

# HOME FRAGRANCES: U.S. MARKET BRIEF

**Base Year: 2021**

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**24th edition**

Kline's 24<sup>th</sup> edition of our U.S. home fragrances market report highlights how the market has evolved post-pandemic. It will reveal if consumers have maintained their new habits despite returning to the workplace and travel, if e-commerce is the new go-to destination for home scent discovery and product replenishment, and what impact new retail partnerships like Sephora + Kohl's will have on the market.

## SCOPE

- › Two key deliverables:
  - › Written report in presentation format
  - › Excel workbook containing data tables (retail sales for leading brands, product categories, retail channels, and forecast sales)
- › Analysis of four product categories: scented candles, diffusers, room sprays, and wax melts/fragrance lamp oils
- › Retail channel analysis
- › Overview of key drivers, trends, competition, emerging fast-growers, and marketing activities
- › Forecast sales
- › Essential/aromatherapy oils are excluded from the analysis

**FEATURING: A FOCUS ON THE  
PREMIUM SEGMENT**

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## Introduction

### Overview

- Key takeaways
- Total market size and growth
- Market drivers and trends
- Product category (as listed in Table 1) and retail channel (as shown in Table 2) sales breakdown
- Competitive landscape
- Outlook to 2026 including expectations for 2022

### Category Profiles

- Developments and trends
- Product type sales breakdown
- Sales data for leading brands (2020-2021)
- New products and fragrance trends
- Retail channel sales
- Outlook to 2026 including expectation for 2022



**Table 1. PRODUCT CATEGORIES COVERED**

Candles
Diffusers
Room sprays
Wax melts/fragrance lamp oils

**Table 2. RETAIL CHANNELS COVERED**

<p><b>Department stores consisting of:</b> Low-end (Kohl's) Specialty (Nordstrom, Neiman Marcus) Traditional (Macy's, Bloomingdale's)</p>	<p><b>Gift and card stores consisting of:</b> Gift and card store chains (Hallmark) Independent boutiques/gift stores</p>
<p><b>Direct sales consisting of:</b> Internet Home-shopping networks (QVC) Social selling or direct-selling model</p>	<p><b>Mass merchandisers consisting of:</b> Big-box retailers (Target, Walmart) Dollar stores Warehouse clubs</p>
<p><b>Drugstores consisting of:</b> Chain drugstores (CVS, Walgreens) Independents</p>	<p><b>Specialty stores consisting of:</b> Vertically integrated stores (Bath &amp; Body Works) Cosmetics specialty stores (Sephora) Home goods and décor stores (HomeGoods) Apparel specialty stores (Anthropologie)</p>
<p><b>Food stores consisting of:</b> Traditional supermarkets Health and natural food stores</p>	

## REPORT BENEFITS

This report serves as an excellent resource for manufacturers and formulators of home fragrance products. Specifically, it provides:

A highly reliable and independent assessment of the market

Key trends impacting category and total market sales

Channel analysis with an eye on fast-moving channels

## METHODOLOGY

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

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