

## Air Fresheners - US - September 2013

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“Air fresheners are widely used in American households and the market is growing and recovering from the recession. However, there are some challenges. Plug-in and battery-operated product sales are struggling, there is growing concern around chemical content that is used in air fresheners, and companies have to look to new ways to expand this mature category.”  
 – Gabriela Elani, Home & Personal Care Analyst

### This report looks at the following areas:

- Plug-in and battery-operated product segment struggling to grow
- Desire for more transparency and “better for you” products
- Expanding an already mature market

The U.S. air fresheners market is strongly recovering from the struggles it encountered during the first few years after the recession. In 2013, total U.S. retail sales for air fresheners are \$2.8 billion, up 12% during 2011-13. Air fresheners are a discretionary household product category and consumers' confidence in the economy is improving, leading them to spend more freely on nonessential household items. Mintel expects that the category will grow steadily during 2013-18, reaching sales of \$3.1 billion in 2018.

Most product segments in the market have performed well in the past year, with vehicle air fresheners, slow-release air fresheners, and aerosols all experiencing sales growth. Aerosols continue to be the most popular format because they offer consumers a convenient odor-fighting solution. The vehicle air freshener segment has doubled in size in the past year due to the success of Febreze entering the segment. While these segments have done well, the largest segment in the market, the plug-in and battery-operated segment, has struggled. This segment's challenges are that the products are expensive and the use of refills requires effort on the part of the consumer to identify that a refill is needed and to make that purchase. Giving consumers sensory cues that a refill is needed could be an opportunity for product innovation in this segment.

There could also be opportunities for companies and brands to expand the category by integrating new functional benefits into air freshener products. Improving air quality, repelling bugs, antibacterial properties, and products that offer aromatherapy and relaxation benefits are all potential product opportunities for this category.

The key focus of the 2013 report will be on understanding current air freshener usage behaviors, the opportunities for companies and brands to improve already existing forms, and what new product opportunities may look like. This report analyzes U.S. sales performance for air fresheners for the past five years and the market forecast through 2018. The report also explores consumers' usage of air fresheners in different areas of their home, the types of odors they are trying to eliminate the most frequently, and their shopping behaviors when purchasing air fresheners.

This report builds on the analysis presented in Mintel's *Air Fresheners—U.S., September 2012*, as well as previous reports with this same title in November 2011, November 2010, December 2009, December 2008, December 2007, December 2006, and September 2003.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Expanding an already mature market

Issues

Insights

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Trend: Transumers

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