Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the aircare market
- Impact of recessionary spending on mainstream aircare brands
- How to leverage the wellness connection of aircare
- How retailers and brands can reach consumers in a changing retail landscape



"The pandemic has led to an explosion of new home behaviors, including how consumers view, use and shop for aircare."

MINTEL

- Rebecca Cullen, Senior Household Care Analyst

Buy this report now		
Visit	store.mintel.com	
EMEA	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
Americo	as +1 (312) 943 5250	
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	

#### Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## **Table of Contents**

### **OVERVIEW**

- What you need to know
- Key issues covered in this Report
- Definition
- COVID-19: Market context
- Economic and other assumptions

#### **EXECUTIVE SUMMARY**

- Top takeaways
- Market overview
- Figure 1: Total US retail sales and forecast of aircare products, at current prices, 2015-25
- Impact of COVID-19 on aircare
   Figure 2: Short-, medium- and long-term impact of COVID-19 on aircare, January 2021
- Opportunities and Challenges
- Focus shouldn't only be on scent
- Proving value will be a must
   Figure 3: Select reason for using less often cost, cost-driven candle shopping behaviors, October 2020
- Communicate safety through transparency and local claims Figure 4: Select attitudes toward aircare ingredients, October 2020
- Change is in the air: younger adults driving shift from functional to emotional
- A new way to shop: boost ecomm strategies

#### THE MARKET - KEY TAKEAWAYS

- A return to slow, steady gains post 2020
- Pandemic wave lifts all boats
- Evolve or fall behind: brands need to adapt to remain relevant
- Widen functionality and health benefits

#### MARKET SIZE AND FORECAST

- 2020 surge will be fleeting
   Figure 5: Total US retail sales and forecast of aircare
   products, at current prices, 2015-25
   Figure 6: Total US retail sales and forecast of aircare
   products, at current prices, 2015-25
- Impact of COVID-19 on aircare

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	emea	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100



#### Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MINTEL

Figure 7: Short-, medium- and long-term impact of COVID-19 on aircare, January 2021

- Lockdown
- Reemergence
- Recovery
- COVID-19: US context
- Learnings from the last recession

#### SEGMENT PERFORMANCE

 Candles maintain dominance; COVID-19 spurs growth in every segment

Figure 8: Total US retail sales of aircare products, by segment, at current prices, 2018 and 2020

• **Pandemic shopping lifts all channels, even drugstores** Figure 9: Total US retail sales of aircare products, by channel, at current prices, 2015–20

#### **MARKET FACTORS**

- Fewer kids mean fewer aircare needs
- Consider the Identity of an increasingly diverse population
   Figure 10: Number of households, by race and Hispanic origin
   of householder, 2013-23

Figure 11: Harlem candle co., September 2020

• External competition could diminish importance of certain segments

Figure 12: Scent substitution within aircare, November 2019 and October 2020

#### MARKET OPPORTUNITIES

- Tap into lingering effects of pandemic at-home lifestyle
- A clean slate: embrace positive impact Figure 13: Gilded Instagram page
- Cleaning the air Figure 14: Ozium Original Air Sanitizer (Oct 2020)

#### **COMPANIES AND BRANDS – KEY TAKEAWAYS**

- Scent expansion supported growth for P&G
- Reinforce the wellbeing benefits of aircare for mind and soul
- Premium moves into the mainstream

#### **MARKET SHARE**

- P&G leapfrogs SCJ to gain leading position
- Sales of aircare by company

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

#### Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 15: Multi-outlet sales of aircare, by leading companies, rolling 52 weeks 2019 and 2020

#### **COMPETITIVE STRATEGIES**

- Start the fire: support wellbeing and change Figure 16: Anecdote candles, October 2020
- Premiumization: novel and premium scents migrate to mass market

Figure 17: MULO sales of premium candles, by companies and brands, rolling 52 weeks 2019 and 2020

Figure 18: Private and mass brands with premium fragrances, US, 2020

How local can communicate safety and trust
 Figure 19: US launches of aircare products, by top five claim categories, 2015–20\*
 Figure 20: Illume Gardenia Luxury Soy Candle, Illume Instagram

#### THE CONSUMER – KEY TAKEAWAYS

- Profile of heaviest aircare users
- Slightly more than one third claim to be using aircare more often
- eCommerce poised to disrupt retail landscape
- The need to innovate beyond scent grows
- Support wellbeing interests: both physical and mental

#### **AIRCARE USAGE**

Most stick to long-established formats; pandemic impacts repertoires

Figure 21: Repertoire of aircare usage, October 2020 Figure 22: Aircare usage, December 2016, October 2018, November 2019, and October 2020

 Usage continues to be driven by young consumers
 Figure 23: Repertoire of aircare product usage – five or more products, by generation, parental status, Hispanic generation, October 2020

#### AIRCARE USAGE FREQUENCY AND MOTIVATORS

- One third of Americans are using aircare more often Figure 24: Aircare usage frequency, October 2020
- Disrupted routines fuel move from functional power to emotional value

Figure 25: Motivators for using aircare more often, October 2020

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	emea	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100



#### Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Select motivators for using aircare more often, by generation, parental status (presence of children under 18) by gender, October 2020

 Pandemic-driven lifestyle shifts also negatively impact usage

Figure 27: Motivators for using aircare less often, October 2020

#### AIRCARE PURCHASE LOCATIONS

• Air freshener and essential oil shopping driven by convenience

Figure 28: Retailers shopped for air fresheners and essential oils, October 2020

- Adjust to an online candle shopping experience
   Figure 29: Retailers shopped for candles, November 2019
   and October 2020
- Younger and multicultural adults shop around, gravitate toward local

Figure 30: Select aircare purchase location, by age, October 2020

Figure 31: Select aircare purchase location, by race and Hispanic origin, October 2020

### CANDLE SHOPPING ATTITUDES AND BEHAVIORS

- Scent development and experimentation remain key Figure 32: Candle shopping attitudes and behaviors, October 2020
- Online an important part of product discovery among younger gens

Figure 33: Select candle shopping behaviors, by generation, parental status, and living location, October 2020

#### ATTITUDES TOWARD AIRCARE

- **Conscious consumerism fuels natural, local preferences** Figure 34: Attitudes toward aircare, October 2020
- Increasing access to natural and premium scent can drive usage

Figure 35: Select attitudes toward aircare, by repertoire of aircare product usage, October 2020

Providing benefits beyond scent will ward off external threats

Figure 36: Aircare scent substitution, by generation, race and Hispanic origin, parental status, October 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



#### Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- A focus on health and wellbeing fuels innovation areas Figure 37: Interest in aircare innovations, October 2020
- Create unique scent experiences to reach younger audiences

Figure 38: TikTok, November 2020 Figure 39: Interest in select aircare innovations, by generation, parental status, October 2020

### **APPENDIX – DATA SOURCES AND ABBREVIATIONS**

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations

### **APPENDIX – THE MARKET**

Figure 40: Total US retail sales and forecast of aircare products, at inflation-adjusted prices, 2015-25 Figure 41: Total US retail sales and forecast of aircare products, at inflation-adjusted prices, 2015-25

#### **APPENDIX – COMPANIES AND BRANDS**

Figure 42: Multi-outlet sales of candles, by leading companies and brands, rolling 52 weeks 2019 and 2020 Figure 43: Multi-outlet sales of vehicle air freshners, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 44: Multi-outlet sales of home air fresheners, by leading companies and brands, rolling 52 weeks 2019 and 2020

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

store.mintel.com
+44 (0) 20 7606 4533
0800 095 9094
+1 (312) 943 5250
+86 (21) 6032 7300
+61 (0) 2 8284 8100





# **About Mintel**

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**