

**NEW** Forecasts for 2019 & 2024 in 15 countries

# World Consumer Air Treatment Systems

Study # 3370

March 2016

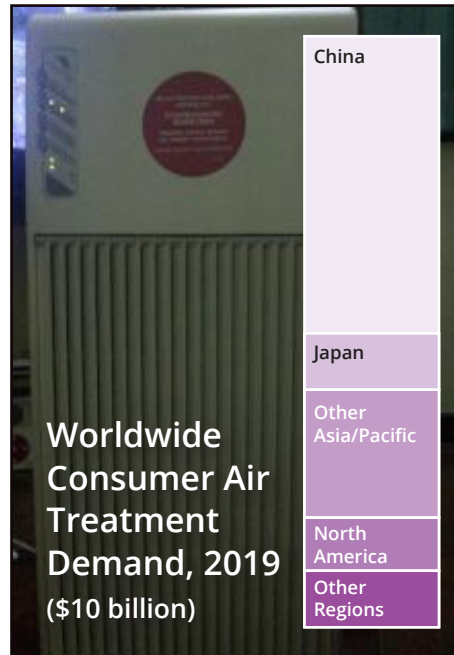
\$6400

## World demand to surpass \$10 billion in 2019

Global demand for consumer air treatment systems is projected to increase to over \$10 billion in 2019. More than 80 percent of growth will occur in China where poor urban air quality combined with a growing middle class and increasing access to a wider variety of consumer air cleaning systems will cause sales to nearly triple by 2019. In China as well as the rest of the world, sales of home air treatment systems are driven by rising awareness of air pollution, both indoors and outdoors, and the effect that the pollution can have on health. Increasing publicity regarding just how bad the air quality is in major urban areas such as Beijing, New Delhi, and Mexico City has accelerated that trend. The rising diagnosis of asthma and allergic rhinitis in those areas and worldwide will also increase demand. Ongoing consumer education about air treatment technologies and more access to several types of systems at various price points will further boost gains.

## India, China, Mexico, Brazil are fastest growing markets

The countries expected to see the fastest growth include India, China, Mexico, and Brazil. These countries do not yet have established markets for consumer air treatment systems but benefit from rising personal incomes, and increased understanding of the connection between air pollution and upper respiratory ailments. In these countries, air quality is poor, particularly in urban areas, in light of limited regulation and lax enforcement on pollution from industrial facilities, vehicles, and coal-fired electric plants. Increasing rates of diagnosed asthma and



allergies are further driving demand for these systems because it is virtually impossible to keep outdoor pollutants from contaminating indoor air.

## Growth to benefit from shifts in cultural habits

Sales gains for home air treatment systems in these and other parts of the world will continue as consumers switch from other habits that are deeply and often culturally ingrained. For instance, in many developing parts of the world and in areas with mild climates, opening windows for ventilation is the primary method for freshening or cooling indoor air. However, doing so reduces the effectiveness of air cleaning systems which work best in an enclosed area. Furthermore, in areas where products are loosely regulated, the consumer air treatment industry must also work to

overcome skepticism about the performance of these systems via the introduction of industry standards and additional consumer educational efforts.

## China, Japan, US are the three largest markets

Combined, China, Japan, and the US -- the three largest national markets for consumer air treatment systems -- accounted for more than half of global sales of these products in 2014. Unlike China, the markets in Japan and the US are more established. In addition, general air quality is high by global standards in most parts of the US and Japan. Even in regions with generally good local air quality, wealthier citizens purchase consumer air treatment systems to reduce dust or seasonal pollen levels, control pet dander, or eliminate tobacco smoke. In Japan, recent sales gains were amplified by concerns regarding dust and nuclear particles in the air following the 2011 Fukushima earthquake and related nuclear crisis, and the pollution clouds that migrated from China during peak smog periods each winter since 2013.

## Study coverage

This upcoming Freedonia study, *World Consumer Air Treatment Systems*, is available for \$6400. It presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) by product type, technology, global region and for 15 major countries. Demand for replacement air filters is also included. In addition, the study considers market environment factors, evaluates company market share, and profiles 34 industry participants, including Alticor, Blueair, Daikin Industries, Electrolux, Midea Group, Royal Philips, and Sharp.

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**#3370 - World Consumer Air Purification**

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**Company Profiles**

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

**COMPANY PROFILES**  
 Profiles 34 global industry competitors such as Alticor, Blueair, Daikin Industries, Electrolux, Midea Group, Royal Philips & Sharp

**ASIA/PACIFIC**

Compared to many other countries, prices are very high in China. This is primarily because many of the systems available on the market are high value types. Additionally, many of the earliest air cleaner customers are foreigners working in the country and wealthy local people who can afford it. Furthermore, there is a greater level of consumer trust placed in the effectiveness of the more expensive versions supplied by foreign manufacturers, particularly in light of media investigations that showed several local brands did not clean the air as fast as advertised. However, that trust is likely to improve over time if industry standards for air cleaners are developed so that consumers can have greater confidence in the rate of air cleaning and the types of pollutants that the system can realistically remove from the air. Also, a growing number of locally based suppliers are entering the market and will likely exert pricing pressure as a competitive factor, targeting the lower range of price points, thus reducing average prices. In general, most of the foreign branded air cleaners are at the top of the price range and the local models are more likely to be on the lower end.

Item	2004	2009	2014	2019	2024
Households (millions) \$ systems/household					
China Consumer Air Treatment (mil \$) Whole-House Portable \$/unit					
Consumer Air Treatment Demand (000) Whole-House Portable					

**SAMPLE TABLE**  
 Presents historical data (2004, 2009, 2014) as well as Freedonia forecasts for 2019 & 2024

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**NORTH AMERICA**

and air cleaning technologies, they are more efficient on a stand-alone basis and are well suited to remove the most common types of household air contaminants

Systems that use ionization and other niche technologies as the primary treatment technology will generate faster growth through 2019, albeit from a much smaller base. Often, these systems are attractive in immature air treatment markets because they capacity. Additionally purchases of replacer that are wiped clean supported in the long most effectively depl conventional filtration as the primary technology. Additionally, as consumers become more aware of the hazards of ozone generated as a byproduct or as a purposeful part of air cleaning, then tend to turn away from ionization, ozone .

**SAMPLE TEXT**  
 Explanations that support each table's numbers & projections

Item	2004	2009	2014	2019	2024
Urban Population (mil persons) \$ air systems/urban capita					
Mexico Consumer Air Treatment Systems Conventional Filtration Electrostatic Ionization & Other					
% Mexico North America Consumer Air Treatment					

**SAMPLE TABLE**  
 Data illustrated with the aid of 114 tables & charts

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## Freedonia's methods involve:

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
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- Researching a proprietary database that includes trade publications, government reports & corporate literature
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## Filters

This study analyzes the US filter industry. It presents historical demand data (2005, 2010 and 2015) and forecasts (2020 and 2025) by filter medium (e.g., paper, fabric), product (e.g., fluid power filters, oil filters, air intake filters, fuel filters, cabin air filters, panel and pocket air filters, fabric air pollution filters, cartridge air filters, electrostatic air filters, air washer filters) and market (e.g., motor vehicles, utilities, consumer, industrial). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3379..... March 2016..... \$5500

## World Major Household Appliances

This study analyzes the world major household appliance industry. It presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product (e.g., refrigerators and freezers, clothes washers and dryers, large cooking appliances, dishwashers), world region, and major country. In addition, the study considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3366..... February 2016 ..... \$6500

## World Consumer Water Treatment Systems

Global demand for consumer water treatment systems will advance nearly 12 percent annually to \$16.3 billion in 2019. Sales of point-of-use (POU) systems will outpace those for point-of-entry (POE) systems. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$9.4 billion world consumer water treatment system industry, with forecasts for 2019 and 2024 by type and technology for six world region and 19 major countries. The study also evaluates company market share and profiles industry participants.

#3360..... January 2016 ..... \$6400

## Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players.

#3281..... July 2015 ..... \$5500

## Consumer Water Treatment Systems in China

Demand for consumer water treatment systems in China will grow 17.0 percent yearly to 26.2 billion yuan in 2017. Point-of-use systems will remain the dominant product, while point-of-entry systems will grow the fastest. Membrane separation will remain the key technology. This study analyzes the 12 billion yuan consumer water treatment system industry in China, with forecasts for 2017 and 2022 by product, aftermarket component, technology and regional market. The study also evaluates company market share and profiles industry participants.

#3168..... August 2014 ..... \$5300

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