

# **Automotive In-Vehicle Air Purifier Market by Product Type (air purifier, air ionizer, and hybrid (air purifier+ air ionizer)), by Technology (high efficiency particulate arrestor (HEPA) filter, active carbon systems, and photo catalytic), by Vehicle Type (passenger cars, light commercial vehicles, and heavy commercial vehicles) - Global Opportunity Analysis and Industry Forecast, 2014-2022**

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## **Abstracts**

The Global Automotive In-Vehicle Air Purifier Market size is projected to reach \$2,010 million by 2022, growing at a CAGR of 9.4% during the forecast period (2016–2022). The automobile industry is dynamic in nature, and it continuously adopts advanced technologies for enhancing the customer experience. Interior cabin space of automobiles has evolved rapidly in terms of upholstery, automation of seats, and infotainment. This cabin space faces the most challenging environment as it is prone to polluted air, smoke, toxic fumes, bad odor, food smell, and pollens, which either get absorbed to the upholstery or float the air, making passengers prone to diseases. Globally, major cities are prone to smog and high pollutant concentrations owing to traffic congestion and increased emissions, which gives rise to the need for installation of onboard air purifiers or ionizers to purify the cabin air from harmful toxicants. Demand for clean & toxin-free cabin air and increase in air pollution level worldwide are the key drivers of automotive in-vehicle air purifiers. However, non-standardized products act as a major restraint to this growth.

The consumer base of automotive in-vehicle air purifiers has expanded from passenger cars to light and heavy commercial vehicles. Cab owners, school buses, private & public transport vehicles (bus and vans), and truck operators are vigilantly installing these

purifiers to provide better service to their customers and are taking precautionary measures to safeguard the health of the passengers and vehicle drivers. According to a study conducted by researchers at the UCLA Fielding School of Public Health in March 2015, an onboard air filtration system developed specifically for school buses resulted in reduced exposure to vehicular pollutants by up to 88%, thus safeguarding the health of passengers.

Various types of onboard air purifiers are available in the in-vehicle air purifier market, such as standalone air purifiers, air ionizers, or a combination of both. Majority of the products are aftermarket products; however, in the near future, owing to increase in pollutant levels in air and standardization of such air purifiers, it is expected that automobile manufacturers will provide onboard air purifiers as standard accessory in their vehicles, providing growth opportunity for OEMs.

Asia-Pacific leads the automotive in-vehicle air purifier market

Adoption of in-vehicle air-purifier in automobiles is comparatively higher in Asia-Pacific than other regions. This owes to the fact that developing countries in Asia-Pacific are largely affected by air pollution, and automobile manufacturers and the government are taking initiatives to promote the technologies that will help reduce the harmful effects of toxic air. Asia-Pacific is the region with fastest growing economies such as China and India, with the former accounting for around 60% of the Asia-Pacific in-vehicle air purifier market revenue. The market of automotive in-vehicle air purifier would be strong in next six years. Also, the vehicle production in this region is the highest in the world and is estimated that Asia-Pacific would show a promising growth in the air purifier market from 2014 to 2022. Moreover, countries such as Malaysia and Indonesia are taking initiatives to induce awareness in people regarding usage of these technologies. Due to all these factors, Asia-Pacific is anticipated to exhibit a high growth rate in terms of adoption of advance air purifier systems.

Rise in air pollution level drives the market growth

Air pollution is the emission of toxic elements into the atmosphere by natural or anthropogenic sources. These sources can be further differentiated into either mobile or stationary sources. Anthropogenic air pollution is often summarized as being mainly related to motorize street traffic (especially exhaust gases and tire abrasion). The World Health Organization (WHO) estimates 2.4 million fatalities due to air pollution every year. As intake of polluted air can have severe health effects such as asthma, COPD, or increased cardiovascular risks, most countries have strengthened laws to control the air quality and mainly focus on emissions from automobiles. Air quality in vehicle cabins is usually found to be worse than those typically found in homes or workplaces. Pollutants enter into the cabin via the ventilation system, also known as the heating, ventilation and air conditioning (HVAC) system. Studies have shown that vehicle cabins commonly show concentrations of toxic gases such as carbon monoxide (CO), hydrocarbons (HC),

volatile organic compounds (VOC), and oxides of nitrogen (NO<sub>x</sub>) higher than safety limits set by Occupational Safety and Health Administration (OSHA) and World Health Organization (WHO). Inhibition of all these pollutants in the vehicle drives the growth of the air purifier market.

Active Carbon Systems has the highest growth rate

Active carbon systems are anticipated to witness the highest growth rate over the next five to six years, in comparison to the other technologies used in in-vehicle air purifier systems. This owes to the fact that it is more efficient than HEPA systems in automobiles in terms of removing cabin air pollution. The effectiveness of activated carbon as an adsorbent is attributed to its unique properties, including large surface area, a high degree of surface reactivity, universal adsorption effect, and pore size. Due to its higher porosity, a single gram of activated carbon contains 500–2,000 m<sup>2</sup> aggregate surface area. Activated carbon, the universal adsorbent, has a capacity for virtually all vapor contaminants and will adsorb and retain a wide variety of chemicals at the same time. Due to these factors, manufacturers are gradually shifting towards the production of air purifiers incorporated with active carbon systems.

The leading market players in the automotive in-vehicle air purifier market focus to expand their business operations in emerging countries. These companies have consistently introduced innovative solutions to enhance their product portfolio.

Expansion and product launch are the prominent growth strategies adopted by these players. The major players profiled in this report include Kent RO Systems Ltd, Koninklijke Philips N.V., Sharp Electronics Corporation, Eureka Forbes, Honeywell, Diamond Air Purifiers, ADA Electrotech (Xiamen) Co., Ltd, Panasonic Corporation, Purafil, Inc., and Livpure Private Limited.

Other players in value chain include Powerseed, Mann+Hummel Filter Technology (S.E.A) Pte Ltd, Amke Technology Co., Ltd, Xiaomi, and Airbus Electronic Technology Co., Ltd.

### Key Benefits

The study provides an in-depth analysis of the global automotive in-vehicle air purifier market, with current trends and future estimations to elucidate the imminent investment pockets.

The report offers a quantitative analysis from 2014 to 2022, which is expected to enable the stakeholders to capitalize on prevailing market opportunities.

The report provides historical figures for 2014 and 2015 and Year-on-Year forecasts from 2016 to 2022, considering 2015 as base.

Competitive intelligence highlights the business practices followed by leading players across various regions.

## AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET KEY SEGMENTS BY PRODUCT TYPE

Air Purifier

Air Ionizer

Hybrid

## BY TECHNOLOGY

High-Efficiency Particulate Arrestor (HEPA) Filters

Active Carbon Systems

Photo Catalytic

## BY VEHICLE TYPE

Passenger Cars

Light Commercial Vehicles

Heavy Commercial Vehicles

## BY GEOGRAPHY

North America

U.S.

Canada

Mexico

Europe

Germany

France

Italy

UK

Rest of Europe

Asia-Pacific

China

Australia

Japan

India

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

## MARKET PLAYERS IN VALUE CHAIN

Kent RO Systems Ltd

Koninklijke Philips N.V.

Sharp Electronics Corporation

Eureka Forbes

Honeywell

Diamond Air Purifiers

ADA Electrotech (Xiamen) Co., Ltd

Panasonic Corporation

Purafil, Inc.

Livpure Private Limited

Powerseed

Mann+Hummel Filter Technology (S.E.A) Pte Ltd

Amke Technology Co., Ltd

Xiaomi

Airbus Electronic Technology Co., Ltd.

## Contents

### CHAPTER 1 INTRODUCTION

- 1.1. REPORT DESCRIPTION
- 1.2. KEY BENEFITS
- 1.3. KEY MARKET SEGMENTS
- 1.4. RESEARCH METHODOLOGY
  - 1.4.1. Secondary research
  - 1.4.2. Primary research
  - 1.4.3. Analyst tools and models

### CHAPTER 2 EXECUTIVE SUMMARY

- 2.1. CXO PERSPECTIVE

### CHAPTER 3 MARKET OVERVIEW

- 3.1. MARKET DEFINITION AND SCOPE
- 3.2. KEY FINDINGS
  - 3.2.1. Top winning strategies
  - 3.2.2. Top investment pockets
- 3.3. PORTERS FIVE FORCES ANALYSIS
  - 3.3.1. Bargaining power of suppliers
  - 3.3.2. Bargaining power of buyers
  - 3.3.3. Threat of substitutes
  - 3.3.4. Threat of new entrants
  - 3.3.5. Intensity of competitive rivalry
- 3.4. MARKET SHARE ANALYSIS, 2015
- 3.5. MARKET DYNAMICS
  - 3.5.1. Drivers
    - 3.5.1.1. Increase in demand for clean and toxin free cabin air
    - 3.5.1.2. Increase in pollution level of atmospheric air
  - 3.5.2. Restraints
    - 3.5.2.1. Less global manufacturers of in-vehicle air purifier
  - 3.5.3. Opportunities
    - 3.5.3.1. Development of advance and low cost air purifier system
    - 3.5.3.2. Expansion in untapped market of Asia-Pacific and LAMEA

## **CHAPTER 4 GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE**

### **4.1. OVERVIEW**

#### **4.1.1. Market size and forecast**

### **4.2. AIR PURIFIER**

#### **4.2.1. Key market trends, Growth factors and opportunities**

#### **4.2.2. Market size and forecast**

#### **4.2.3. Key Player Positioning**

### **4.3. AIR IONIZER**

#### **4.3.1. Key market trends, growth factors and opportunities**

#### **4.3.2. Market size and forecast**

#### **4.3.3. Key Player Positioning**

### **4.4. HYBRID (AIR PURIFIER+AIR IONIZER)**

#### **4.4.1. Key market trends, growth factors and opportunities**

#### **4.4.2. Market size and forecast**

#### **4.4.3. Key Player Positioning**

## **CHAPTER 5 GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY**

### **5.1. OVERVIEW**

#### **5.1.1. Market size and forecast**

### **5.2. HIGH-EFFICIENCY PARTICULATE ARRESTOR (HEPA) FILTERS**

#### **5.2.1. Key market trends, growth factors and opportunities**

#### **5.2.2. Market size and forecast**

### **5.3. ACTIVE CARBON SYSTEM**

#### **5.3.1. Key market trends, growth factors and opportunities**

#### **5.3.2. Market size and forecast**

### **5.4. PHOTO CATALYTIC**

#### **5.4.1. Key market trends, growth factors and opportunities**

#### **5.4.2. Market size and forecast**

## **CHAPTER 6 GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE**

### **6.1. OVERVIEW**

#### **6.1.1. Market size and forecast**

### **6.2. PASSENGER CAR**



- 6.2.1. Key market trends, growth factors and opportunities
- 6.2.2. Market size and forecast
- 6.3. LIGHT COMMERCIAL VEHICLE
  - 6.3.1. Key market trends, growth factors and opportunities
  - 6.3.2. Market size and forecast
- 6.4. HEAVY COMMERCIAL VEHICLE
  - 6.4.1. Key market trends, growth factors and opportunities
  - 6.4.2. Market size and forecast

## **CHAPTER 7 GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY GEOGRAPHY**

- 7.1. OVERVIEW
  - 7.1.1. Market size and forecast
- 7.2. NORTH AMERICA
  - 7.2.1. Key market trends, growth factors and opportunities
  - 7.2.2. Market size and forecast
  - 7.2.4. U.S.
    - 7.2.4.1. Market size and forecast
  - 7.2.5. Canada
    - 7.2.5.1. Market size and forecast
  - 7.2.6. Mexico
    - 7.2.6.1. Market size and forecast
- 7.3. EUROPE
  - 7.3.1. Key market trends, growth factors and opportunities
  - 7.3.2. Market size and forecast
  - 7.3.4. GERMANY
    - 7.3.4.1. Market size and forecast
  - 7.3.5. FRANCE
    - 7.3.5.1. Market size and forecast
  - 7.3.6. ITALY
    - 7.3.6.1. Market size and forecast
  - 7.3.7. UK
    - 7.3.7.1. Market size and forecast
  - 7.3.8. REST OF EUROPE
    - 7.3.8.1. Market size and forecast
- 7.4. ASIA-PACIFIC
  - 7.4.1. Key market trends, growth factors and opportunities
  - 7.4.2. Market size and forecast

#### 7.4.4. CHINA

##### 7.4.4.1. Market size and forecast

#### 7.4.5. JAPAN

##### 7.4.5.1. Market size and forecast

#### 7.4.6. INDIA

##### 7.4.6.1. Market size and forecast

#### 7.4.7. Australia

##### 7.4.7.1. Market size and forecast

#### 7.4.8. REST OF ASIA-PACIFIC

##### 7.4.8.1. Market size and forecast

### 7.5. LAMEA (LATIN AMERICA MIDDLE-EAST AND AFRICA)

#### 7.5.1. Key market trends, growth factors and opportunities

#### 7.5.2. Market size and forecast

#### 7.5.4. LATIN AMERICA

##### 7.5.4.1. Market size and forecast

#### 7.5.5. MIDDLE EAST

##### 7.5.5.1. Market size and forecast

#### 7.5.6. AFRICA

##### 7.5.6.1. Market size and forecast

## CHAPTER 8 RELATED INDUSTRY INSIGHTS

### 8.1.Global Air Quality Monitoring Market

#### 8.1.1. Executive Summary

### 8.2.Global Automotive Interiors Market

#### 8.2.1. Executive Summary

### 8.3.Global Automotive Lighting Market

#### 8.3.1. Executive Summary

### 8.4.Global Air Freshener Market

#### 8.4.1. Executive Summary

### 8.5.Global Air Compressor Market

#### 8.5.1. Executive Summary

## CHAPTER 9 COMPANY PROFILES

### 9.1. KENT RO SYSTEMS LTD

#### 9.1.1. Company overview

#### 9.1.2. Operating business segments

#### 9.1.3. Business performance

- 9.1.4. Key strategic moves and developments
- 9.2. KONINKLIJKE PHILIPS N.V.
  - 9.2.1. Company overview
  - 9.2.2. Operating business segments
  - 9.2.3. Business performance
  - 9.2.4. Key strategic moves and developments
- 9.3. SHARP ELECTRONICS CORPORATION
  - 9.3.1. Company overview
  - 9.3.2. Operating business segments
  - 9.3.3. Business performance
  - 9.3.4. Key strategic moves and developments
- 9.4. EUREKA FORBES
  - 9.4.1. Company overview
  - 9.4.2. Operating business segments
  - 9.4.3. Business performance
  - 9.4.4. Key strategic moves and developments
- 9.5. HONEYWELL
  - 9.5.1. Company overview
  - 9.5.2. Operating business segments
  - 9.5.3. Business performance
  - 9.5.4. Key strategic moves and developments
- 9.6. DIAMOND AIR PURIFIER
  - 9.6.1. Company overview
  - 9.6.2. Operating business segments
  - 9.6.3. Business performance
  - 9.6.4. Key strategic moves and developments
- 9.7. ADA ELECTROTECH (XIAMEN) CO., LTD.
  - 9.7.1. Company overview
  - 9.7.2. Operating business segments
  - 9.7.3. Business performance
  - 9.7.4. Key strategic moves and developments
- 9.8. PANASONIC CORPORATION
  - 9.8.1. Company overview
  - 9.8.2. Operating business segments
  - 9.8.3. Business performance
  - 9.8.4. Key strategic moves and developments
- 9.9. PURAFIL, INC.
  - 9.9.1. Company overview
  - 9.9.2. Operating business segments

9.9.3. Business performance

9.9.4. Key strategic moves and developments

#### 9.10. LIVPURE PRIVATE LIMITED

9.10.1. Company overview

9.10.2. Operating business segments

9.10.3. Key strategic moves and developments

Other players in the value chain include.

Nostrum Energy

TI Automotive

GP Performance

Infineon Technologies AG

Synerject LLC

Renesas Electronics Corporation

Airtex Products

Profiles of these players are not included. The same will be included on request

## List Of Tables

### LIST OF TABLES

TABLE 1. AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE, 2014-2022 (\$MILLION)

TABLE 2. AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 3. AIR PURIFIER MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 4. AIR IONIZER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 5. AIR IONIZER MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 6. HYBRID MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 7. HYBRID MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 8. AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY, 2014-2022 (\$MILLION)

TABLE 9. HEPA MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 10. HEPA MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 11. ACTIVE CARBON SYSTEM MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 12. ACTIVE CARBON SYSTEM MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 13. PHOTO CATALYTIC MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 14. PHOTO CATALYTIC MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 15. AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 16. PASSENGER CAR AIR PURIFIER, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 17. LIGHT COMMERCIAL VEHICLE AIR PURIFIER, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 18. HEAVY COMMERCIAL VEHICLE AIR PURIFIER, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 19. AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY GEOGRAPHY, 2014-2022 (\$MILLION)

TABLE 20. NORTH AMERICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE, 2014-2022 (\$MILLION)

TABLE 21. NORTH AMERICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY, 2014-2022 (\$MILLION)

TABLE 22. NORTH AMERICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 23. NORTH AMERICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY COUNTRY, 2014-2022 (\$MILLION)

TABLE 24. EUROPE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE, 2014-2022 (\$MILLION)

TABLE 25. EUROPE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY, 2014-2022 (\$MILLION)

TABLE 26. EUROPE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 27. EUROPE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY COUNTRY, 2014-2022 (\$MILLION)

TABLE 28. ASIA-PACIFIC: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE, 2014-2022 (\$MILLION)

TABLE 29. ASIA-PACIFIC: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY, 2014-2022 (\$MILLION)

TABLE 30. ASIA-PACIFIC: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 31. ASIA-PACIFIC: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY COUNTRY, 2014-2022 (\$MILLION)

TABLE 32. LAMEA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY PRODUCT TYPE, 2014-2022 (\$MILLION)

TABLE 33. LAMEA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY TECHNOLOGY, 2014-2022 (\$MILLION)

TABLE 34. LAMEA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE, 2014-2022 (\$MILLION)

TABLE 35. LAMEA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY COUNTRY, 2014-2022 (\$MILLION)

TABLE 36. KENT RO SYSTEMS: COMPANY SNAPSHOT

TABLE 37. KENT RO SYSTEMS: OPERATING SEGMENTS

TABLE 38. PHILIPS: COMPANY SNAPSHOT

TABLE 39. PHILIPS: OPERATING SEGMENTS

TABLE 40. SHARP: COMPANY SNAPSHOT

TABLE 41. SHARP: OPERATING SEGMENTS

TABLE 42. EUREKA FORBES: COMPANY SNAPSHOT

TABLE 43. EUREKA FORBES: OPERATING SEGMENTS

TABLE 44. HONEYWELL: COMPANY SNAPSHOT

TABLE 45. HONEYWELL: OPERATING SEGMENTS

TABLE 46. DIAMOND: COMPANY SNAPSHOT

TABLE 47. DIAMOND: OPERATING SEGMENTS

TABLE 48. ADA ELECTROTECH: COMPANY SNAPSHOT

TABLE 49. ADA ELECTROTECH: OPERATING SEGMENTS

TABLE 50. PANASONIC: COMPANY SNAPSHOT

TABLE 51. PANASONIC: OPERATING SEGMENTS

TABLE 52. PURAFIL: COMPANY SNAPSHOT

TABLE 53. PURAFIL: OPERATING SEGMENTS

TABLE 54. LIVPURE: COMPANY SNAPSHOT

TABLE 55. LIVPURE: OPERATING SEGMENTS

## List Of Figures

### LIST OF FIGURES

FIGURE 1. TOP WINNING STRATEGIES: PERCENTAGE DISTRIBUTION (2013 - 2016)

FIGURE 2. TOP WINNING STRATEGIES: NATURE AND TYPE

FIGURE 3. TOP INVESTMENT POCKETS IN GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, BY VEHICLE TYPE

FIGURE 4. PORTERS FIVE FORCES ANALYSIS

FIGURE 5. MARKET SHARE ANALYSIS, 2015

FIGURE 6. TOP IMPACTING FACTORS OF GLOBAL AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET, 2015-2022

FIGURE 7. U.S.: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 8. CANADA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 9. MEXICO: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 10. GERMANY: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 11. FRANCE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 12. ITALY: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 13. UK: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 14. REST OF EUROPE: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 15. CHINA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 16. JAPAN: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 17. INDIA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 18. AUSTRALIA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 19. REST OF ASIA-PACIFIC: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)



FIGURE 20. LATIN AMERICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 21. MIDDLE EAST: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 22. AFRICA: AUTOMOTIVE IN-VEHICLE AIR PURIFIER MARKET SIZE, 2014-2022 (\$MILLION)

FIGURE 23. PHILIPS SNAPSHOT

FIGURE 24. SHARP SNAPSHOT

FIGURE 25. CONTINENTAL SNAPSHOT

FIGURE 26. HONEYWELL SNAPSHOT

FIGURE 27. DIAMOND SNAPSHOT

FIGURE 28. ADA ELECTROTECH SNAPSHOT

FIGURE 29. PANASONIC SNAPSHOT

FIGURE 30. PURAFIL SNAPSHOT

FIGURE 31. LIVPURE SNAPSHOT

## I would like to order

Product name: Automotive In-Vehicle Air Purifier Market by Product Type (air purifier, air ionizer, and hybrid (air purifier+ air ionizer)), by Technology (high efficiency particulate arrestor (HEPA) filter, active carbon systems, and photo catalytic), by Vehicle Type (passenger cars, light commercial vehicles, and heavy commercial vehicles) - Global Opportunity Analysis and Industry Forecast, 2014-2022

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