



Research and Forecast of China Air Purifier Industry, 2013-2017

(Sample)

Huidian Research

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3. Status Quo of China's Air Purifier Industry

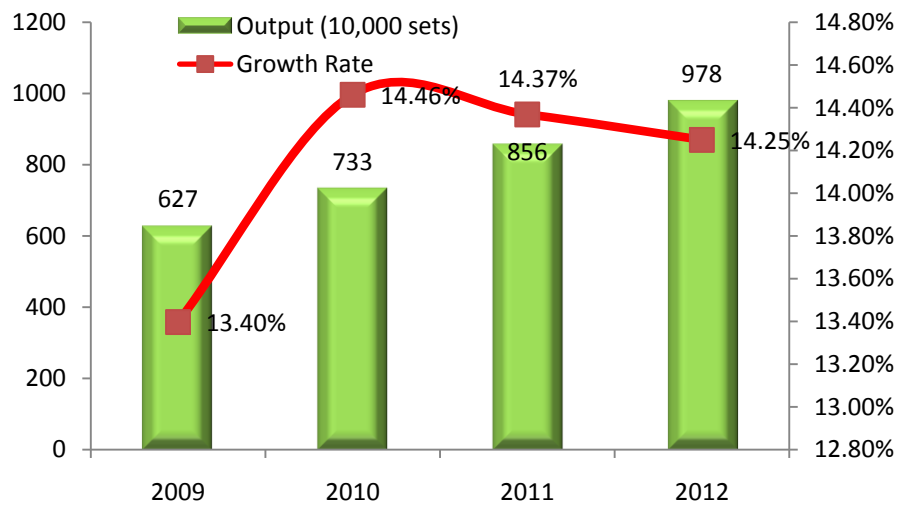
3.1 Status Quo

3.1.3 Output of Air Purifier

Currently, there are more than 200 air purifier manufacturers, which are mainly the medium and small-sized enterprises; there are a few enterprises with large scale, which are mainly concentrated in Yangtze River Delta and Pearl River Delta. The output of China's air purifiers accounts for about 70% of the world output and many Chinese enterprises focus on the export. According to the statistics of Customs, in 2012, the China's exported household air filtering and purification devices reached 9.3 million sets, rising by 4.3% compared with 2011; only in December 2012, the export volume rose by 12.2% compared with 2011 over the same period, that is to say, the air pollution condition in 2012 H2, especially in December, was the most obvious.

In 2012, the attention to PM 2.5 caused the hot situation of air purifier. The air purifier belongs to the emerging and high-tech industry, which has strong professionalism and high product quality safety level as well as the strict monitoring. At present, the overall scale of China's air purifier industry is less than CNY 100 billion; nearly 80% of market shares are occupied by the foreign brands; in 2012, the global output value of air purifiers reached USD 470 billion.

As the statistics show, the total output of China's air purifiers was 5.43 million sets in 2008, 6.27 million sets in 2009, 7.33 million sets in 2010 and reaching 8.56 million sets in 2011; although the output showed the upward trend, accounting for about 70% of the world output, many enterprises focus on the export. According to the statistics, the output of China's air purifiers was 9.78 million sets in China in 2012.

Fig.5 China's Air Purifier Output, 2009-2012

Source: <http://www.kgijhw.roboo.com/>; Huidian Research

3.2 Competitive Pattern

3.2.1 Place of Origin Pattern

Currently, there are more than 200 enterprises that produce air purifier in China, mainly in the East China and South China. There are totally 192 air purifier manufacturers in these two regions, accounting for 86% of the total number. Meanwhile, there are 6 manufacturers in Northeast China, accounting for 3%; 11 manufacturers in North China, accounting for 5%; 7 manufacturers in Central China, accounting for 3%; 7 manufacturers in Southwest China, accounting for 3%. Among these 192 manufacturers, most base on the household applicants and there are a few of them that just only produce air purifiers. In South China, Panasonic (Shunde) is such an enterprise that early engages in the air purification industry.

3.2.2 Brand Pattern

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Fig. 6 Market Share of Air Purifier in China - by Brand, Oct 2013

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