Indians buy clean air from foreign brands. On Amazon India, room purifiers sell at ₹472.2 crore a year at October's rate, and Indian brands take 10.1% of it.

AIR PURIFIERS AND POLLUTION MASKS · AMAZON INDIA, FLIPKART, BLINKIT · READ 2026-11-02

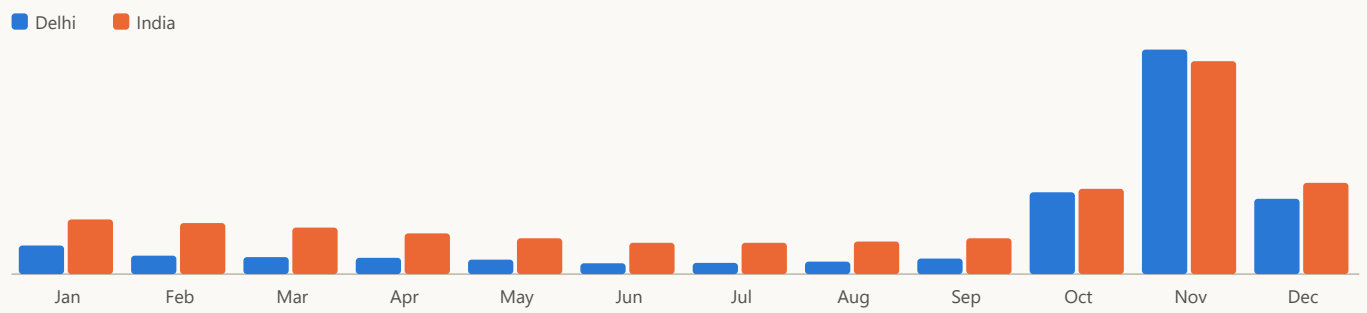
Searches for an air purifier in Delhi run 21 times higher in November than in June. We read the shelf as the smog season starts: 887 Amazon listings for 24 searches, every one that shows sales opened, Flipkart for the same searches, and Blinkit in six dark stores in four cities.

> **The measure.** Sales on Amazon India: the "bought in past month" figure at its lower bound, times the product-page price, times twelve. The past month is October, so this is the **in-season rate**, not a year's total. Read on 2026-11-02, early in the smog season and before Diwali. Search interest is Google Trends, which is relative, never a count.

1 · THE SHORT VERSION

- Room purifiers sell at **₹472.2 crore a year** at October's rate, 33,500 units a month: 96.1% of everything on the shelf.
- **Korean brands take 35.8%** of room-purifier money: Coway 29.7% and Cuckoo. Western multinationals take 43.5% (Philips 23.1%, Honeywell, Dyson), Chinese-owned brands 9.3%.
- **Indian brands take 10.1%**, nearly all of it Hero's Qubo. Eureka Forbes, the best-known Indian name in water purifiers, takes 0.1%.
- **One listing is 22.0% of the whole shelf**: the Coway Airmega 150, 6,000+ sold last month at ₹14,999.
- Masks are 34.8% of the units and 1.8% of the money. They are bought by the pack at ₹324.
- **On Blinkit, the Delhi store carries 4 room purifiers** and none from Philips, Xiaomi, Honeywell or Coway. Hyderabad's Banjara Hills carries 15.
- **On Flipkart, 367 of 526 listings typed "Room Air Purifier" cost under ₹1,000.** Most are USB mist humidifiers and aroma diffusers.

2 · THE SEASON



Google searches for “air purifier”, mean weekly interest by month, five years to 2026-11-02. Each line is scaled on its own, so compare the shape, not the height.

Across India, November interest is **6.8 times** June’s. In Delhi it is **20.7 times**. Every season since 2021 has peaked between 30 October and 17 November.

The season is also growing. Interest across October to January was 5.7 times higher in 2025 than in 2021, and 2025 set the five-year peak in the week of 9 November. This season has not peaked yet: the last four weeks average 16.5, against 17.5 in the same weeks of 2025.

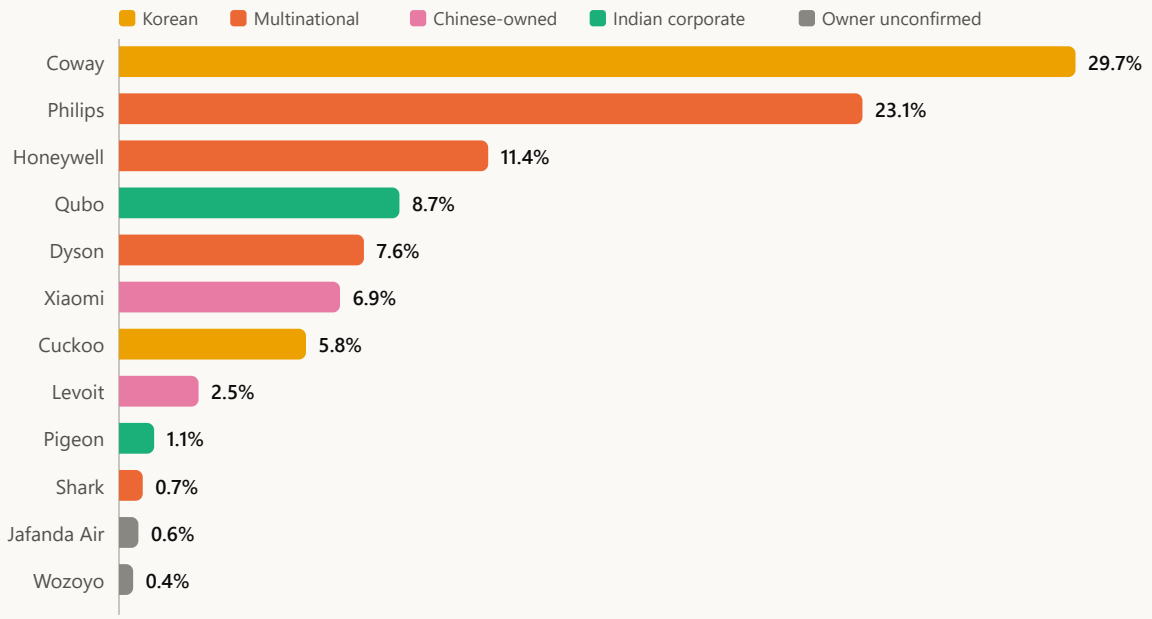
By state over the last twelve months, the order is Delhi (100), Haryana (64), Chandigarh (23), Uttar Pradesh (23), Maharashtra (19), with Delhi set to 100.

3 · WHAT THE SHELF SELLS

SEGMENT	SHARE OF MONEY	SHARE OF UNITS	SALES A YEAR, AT THE OCTOBER RATE	LISTINGS THAT SELL	MEDIAN PRICE
Room purifiers	96.1%	60.1%	₹472.2 crore	51	₹11,995
Pollution masks	1.8%	34.8%	₹8.6 crore	68	₹324
Car purifiers	1.5%	3.9%	₹7.3 crore	8	₹3,099
Air quality monitors	0.5%	0.9%	₹2.5 crore	5	₹4,364
Wearable purifiers	0.1%	0.3%	₹0.5 crore	2	₹2,799

Beside the shelf and not in it: **replacement filters sell ₹18.6 crore a year** at the same rate, led by Coway’s and Philips’s own filters. A purifier is a filter subscription that the buyer renews by hand.

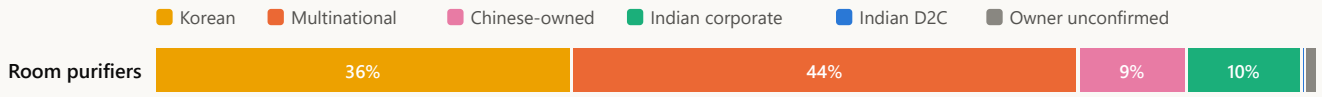
4 · WHO SELLS ROOM PURIFIERS



BRAND	OWNER	LISTINGS THAT SELL	UNITS A MONTH	MEDIAN PRICE	SHARE	SALES A YEAR, OCTOBER RATE
Coway	Korean	7	8,300	₹13,499	29.7%	₹140.1 crore
Philips	Multinational	9	6,000	₹16,900	23.1%	₹108.9 crore
Honeywell	Multinational	7	6,850	₹10,499	11.4%	₹54.1 crore
Qubo	Indian corporate	5	2,950	₹9,990	8.7%	₹41.1 crore
Dyson	Multinational	2	1,000	₹29,900	7.6%	₹35.9 crore
Xiaomi	Chinese-owned	3	2,500	₹10,990	6.9%	₹32.4 crore
Cuckoo	Korean	3	1,600	₹15,789	5.8%	₹27.4 crore
Levoit	Chinese-owned	2	1,500	₹7,299	2.5%	₹11.6 crore
Pigeon	Indian corporate	1	1,000	₹4,299	1.1%	₹5.2 crore
Shark	Multinational	1	100	₹28,999	0.7%	₹3.5 crore
Jafanda Air	Owner unconfirmed	2	400	₹6,900	0.6%	₹2.8 crore
Wozoyo	Owner unconfirmed	2	400	₹4,589	0.4%	₹2.1 crore

Coway leads on one product. The Airmega 150 alone is ₹108.0 crore of Coway's ₹140.1 crore. Philips spreads its ₹108.9 crore over 9 listings. By units, Coway is first, then Honeywell, whose best

seller is a ₹5,149 purifier, then Philips.



OWNER GROUP	SHARE OF ROOM-PURIFIER MONEY	MEDIAN PRICE
Korean	35.8%	₹14,999
Multinational	43.5%	₹13,499
Chinese-owned	9.3%	₹9,799
Indian corporate	9.9%	₹8,990
Indian D2C	0.3%	₹2,499
Owner unconfirmed	1.1%	₹4,900

The Korean brands are the dearest at ₹14,999 at the median. Qubo sells at ₹8,990, under every foreign group. Honeywell is a licensed brand in India and Philips home appliances are made by Versuni under the Philips name; both are counted by the name the buyer sees.

5 · WHERE IT IS MADE

45.0% of room-purifier money, and 51.0% of the listings that sell, are on listings whose product page says China. Korea is 28.7% of the money, all Coway and Cuckoo. India is 3.4%. Masks are the opposite: 74.8% of mask money is on listings made in India.

6 · BLINKIT: WHAT EACH CITY'S DARK STORE CARRIES

STORE	CITY	ROOM PURIFIERS	POLLUTION MASKS	WEARABLE AND CAR	ROOM PURIFIER BRANDS
Connaught Place	Delhi	4	21	6	Cpensus, NUEVO, Qubo
Powai	Mumbai	8	12	3	Honeywell, Philips, Qubo, Xiaomi
Bandra West	Mumbai	8	8	5	Honeywell, Philips, Xiaomi
Indiranagar	Bengaluru	13	12	1	Coway, Honeywell, Philips, Qubo, Xiaomi
Koramangala	Bengaluru	2	20	2	Philips, Xech
Banjara Hills	Hyderabad	15	17	1	Coway, Honeywell, Philips, Qubo, Xiaomi

Where the air is worst, the purifier shelf is among the thinnest. Connaught Place in Delhi shows 4 room purifiers, fewer than every store but 1, from 3 brands, none of them a leader on Amazon; and the most masks of any store, 21. Banjara Hills shows 15 room purifiers from five brands. Blinkit shows no product as sold out in any store, so a missing purifier may be stocked and sold through, not left out.

7 · FLIPKART: MOST "AIR PURIFIERS" ARE NOT

Flipkart types 526 listings as "Room Air Purifier" for our searches. **367 of them cost under ₹1,000**, and 188 say in the name that they are a humidifier, a mist maker or a diffuser. After those, 102 cost ₹5,000 or more, at a median of ₹11,446, close to Amazon's. Amazon files humidifiers in their own category, so they never reach its purifier shelf.

Among Flipkart purifiers at ₹5,000 or more on the first page of results, the most listed brands are Philips (17), Eureka Forbes (8), Qubo (4), Xiaomi (3), Dyson (3). Eureka Forbes is second on Flipkart and barely sells on Amazon. Flipkart shows no sales figure, so this is presence, not money.

8 · WHAT SHARE OF THE COMPANY'S SALES THIS IS

COMPANY	REPORTED REVENUE	ROOM PURIFIERS ON AMAZON, OCTOBER RATE	SHARE OF REVENUE
Hero Electronix (Qubo) (FY25)	₹275 crore	₹41.1 crore	15%

At October’s rate, Qubo’s Amazon purifiers equal about a sixth of what Hero Electronix reports for its whole Qubo range, which also sells cameras, locks and dashcams. October is a peak month, so the yearly share is lower. Coway and Philips do not report Indian purifier revenue separately.

Hero Electronix (Qubo): Qubo, revenue "over Rs 275 crore" in FY2024-25, all products, company announcement (Digital Terminal), not a filing.

9 · WHAT WE PREDICTED

We wrote down 8 predictions before we read the shelf. 4 of 8 held.

WE SAID	WE FOUND	
Room purifiers sell ₹300 to ₹900 crore a year at the in-season rate	₹472.2 crore	Right
Philips is the largest brand by money	Coway is; Philips is second	Wrong
Foreign brands take over 60% of room-purifier money; Indian brands under 25%	Foreign 88.7%; Indian 10.1%	Right
Xiaomi is the largest brand by units	Coway is; Xiaomi is fifth	Wrong
Masks are under 15% of the money but over 40% of the units	1.8% of the money, 34.8% of the units	Wrong
The median room purifier that sells costs ₹8,000 to ₹14,000	₹11,995	Right
Over half of room-purifier listings that sell are made in China	51.0%	Right
Delhi (Connaught Place) carries at least twice the products of any Bengaluru store	32 against 26	Wrong

10 · METHOD

Amazon India, 24 searches, three pages each: room, bedroom, HEPA and car purifiers, two price bands, air quality monitors, three mask searches, and twelve brand searches so every large brand is reached. We counted only Amazon’s own results and opened the product page of every listing that shows a sales figure.

The shelf is Amazon’s own category: HEPA and portable air purifiers, car purifiers, air quality meters, and pollution masks and respirators. Surgical and procedure masks, riders’ face covers, humidifiers, air fresheners and filters are left out. Flipkart was read for the same searches, Blinkit for five searches in six stores: Connaught Place (Delhi), Powai and Bandra West (Mumbai), Indiranagar and Koramangala (Bengaluru), Banjara Hills (Hyderabad).

Every brand’s owner is researched by hand; a brand we cannot confirm is counted as unconfirmed. Made in China is the Country of Origin the product page states. We read this shelf again at the peak of the season and again in spring, with the same searches, to measure how much of it is seasonal.

> We read shelves like this one by category, by platform and by city, and read them again to show what moved. If you are building in home appliances or health, **book a discovery call at www.impuls8.com/enterprise**.

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