

In-vehicle Air Purifier - Global Outlook and Forecast 2021-2026

<https://marketpublishers.com/r/l8FE178FE253EN.html>

Date: April 2021

Pages: 228

Price: US\$ 3,750.00 (Single User License)

ID: l8FE178FE253EN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global In-vehicle Air Purifier Market Report

The global in-vehicle air purifier market by revenue is expected to grow at a CAGR of approx. 11% during 2020–2026.

The global automotive air filter market is observing a shift from conventional purifiers to smart technology. The inclusion of prominent technologies - HEPA, active carbon systems, and photocatalytic is likely to increase vendors' growth opportunities. Vendors are expected to incorporate features such as Bluetooth speaker, USB, lights, air conditioner to cool, fan to circulate air, dehumidifier to remove moisture to increase penetration. Hence, multifunctional in-vehicle air purifiers are expected to increase the market demand during the forecast period. Further, the increased awareness of air filters among consumers has driven innovations in the industry. An increasing trend of multifunctional compact and simple designs of these devices is driving market adoption. Major vendors are investing in R&D activities to manufacture augmented products for the future. Innovations and feature-enrichment in-car air purifiers have evolved as a trend among the key players.

The following factors are likely to contribute to the growth of the in-vehicle air purifier market during the forecast period:

Advances in Air Purifier Technology

Increase in Multi-Functional In-vehicle Air Purifiers

Growth in Air Pollution related Disorders

Growth in Automotive Sector

The study considers the in-vehicle air purifier market's present scenario and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global In-Vehicle Air Purifier Market Segmentation

The global in-vehicle air purifier market research report includes a detailed segmentation by product type, application, end market, technology, aftermarket distribution channel, geography. With the increase in the adoption of personal vehicles such as sedans and SUVs, the consumer base of in-vehicle air purifiers is growing. Adopting the in-vehicle air filters is comparatively higher in APAC than in other regions as several countries are primarily affected by air pollution. Hence, automobile manufacturers and government agencies are taking initiatives to reduce the severity of toxic air. The market is expected to be strong in the next six years. Also, vehicle production in this region is the highest globally, and it is estimated that the region would show promising growth. Moreover, countries such as Malaysia and Indonesia are taking initiatives to increase awareness of these technologies. Although the hybrid in-vehicle air purifier market is currently at the introductory phase, the increased knowledge of these products is expected to increase during the forecast period. The increasing collaboration between manufacturers is likely to contribute to the global in-vehicle air purifier market growth.

Standardization of air purifiers in sedans and SUVs is expected to increase OEMs' market share during the forecast period. High-end manufacturers in the US have started including built-in air filters and fragrance disseminators in their vehicles. Hence, the increase in air pollution and product standardization is expected to drive automobile manufacturers to provide in-built air purifiers as a standard accessory, thereby providing growth opportunities for OEMs.

A high percentage of passenger vehicles are equipped with in-vehicle air purifiers, which are likely to increase the market share. Several automobile manufacturers in China have shown interest in automotive air purifiers (AAP). Moreover, automotive air

purifiers are becoming handy solutions against allergies and ensure sanitization. They are exported to the Americas and Europe. However, India is emerging as the most lucrative market for these products as the country is witnessing deterioration in air quality levels. The commercial in-vehicle air purifier market is expected to grow as several heavy vehicle manufacturers are expected to invest in this technology.

The demand for HEPA filters increases as they effectively remove small particles and pollutants; however, they require high maintenance. APAC accounts for maximum demand for HEPA filters on account of high air pollution levels in several countries. Strict government regulations to improve air quality and the increasing consumer spending are expected to drive the demand. The HEPA purifier market is fragmented due to several small and national vendors and is expected to be highly competitive with increased investments.

With the increase in e-commerce worldwide, manufacturers have shifted to online sale platforms. The online in-vehicle air purifier market is currently observing growth. However, the offline segment is expected to flourish during the forecast period as the B2C segment will gradually shift toward B2B with vendors' partnerships with automotive manufacturers. In 2020, the online segment observed growth, particularly due to the COVID-19 virus. Moreover, online platforms are growing as they offer discounts and free-of-cost aftermarket service.

Application

Personal Vehicles

Commercial Vehicles

Taxi and Rental Cars

Emergency Vehicles

Public Buses

Corporate Fleet

Others

End Market

OEM

Aftermarket

Product

Air Purifiers

Hybrid Purifiers

Technology

HEPA Filters

Ionic Filter

Activated Carbon Filters

Others

Aftermarket Distribution Channel

Online

Offline

INSIGHTS BY GEOGRAPHY

China, Japan, and India are the fastest-growing region for in-vehicle air purifiers in APAC. With the increased awareness of these devices among consumers, the demand is expected to grow as they help eliminate toxic gases in the environment. The growth in pollution levels is also likely to increase in-vehicle air purifiers substantially during the forecast period. China is one of the largest suppliers, and the penetration level has been

the highest than other countries till 2020. With its robust distribution channel and high demand, the market is expected to boost during the forecast period. Moreover, with the rise in particulate matter, HEPA and ionic air purifiers are expected to grow significantly.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

India

Australia

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

Turkey

UAE

Rest of Middle East & Africa

INSIGHTS BY VENDORS

The global in-vehicle air purifier market is in the growth stage, and it has achieved popularity and penetration in several countries such as China and the US. The market consists of several players, making it highly fragmented. Philips Ltd., 3M, and Honeywell are the major vendors capturing the largest market share. In APAC, Europe, and North America, major players account for more than 80% of the overall share. There are immense opportunities for vendors to expand their business in high pollution regions and densely populated areas. Since the entry barriers are low, the in-vehicle air purifier market is flexible. This increases the focus of mergers or acquisitions and is also expected to enable manufacturers to intensify product innovation and improve the customer experience.

Prominent Vendors

Philips Ltd.

3M

Honeywell

Other Prominent Vendors

Sharp

Blueair

Blaupunkt

Amway

Airlabs

Boneco

Coway

Eureka Forbes

IQAir

GreenTech Environmental

Pure Enrichment

Ansio

Kent RO

Livpure

Nebelr

Olansi Healthcare

Purafil

Purita

Vantro

Xiaomi

KEY QUESTIONS ANSWERED

1. What are major advances witnessed in in-vehicle air purifier technology?
2. What is the impact of the COVID-19 pandemic on the car air purifier market?
3. Which players occupy the largest share in the in-vehicle air filter market?
4. What are the key strategies in the global automotive air purifier market vendor landscape?
5. Which region is expected to hold the largest share in the personal vehicle air purifier market?
6. What are the current trends and drivers enabling the air purifier market growth?

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