

Air Care - China - January 2021

Report Price: £3302.97 | \$4460.00 | €3717.16

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:

- How consumers' time spent at home has changed after the COVID-19 outbreak?
- What indoor air pollutants concern consumers most?
- Trends in the usage of air care products
- Usage occasions and purchase factors of scented candles
- Consumer preferences towards different approaches to improving indoor air quality

The air care market in China is expected to continue growing in 2020 with people spending more time at home after the COVID-19 outbreak, reaching value sales of RMB2,972 million. The most important opportunity for this category is to position air care as an effective way to make people feel more comfortable at home, which requires air care products to adapt to consumers' changing lifestyles and create new usage occasions, such as tackling kitchen smoke and bad cooking smells, or for use when working, exercising or taking a shower/bath at home.



“Air care needs to adapt to consumers' changing lifestyles and create new usage occasions to remain relevant. While odour-removal air fresheners are almost a thing of the past, there are opportunities to target bad cooking smells and pet odours.”

– Alice Li, Associate Director

Buy this report now

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

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

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Definitions**
- **Sub-group definitions (by monthly household income)**

EXECUTIVE SUMMARY

- **The market**

Figure 1: Best- and worst-case forecast of value sales of air care products, China, 2015-25

Figure 2: Segment value share of air care products, China, 2015-20

- **Companies and brands**

Figure 3: Leading manufacturers' share in value sales of air care products, China, 2019-20

- **The consumer**

- **The home has become a place to exercise, study, work and have fun**

Figure 4: Changes in time spent on at-home activities after the COVID-19 outbreak, December 2020

- **Consumers are concerned about kitchen smoke and lampblack most**

Figure 5: Most concerning indoor air pollutants, December 2020

- **Scented candles saw steady growth in penetration**

Figure 6: Air care products used in the last 12 months, 2016-20

- **Scented candles are used when working and bathing more than dining**

Figure 7: Usage occasions of scented candles, December 2020

- **Consumers take multiple factors into account in addition to scent**

Figure 8: Most important purchase factors of scented candles, December 2020

- **Unscented products are also in demand**

Figure 9: Preference for home fragrance, December 2020

- **What we think**

ISSUES AND INSIGHTS

- **Potential to increase usage in the kitchen**

Figure 10: Examples of scented candles designed for the kitchen, Australia and France, 2019-20

- **Leverage health benefits to expand appeal**

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.

Buy this report now

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: £3302.97 | \$4460.00 | €3717.16

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

Figure 11: Examples of air care products with sleep-aiding benefits, Germany and UK, 2019

Figure 12: Uma Pure Energy Wellness Incense, India, 2020

Figure 13: Primavera Kids room spray, Germany, 2019

THE MARKET – KEY TAKEAWAYS

- **The market achieved steady growth amid the COVID-19 outbreak**
- **Mixed performance across segments continues**

MARKET SIZE AND FORECAST

- **An emphasis on indoor air quality and home ambience drives category growth**

Figure 14: Total value sales of air care products, China, 2015-20

Figure 15: Best- and worst-case forecast of value sales of air care products, China, 2015-25

MARKET SEGMENTATION

- **Slow release and car air fresheners contribute most to category growth**

Figure 16: Segment value share of air care products, China, 2015-20

MARKET FACTORS

- **The pandemic has brought people closer to their homes**
- **Consumers are trading up to more natural products**
- **Pets create new demand for odour control products**
- **Cross-category competition could diminish the importance of air care**

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Weaker sales of traditional products dampen market leaders' share**
- **Scented candles and diffusers see more launches and innovations**

MARKET SHARE

- **Big companies losing share due to weaker sales of traditional products**

Figure 17: Leading manufacturers' share in value sales of air care products, China, 2019-20

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.

Buy this report now

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: £3302.97 | \$4460.00 | €3717.16

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

COMPETITIVE STRATEGIES

- **International companies push imported products**
- **Mainstream brands focus on added functions to boost appeal**

Figure 18: Examples of anti-bacterial and mosquito repellent air fresheners, China, 2020

- **Fragrance and lifestyle brands still lead in scented candles**

LAUNCH ACTIVITY AND INNOVATION

- **New brands elevate the design aesthetic of candles and diffusers**

Figure 19: Examples of Cosmic Speculation scented candles and diffusers, China, 2020

Figure 20: Examples of He Xi scented candles, China, 2020

- **Launched with shower and bath products**

Figure 21: Lux L'art Du Bain Celestial Escape Bathtime Diffuser, China, 2021

Figure 22: Rituals...The Ritual of Sakura Rice Milk & Cheery Blossom set, China, 2020

- **On-trend ingredients make their way into air care**

Figure 23: Examples of air care products that contain probiotics, US, 2020

- **Explore novel fragrances to drive interest**

Figure 24: Examples of air care products with innovative fragrances, global, 2019-20

- **Extend the consumer experience with creative ideas**

Figure 25: Example of a scented candle with a creative idea, Poland, 2019

- **Connect with consumers emotionally**

Figure 26: Anecdote Candles candle of the year, US, 2020-21

THE CONSUMER – KEY TAKEAWAYS

- **Consumers are most concerned about kitchen smoke and lampblack**
- **The penetration of scented candles grew steadily**
- **Scented candles are used when working and bathing more than dining**
- **The décor element of scented candles is also important, while scent remains key**

CHANGES IN AT-HOME ACTIVITIES

- **The home has taken on new roles**

Figure 27: Changes in time spent on at-home activities after the COVID-19 outbreak, December 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.

Buy this report now

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: £3302.97 | \$4460.00 | €3717.16

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

- **Target the 30-39 year olds who spend more time at home**
Figure 28: Changes in time spent on at-home activities after the COVID-19 outbreak – More than before the outbreak, by age, December 2020

MOST CONCERNING INDOOR AIR POLLUTANTS

- **Kitchen smoke and lampblack has a greater impact on indoor air quality**
Figure 29: Most concerning indoor air pollutants, December 2020
- **Odour control is more important to 18-24 year olds**
Figure 30: Most concerning indoor air pollutants, by age, December 2020
- **Homeworkers are more concerned about toxic emissions from everyday products**
Figure 31: Most concerning indoor air pollutants, by changes in time spent on working at home, December 2020

USAGE OF AIR CARE PRODUCTS

- **Shifts in usage of home fragrance products**
Figure 32: Air care products used in the last 12 months, 2016-20
Figure 33: Air care products used in the last 12 months – Potpourri and scented candles, by gender and age, December 2020
- **Sprays regain relevance among young consumers**
Figure 34: Air care products used in the last 12 months – Spray air fresheners, by age, 2019 and 2020
- **Consumers pay increasing attention to fragrance for clothes**
Figure 35: Air care products used in the last 12 months – Closet fragrance sachets, by selected demographics, December 2020
- **Lower tier cities start to lead usage of car air fresheners**
Figure 36: Air care products used in the last 12 months – Car air fresheners, by city tier, 2016, 2019 and 2020

USAGE OCCASIONS OF SCENTED CANDLES

- **Scented candles are used to create a relaxing atmosphere**
Figure 37: Usage occasions of scented candles, December 2020
- **Men are more likely to use scented candles to impress others**
Figure 38: Usage occasions of scented candles, by gender, December 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.

Buy this report now

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: £3302.97 | \$4460.00 | €3717.16

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

- **Decoration is more important for high earners**
Figure 39: Usage occasions of scented candles, by monthly household income, December 2020

PURCHASE FACTORS OF SCENTED CANDLES

- **Scent is the most important, but more factors are being taken into account**
Figure 40: Most important purchase factors of scented candles, December 2020
Figure 41: To Summer Scented Wood Wick Candle, China
- **18-24 year olds are more likely to consider the container's appearance, as well as brand and price**
Figure 42: Most important purchase factors of scented candles, by age, December 2020

PREFERENCES FOR IMPROVING INDOOR AIR QUALITY

- **Unscented products are also in demand**
Figure 43: Preference for home fragrance, by gender and age, December 2020
- **Consumers focus on the 'natural' way**
Figure 44: Preference for removing indoor odours, December 2020
Figure 45: Preference for removing indoor odours, by concern about outdoor air pollution, December 2020
- **Air care products could rival air purifiers**
Figure 46: Preference for cleaning indoor air, by age and monthly household income, December 2020
Figure 47: Preference for home fragrance, by preference for cleaning indoor air, December 2020
- **Families with children have greater needs for air care products**
Figure 48: Preferences for removing indoor air and cleaning indoor air, by family structure, December 2020

APPENDIX – MARKET SIZE AND FORECAST

Figure 49: Total value sales of air care products, China, 2015-25

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Consumer research methodology**
- **Abbreviations**

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.

Buy this report now

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



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](https://www.mintel.com)**.