

United States Home Fragrance Market, By Product Type (Scented Candles, Sprays, Essential Oils, Incense Sticks, Other), By Sales Channel (Supermarket/Hypermarkets, Convenience Stores, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The United States Home Fragrance Market was valued at USD 2.90 billion in 2024 and is projected to reach USD 4.60 billion by 2030, growing at a CAGR of 8.05% during the forecast period. This growth is fueled by a strong consumer inclination toward enhancing indoor environments with pleasant scents that promote wellness and relaxation. Products such as scented candles, diffusers, room sprays, and essential oils are increasingly popular, especially those featuring natural, sustainable, and premium formulations. Heightened interest in stress reduction and self-care has positioned home fragrances as integral to daily wellness routines. Moreover, the convenience and variety offered by e-commerce platforms have further supported the market's expansion. Continuous innovation in fragrance delivery systems, alongside a rising demand for eco-conscious and experiential products, is shaping the future of the market.

Key Market Drivers

Increased Focus on Wellness and Self-Care

The growing consumer focus on well-being is a significant factor driving the home

fragrance market in the U.S. As individuals place more importance on creating peaceful and comforting living spaces, home fragrance products have become a vital element in personal care routines. Scents like lavender, eucalyptus, and chamomile are favored for their calming and therapeutic effects, commonly used in candles, sprays, and diffusers to enhance mental and emotional wellness. The surge in interest around aromatherapy and natural essential oils—particularly among younger, health-conscious demographics—has further propelled the demand for organic and eco-friendly fragrance options. These products are increasingly seen as tools for stress management and mood enhancement, aligning with broader trends in mindfulness and holistic self-care.

Key Market Challenges

Intense Competition and Market Saturation

The home fragrance sector in the United States is characterized by strong competition and a saturated product landscape. Numerous brands—ranging from established names to emerging artisanal and niche labels—offer a wide array of scented candles, sprays, and oils. This abundance of similar offerings makes it challenging for companies to distinguish their products and secure consumer loyalty. The premium segment is particularly competitive, with customers seeking distinct, high-quality experiences. Additionally, the growing dominance of e-commerce has heightened competition by providing consumers with greater access to a broader range of choices. To succeed in this crowded space, brands must invest in innovation, storytelling, and personalized customer engagement strategies.

Key Market Trends

Multi-Sensory and Experiential Products

The home fragrance market in the U.S. is evolving toward multi-sensory experiences that go beyond traditional scent delivery. Consumers are increasingly drawn to products that integrate visual elements, sound, and technology to enhance ambiance and personalization. This includes smart diffusers that adjust lighting and synchronize with music, or fragrance devices that emit essential oils in tandem with ambient soundscapes. These innovations create immersive environments that support relaxation and lifestyle enhancement. The trend reflects a broader shift in consumer expectations—favoring holistic sensory engagement and emotional connectivity with home environments. As a result, brands that fuse design, technology, and wellness

int%li%their fragrance offerings are gaining a competitive edge.

Key Market Players

Newell Brands Inc.

Reckitt Benckiser Group PLC

The Procter & Gamble Company

Unilever plc

S. C. Johnson & Son, Inc.

The Estee Lauder Companies Inc

Bath & Body Works Inc

NEST Fragrances, LLC

Curi%li%Brands, LLC (Thymes)

Flame and Wax Inc. (Voluspa)

Report Scope:

In this report, the United States Home Fragrance Market has been segmented int%li%the following categories, in addition t%li%the industry trends which have als%li%been detailed below:

United States Home Fragrance Market, By Product Type:

Scented Candles

Sprays

Essential Oils

Incense Sticks

Others

United States Home Fragrance Market, By Sales Channel:

Supermarket/Hypermarkets

Convenience Stores

Online

Others

United States Home Fragrance Market, By Region:

South

West

Midwest

Northeast

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Home Fragrance Market.

Available Customizations:

United States Home Fragrance Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up

United States Home Fragrance Market, By Product Type (Scented Candles, Sprays, Essential Oils, Incense Sticks,...

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