

Home Fragrances 2009:

Multi-Region Market Analysis and Opportunities

Published since 1996

United States: Published June 2010

United Kingdom: Published August 2010

Germany: Published September 2010

Base Year: 2009

The authoritative source on the home fragrance market, focusing on key trends, challenges, competitive landscape, and business opportunities, and addressing such questions as:

- What are the key fragrance trends?
- How have new boutique-oriented collections from Febreze and Glade performed?
- Are the new cadre of diffusers helping to reinvigorate the category?
- Which competitors are gaining/losing share and why?
- Is odor elimination a hot trend in all product categories?
- Have private-label sales grown dramatically due to the economy?

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Report Scope

Home Fragrances 2009 provides subscribers with a comprehensive analysis of industry trends, market size and growth, and profiles on key competitors. This report examines products that provide the home with scent and ambiance, specifically candles, diffusers, room sprays, fragrance oils, incense, scented ceramics, and specialty wardrobe products.

The report examines all channels of distribution, including specialty stores, mass outlets, department stores, gift/card stores, and direct sales.

Kline has successfully tracked the U.S. home fragrance market since 1996. The geographic scope for the 2009 edition has been expanded to include select markets in Europe. The report is available as a three-volume series, with separate volumes available for the United States, the United Kingdom, and Germany.

Sales data is provided on the overall market, at the category level, and by company and brand. Each of the five product categories analyzed in this report addresses the following:

- Category developments
- Five-year historical sales by category
- Category size and growth
- New product activity and fragrance trends
- Private-label sales
- Key competitors
- Retail distribution
- Five-year forecasts

The base year for the study is 2009. The study includes forecasts by product category to 2014.

Key Benefits

This report serves as an excellent resource for marketers and suppliers involved in the home fragrance market or for those interested in assessing the market. The report enables the subscriber to:

- Identify market opportunities
- Augment business plans with highly reliable insights and data
- Quantify market sales by purchase channel
- Track growth segments within key product categories
- Understand sales changes for the overall market and for each category over the five-year period ending 2009
- Develop sales forecasts through 2014

Forecasts in this report are generated with Kline's FutureView Scenario Forecasting Model. With the enhanced forecasts, subscribers are able to see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

The data and insights in this study are valuable for professionals involved in forecasting, marketing, brand management, market research, business development, and/or corporate planning. The study also helps subscribers to stay abreast of trends and developments in the home fragrances market. It is a useful source of competitive intelligence for those companies with investments in this sector, and those considering entry into the market.

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Report Contents

EXECUTIVE OVERVIEW

This report provides a comprehensive overview of the market in terms of sales, competition, regional differences, and opportunities. It is available only to subscribers of both regional reports.

Table of Contents for Each Volume

1. INTRODUCTION

2. EXECUTIVE SUMMARY

This presentation-style chapter provides an overview of key industry statistics and trends, including:

- Total industry size and growth
- Market drivers and trends
- Category and channel sales breakdown
- Key lessons learned
- Challenges and opportunities
- Outlook to 2014

3. PRODUCTS

Profiles are provided for each of the product categories listed in Table 1. Information provided in each category profile includes:

- Category development
- Sales data at the manufacturers', retail, and unit levels for 2009
- Historical manufacturers' sales for 2004 through 2009
- Trends
- Competition, including sales by company and brand for 2008 and 2009
- Retail outlet breakdowns for 2008 and 2009
- Promotional activity
- Outlook to 2014

4. COMPANIES

Profiles are provided for each of the marketers are listed in Table 2. Each profile includes:

- Overview
- Corporate sales
- Home fragrance products and sales for 2008 and 2009
- Outlook

Table 1
Product Categories Profiles

- Candles
- Diffusers (adjustable solids, electric wall diffusers, reed diffusers, etc.)
- Home fragrance oils
- Room sprays
- Specialty products (incense, potpourri, scented ceramics, sachets, etc.)

Table 2
Company Profiles

United States	United Kingdom	Germany
■ Aromatique	■ Arran Aromatics	■ Blyth/PartyLite
■ Blyth/PartyLite	■ Blyth/PartyLite	■ Bolsius
■ Henkel	■ Diptyque	■ Eika Kerzen
■ Lancaster Colony	■ Lily Flame	■ Gala Kerzen
■ Limited Brands	■ Procter & Gamble	■ Gies Kerzen
■ Method	■ Reckitt Benckiser	■ Linari
■ Pacific Trade Intl.	■ S.C. Johnson	■ Millefiori Milano
■ Pier 1 Imports	■ Shearer Candles	■ Procter & Gamble
■ Procter & Gamble	■ The Body Shop	■ Reckitt Benckiser
■ Reckitt Benckiser	■ True Grace	■ S.C. Johnson
■ S.C. Johnson	■ The White Company	■ Wax Lyrical
■ Village Candle	■ Yankee Candle Company	■ Yankee Candle Company
■ Virginia Candle	■ Wax Lyrical	
■ Yankee Candle Company		

NOTE: List is tentative and subject to change based on charter subscriber input.

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts will conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including home fragrance product manufacturers and marketers, distributors and suppliers, key retailers, public relations executives, and other direct influencers on brand and supplier purchase decisions. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts. In addition, this analysis will be supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 50 years.

Kline's research and consulting services extend across the entire consumer products industry. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

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