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Home Fragrances:

U.S. Market Analysis and Opportunities

Published June 2017

Base Year: 2016

Forecasts to 2021

Regional Coverage: United States

A comprehensive analysis of the U.S. market for home fragrances, focusing on market size and growth, key trends, challenges, and business opportunities.

This Report Answers Such Questions As:

- How will new mergers and partnerships impact stalwart home fragrance brands like Yankee Candle Company and PartyLite?
- What role does social media play in this market?
- How is the mega-trend of personalization interpreted by home fragrance marketers?
- What's new in boutique candle brands?

Featuring an interactive online database!



Report Contents

Introduction

Executive Summary

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

- Total industry size and growth
- Market drivers
- Category and channel sales breakdown
- Challenges and opportunities
- Outlook to 2021

Products

Profiles are provided for each of the product categories listed in Table 1 and include the following information:

- Category developments
- Sales data at the manufacturers', retail, and unit levels for 2016
- Historical manufacturers' sales for 2011 through 2016

Table 1: Product Categories Profiled

Candles
Diffusers (adjustable solids, electric wall diffusers, reed diffusers, etc.)
Home fragrance oils, wax melts, and fragrance lamps
Room sprays
Specialty products-a
a- Includes potpourri, incense, scented ceramics, sachets, etc. Included in the database and Executive Summary only.

- New product and fragrance trends
- Competition, including sales by company and brand for 2015 and 2016
- Private-label activity
- Retail outlet breakdowns for 2015 and 2016
- Promotional activity
- Outlook to 2021

Companies

Profiles are presented for the marketers of home fragrance products listed in Table 2. Each profile includes:

- Overview
- Corporate sales
- Product offerings
- Home fragrance sales for 2015 and 2016
- Outlook to 2021

Table 2: Companies Profiled

Chesapeake Bay Candle (Pacific Trade International)
Illume (Regent Holding Company)
L Brands (Bath & Body Works)
Nest Fragrances
Pier 1 Imports
Reckitt Benckiser
S.C. Johnson
Star Candle Company
Trapp Fragrances
Yankee Candle Company (Newell Brands)





Scope

Home Fragrances: U.S. Market Analysis and Opportunities provides subscribers with a comprehensive analysis of industry trends, market size and growth, and profiles on key marketers. This report covers the U.S. home fragrances market, which encompasses products that are purchased to provide the home with scent and ambiance. Sales data is provided for the overall market, at the category level, and by company and brand. Each of the five product categories covered in this report is analyzed along the following dimensions:

- Category developments
- Five-year historical sales
- Category size and growth for 2016
- New product activity and fragrance trends
- Private-label sales
- Leading marketers
- Retail distribution
- Five-year forecasts through 2021

Key Benefits

This report serves as an excellent resource for marketers, suppliers, and manufacturers involved in the home fragrance market or for those interested in assessing the market. Subscribers receive one day of consultation time with members of the research team. This time can be used for assistance with plans or to explore related industry information. This report is available through a Web-based format for easy access. Subscribers have unlimited access to the report from anywhere in the world. The report enables the subscriber to:

- Understand their position in the overall market
- Augment business plans with highly reliable insights and data
- Quantify market sales by purchase channel
- Track growth segments within key product categories
- Identify potential strategic alliances, acquisition candidates, or customers

Database Content

Subscribers have unlimited access to the report data and written contents through our new sophisticated but easy-to-use online database, with the following capabilities:

- Search capabilities by company, brand, and product category
- Flexible search options
- Subtotaling abilities
- Easy access and downloading of sales, market shares, growth rates, and forecasts

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 50-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.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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 over 50 years.

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