

HOME FRAGRANCES: U.S. MARKET BRIEF

Base Year: 2022

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25th edition

Kline is celebrating the silver jubilee of its U.S. home fragrances market report. The 25th report edition will highlight how the market is performing in an inflationary environment and whether consumer spend is sustaining at the same levels or consumers have made concessions. The report will also evaluate sales through brick-and-mortar versus e-commerce, look at how rising indie brands are expanding their distribution and product offerings, and forecast future market values and consumer demand using Kline's enhanced predictive analytics tools.

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: ALL NEW
ADVANCED FORECASTING**

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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
- Marketing activities
- Outlook to 2027 including expectations for 2023

Category Profiles

- Developments and trends
- Product type sales breakdown
- Sales data for leading brands (2021–2022)
- New products and fragrance trends
- Retail channel sales
- Outlook to 2027 including expectation for 2023



TABLE 1. PRODUCT CATEGORIES COVERED

Candles
Diffusers
Room sprays
Wax melts/fragrance lamp oils

TABLE 2. RETAIL CHANNELS COVERED

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

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. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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