

AIRCARE – GERMANY – 2023

In challenging market conditions, aircare brands can prove their value by promoting aircare as affordable luxury, by making products greener and by using natural ingredients.



Katharina Kirsch, Analyst



Aircare - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of the economic situation and inflation on the aircare market
- The usage, purchase frequency and purchase locations of aircare products
- Incentives and general buying behaviour towards aircare
- Launch activity and innovation opportunities; relevant advertising activity launched
- Market size and share for aircare products



In challenging market conditions, aircare brands can prove their value by promoting aircare as affordable luxury, by making products greener and by using natural ingredients.

Overview

Working and studying from home mandates during the pandemic fueled demand for aircare products, especially among a new user group. Between 2020 and 2022, aircare **usage of 16-24 year old males increased** by 8 percentage points to **81%**.

One of the biggest threats for the aircare market is the tough economic situation. The purchase of aircare products is discretionary, which puts the market under pressure. **Nearly one in two Germans** noticed a **price increase** in household products, and **42%** of consumers looked more carefully at the price of products. After record high sales in 2020 and 2021, the market declined in 2022 but remained well above pre-pandemic levels. **While price increases will hold up value sales in 2023, aircare brands need to prove their value once more.**

BUY THIS REPORT NOW


€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL



Aircare brands can focus on launching a greater variety of **gender neutral products** and products with innovative technology to keep up engagement among young men. Moreover, brands can promote aircare as affordable luxury to meet consumers' need for creating a special atmosphere in tough economic times.

Brands also need to step up their NPD efforts around sustainability as aircare launches still fall short on ethical claims compared to other household categories. Launching more refillable and recycled products **can be positioned as both the more sustainable and cost-effective option for consumers.**

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for aircare

Market context

- The impact of the economic situation on the aircare market
- Aircare products to boost health

Mintel predicts

- Market size & forecast
- Stable long-term outlook for the aircare market

Opportunities

- Target young males as aircare users of the future
- Position aircare as a small luxury when budgets are tight
- Step up efforts for a green profile in aircare
- Increase naturalness to reach 65+ consumers as a new target group

The competitive landscape

- Brands need to be careful to not get swapped out
- Quick download resources

MARKET DRIVERS

German economy

- The cost of living crisis is holding back the post-COVID-19 recovery
 - Graph 1: key economic data, in real terms, 2019-24
- Inflation continues to be the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- The impact of the economy on the aircare market

Sustainability

- The manifestation of a sustainable mindset among consumers...
- ...and governments
- Act now to diminish greenhouse emissions

Health

- Becoming the chosen partner for wellbeing at home
- Finding innovative ways to improve air quality at home
- Brands need to mention product safety

Hybrid working

- Flex-work increases time spent at home

WHAT CONSUMERS WANT AND WHY

Usage and purchase frequency of aircare products

- Usage of aircare products increased
- Usage of all aircare product types on the rise
 - Graph 2: usage of types aircare products in the last 12 months, 2020 vs 2022
- Launch sprays and aerosols with natural ingredients
- Room to up purchasing frequency
 - Graph 3: buying frequency of aircare products, 2022
- Focus on most-engaged aircare buyers
 - Graph 4: frequency of buying aircare products – NET, by age, 2022
- Intensify social media activity to reach the young
- Focus on long-term collaborations with influencers
- Focus on new users to keep up growth

Purchase location

- Use creativity to differentiate from in-store competitors
 - Graph 5: purchase channel of aircare products, 2022
- Drugstores most popular for buying aircare products
 - Graph 6: location of purchase of in-store aircare products, 2022
- Supermarkets to cooperate with premium brands
- Refill stations at supermarkets as an incentive to buy aircare
- Online shopping for aircare products most popular among young men
- Invest in online shopping to target younger men
- Reach young males with innovative ideas
- Online-only retailers as most popular channel for online purchases
 - Graph 7: online purchase locations of aircare products, 2022
- Improve the experience of online shopping

Incentives to buy aircare products

- Low price as most important factor for consumers

- Graph 8: most important factors when buying aircare products – NET, 2022
- Use natural ingredients to appeal to customers aged 65+
 - Graph 9: most important factors when buying aircare products, natural ingredients – NET, by age, 2022
- Use natural ingredients to appeal to customers aged 65+

Buying behaviours around aircare products

- Marketers should increase functional own-label launches
 - Graph 10: buying behaviour around aircare products, 2022
- Communicate money-saving potential of refills
- Provide proof for eco-friendliness of products

Attitudes towards aircare products

- Aircare helps to create a special atmosphere at home
 - Graph 11: attitudes towards aircare products, 2022
- Young consumers can be reached by aircare that creates a special atmosphere
- Naturalness: a factor young consumers find worth paying more for
- Help consumers to improve their wellbeing at home
- Target parents that want to improve air quality at home

LAUNCH ACTIVITY AND INNOVATION

- NPD in aircare remains at the highest level
 - Graph 12: NPD in household care, by top five categories, 2018-22
- NPD in aircare remains at the highest level
- NPD in scented candles experienced a boom in 2022
 - Graph 13: NPD in aircare, by subcategory, 2018-22
- Categories other than candles are lacking growth
- Examples of NPD in scented candles
- Global atmospheres created at home
- Examples of NPD in sprays/aerosols
- Examples of NPD in reed diffusers/scented oils
- Examples of NPD in powered aircare products
- Botanical/herbal claim still leading claim in aircare
 - Graph 14: NPD in aircare, by top ten claims, 2018-22
- Brands meet consumer interest for natural products
- Mention sustainable product features on pack
- Boost refillable launches to meet consumer demand
- New product launches elevated in 2022 again
 - Graph 15: share of NPD in aircare, by launch type, 2018-22

- New packaging launches show room for improvement
- Aircare products get repackaged for multiple reasons
- Yankee Candle is way ahead of its competitors
 - Graph 16: NPD in aircare products, by top 10 companies, 2022
- Aircare showing great potential for own-label NPD
 - Graph 17: NPD in aircare, own-label vs branded, 2018-22
- Examples of NPD from own-label

Advertising and marketing activity

- Air Wick's focus on natural and sustainable aircare

MARKET SHARE

- Own-label on the downgrade
- Own-label needs to intensify its efforts
- Only small share increase among all players

MARKET SIZE, SEGMENTATION AND FORECAST

- Decline in market size after a strong pandemic growth
- Value sales still above pre-pandemic levels
- Scented candles and aerosols switched places again
- Scented candles gave up top position to aerosols
- Aerosols as the new segment leader
- Slow release segment on the rise
- Plug-in/electric lost value due to cost-conscious consumers
- Car fresheners show highest category growth
- Stable long-term outlook for aircare
- Short-term market increase
- Medium term normalisation
- Long-term stabilisation

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Market size and forecast – value
- Market segmentation – value

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850