

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_x) 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 m² 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.

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TI Automotive

GP Performance

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