

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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



“Value sales in the air care category have stalled somewhat, but market conditions look set to ensure it returns to growth. There is an appetite for innovation in the category, and potential for product development of more premium scents and formats to boost the market, building on the positive impact that brand new products have had on the category in recent years.”

– Richard Hopping, Brand and Household Analyst

This report looks at the following areas:

- Preventing further stagnation of the aerosols segment
- Building the profile of wax melts
- A question of air quality

Value sales of air care products plateaued in 2015, with the impact of new innovations from big name brands tempered by discounting and competitive pricing by retailers. This appears to have hit the aerosols segment the hardest; their popularity and ubiquity make them a prime target for retailer promotions.

Innovations in this category are vital, with Air Wick and Glade in particular benefiting from new product lines and accompanying advertising campaigns. Brands can look to further NPD (New Product Development) in terms of premium formats and scents to encourage consumers to trade up on air care products.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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
- Products covered in this Report

Executive Summary

- Market stalls but is expected to return to growth
 - Figure 1: Best- and worst-case forecast of UK retail sales of air care products, 2011-21
- Scented candles and continuous electric segments sustain the category
 - Figure 2: UK retail sales of air care products, by segment, 2014-16
- Major brands invest in brand new products
 - Figure 3: New product development in the air care products category, by launch type, January 2012-May 2016
- Adspend increased in 2015
 - Figure 4: Total above-the line, online display and direct mail advertising expenditure on air care products, January 2012-May 2016
- Perceived characteristics of sprays/aerosols drive usage
 - Figure 5: Usage of air care products in the last 12 months, April 2016
- Functional aspect of sprays/aerosols evident
 - Figure 6: Most likely room that air care products are used in, April 2016
- Safety of products is some concern
 - Figure 7: Attitudes towards air care products, April 2016
- A third see air care in purely functional terms
 - Figure 8: Air care product behaviours, April 2016
- What we think

Issues and Insights

- Preventing further stagnation of the aerosols segment
 - The facts
 - The implications
- Building the profile of wax melts
 - The facts
 - The implications
- A question of air quality
 - The facts
 - The implications

The Market – What You Need to Know

- Growth in air care products slowing
- Continuous electric and scented candles support the category
- Discounters increasing influence
- Growing population could be beneficial...

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: 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 |
 EMAIL: reports@mintel.com

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

...although Brexit vote may undermine consumer confidence
Outdoor pollution declining, but awareness of indoor pollution increases

Market Size and Forecast

Value sales in the air care category stagnate

Figure 9: UK retail value sales and forecast of air care products, at current and constant prices, 2011-21

Market expected to return to growth

Figure 10: Best- and worst-case forecast of UK retail sales of air care products, 2011-21

Forecast methodology

Segment Performance

Scented candles are the fastest-growing segment

Figure 11: UK retail sales of air care products, by segment, 2014-16

Continuous electric segment maintains sales

Aerosols hit by discounting and discounters

Big brands reduce focus on non-electric segment

Channels to Market

Major grocers at an advantage, but discounters' influence is growing

Figure 12: UK retail value sales of air care products, by outlet type, 2014-16

Market Drivers

Population increase could be beneficial

Figure 13: Trends in the age structure of the UK population, 2011-21

A reduction in average household size may dampen growth

Figure 14: UK households, by size, 2011-21

Consumer confidence improving among many

Figure 15: Consumer sentiment for the coming year, January 2009-May 2016

Government legislation drives outdoor pollution down

Figure 16: Greenhouse gas emissions produced by fuel sources used by road vehicles, 1990-2013

Increased coverage of indoor air quality

Opportunity for brands to tie in with mental state

Figure 17: Health issues experienced and future concerns, June 2015

Car ownership increases but smoking ban may put limits on freshener growth

Importance of fragrance in other household categories

Companies and Brands – What You Need to Know

Air Wick remains the biggest brand...

...while Yankee Candle continues to build share

NPD dominated by major brands

RB and P&G increase adspend share

Yankee Candle stands out, while Febreze generates trust

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Market Share

Yankee Candle the biggest mover

Figure 18: Brand shares of value sales of air care products, year to March 2016

Air Wick remains the biggest brand in air care

Glade contributes towards growth of continuous electrical segment

Figure 19: Brand shares in value sales of continuous electrical air fresheners, years ending March 2015 and 2016

Yankee Candle continues strong growth

Figure 20: Brand shares in value sales of scented candles, years ending March 2015 and 2016

Air Wick Life Scents boosts its share of non-electric segment

Figure 21: Brand shares in value sales of continuous non-electrical air fresheners, years ending March 2015 and 2016

Febreze and Glade experience decline in non-electric sales

Air Wick's Pure aerosol makes an impact

Figure 22: Brand shares in value sales of aerosol air fresheners, years ending March 2015 and 2016

Launch Activity and Innovation

NPD on the rise

Figure 23: New product development in the air care products category, by sub-category, January 2012-May 2016

Brands dominate

Figure 24: New product development in the air care products category, own-label vs branded, January 2012-May 2016

Big manufacturers dominate category

Figure 25: New product development in the air care products category, by top ultimate companies and other, 2015

Glade launches a number of limited edition collections

Figure 26: Examples of SC Johnson launches under the Glade brand, January 2015-May 2016

Air Wick launches Air Wick Pure and Life Scents

Figure 27: Examples of RB Air Wick Life Scents launches, January 2015-May 2016

Febreze maintains focus on aerosol sprays

Figure 28: Examples of P&G launches under the Febreze Air Effects brand, January 2015-May 2016

New innovations and limited edition launches dominate

Figure 29: New product development in the air care products category, by launch type, January 2012-May 2016

Functionality of category still noted

Figure 30: Leading claims in the air care products category, based on top claims for 2015, 2014 and 2015

Limited edition and seasonal offer extra reason for purchase

Figure 31: Examples of limited edition and seasonal launches in the air care category, January 2015-May 2016

Focus on ingredients influences claims

Fragrance launches match consumer preferences

Figure 32: Leading fragrances in the air care products category, based on top fragrance component groups for 2015, 2012-15

Interest in air quality drives product launches

Brand Communication and Promotion

Adspend increased in 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 33: Total above-the line, online display and direct mail advertising expenditure on air care products, January 2012-May 2016

Figure 34: Total above-the line, online display and direct mail advertising expenditure on air care products, by advertiser, January 2012-May 2016

TV advertising continues to dominate

Figure 35: Total above-the line, online display and direct mail advertising expenditure on air care products, by media type, January 2012-May 2016

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 36: Attitudes towards and usage of selected brands, February 2016

Key brand metrics

Figure 37: Key metrics for selected brands, February 2016

Yankee Candle fragrances boost innovative image

Figure 38: Attitudes, by brand, February 2016

Air Wick, Glade and Ambi Pur struggle to capture the imagination

Figure 39: Brand personality – Macro image, February 2016

Febreze most likely to be seen as caring

Figure 40: Brand personality – Micro image, February 2016

Brand analysis

Yankee Candle performs strongly

Figure 41: User profile of Yankee Candle, February 2016

Febreze's odour-elimination focus promotes strong image

Figure 42: User profile of Febreze, February 2016

Air Wick lacks perceived differentiation

Figure 43: User profile of Air Wick, February 2016

Ambi Pur has lower penetration than other brands

Figure 44: User profile of Ambi Pur, February 2016

Glade has slight value advantage over similar brands

Figure 45: User profile of Glade, February 2016

The Consumer – What You Need to Know

Aerosols/sprays the most popular format

High proportion of purchase reflects potential for gifting

Wax melts have yet to carve out a niche

Most formats likely to be used in living room areas

Floral fragrances preferred

Concern over safety of ingredients

A third see air care as purely functional

Usage of Air Care Products

Perceived characteristics of sprays/aerosols drive usage

Figure 46: Usage of air care products in the last 12 months, April 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Air Care - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

A gender divide

A mature market, but still room for growth

Figure 47: Repertoire of air care products used, April 2016

Purchase of Air Care Products

Purchasing higher than usage

Figure 48: Frequency of purchase of air care products in the last 12 months, April 2016

Perceptions of Air Care Formats

Sprays/aerosols seen as functional, but have drawbacks

Figure 49: Perceptions of air care formats, April 2016

Plug-ins' image influences lower usage than other formats

Figure 50: Perceptions of air care formats, April 2016

Wax melts yet to carve out a niche

Where Air Care Products are Used

Functional aspect of sprays/aerosols evident

Figure 51: Most likely room that air care products are used in, April 2016

Chance for wax melts to differentiate

Air Care Fragrance Preferences

Floral scents favoured

Figure 52: Air care fragrance preferences, April 2016

The less engaged still likely to change fragrance

Figure 53: Repertoire of air care fragrance preferences, April 2016

Attitudes towards Air Care Products

Safety of products is some concern

More information about ingredients could be necessary

Figure 54: Attitudes towards air care products, April 2016

Opportunity to tie in with other cleaning products

Air Care Product Behaviours

A third look at air care as purely functional

Figure 55: Air care product behaviours, April 2016

Opportunity to explore different fragrances for different rooms

New innovations likely to replace old products

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Forecast methodology

Appendix – Companies and Brands

Figure 56: New product development in the air care products category, own-label vs branded, by segment, 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com