

## Air Care - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



Sales in the air care industry remain nearly flat from 2016-17, contracting 0.3% to reach just more than \$6 billion. While the need to eliminate temporary smells and create a pleasant ambiance drive demand, competition from other industries, disengagement with the category, and a lack of major innovation are hindering incremental sales growth.

This report looks at the following areas:

The industry enjoys wide penetration, with most using air care more than once a month. However, non-users avoid these products due to preferences for an unscented space.

- **Unscented preferences, absence of odors prohibit use for some**
- **Importance of discounts signals disengagement in the category**

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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 - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Definition

### Executive Summary

The market

Market contracts slightly from 2016-17; slow future projected growth

Figure 1: Total US sales and fan chart forecast of air care products, at current prices, 2012-22

The issues

Unscented preferences, absence of odors prohibit use for some

Figure 2: Select usage barriers, November 2017

Importance of discounts signals disengagement in the category

Figure 2: Select purchase Influencers, by product type, November 2017

The opportunities

Emphasize fun and celebration to widen penetration and increase demand

Yankee Candle is one example of a brand whose products embrace fun and celebration, as unique scents such as Peeps allow adults to act like kids again, and a wide variety of scents encourage experimentation (see What's Working?).

Figure 3: Select usage drivers, November 2017

Strengthen product association with specific odors to compel users

Figure 4: Select smell sources, by select product usage, November 2017

Target certain demographics to reach a captive audience

Figure 5: Select product usage, by those aged 18-34, parental status, and Hispanic origin, November 2017

What it means

### The Market – What You Need to Know

Market contracts slightly from 2016-17, slow future projected growth

Candle sales decline while home, vehicle air fresheners grow

Smoking trends, scent delivery from other industries impact market

Consumer confidence levels, demographic growth help industry

### Market Size and Forecast

Market contracts slightly from 2016-17, future is slow

Figure 6: Total US sales and fan chart forecast of air care products, at current prices, 2012-22

Figure 7: Total US sales and forecast of air care products, at current prices, 2012-22

### Market Breakdown

Safety issues, declines within Glade challenge candle sales

Figure 8: Total US retail sales of air care products, by segment, at current prices, 2012-17

Brand growth, innovations help home air freshener sales

Momentum slows for vehicle air freshener sales

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Air Care - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 9: Total US retail sales of air care products, by segment, at current prices, 2012-17 (est)

## Market Perspective

Smoking declines are good news for public health, affect demand

Figure 10: Smokers in the US, by high school students and adults, 1965-2014

Scented surface cleaners, trash bags hinder air care market

Air pollution issues bring opportunity to widen health benefits

## Market Factors

Consumer confidence bodes well for spending in air care

Figure 11: Consumer Sentiment Index, January 2007-December 2017

Hispanic, Black population growth is positive for air care market

Figure 12: Population by race and Hispanic origin, 2017-22

## Key Players – What You Need to Know

Market share leader experiences flat sales and share growth

Products, brands addressing usage drivers experience growth

Broad-line candles, private label air fresheners beat out by more expensive options

Hygge, essential oils begin to shape the industry

## Company and Brand Sales of Air Care

Most MULO manufacturers struggle to achieve growth

Leader S.C. Johnson sees flat sales and share growth

P&G capitalizes on market trends to achieve growth

Figure 13: Multi-outlet sales of air care, by leading companies, rolling 52 weeks 2016 and 2017

## What's Working?

Products addressing (and communicating) consumer needs grow

Air care items that create a pleasant ambiance see growth

Brands encourage experimenting with scents and having fun

Subtler scents gain traction as some prefer an unscented space

Figure 14: Febreze ONE fabric and air mist commercial, October 30, 2017

Male-positioned air care products establish a presence

## What's Struggling?

Specialty brands challenge broad-line candles such as Glade

Private label air fresheners struggle to keep pace

## What's Next?

New wave of demand for air care possible as hygge takes hold

Mass brands make the leap into essential oils, diffusers

## The Consumer – What You Need to Know

Use of air care is widespread

Usage drivers are both functional and experiential

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

## Air Care - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Users rely on different products to treat various odors  
 Users appreciate promotions, experimenting in the category  
 Category users prioritize scent, discounts regardless of format  
 Preferring an unscented space is top usage barrier

### Product Usage and Frequency

Products addressing usage drivers have highest penetration

Figure 15: Product usage, November 2017

Category enjoys frequent use

Figure 16: Usage frequency of air fresheners, wax melts, and scented candles, November 2017

Women are heavier category users than men

Figure 17: Select product usage, by gender, November 2017

18-34s, parents use wider variety of air care products

Figure 18: Select product usage, by age, November 2017

Figure 19: Select product usage, by parental status, November 2017

Hispanics, Black consumers are above-average category users

Figure 20: Select product usage, by Hispanic origin and race, November 2017

### Usage Drivers

Primary usage drivers are two-pronged

Secondary usage drivers address persistent smells, cleanliness

Supplemental usage drivers focus on fun and celebration

Figure 21: Usage drivers, November 2017

Heavier users report more reasons for using air care

Figure 22: Usage drivers, by usage group, November 2017

Women cite experiential drivers, men take functional approach

Figure 2: Usage drivers, by age and gender, November 2017

A clean home is a heightened priority for Hispanics, Black consumers

Figure 23: Usage drivers, by race and Hispanic origin, November 2017

### Smell Sources

Air care used more for temporary odors

Figure 24: Smell sources, November 2017

Consumers rely on certain products to eliminate specific smells

Figure 25: Select smell sources, by select product usage, November 2017

Air care use for specific odors varies by age group, life stage

Figure 26: Select smell sources, by age, November 2017

Pet ownership, smoking explain differences by race and Hispanic origin

Figure 27: Select smell sources, by race and Hispanic origin, November 2017

### Purchase Behavior

Category is promotional, experimental to users

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Air Care - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 28: Purchase behavior, November 2017

Reasons for purchase inform behaviors

Figure 29: Purchase behavior, by select usage drivers, November 2017

Age influences purchase behavior

Figure 30: Select purchase behaviors, by age, November 2017

Parents are promotionally driven, experiential

Figure 31: Select purchase behaviors, by parental status, November 2017

### Purchase Influencers

Purchase influencers similar across products

Scent dictates air care purchases, followed by discounts

Secondary criteria can further differentiate products

Figure 32: Purchase influencers, by product, November 2017

18-34s are prime audience for new air care launches

Figure 33: Select purchase influencers, by age and parental status, November 2017

### Usage Barriers

Unscented preferences are primary barrier to use

Some don't have odors to eliminate

Figure 34: Usage barriers, November 2017

Female non-users report more strongly felt barriers

Figure 35: Select usage barriers, by gender, November 2017

### Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

### Appendix – The Market

Figure 36: Total US sales and forecast of air care products, at inflation-adjusted prices, 2012-22

Figure 37: Total US sales and forecast of air care products, by segment, at current prices, 2012-22

Figure 38: Total US retail sales and forecast of candles, at current prices, 2012-22

Figure 39: Total US retail sales and forecast of home air fresheners, at current prices, 2012-22

Figure 40: Total US retail sales of air care products, by channel, at current prices, 2012-2017

Figure 41: Total US retail sales of air care products, by channel, at current prices, 2015 and 2017

### Appendix – Key Players

Figure 42: Multi-outlet sales of candles, by leading companies and brands, rolling 52 weeks 2016 and 2017

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Air Care - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 43: Multi-outlet sales of home air fresheners, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 44: Multi-outlet sales of vehicle air fresheners, by leading companies and brands, rolling 52 weeks 2016 and 2017

### Appendix – The Consumer

#### TURF analyses

##### Methodology

Figure 45: TURF Analysis – Purchase influencers for wax melts, November 2018

Figure 46: Table – TURF Analysis – Purchase influencers for wax melts, November 2018

Figure 47: TURF Analysis – Purchase influencers for air fresheners, November 2018

Figure 48: Table – TURF Analysis – Purchase influencers for air fresheners, November 2018

Figure 49: TURF Analysis – Purchase influencers for scented candles, November 2018

Figure 50: Table – TURF Analysis – Purchase influencers for scented candles, November 2018

Figure 51: Target air care seasonal end-cap display, December 2017

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)