

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.



"Aircare had another year of growth as consumers turn to aircare for reasons beyond functional odor control, presenting new growth and engagement opportunities for brands and retailers to boost the sluggish aircare market. Optimal growth will hinge on brands addressing ingredient concerns, which are in part contributing to shrinking inventories."

-Rebecca Cullen, Household Care Analyst

This report looks at the following areas:

- Market experiences moderate gains
- Consumers find reasons to use fewer aircare products
- Format fatigue gives rise to newer formats
- Fragmented retail market turns to customization to engage shoppers

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

_{АРАС} +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



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

Table of Conten	
Overview	
What you nee	ed to know
Definition	
Executive Sun	nmary
Market overv	iew
	iences moderate gains Total US sales and fan chart forecast of aircare market, at current prices, 2014-24
Top takeaway	ys
Key trends	
	nd reasons to use fewer aircare products Repertoire of product usage, by age, parental status, November 2019
	e gives rise to newer formats Usage of select aircare products, December 2016, October 2018 and November 2019
	retail market turns to customization to engage shoppers Retailers shopped, November 2019
	toward new era of transparency Attitudes and behaviors toward aircare ingredients and scents, November 2019
What it mean	IS
The Market -	What You Need to Know
Market maint	ains stable growth
Majority of sp	pend allocated toward candles
Adjacent cate	egories, technology threaten sales
Market Size a	nd Forecast
	experience slow gains Total US sales and fan chart forecast of aircare market, at current prices, 2014-24
Figure 7:	Total US retail sales and forecast of aircare products, at current prices, 2014-24
Market Break	down
	argest segment, post strongest gains WoodWick Humidor Scented Candle

Figure 9: Total US retail sales and forecast of aircare products, by segment, at current prices, 2014-19

Other channels command majority of sales

Figure 10: Total US retail sales of aircare products, by channel, at current prices, 2017 and 2019

Market Perspective

Competition from within and outside of the category will challenge brands

Air monitoring exposes the home

BUY THIS REPORT NOW



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.

Scent substitution challenges value of aircare

Figure 11: SC johnson glade, Mrs. Meyer's Clean Day

Market Factors

For some, the home no longer "feels" like home

Figure 12: Homeownership rate, 2008-18

Figure 13: Homesick New York City Home Fragrance Oil

Key Players – What You Need to Know

SCJ maintains lead but losing share

Green goes mainstream, wellbeing becomes one with aircare

Mass, value-focused brands struggles to compete with private label

Science, technology and sustainability will play a role in future market

Manufacturer Sales of Aircare

SCJ losing share to P&G, smaller brands

Figure 14: Opalhouse target private label line

Sales of aircare by company

Figure 15: MULO sales of aircare products, by leading companies, rolling 52 weeks 2018 and 2019

What's Happening

Seasonality claims decline, natural and eco claims gain momentum

Figure 16: Share of US aircare product launches, by select claims, 2014-19

Figure 17: Everspring

Removing odor and unwanted ingredients

Figure 18: Fresh Wave Lavender Odor Removing Spray

Brands flex around holistic wellbeing trends

Figure 19: US aircare NPD with aromatherapy claims, Jan 2014-Dec 2019

What's Struggling

Private label challenging mass and value-focused brands

Figure 20: MULO sales of select candles, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 21: Private label candles

What to Watch

Candle gift sets could make a comeback

Figure 22: Diptyque advent calendar, October 2019

Balancing bacteria for cleaner air

Figure 23: Counter culture clean, November 2019

New formats and scent diffusion experiences: technology and portables

Figure 24: Diptyque Prêts-à-Parfumer Perfumed Brooch

Sustainability will become an expectation

Figure 25: SunLeaf Orange Ginger Candle in a Glass

BUY THIS REPORT NOW



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 26: Convivial refill Instagram story

The Consumer – What You Need to Know

Majority of adults use one or two products

Motivations moving from functional to discretionary

Candle market becomes more fragmented

Younger shoppers spread their spend across retailers

Consumers seek ingredient transparency

Adults adventurous with new scents, but perhaps not brands

Aircare Usage

Shifts in usage reflect format fatigue, healthier alternative interests

Figure 27: Aircare usage, December 2016, October 2018 and November 2019

Aircare inventory narrows

Figure 28: Repertoire of product usage, November 2019

Elevated usage among younger adults, parents

Figure 29: Repertoire of product usage, by age, parental status, November 2019

Figure 30: Aircare usage, by age, parental status, November 2019

Aircare Usage Motivators

A paradigm shift in motivations

Figure 31: Aircare usage motivators, November 2019

Figure 32: Select aircare usage motivators, by aircare product usage, November 2019

Younger adults use aircare for variety of reasons

Figure 33: Select aircare usage motivators, by age, November 2019

Shopping for Candles

The candle retail market remains highly fragmented

Figure 34: Retailers shopped for scented candles, by age, November 2019

Figure 35: The candle bar

Scent tops the priority list for candles

Figure 36: Scented candle purchase influencers, November 2019

Younger candle shoppers value ingredients and eco-benefits

Figure 37: Select scented candle purchase influencers, by age, November 2019

Shopping for Air Fresheners and Essential Oils

Air freshener, essential oil shopping driven by value, convenience

Figure 38: Target Everspring line, August 2019

Figure 39: Retailers shopped for air freshener and essential/scented oil, November 2019

Younger shoppers skipping mass for lifestyle retailers

Figure 40: Select retailers shopped for air freshener and essential/scented oil, by age, November 2019

Function drives air fresheners, health drives essential oils

Figure 41: Air freshener and essential/scented oil purchase influencers, November 2019

BUY THIS REPORT NOW



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.

Younger shoppers look for ingredient claims

Figure 42: Select air freshener and essential/scented oil purchase influencers, by age, November 2019

Attitudes and Behaviors toward Aircare Ingredients

A call for greater transparency

Figure 43: Febreze ONE candle and Everspring essential oil

Figure 44: Attitudes and behaviors toward ingredients, November 2019

Heavier users experience heightened ingredient concerns

Figure 45: Select attitudes and behaviors toward ingredients, by repertoire of product usage, November 2019

Importance of ingredients, natural claims decline with age

Figure 46: Select attitudes and behaviors toward ingredients, by age, November 2019

Attitudes and Behaviors toward Aircare

Scent variety remains critical

Figure 47: Attitudes and behaviors toward aircare, November 2019

Customized and controlled scent experiences interest 18-54's

Figure 48: Select attitudes and behaviors toward aircare scents and innovations, by age, November 2019

Appendix – Data Sources and Abbreviations

Data sources
Sales data
Fan chart forecast
Consumer survey data
Abbreviations and terms
Abbreviations
Appendix – The Market
Figure 49: Total US retail sales and forecast of aircare products, at inflation-adjusted prices, 2014-24
Figure 50: Total US retail sales and forecast of aircare products, by segment, at current prices, 2014-19
Figure 51: Total US retail sales of aircare products, by segment, at current prices, 2017 and 2019
Figure 52: Total US retail sales and forecast of candles, at current prices, 2014-19
Figure 53: Total US retail sales and forecast of home air fresheners, at current prices, 2014-19
Figure 54: Total US retail sales and forecast of vehicle air fresheners, at current prices, 2014-19
Appendix – Retail Channels

Figure 55: Total US retail sales of aircare products, by channel, at current prices, 2014-19 Figure 56: Total US retail sales of aircare products, by channel, at current prices, 2017 and 2019

Appendix – Key Players

Figure 57: Multi-outlet sales of candles, by leading companies and brands, rolling 52 weeks 2018 and 2019 Figure 58: Multi-outlet sales of home air fresheners, by leading companies and brands, rolling 52 weeks 2018 and 2019 Figure 59: Multi-outlet sales of vehicle air fresheners, by leading companies and brands, rolling 52 weeks 2018 and 2019

BUY THIS REPORT NOW