

AIR CARE – CHINA – 2024

The rigid demand for air fresheners is stable, and scented air care products can capitalise on Chinese aesthetics and the DIY trend to attract consumers.



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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definition
- What you need to know

The Market

- Market Size and Forecast: the waning spending momentum on scented air care products is leading to a slowdown in the growth of the air care market
- Market factors: practicality and affordability are preferred, with Chinese aesthetics driving category development
- Market segmentation: growth in most segments is stable, while growth rates in scented candles/incense decline
 - Graph 1: retail value of the air care market, by segments, 2018-2023
 - Graph 2: retail value growth rate of the air care market, by segments, 2019-2023

Companies and brands

- Market share: despite low market concentration, Miniso and NetEase Yanxuan lead due to active innovation and affordable prices
- Marketing activities: the trend of Chinese incense lore drives the growth of incense, while innovation in offline experiences deepens the brand impression
- New product trends: oriental scents like gardenia, jasmine and sandalwood are on the rise, while sterilisation features enhance the practicality of products
 - Graph 3: mainstream fragrance components in air care product launches, 2019-2023*
 - Graph 4: mainstream claims for air care product launches, 2019-2023*
- Product examples: oriental fragrances become a core selling point, while sprays with odour-removing and anti-bacterial features enhance practicality and effectiveness

The consumer

- The usage of air fresheners and incense increases, while the usage of scented candles declines
 - Graph 5: product usage, 2022 vs 2023
- Long-lasting effect and mood improvement are the most important claims for air fresheners
 - Graph 6: interested claims of air fresheners, 2022 vs 2023
- Scented air care products continue to prioritise providing emotional value, while air fresheners focus on freshening the air
 - Graph 7: reasons for using different product types, 2023
- Safety concerns and complicated usage are barriers to increasing the popularity of scented candles
 - Graph 8: usage barriers of scented candles, 2023
- Floral is the most common choice, with woody, citrus and oriental scent types also being popular to varying degrees
 - Graph 9: preferred scent types by product types, 2023

- Both online and offline channels are crucial, as lifestyle brand retailers and short video platforms see increased usage
 - Graph 10: purchase channels, 2022 vs 2023
 - Graph 11: purchase channels, 2023
- On-site comparisons/sampling are the main motivations for offline purchases
 - Graph 12: offline purchase motivations, 2023

Issues and insights

What we think

THE MARKET

Market size and forecast

- The overall growth of the air care market is slowing down due to a lack of momentum in the penetration of scented air care products

Market factors

- Amid intentional spending, the penetration of scented air care products is slowing down, while air fresheners are becoming more attractive
- Consumers favour lower-priced products
 - Graph 13: average price range per item for air care products on Tmall, 2022 and 2023
 - Graph 14: average price range per item for air care products on Douyin, 2022 and 2023
 - Graph 15: average price range per item for air fresheners on Tmall, 2022 and 2023
 - Graph 16: average price range per item for scented air care products on Tmall, 2022 and 2023
- The admiration for Chinese aesthetics drives the development of the air care product market
 - Graph 17: mentions and engagement of 'incense' (熏香*) on social media**, 2022-2023
 - Graph 18: mentions and engagement of 'incense lore' (香道*) on social media**, 2022-2023

Market segmentation

- Spray air fresheners are keeping pace with slow-release products, while scented candles and incense slowed down significantly
 - Graph 19: retail value of the air care market, by segments, 2018-2023
 - Graph 20: retail value growth rate of the air care market, by segments, 2019-2023

COMPANIES AND BRANDS

Market share

- Market share: despite low market concentration, Miniso and NetEase Yanxuan lead due to active innovation and affordable prices
- The concentration of the air care market is low, particularly among air freshener manufacturers, whose market shares are similar

- Miniso solidifies its leading position in the scented air care sector
- NetEase Yanxuan experienced a larger increase in market share in 2023
- To Summer leads the premium scented air care market
- Online-only brands have also gained more market share
- Lao Guan Jia and Kobayashi have achieved market share growth by focusing on specific channels

Marketing activities

- Chinese aesthetics catalyse the spending trend of scented air care products
- Experiential brick-and-mortar stores offer a platform for brands to engage with consumers
- Introducing household air care products into public spaces through IP-based collaboration

New product trends

- Floral, citrus and fresh & clean scents are common, while oriental elements like gardenia, jasmine and sandalwood are emerging
 - Graph 21: fragrance component groups for air care product launches, 2019-2023*
 - Graph 22: mainstream fragrance components in air care product launches, 2019-2023*
- Oriental fragrance concepts are increasingly featured in new products
- Anti-bacterial and time/speed claims are gaining popularity, while refillable features demonstrate sustainability
 - Graph 23: mainstream claims for air care product launches, 2019-2023*
- Anti-bacterial feature permeates different types of air care products, while instant effects are also capturing attention
- Air care products demonstrate sustainability through the use of eco-friendly ingredients and refillable features
- Plant and natural ingredients are becoming more popular
 - Graph 24: mainstream ingredient claims for air care product launches, 2019-2023*
- Natural ingredients and simple formulas are now key selling points for scented candles and incense, enhancing product safety
- The expansion of practical features enhances the functionality of scented candles

THE CONSUMER

Product Usage

- The usage of air fresheners and incense is on the rise, while the popularity of scented candles is declining
 - Graph 25: product usage, 2022 vs 2023
 - Graph 26: selected product usage, 2021-2023
- Females and consumers aged 25-39 are active users of scented air care products
 - Graph 27: product usage, by age, 2023
 - Graph 28: selected product usage, by gender, 2023
- The increase in the usage of spray air fresheners is driven by women and lower-income households
 - Graph 29: User profile of spray air fresheners, 2022 vs 2023
 - Graph 30: user profile of solid/gel/liquid air fresheners, 2022 vs 2023

- The decrease in the usage of scented candles can be attributed to men and lower-income households
 - Graph 31: User profiles of scented candles, 2022 vs 2023
- Incense is favoured by men and consumers aged 50–59 for its embodiment of traditional Chinese aesthetics
 - Graph 32: user profiles of incense users, 2022 vs 2023

Interested Claims of Air Fresheners

- Long-lasting effects and mood improvement remain key claims, while practical features like removing pollutants and odours are gaining popularity
 - Graph 33: interested claims of air fresheners, 2022 vs 2023
- Consumers aged 25–39 are more interested in anti-bacterial properties, while those aged 18–24 are attracted to unique scents
 - Graph 34: selected claims that interest consumers in air fresheners, by age, 2023

Reasons for using different product types

- Air fresheners and scented air care products play distinct roles
 - Graph 35: reasons for using different product types, 2023
- Consumers aged 18–39 have specific emotional value demands for air fresheners
 - Graph 36: selected reasons for using air fresheners, by age, 2023
- High-income families prioritise the odour elimination and masking functions of air fresheners, as well as their ability to improve mood
 - Graph 37: selected reasons for using air fresheners, by monthly household income, 2023
- Consumers aged 25–29 use scented air care products to enhance their mood and freshen the air
 - Graph 38: selected reasons for using scented air care products, by age, 2023
- Men's understanding of the functional positioning of different types of air care products is ambiguous
 - Graph 39: selected reasons for using scented air care products, by gender, 2023
 - Graph 40: selected reasons for using air fresheners, by gender, 2023

Usage barriers of scented candles

- Safety concerns and complicated usage are barriers to increasing the popularity of scented candles
 - Graph 41: usage barriers of scented candles, 2023
- Safety concerns also pose a barrier to the use of scented candles for potential target consumers
 - Graph 42: selected usage barriers of scented candles, by age, 2023
 - Graph 43: selected usage barriers of scented candles, by gender, 2023
 - Graph 44: selected usage barriers of scented candles, by monthly household income, 2023
- Users of incense, scent diffusers and scented sprays prefer these products over scented candles because the latter is perceived as less convenient
 - Graph 45: selected usage barriers of scented candles, by product usage, 2023

Preferred scent types by product type

- Floral scents are the most common choice, with woody, citrus and oriental fragrances also being popular to varying degrees
 - Graph 46: preferred scent types by product types, 2023
- High-income families prefer household air fresheners with oriental scents
 - Graph 47: selected preferred scent types for spray air fresheners, by monthly household income, 2023
 - Graph 48: selected preferred scent types for solid/gel/liquid air fresheners, by monthly household income, 2023

Purchase channels

- Online and offline channels hold equal significance, with an increased penetration of lifestyle brand retailers and short video platforms
 - Graph 49: purchase channels, 2022 vs 2023
 - Graph 50: purchase channels, 2023
- Consumers aged 18-39 favour buying from emerging online platforms, including short video sites, brand channels, and social ecommerce platforms
 - Graph 51: selected purchase channels, by age, 2023
- Purchase channels for scented air care products are becoming more diverse, while incense users prefer group buying and short video platforms
 - Graph 52: selected purchase channels, by usage of product categories, 2023
 - Graph 53: selected purchase channels, by usage of scented air care products, 2023

Offline purchase motivations

- On-site comparisons/sampling are the main motivations for offline purchases
 - Graph 54: offline purchase motivations, 2023
- Sampling or comparing scents in offline channels is particularly important for active users, including women and consumers aged 25-39
 - Graph 55: selected offline purchase motivations, by age, 2023
 - Graph 56: selected offline purchase motivations, by gender, 2023
- High-income groups prefer immersive experiences, instant buys, and custom gift boxes, while shoppers in smaller cities value recommendations from shopping assistants
 - Graph 57: selected offline purchase motivations, by city tier, 2023
 - Graph 58: selected offline purchase motivations, by monthly household income, 2023
- Lifestyle brands and home furniture chains offer easier consumer experiences and comparisons, while specialty stores excel in gift box packaging
 - Graph 59: selected offline purchase motivations, by purchase channels, 2023

ISSUES AND INSIGHTS

- Chinese lifestyle aesthetics can unlock the development potential of incense products

- Oriental fragrances can draw upon Chinese aesthetics to enhance their appeal and contribute to creating a home ambiance
 - Graph 60: growth rate of mentions of various fragrances in scented air care products* on social media**, 2022 vs 2023
- Scented candles struggle to grow their customers, and tapping into the DIY trend could help solidify their user base
 - Graph 61: mentions and engagement of 'handmade candles' (手工蜡烛)* on social media**, 2022-2023

APPENDIX – MARKET SIZE AND FORECAST, RESEARCH METHODOLOGY AND ABBREVIATIONS

- Market size and forecast
- Methodology
- Abbreviations

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