



# Targeting the Invisible: Pollutant-Focused Market Fit Study for AirPure Innovations.

**Overview**

**Primary Analysis**

**Severity - Demand Matrix**

**City Risk & Health Burden**

**Market Prioritization**

# India's Air Quality: What the Data Tells Us

A snapshot of air pollution across India - highlighting trends, key pollutants & how cities & states compare.



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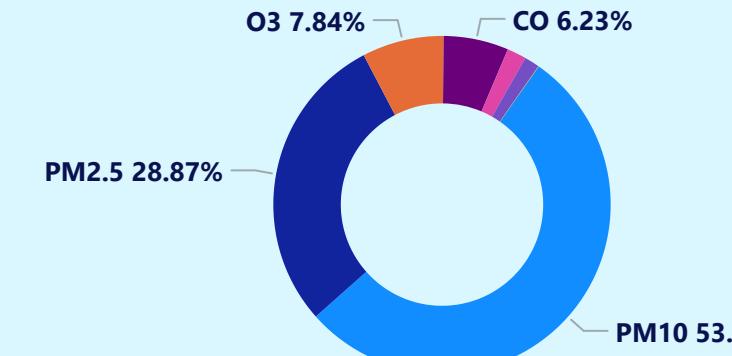
Clear all slicers



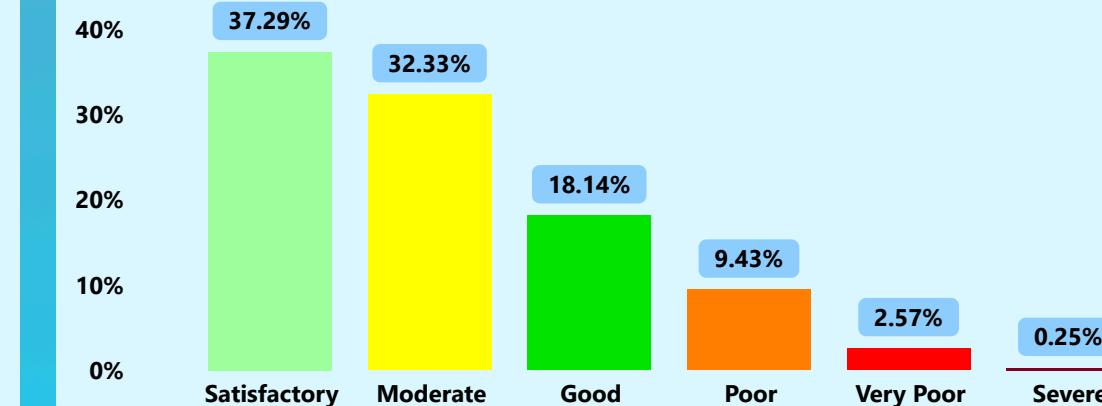
## Monthly AQI Trends



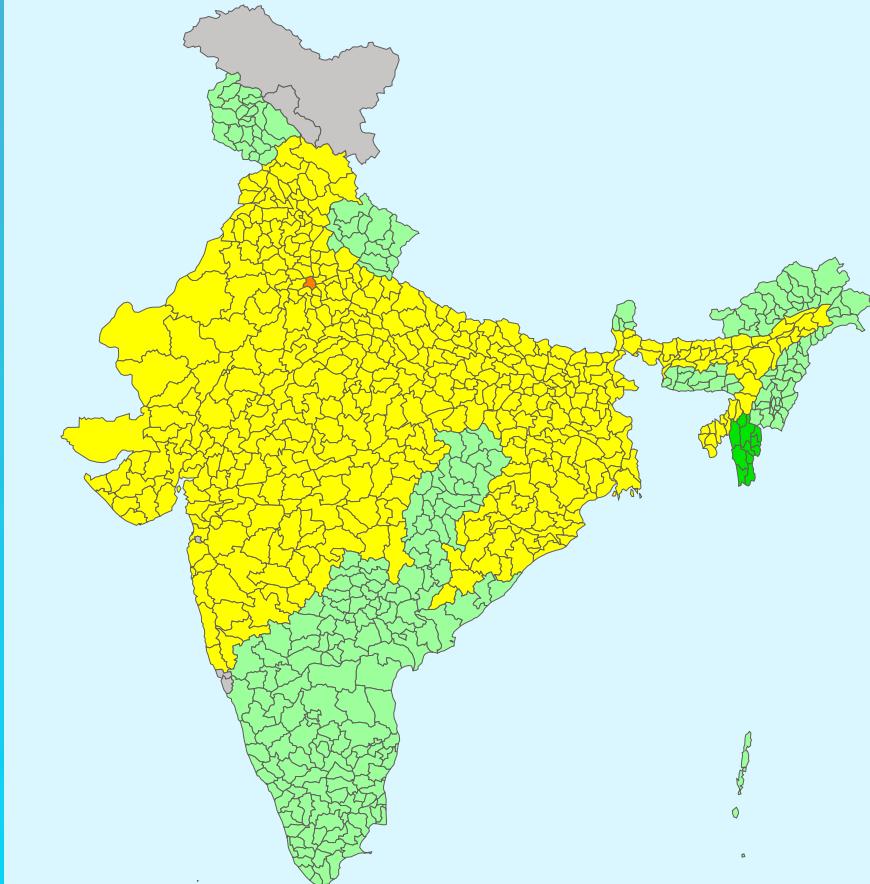
## Pollutants Distribution



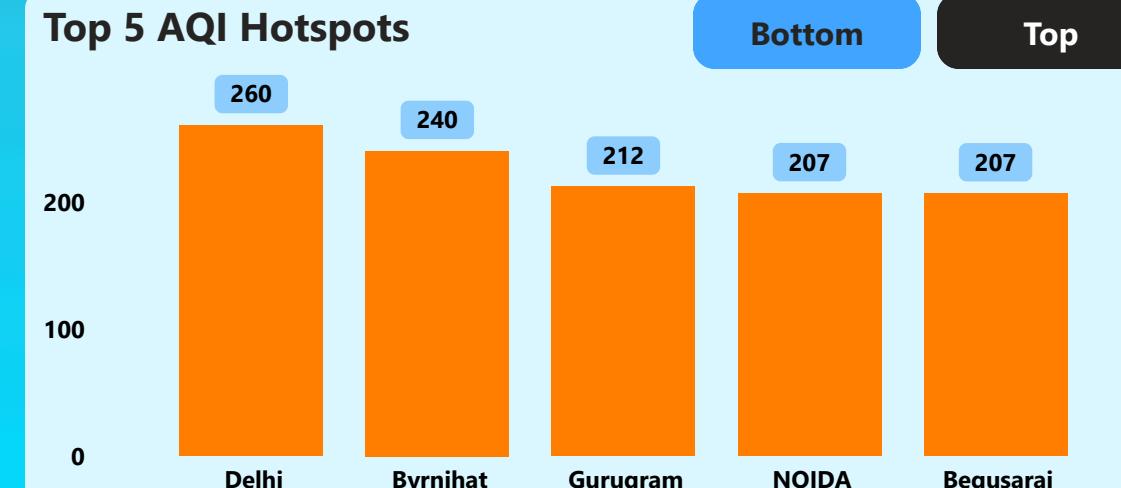
## AQI Status Distribution



## India's AQI Landscape: Air Quality Map



## Top 5 AQI Hotspots



## Top 5 AQI Hotspots



Year

All

Month

All

Region & State

All

Tier & City

All

# Primary Analysis.

Explores air quality trends by geography, time & emission type.

Part 2



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Andhra Pradesh

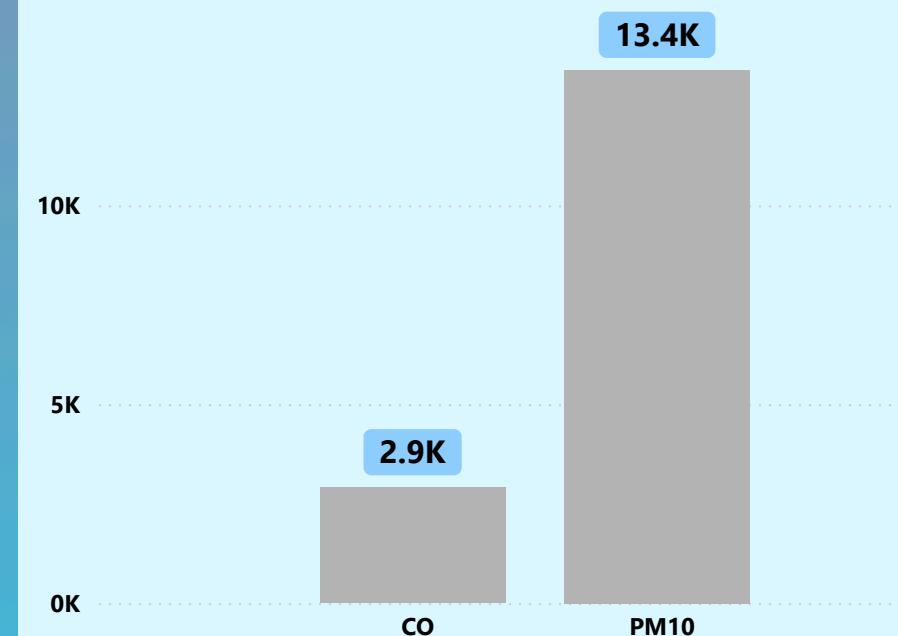
Karnataka

Kerala

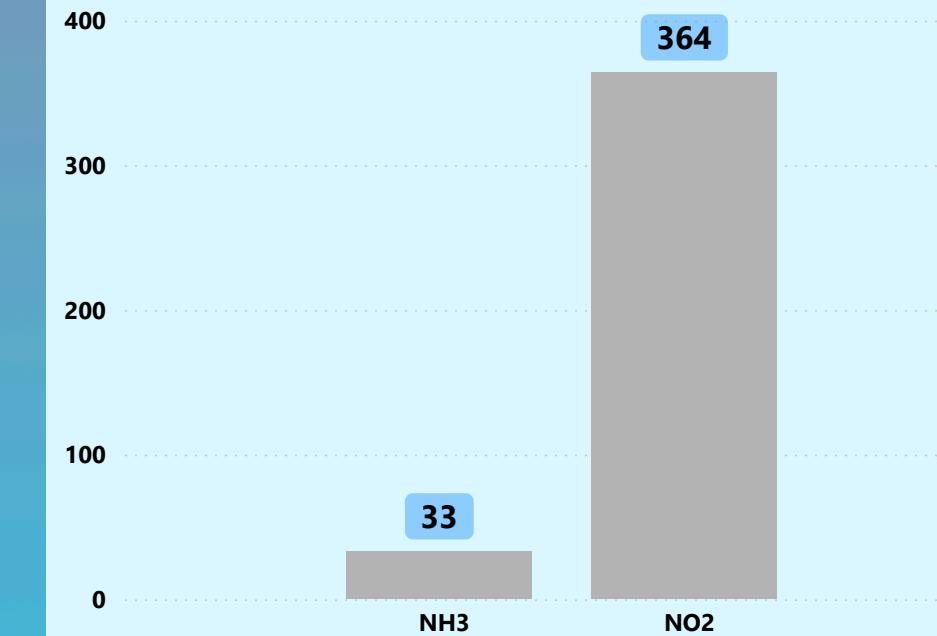
Tamil Nadu

Telangana

## Major Pollutants in Karnataka



## Minor Pollutants in Karnataka



## Air Quality Category Breakdown: Bengaluru (Mar–May 2025)



## Do Weekends Breathe Better? Metro AQI Trend (June-24 to May-25)



# Primary Analysis.

Explores air quality trends by geography, time & emission type.

Part 1



Overview

Primary Analysis

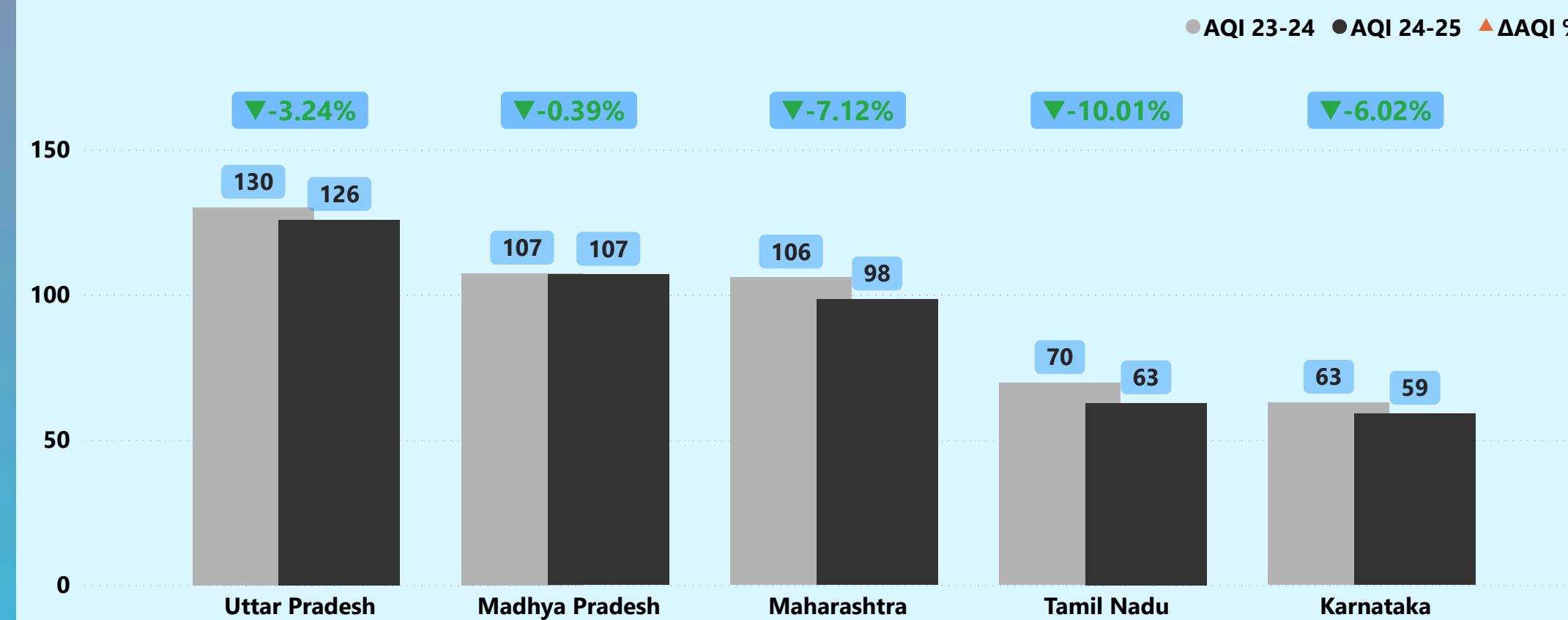
Severity - Demand Matrix

City Risk & Health Burden

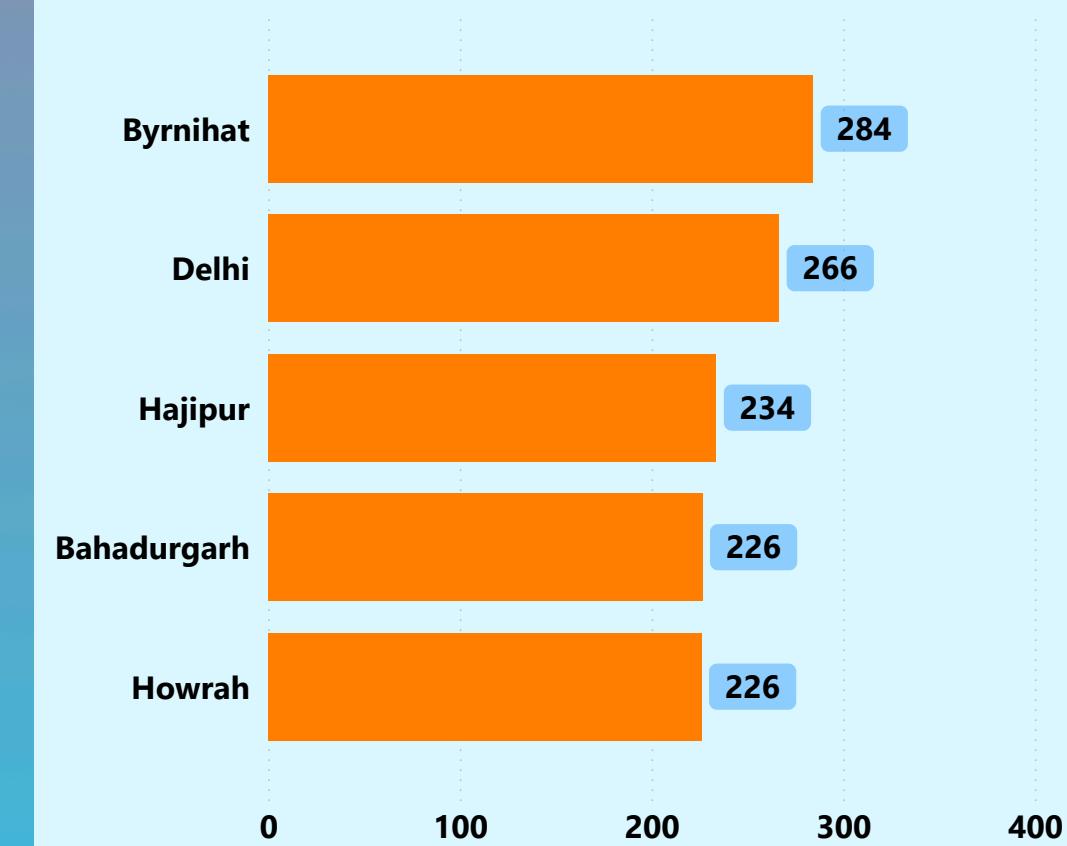
Market Prioritization

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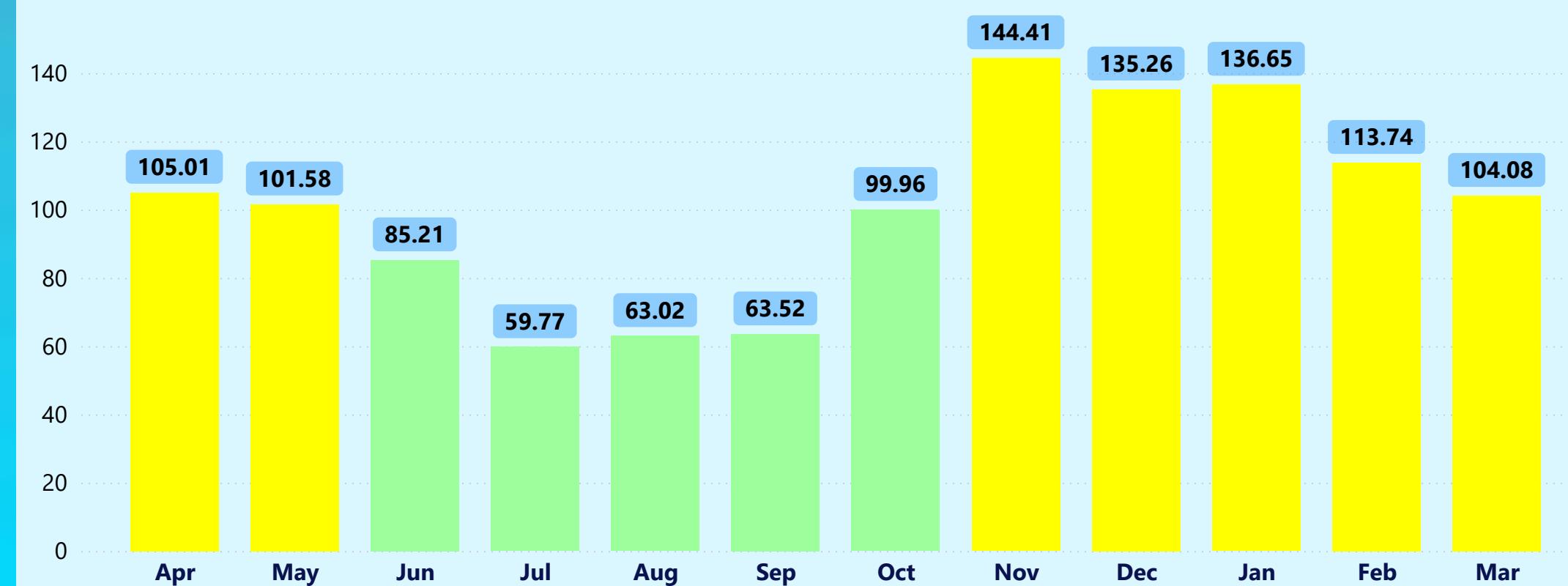
## Do EV-Heavy States Breathe Cleaner? AQI vs EV Penetration



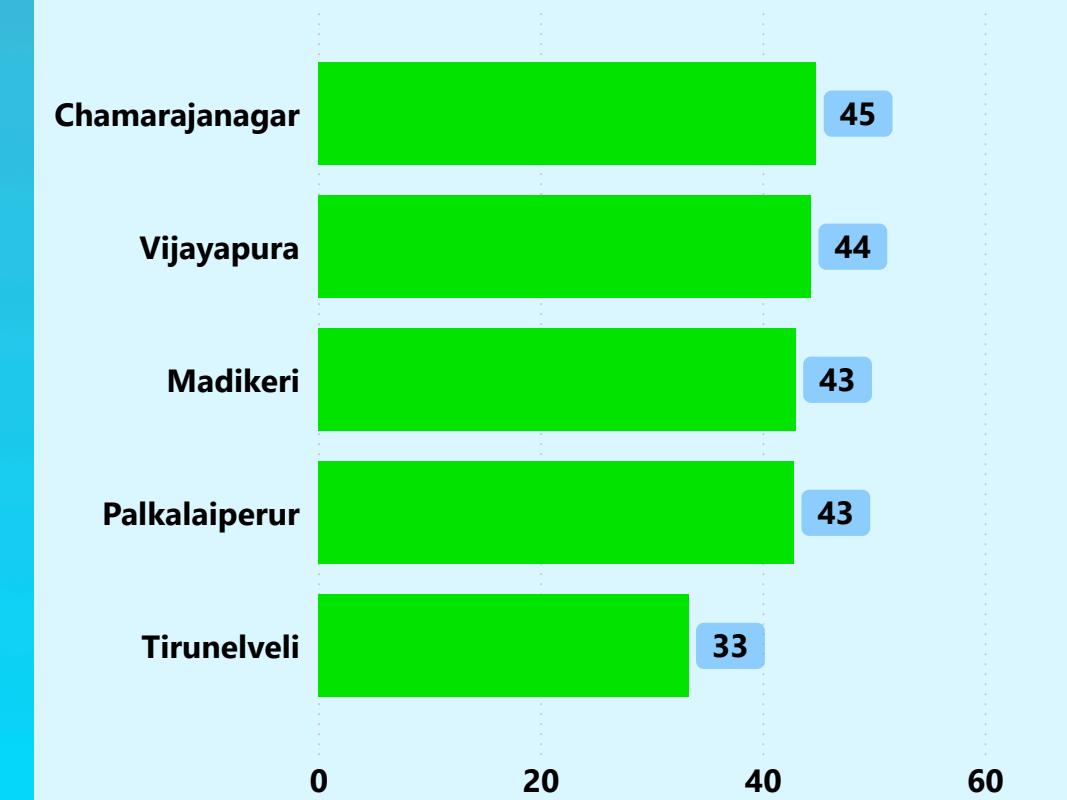
## India's Most Polluted Cities (Dec 2024 to May 2025)



## Air Quality by Month - Key Indian States



## India's Most Cleanest Cities (Dec 2024 to May 2025)



# Severity - Demand Matrix.

Highlight pollution severity & Behavior Shifts.

Tier 1

Tier 2

2022-23

2023-24

2024-25

2025-26

## Severity Mapping

Where the air is getting worse & when it's the worst.

City	2022-23	2023-24	2024-25	Percentage Change	Trend
Ahmedabad	116.01	112.96	132.46	▲ 14.2%	Irreversible
Bengaluru	74.92	68.77	74.25	▼ -0.9%	Stagnant
Pune	114.59	136.93	94.92	▼ -17.2%	Improving
Hyderabad	97.57	81.31	77.26	▼ -20.8%	Improving
Chennai	103.06	77.05	79.31	▼ -23.0%	Improving
Mumbai	140.20	106.97	101.50	▼ -27.6%	Improving
Kolkata	182.49	130.26	126.22	▼ -30.8%	Improving
Delhi	271.04	263.36	252.01	▼ -7.0%	Stagnant

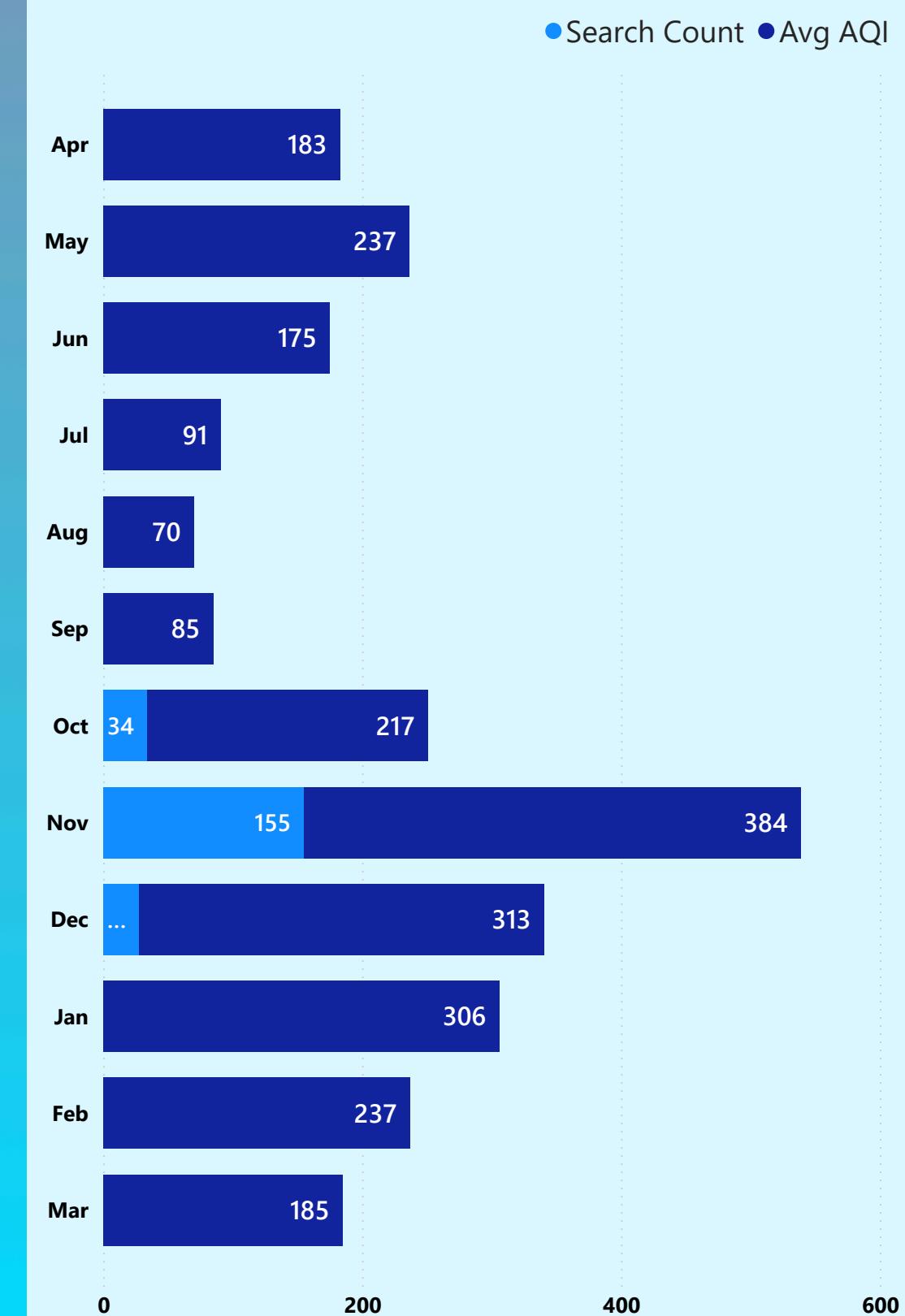
## Severity - Demand Matrix

City	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Avg AQI
Ahmedabad	128.90	147.11	107.75	74.50	63.14	61.22	137.81	156.67	157.65	132.08	145.60	143.57	132.46
Bengaluru	74.50	62.14	56.00	53.00	57.67	67.00	53.00	85.78	67.83	90.47	84.15	76.13	74.25
Chennai	61.91	61.89	63.50	...	51.67	60.57	111.00	122.57	77.83	102.83	83.20	71.80	79.31
Delhi	183.00	236.60	175.00	90.80	70.00	84.89	216.81	383.79	312.64	305.93	237.00	184.80	252.01
Hyderabad	80.40	75.62	56.41	48.41	57.44	59.81	74.67	110.62	103.10	100.07	92.24	93.20	77.26
Kolkata	97.23	68.89	59.50	50.00	38.75	67.00	101.75	159.04	167.56	171.88	118.00	99.73	126.22
Mumbai	122.67	84.09	54.93	58.00	44.84	53.82	104.67	153.36	162.95	136.31	117.70	92.40	101.50
Pune	...	125.20	53.80	50.79	51.64	55.14	78.75	162.82	151.89	...	132.50	163.67	94.92

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## Demand Triggers

Do AQI Spikes Drive Air Purifier Demand in Delhi?



# City Risk & Health Burden.

Mapping AQI Severity Against Population & Health Burden.



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Severity - Demand Matrix

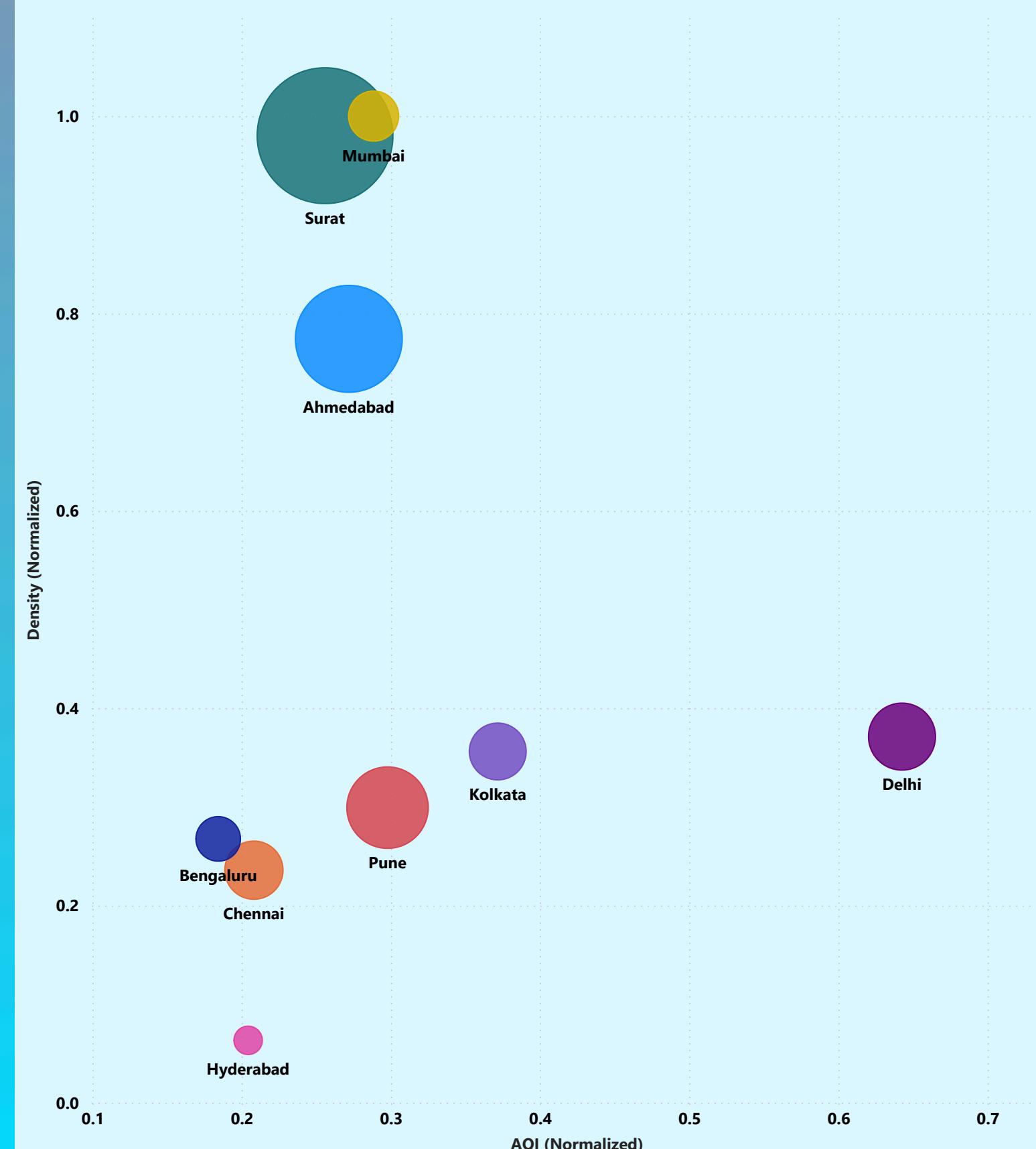
City Risk & Health Burden

Market Prioritization

Clear all slicers

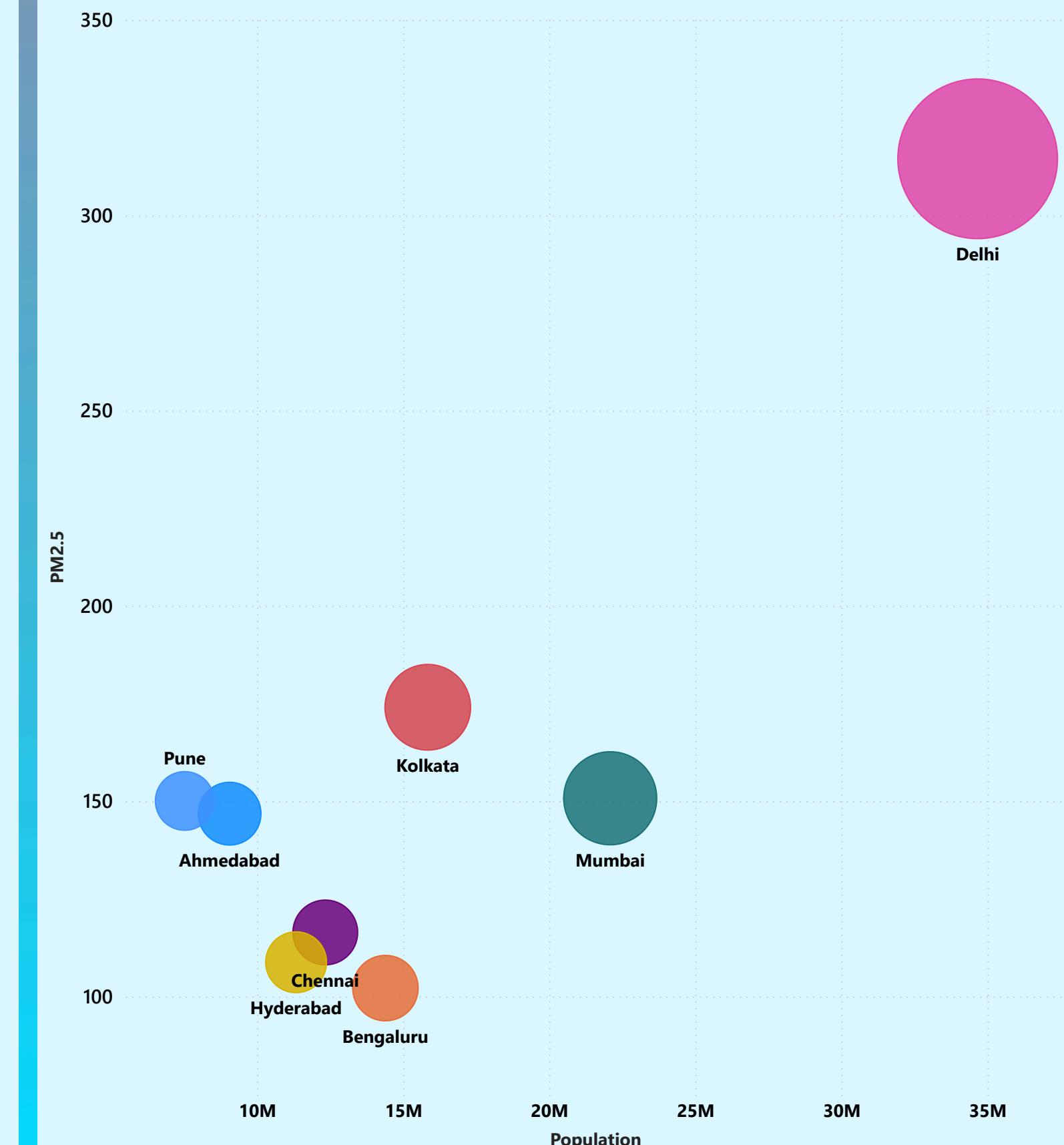
## Where Pollution Hurts Most: City-Level Risk Mapping (2024)

Bubble size indicate Risk Score



## PM2.5 Exposure vs. Total Health Burden Across Cities

Bubble size represents Health Burden. Higher PM2.5 levels & Population drive up health cost burden.



# Market Prioritization.

It identifies potential cities for air purifier policy action using pollution, health impact, awareness & population metrics.



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## Mapping Urban Demand

Other

Tier 1

Tier 2

City	AQI Value	Awareness level	Population(2024)	Market Size(Est)	Demand Tiering
Delhi	266.17	98.00%	34.67M	₹ 2,266.66 Cr	Very High
Kolkata	142.10	98.00%	15.85M	₹ 648.91 Cr	Medium
Mumbai	100.48	85.00%	22.09M	₹ 884.77 Cr	Medium
Pune	87.64	98.00%	7.53M	₹ 240.73 Cr	Low
Ahmedabad	131.65	85.00%	9.06M	₹ 271.66 Cr	Low
Hyderabad	74.29	85.00%	11.34M	₹ 327.94 Cr	Low
Chennai	74.76	98.00%	12.34M	₹ 393.27 Cr	Low
Bengaluru	73.96	98.00%	14.40M	₹ 466.56 Cr	Low

## City wise Product Strategy

City	Demand Tiering	Tier	Target Segment	Model Features
Delhi	Very High	Premium	Affluent homes, health-conscious consumers	HEPA H13+, Carbon, Smart App, PM Display, UV, Air Quality Sensor
Kolkata	Medium	Mid-Range	Urban families, middle-income earners	Large coverage area, CADR > 400, washable filters, B2B packages
Mumbai	Medium	Premium	Affluent homes, health-conscious consumers	HEPA H13+, Carbon, Smart App, PM Display, UV, Air Quality Sensor
Ahmedabad	Low	Mid-Range	Urban families, middle-income earners	HEPA + Carbon, Auto Mode, 300–500 sq ft coverage
Bengaluru	Low	Premium	Affluent homes, health-conscious consumers	HEPA H13+, Carbon, Smart App, PM Display, UV, Air Quality Sensor
Chennai	Low	Mid-Range	Urban families, middle-income earners	HEPA + Carbon, Auto Mode, 300–500 sq ft coverage
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