

AIRCARE – INDIAN CONSUMER – 2020

Exciting times are ahead for the Indian aircare market – tap into the right target audience and under-served segments.



Rimpie Tulsiani, Sr. Beauty
& Personal Care Analyst,
India



Report Content

- What you need to know

EXECUTIVE SUMMARY

- Address the West Indian market & Tier 1 cities to cash in on the aircare space
- Global retail market overview: aircare, 2019
- Low-cost air fresheners coupled with educating on the need for air fresheners will drive category growth
- Awareness of safe aircare products, coupled with economic pricing and targeting the upper middle class/rich will drive demand
- Target the upper middle class/rich for aircare products
- Economical pricing will help consumers experiment
- Introducing natural and organic aircare products will give confidence in their use

KEY TRENDS

Key drivers

- Aromatherapy and fragrance: a key demand factor
- Growing importance of aromatherapy at home
- Adding fragrance and masking bad odour are the key purchase drivers
- Affordable unit prices and increased car ownership
- Growing consumer affluence to indulge in luxury products
- Consumer preference for decorating homes

CONSUMER INSIGHTS

- Consumers concentrate aircare in two rooms and for one reason
- Incense continues to be a consumer favourite
- Incense and fragrance sachets lead
 - Graph 1: usage of aircare products regularly in last 12 months, December 2019
- Incense more popular in the South
- Room-by-room regional focus
- Delivery differences in the regions
- Delivery differences in the regions

Heighten penetration in price-sensitive consumers

- Low-cost aircare products will encourage sales

- Graph 2: reasons for not using any aircare products in the last 12 months, December 2019
- Dabur's Odonil Smile launched in innovative, low-cost format
- North & East find aircare too expensive

Convince consumers who consider aircare unnecessary

- Shift the stigma around aircare purchases
- Over-emphasis of bad odours is stifling expansion
- Over-emphasis of bad odours is stifling expansion
 - Graph 3: reasons aircare products are used, 2019
- South & East find aircare unnecessary
- Target with aircare products for washroom and bedroom
 - Graph 4: usage of aircare products, by location, December 2019
- Washroom air fresheners launched in new formats
- Room-by-room for city tiers
- Men use aircare products in the bedroom and women in the washroom
- Popular fragrances seen in the Indian aircare market

More car owners offer a silver lining

- More car owners mean more car aircare users
- Take cues from these car fresheners

MARKET APPLICATION

Opportunities

- Target the right consumer group and the West Indian market will boost returns

Issue: aircare products are perceived expensive

- Encourage people to adopt air fresheners in their day-to-day lives to improve home hygiene
- Introduce aircare products as sets/kits for gifting purposes
- Associate with spas and beauty salons
- Collaborate with online companies in the wellness space

Issue: aircare products are perceived as unnecessary

- 25-34s as the ideal target age group
- Educate on the use of air fresheners to control bad odour and air pollution
- Emphasise mood elevation and stress-relieving properties
- Car Aircare: Concentrate on Tier 1
- Boost West India car aircare sales
- Collaborate with automobile companies, rental car companies and online companies like Zoomcar

WHO'S INNOVATING

Local innovations

- Odonil Smile LOL French Melody Air Freshener
- Dettol Neutra Air Energising Citrus Zest Air Freshener
- Godrej Aer Smart-matic
- Stop-O Fragranced Bathroom Freshener

GLOBAL INNOVATIONS

- Removing pollution offers opportunities
- Purifying and reducing allergens in the air
- Excite consumers with exotic and innovative seasonal fragrances
- Seasonal aircare can add appeal

GLOBAL TRENDS PLAYING OUT IN INDIA

- Grow Fragrance takes mindful approach to air fresheners
- Introduced with natural ingredients
- Aircare should support mental health
- Indian launches with mental wellness claims
- Use packaging to create a holistic experience
- Global: pack design and colour can create a mood response
- India: pack design and colour also play in a role in creating an experience

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

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01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

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03

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