPITAL AIR.....	120
TABLE 31 CHARACTERISTICS OF NONWOVEN FILTER MEDIA IN HOSPITAL AIR FILTRATION APPLICATIONS.....	120
Air Filtration in ... (Continued)	121
BIOFLUID FILTRATION APPLICATIONS.....	122
Blood and Serum Filtration Applications.....	123
Separation of Red and White Blood Cells by Filtration.....	123
MEMBRANE SUPPORT APPLICATIONS IN BIOTECH.....	124
MISCELLANEOUS APPLICATIONS IN THE HEALTHCARE SECTOR	125

NONWOVEN FILTER MEDIA GROWTH IN THE HEALTHCARE INDUSTRY	126
Nonwoven Filter Media ...(Continued).....	127
TABLE 32 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE HEALTHCARE INDUSTRY, THROUGH 2015 (\$ MILLION).....	128
FIGURE 15 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE HEALTHCARE INDUSTRY, 2005–2015 (\$ MILLION)....	128
TABLE 33 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN HEALTHCARE APPLICATIONS, BY MEDIA TYPE, 2010 (\$ MILLIONS).....	129
FIGURE 16 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA HEALTHCARE APPLICATIONS, BY MEDIA TYPE, 2010 (\$ MILLIONS)	130
PETROLEUM PROCESSING INDUSTRY	130
OIL WATER SEPARATION APPLICATIONS.....	130
NONWOVEN FILTER MEDIA GROWTH IN THE PETROLEUM INDUSTRY.....	130
TABLE 34 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE PETROLEUM PROCESSING INDUSTRY, THROUGH 2015 (\$ MILLIONS).....	131
FIGURE 17 MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA IN THE PETROLEUM PROCESSING INDUSTRY, 2005–2015 (\$ MILLIONS).....	132
TABLE 35 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN PETROLEUM PROCESSING, BY MEDIA TYPE, 2010 (\$ MILLIONS/%).....	133
FIGURE 18 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN PETROLEUM PROCESSING, BY MEDIA TYPE, 2010 (\$ MILLIONS)	133
HIGH TECHNOLOGY AND CLEAN ROOMS	133
ELECTRONICS MANUFACTURING	134
Clean Room Manufacturing Environment	134
Removal of Foul Gases by Adsorbent Loaded Filter Media....	135
Solvent Filtration in Printed Circuit Board Manufacturing.....	136
Ultrapure Water Usage in the High-Technology Industry.....	136
Meltblown Polypropylene for CMP Slurry Applications.....	137
AIR FILTRATION FOR ELECTRONIC COMPONENTS	138
Electronics and Disk Drives	138
Fuel Cells	138
NONWOVEN FILTER MEDIA GROWTH IN THE HIGH TECHNOLOGY AND CLEAN ROOM SUPPLY INDUSTRY	139

<i>TABLE 36 MARKET SIZE AND GROWTH IN THE HIGH TECHNOLOGY INDUSTRY, THROUGH 2015 (\$ MILLIONS).....</i>	140
<i>FIGURE 19 MARKET SIZE AND GROWTH IN THE HIGH TECHNOLOGY INDUSTRY, 2005–2015 (\$ MILLIONS).....</i>	140
<i>TABLE 37 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN THE HIGH TECHNOLOGY INDUSTRY, BY MEDIA TYPE, 2010 (\$ MILLIONS/%).....</i>	141
<i>FIGURE 20 GLOBAL MARKET SHARE FOR NONWOVEN FILTER MEDIA IN THE HIGH TECHNOLOGY INDUSTRY, BY MEDIA TYPE, 2010 (\$ MILLIONS)</i>	141
CHAPTER FIVE: GLOBAL MARKETS FOR NONWOVEN FILTER MEDIA.....	142
GLOBAL MARKETS FOR NONWOVEN FILTER MEDIA	142
GLOBAL MARKETS FOR ... (CONTINUED).....	143
GLOBAL MARKETS FOR ... (CONTINUED).....	144
<i>TABLE 38 GLOBAL MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY WORLD REGION, THROUGH 2015</i>	145
<i>FIGURE 21 GLOBAL MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY WORLD REGION, 2005–2015</i>	145
<i>TABLE 39 GLOBAL MARKET SHARE OF NONWOVEN FILTER MEDIA, BY WORLD REGION, 2010 (\$ MILLIONS/%).....</i>	146
<i>FIGURE 22 GLOBAL MARKET SHARE OF NONWOVEN FILTER MEDIA, BY WORLD REGION, 2010 (%)</i>	146
MARKETS BY APPLICATION	146
Markets by Application (Continued).....	147
<i>TABLE 40 GLOBAL MARKET SIZE AND GROWTH OF NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (%)</i>	148
<i>FIGURE 23 GLOBAL MARKET SIZE AND GROWTH OF NONWOVEN FILTER MEDIA, BY APPLICATION, 2010 (%).....</i>	149
<i>TABLE 41 GLOBAL MARKET SHARE OF NONWOVEN FILTER MEDIA, BY MEDIA TYPE, 2010 (\$ MILLIONS/%).....</i>	150
<i>FIGURE 24 GLOBAL MARKET SHARE OF NONWOVEN FILTER MEDIA, BY MEDIA TYPE, 2010 (%).....</i>	150
Unmet Needs in the Filtration Industry	151
NORTH AMERICA	152
ECONOMIC TRENDS	152
U.S.....	152
Canada	152
Mexico	153
REGIONAL MARKET SIZE AND GROWTH.....	153
DRINKING WATER, MUNICIPAL/DOMESTIC WASTEWATER	154
INDUSTRIAL PROCESS WATER/WASTEWATER	154
INDUSTRIAL AIR	155
FOOD AND BEVERAGE	156

HEALTHCARE	157
Biotech, Bioprocessing, and Pharmaceuticals.....	157
Canada	158
HIGH TECHNOLOGY.....	158
HVAC	159
TRANSPORTATION.....	160
PETROLEUM PROCESSING	160
<i>TABLE 42 NORTH AMERICAN MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (\$ MILLIONS).....</i>	161
<i>FIGURE 25 NORTH AMERICAN MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2005–2015 (\$ MILLIONS).....</i>	161
EUROPE.....	162
ECONOMIC TRENDS	162
MARKET SIZE AND GROWTH.....	163
Water Treatment	163
Wastewater	164
Desalination	164
HVAC.....	165
Transportation	165
Manufacturing Industries	166
Food and Beverage	166
Healthcare.....	167
High Technology	168
Petroleum Processing	169
<i>TABLE 43 EUROPEAN MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (\$ MILLIONS).....</i>	170
<i>FIGURE 26 EUROPEAN MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2005–2015 (\$ MILLIONS).....</i>	170
ASIA.....	171
ECONOMIC TRENDS	171
China	171
India	172
VALUE OF THE ASIA-PACIFIC MARKET	172
Municipal Water/Wastewater	173
Industrial Process Water/Wastewater.....	174
Manufacturing Industries	174
HVAC	175
Transportation.....	175
Healthcare.....	176
High Technology	176

Petroleum Processing	177
TABLE 44 ASIA-PACIFIC MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (\$ MILLIONS).....	177
FIGURE 27 ASIA PACIFIC MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2005–2015 (\$ MILLIONS).....	178
REST OF THE WORLD	178
LATIN AMERICA	178
Economic Trends.....	178
THE MARKET FOR NONWOVEN FILTER MEDIA IN THE REST OF THE WORLD	179
Water, Wastewater Treatment	179
Petroleum Processing	180
MIDDLE EAST/AFRICA	180
Economic Trends.....	180
Water, Wastewater Treatment	181
Desalination	182
Other Applications.....	182
TABLE 45 REST OF THE WORLD MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, THROUGH 2015 (\$ MILLIONS).....	183
FIGURE 28 REST OF THE WORLD MARKET SIZE AND GROWTH FOR NONWOVEN FILTER MEDIA, BY APPLICATION, 2005–2015 (\$ MILLIONS).....	184
CHAPTER SIX: TECHNOLOGICAL DEVELOPMENTS AND TRENDS	185
PATENT ANALYSIS	185
BY COMPANY	185
By Company (Continued)	186
TABLE 46 U.S. AND WORLD PATENTS, BY COMPANY	187
FIGURE 29 U.S. AND WORLD PATENTS, BY COMPANY	188
BY COUNTRY	188
TABLE 47 NUMBER OF U.S. AND WORLD PATENTS, BY COUNTRY	189
FIGURE 30 NUMBER OF U.S. AND WORLD PATENTS, BY COUNTRY	189
TECHNOLOGY DEVELOPMENT TRENDS	190
NANOFIBER MATERIALS	191
Nanoval Process for Nanofibers	192
BICOMPONENT FIBERS	192
ENVIRONMENTALLY SUSTAINABLE MEDIA	193
RECYCLED FIBERS	193
SURFACE-MODIFIED FIBERS	194
POST-PROCESS TREATMENT.....	194
Catalyst-Containing Media	195
Adhesive-Containing Media	195

PLEATED CERAMIC MATERIALS	195
CHAPTER SEVEN: INDUSTRY STRUCTURE	196
CUSTOMER BASE	196
COMMODITY AND SPECIALIZED MARKETS	197
SWOT ANALYSIS OF THE NONWOVEN FILTER MEDIA INDUSTRY	197
STRENGTHS.....	197
WEAKNESSES	198
OPPORTUNITIES	198
THREATS.....	199
DRIVING FORCE ANALYSIS	199
REGULATORY FORCES	199
Clean Air Act (CAA)	200
The 2007 Highway Rule by the EPA	200
PM _{2.5} Standard.....	201
Clean Water Act (CWA)	201
Safe Drinking Water Act (SDWA)	201
PUBLIC HEALTH AND ENVIRONMENTAL CONCERNs	201
Air and Water Quality Concerns	202
Environmental Protection and Pollution Control	202
ECONOMIC FORCES	202
Raw Material Inflation and Product Pricing	203
INDUSTRY STRUCTURE FORCES.....	203
Competition.....	203
New Entrants.....	204
Substitute Products	205
Buyers' Influence	206
Suppliers' Influence	206
COMPETITIVE STRATEGIES IN THE NONWOVEN FILTER MEDIA INDUSTRY	207
NEW MARKET DEVELOPMENT	207
STRATEGIC ALLIANCES AND MERGERS	207
Hollingsworth & Vose/Donaldson Alliance.....	208
Donaldson and Polymer Group Alliance.....	208
Freudenberg and Thermax Partnership.....	208
CUSTOMIZATION.....	208
FOCUS ON NICHE MARKETS	209
STANDARDIZATION	209
MARKET SHARE	210
TABLE 48 MARKET SHARE FOR FILTER MEDIA MANUFACTURERS, 2010 (\$ MILLIONS/%).....	210
FIGURE 31 MARKET SHARE FOR FILTER MEDIA MANUFACTURERS (%)	211
COMPANY PROFILES	211

3M	212
ALBARRIE CANADA LTD.....	212
AHLSTROM	213
ANDREW INDUSTRIES	214
ASAHI KASEI FIBERS	215
BUCKEYE TECHNOLOGIES, INC.....	215
CEREX CO.	216
CHARMINAR NONWOVEN LTD.....	216
CLARCOR CORP	216
CRANE NONWOVENS	217
DELSTAR TECHNOLOGIES, INC.....	218
DONALDSON CO.	218
DUPONT NONWOVENS	219
EAGLE NONWOVENS INC.....	219
FIBER BOND CORP.....	220
FIBERMARK.....	220
FIBERTEX A/S.....	221
FIBERWEB	221
FIBERWEB (INDIA) LTD.	222
FILTER SPECIALISTS, INC. (FSI)	222
FIRST QUALITY NONWOVENS INC.	223
CUMMINS FILTRATION.....	223
FOSS MANUFACTURING CO.	224
FREUDENBERG NONWOVENS CO.....	224
FYBON INDUSTRIES LTD.	225
GLATFELTER.....	225
GORDIAN NONWOVEN TECHNOLOGY CO.....	226
GUTSCHE GMBH.....	226
HANES COMPANIES, INC.....	227
HOLLINGSWOTH & VOSE CO.....	227
HONEYWELL INTERNATIONAL, INC.	228
JACOB HOLM & SONS AG	228
JAPAN VILENE CO.	229
JOFO GROUP	230
JOHNS MANVILLE CO.	230
KANG NA HSIUNG (KNH) ENTERPRISE LTD.	231
KARINCA FILTER	231
KIMBERLY-CLARK CORP.	232
KURARAY CO. LTD.	232
LYDALL INC.....	233
IMITSUI CHEMICALS, INC.	233
MOGUL NONWOVENS	234
MONADNOCK NONWOVENS LLC.....	235
NATIONAL NONWOVENS INC.....	235

NORAFIN	236
PEGAS NONWOVENS	236
PGI NONWOVENS	236
POLIMEROS Y DERIVADOS	237
PRECISION CUSTOM COATINGS LLC (PCC)	238
SANDLER.....	238
SEFAR AMERICA INC.....	239
SUPERIOR FIBERS, INC.	239
TEXEL NONWOVENS	240
TEXTILGRUPPE HOF AG	240
TORAY ADVANCED MATERIALS	241
TOYOB0	241
TWE GROUP	242
VITA NONWOVENS	242
W.L. GORE & ASSOCIATES.....	243
 APPENDIX	244
 <i>TABLE 49 U.S. AND WORLD PATENTS RELATED TO NONWOVEN FILTER MEDIA, SEPTEMBER 2005 TO SEPTEMBER 2010.....</i>	244
TABLE 49 (CONTINUED).....	245
TABLE 49 (CONTINUED).....	246
TABLE 49 (CONTINUED).....	247
TABLE 49 (CONTINUED).....	248
TABLE 49 (CONTINUED).....	249
TABLE 49 (CONTINUED).....	250
TABLE 49 (CONTINUED).....	251
TABLE 49 (CONTINUED).....	252
TABLE 49 (CONTINUED).....	253
TABLE 49 (CONTINUED).....	254