Increasing anthropogenic activities contribute to pollution and results in increased air pollution. Activities such as construction, mining, and deforestation increase the content of PM2.5 and PM10 in the air. Other sources such as industrial & vehicular exhausts, power plants, and others contribute to gaseous air pollutants (carbon monoxide, SOx, NOx, etc.). According to the fact sheet published by the World Health Organization (WHO) in 2011, urban outdoor air pollution is estimated to cause 1.3 million deaths worldwide per year.

The aforementioned air pollutants are not only harmful to life, but also deem to be a threat to vehicles, if not filtered. Hence, the prominence for automotive air filters has risen and will continue to grow in the near future. Installation of intake or engine filters is proven to increase the engine life as well as overall fuel efficiency (up to 10%) of the vehicle. A clean and good quality intake air filter restricts the entry of all external pollutants (such as pollens, particulate matter, dust, etc.), and only permits clean air to enter the engine.

The entry of dirt particles can damage engine cylinders, walls, pistons and piston rings, which will result in reduced engine life. Availability of clean air in the combustion chamber leads to complete fuel combustion, thus, resulting in reduced exhaust emissions. Increasing regulations for air emissions from vehicles have triggered the R&D and overall market demand for air intake filters.

Likewise, increased air pollution and an increase in the population that is sensitive to allergic conditions, have triggered the demand for cabin air filter. The current cabin air filter not only restricts the entry of air pollutants, but also traps harmful gases, passing fresh air in the cabin air system, which leads to a sanitary ambiance in the cabin space. At present, ‘nanotechnology’ based cabin filters are prevalently used to improve cabin air quality. These types of cabin filters can carry out mechanical filtration of dust and other particles in the air, whereas the charcoal layers remove gases with odors.

Alternatively, the demand for vehicles has been increasing at a significant rate since the past few years. According to a recent publication from Organization Internationale des Constructeurs d'Automobiles (OICA), the global vehicle production in 2012 reached 84.1 million units, of which the passenger car production was 63.0 million units, light commercial vehicle production were 16.9 million units, and heavy commercial vehicle production was 4.1 million units.

Additionally, the production of two-wheelers was observed to be about 84.3 million units in 2012. This increase in production numbers has increased the total number of on-road vehicles (vehicle parc). Subsequently, the demand for automotive air filters is also set to increase during the next five years. Hence, to withstand the existing and upcoming environmental regulations, automotive as well as air filter manufacturers have shifted their focus towards efficient, durable, recyclable, and cost-effective filters.

Scope of the Report

Geography

- Asia-Oceania
- Europe
- North America
- ROW

Filter Type

- Intake Air Filter
- Cabin Air Filter
Market & Vehicle Type

- OE
  -- Passenger Car
  -- LCVs
  -- HCVs
- Aftermarket
  -- Passenger Car
  -- LCVs
  -- HCVs

Two-Wheelers

- OE
- Aftermarket

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10.6 Denso Corporation
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10.9 Hengst GMBH & Co. Kg
10.10 Hollingsworth & Vose Co. Inc.
10.11 K&N Engineering Inc.
10.12 Lydall, Inc.
10.13 Mahle GMBH
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10.15 Neenah Paper Inc.
10.16 Parker Hannifin Corp.
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10.19 Sogefi SPA
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<table>
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<th>Description</th>
<th>Details</th>
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<td>Account number</td>
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</table>
| Bank Address      | Ulster Bank,
                   | 27-35 Main Street,
                   | Blackrock,
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