Industry Insights

Growth in automotive production in emerging markets is expected to have a positive impact on the overall automotive air filters market. Increasing disposable income along with growing industrialization is expected to act favorable for the global automotive air filters market. Global traffic rate across the globe has increased considerably in the last few years which had a negative effect by the increase in air pollutants on the environment. Awareness spread about the health disorders by environmental associations including Environmental Protection Agency (EPA) and Car Care Council (CCC) is expected to be a key driving force for global automotive air filters market. Prolonged exposures to extreme pollutants are not only unpleasant while driving but also has adverse effects on health.

Accumulation of the micro organisms inside the car results in health disorders such as asthma, extreme allergic reactions, nausea, irritated mucous membranes and watering of eyes. Positive emergence of electricity powered vehicles in the market may hinder the growth of intake automotive air filters as repeated replacement of these filters are required to maintain the car health. Use of electricity powered engines in the car minimizes their operation and maintenance cost and also emits less hazardous pollutants in comparison to conventional combustion engine vehicles. Major automotive air filters manufacturers around the world are investing on R&D spend owing to the volatility in the raw material prices.

Product Insights

Cabin filters was the largest automotive air filters product market and had over half of the total market share in 2012. Growing health concern among the car occupants regarding the health disorders that can be caused by contaminated air is expected to have a positive influence on the overall automotive air filters market growth. This awareness among the population have forced the automobile manufacturers to change the pattern and made it a point to put inbuilt cabin filters in the automobiles. This change in pattern of manufacturing automobiles is expected to propel the growth of cabin filters in automobiles. Intake filters are fitted to the engine to improve their performance and protect fuel from getting contaminated by reducing the entry of abrasive particles and pollutants. Regular replacement of the intake air filters are required to sustain the performance in engine which increase the usage by volume of these filters which is in comparison higher than those of cabin air filters.

Application Insights

Passenger cars emerged as the dominant automotive air filters application segment owing to the growth in usage of passenger cars in BRIC nations. Purchase of cars per person has increased considerably due to increase in disposable income especially in China, Brazil and India. Two wheelers and light & heavy commercial vehicles are other important automotive air filters application market. Usage of two wheelers is very prominent in Asia Pacific due to presence of inconvenient roads in rural parts of the region. Light & heavy commercial vehicles are mostly used in North America due to rise in small scale industries in this particular region.

End-Use Insights

Aftermarket and OEM are the major end-use automotive air filters industry. Use of air filters is more prominent in aftermarket and accounted for more three fourth of the total automotive air filters market value owing to the growth in demand for replacement intake air filters. Continuous threat is imposed on the OEM market from a large number of unorganized automotive air filters manufacturers in weak economic regions such as India and China. However increase in demand for automobile and hence growth in automotive production is expected to have a positive impact on the overall automotive air filters market.

Regional Insights

Global automotive air filters market growth is expected to rise in the next few years owing to presence of strong favorable norms and regulations across the globe. These regulations are behind the spread of awareness in consumers regarding the health disorders that are caused due to long term exposure to extreme pollution. Asia Pacific was the largest automotive air filters regional market and accounted for
nearly half of the overall market. Increase in automotive production in China and India is expected to act favorable to the total automotive air filters market growth.

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