

Air Care - US - March 2015

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“To help encourage growth, market players must combat cannibalization within the category by promoting complementing suites of products for greater efficacy, focus on improving the multifunctional capabilities of air care products.”

Molly Maier, Category Manager, Health, Household, Beauty and Personal Care

This report looks at the following areas:

- Combat cannibalization within category
- Focus on multifunctional attributes
- Target the multicultural consumer

What you need to know

Air care product usage enjoys strong incidence of use (81% of adults use any air care); however, household penetration has remained unchanged over time. While this strong, steady consumer base provides a solid foundation, significant growth remains elusive. Trade down to less expensive (private label) and/or replacement use of one air care product with another is also impeding market performance. Marketers must work harder to increase replenishment cycles and complementary product usage rather than allow cannibalization within the category.

In 2014, total US retail sales for the air care market were \$5.7 billion (est), a 3% increase since 2009. The category is expected to remain stagnant, with Mintel forecasting sales to grow by a mere 1% through 2019.

Definition

This report builds on the analysis presented in Mintel's *Air Care – US, August 2014*, as well as *Air Fresheners – US, September 2013* and previous reports with this same title in September 2012, November 2011, November 2010, December 2009, December 2008, December 2007, December 2006, and September 2003. In addition, the report builds on analysis presented in Mintel's *Candles – US, August 2013*, as well as previous reports with this same title in August 2012, August 2011, August 2010, August 2009, February 2008, February 2007, February 2006, February 2005, and January 2003.

Mintel defines the US air care market as consisting of the following product categories:

- Candles – A body of wax formed around a wick, which provides a flame, and, in many cases, fragrance, when lit. Includes tea lights, votives, pillars, tapers (dinner candles), and birthday candles. Candles can stand-alone or be designed for use in a holder or metal container. Both scented and unscented candles are included.
- Home Air Fresheners – Includes the aerosols/sprays, slow-release (solid, gel, liquid, reed diffusers), and plug-in and electric/battery-operated devices.
- Vehicle Air Fresheners

Wax melts, which consist of a burner device that melts wax pieces as a means of releasing fragrance are excluded from the market size, but they are discussed in the consumer sections of this report. Potpourri and flameless candles, which use LED lights or light bulbs to create the appearance of a candle flame, are not included in the market size nor are they discussed in the report.

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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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International Housewares Association

National Candle Association (NCA)

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