

## Air Care - US - February 2018

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

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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**

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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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Emphasize fun and celebration to widen penetration and increase demand

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

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Consumer confidence levels, demographic growth help industry

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Market contracts slightly from 2016-17, future is slow

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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

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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

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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

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Specialty brands challenge broad-line candles such as Glade

Private label air fresheners struggle to keep pace

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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

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- 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

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