

Household Fresheners - UK - December 2010

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What is this report about?

Household fresheners are enjoying a period of rapid innovation, with new fragrances, new formats and new participants in the overall market. Fresheners have moved on from being a functional product designed to cover unpleasant smells, into being a more integral part of improving the general ambience of the home. This report looks at the landscape for innovation among household fresheners and the way in which manufacturers have created premiumisation in the sector.

What have we found out?

- Sales of household fresheners grew by 17% over 2005-10 to reach £356 million. Growth has been driven by innovation, especially the introduction of powered fresheners and new fragrances.
- Three major companies dominate the market; RB (29%), SC Johnson (26%) and P&G (18%). P&G's acquisition of Ambi Pur from Sara Lee in July 2010 has concentrated supply and brings P&G closer to its main rivals in terms of sales and market share.
- The leading brand is RB's Air Wick which has a market share of 28%. However, it has lost a little market share in the face of stiffening competition from Glade (SC Johnson) and Febreze (P&G).
- Own-label is a significant force in household fresheners and accounts for some 18% share of the whole market. Growth of own-label brands outstripped the market as a whole over 2008-10. Own-label sales grew 6% over 2008-10 to £62.5 million. At the same time market growth was a little under 3%.
- In the UK two thirds of households (65%) use household fresheners. All socio-economic groups use fresheners, although C2DEs are the heaviest users. Household fresheners are used by 61% of adults, and 24% use scented candles.
- The main factors influencing choice of household fresheners are scent (51%), promotions (28%), performance (27%), brand (23%) and low price (23%). Under 35s more inclined to go for the cheapest options, are less brand loyal and will buy products that attract more loyalty points.

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