

Global Home Fragrance Market: Analysis By Product Type (Scented Candles, Room Sprays, Reed Diffusers, and Others), By Distribution Channel (Supermarkets/Hypermarkets, Convenience Stores, Online Stores, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The global home fragrance market in 2021 was valued at US\$7.12 billion. The market is expected to reach US\$9.70 billion by 2027. Home perfumes are personal care items that release aroma to cover up unpleasant odors. Additionally, these scents aid in lowering weariness and easing tension. There are many different types of home fragrance diffusers, including reed diffusers, smart diffusers, essential scented candles, air pockets, and sprays. Also, they are available in a variety of designs, colors, and types, which improve the aesthetics of homes.

Home fragrances, such as customizable plug-ins, aromatherapy diffusers, and aromatic candles with platform lids, are some of the creative offerings that have increased their demand among target customers. Therefore, expanding the scale of product offerings is one of the main factors that would drive the demand for home fragrances in the forthcoming years. The market is expected to grow at a CAGR of approx. 5.3% during the forecasted period of 2022-2027.

Market Segmentation Analysis:

By Product Type: The report provides the bifurcation of the market into four segments based on the product type: Scented Candles, Room Spray, Reed Diffusers, and Others.

In 2021, scented candles held a major share of 38.5% in the market. On the other hand, the reed diffusers segment is expected to grow at the highest CAGR in the forthcoming years as reed diffusers are relatively inexpensive as compared to other fragrance products, which makes them more lucrative products.

By Distribution Channel: The report further provides the segmentation based on the distribution channel: Supermarket/Hypermarket, Online Stores, Convenience Stores, and Others. The supermarket/hypermarkets held the highest share of more than 30% in the market. The market's expansion is aided by the competitive advantages of supermarkets/hypermarkets such as longer opening hours, greater product assortment, and better adaptation to consumer shopping habits.

By Region: The report provides insight into the home fragrance market based on the regions namely North America, Europe, Asia Pacific, and the Rest of the World. North America held the major share of above 30% in the market owing to growing penetration of fragrance-based companies, increasing population, and rising adoption of room sprays in homes. The US market is further divided based on product type namely, Room Spray, Scented Candles, Reed Diffusers, and Others.

In Europe, Germany is expected to be the fastest growing region in the forecasted period. Whereas, in the Asia Pacific region, China held almost 52% share in the market owing to the rise in spending on home furnishings, growth in the air care market, and high consumer preference for pleasant aromas in their surroundings.

Market Dynamics:

Growth Drivers: The global home fragrance market has been growing over the past few years, due to factors such as rapid urbanization, improving consumer confidence index, accelerating e-commerce channels, rising adoption of aromatherapy candles, and many other factors. With rapid urbanization and a rise in the population's disposable income, it is observed that both commercials, as well as domestic buyers, are preferring to buy home fragrance products online as it offers them access to a wide range of products, thus reducing their time spent on shopping. Thus, the accelerating e-commerce channels have positively contributed to the market growth.

Challenges: However, the market has been confronted with some challenges specifically, high competitive pressure, retail consolidations, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to

various latest trends such as technological innovations in diffusers, high preference for personalized scented candles, etc. In daily life, several fragrances appear and a sense of smell plays an important role in the physiological effects of mood, stress, and working capacity. The demand for home fragrances is strong because in a study conducted by Mood Media, “75% of all emotions generated every day are due to smell”. Hence, the plethora of fragrances on the market now is an interface between sensorial gratification, wellness, and mental stimulation.

Impact Analysis of COVID-19 and Way Forward:

In 2020, the global home fragrance sales have been weak and there have been widespread store closures. However, after the relaxation of the lockdown, the industry responded positively to the crisis. Throughout 2020, various home fragrance product manufacturers were focused on the promotion of classic or popular products to drive repeat purchases. Manufacturers were also using online quizzes and personalization profiles to guide customers toward their ideal home fragrance. The technological innovations have also helped home fragrance retailers to align with safety regulations in stores.

Competitive Landscape:

The global home fragrance market is highly fragmented, with a large number of small- and medium-sized manufacturers operating in the market.

The key players in the global home fragrance market are:

Reckitt Benckiser Group plc

The Procter & Gamble Company

Henkel AG & Co. KGaA

Newell Brands Inc.

3M Company

Godrej Consumer Products

S.C. Johnson & Son Inc.

Faultless Brands

Beaumont Products, Inc.

Regent Holding Company, LLC (Illume, Inc.)

GALA Group GmbH (Korona Candles)

Voluspa

Seda France Inc.

NEST Fragrances, LLC

Some of the strategies among key players in the market for home fragrances are product launches, mergers, acquisitions, and collaborations. For instance, in 2022, Newell Brands announced the launch of a new brand, Friday Collective™. The bold lifestyle brand has launched a range of scented candles that channel optimism and joy with vibrant colors and unexpected fragrance combinations. Whereas, in 2022, Henkel and Chip Integration Technology Center (CITC) announced that the organizations have formalized an agreement to collaborate on the development of high-thermal die attach solutions.

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