Trends in the Aerosol Market

SATA, Fall 2012

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We buy more than 1,200 newly launched consumer products

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*Since 2009*
We look at what consumers are spending in 4,000 markets across 45 countries
Consumers have conflicting thoughts on cleaning

72%
“Cleaning the house gives me a sense of accomplishment.”

56%
“Cleaning is a thankless chore.”

Source: Mintel Household Cleaning Equipment Report
Majority of consumers are reactive cleaners

- **77%** Clean when something needs cleaning
- **54%** Thorough cleaning on a regular schedule
- **40%** Put off cleaning as long as possible

Source: Mintel Household Cleaning Equipment Report
Women are still the primary cleaners

Cleaning Responsibilities by Gender, US, 2012

<table>
<thead>
<tr>
<th>Sole Responsibility</th>
<th>Shared Responsibility</th>
<th>No Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>58%</td>
<td>38%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Mintel Household Cleaning Equipment Report
Consumers report range of cleaning concerns

Top Cleaning Concerns of US Adults, 2012

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dust</td>
<td>36%</td>
</tr>
<tr>
<td>Hard to reach places</td>
<td>26%</td>
</tr>
<tr>
<td>Dirt &amp; grime on the floor</td>
<td>25%</td>
</tr>
<tr>
<td>Dirty windows</td>
<td>24%</td>
</tr>
<tr>
<td>Bacteria &amp; germs</td>
<td>19%</td>
</tr>
<tr>
<td>Allergens</td>
<td>19%</td>
</tr>
<tr>
<td>Odors</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Mintel Household Cleaning Equipment Report
AERO: Trends in the aerosol market

- Aerosol Market Overview
- Environmental Concerns
- Reasons for Purchasing
- Other Aerosol Categories
Aerosol Market Overview
Aerosol products gaining global momentum

Aerosol Household Launches by Region, 2009-2011

- Europe
- Asia Pacific
- North America
- Latin America
- Middle East & Africa

Source: Mintel GNPD
Regional preferences dictate category NPD

Latin America
Alex Floor Cleaning Spray (Chile)

Asia Pacific
Hit Aerosol Insecticide (India)

Europe
Scotch-Gard Shoe Protector (France)

Source: Mintel GNPD
Aerosol a small but growing US household segment

Household Product Launches by Package Type, US, 2009-2011

- **Bottle**: 32%
- **Flexible**: 25%
- **Jar**: 17%
- **Carton**: 16%
- **Aerosol**: 7%
- **Other**: 3%

Source: Mintel GNPD
US consumers turn to aerosols for air care needs

81% of US adults use aerosol or spray air fresheners...

...making it the most frequently used segment of the category

31% are highly engaged, using aerosols on most days

Source: Mintel Air Fresheners Report
Air care is largest US household aerosol category

Household Aerosol Launches by Category, US, 2009-2011

- **Air Care**: 49 launches
- **Hard Surface**: 40 launches
- **Pest Control**: 80 launches
- **Fabric Care**: 7 launches

Source: Mintel GNPD
Top manufacturers dominate aerosol introductions

- **P&G**
  - Febreze

- **SC Johnson**
  - Glade

- **Reckitt Benckiser**
  - Air Wick

Source: Mintel GNPD
Environmental Concerns
Environmentally-friendly cleaning is on the rise

Agreement with: “I try to take an environmentally-friendly approach to cleaning.”

Source: Mintel Household Cleaning Equipment Report
Consumers concerned about aerosol ingredients

47% Concerned about chemicals used in aerosol air fresheners

46% Prefer to get scent from natural products such as lemons and flowers

Source: Mintel Household Cleaning Equipment Report
And eco-friendly continues to be a top claim

Top Claims in Aerosol Household Product Launches, US, 2009-2012

- Eco-friendly product: 44%
- Eco-friendly packaging: 28%
- Odor neutralising: 25%
- Seasonal: 16%
- Time/speed: 14%

Source: Mintel Air Fresheners Report
Eco-friendly product claims relieve ingredient concerns

Bissell Carpet Stain Remover
Features an earth friendly formula

Hot Shot Insect Killer
Natural insecticide safe for children and pets

Glade Air Freshener
100% natural propellant

Source: Mintel GNPD
Refill packaging encourages eco-friendly actions

**Air Wick**
- Refill bottle in a recyclable pack

**Glade**
- 100% recyclable paperboard

**Scrubbing Bubbles**
- Recyclable steel aerosol

*Source: Mintel GNPD*
Natural is an important factor in aerosol purchases

**Important Factors in Selection of Aerosols and Sprays, US, 2012**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Makes my home smell fresh</td>
<td>97%</td>
</tr>
<tr>
<td>Able to eliminate strong odors</td>
<td>97%</td>
</tr>
<tr>
<td>Long lasting scent</td>
<td>93%</td>
</tr>
<tr>
<td>Offered in a variety of scents</td>
<td>90%</td>
</tr>
<tr>
<td>Doesn’t require frequent replacement</td>
<td>89%</td>
</tr>
<tr>
<td>Natural ingredients</td>
<td>67%</td>
</tr>
</tbody>
</table>

Source: Mintel Air Fresheners Report
Botanical & herbal ingredients convey natural positioning

**Lemon Oil**
- Nice! Furniture Polish with Lemon Oil

**Juniper Berry**
- Thymes Wildwood Home Fragrance Mist

**Cottonseed Oil**
- Swiffer Dust & Shine Furniture Spray

*Source: Mintel GNPD*
AERO: Trends in the aerosol market

Reasons for purchasing
Consumes turn to aerosols for odor control

- Able to eliminate strong odors
- Detects odors and releases scent
- Makes home smell fresh
- Long lasting scent

Source: Mintel Air Fresheners Report
Manufacturers highlight odor neutralization

<table>
<thead>
<tr>
<th>Ambi Pur Air Refresher</th>
<th>Brise Air Freshener</th>
<th>Carrefour Air Freshener</th>
</tr>
</thead>
<tbody>
<tr>
<td>Said to eliminate odors, not mask them</td>
<td>Eliminates odor with Oust technology</td>
<td>Perfumes the home and neutralizes odors for two hours</td>
</tr>
</tbody>
</table>

Source: Mintel GNPD
Aerosol sprays used throughout the home

- **85%** Bathroom
- **47%** Kitchen
- **43%** Living Room or Bedroom

*Source: Mintel Air Fresheners Report*
Floral scents most popular, but wide range preferred

**Preferred Scents in Aerosol Air Fresheners, US, 2012**

<table>
<thead>
<tr>
<th>Scents</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flower</td>
<td>36%</td>
</tr>
<tr>
<td>Home</td>
<td>33%</td>
</tr>
<tr>
<td>Forest/Nature</td>
<td>32%</td>
</tr>
<tr>
<td>Citrus</td>
<td>32%</td>
</tr>
<tr>
<td>Spices/Ingredients</td>
<td>28%</td>
</tr>
<tr>
<td>Fruit</td>
<td>24%</td>
</tr>
<tr>
<td>No preference</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Mintel Air Fresheners Report
Floral scents cross multiple categories

**Air Fresheners**
- Febreze Air Air Freshener Spray (South Korea)

**Surface Cleaners**
- Afton Furniture Polish (South Africa)

**Pest Control**
- Falcon Falcon Aerosol Insecticide (Vietnam)

*Source: Mintel GNPD*
Nature scents invoke natural positioning

Nature’s Field
Dis-Chem All-Purpose Cleaner (South Africa)

Forest
Crabtree & Evelyn Home Fragrance Spray (Hong Kong)

Smoky Mountains
Air Wick Automatic Spray Refill (US)

Source: Mintel GNPD
AERO: Trends in the aerosol market

Other Aerosol Categories
Aerosol formulations surge in personal care

Personal Care Aerosol Launches by Category, US, 2009-2012 YTD

Source: Mintel GNPD
Aerosols enable advanced haircare claims

Hair spray, mousse, shine and heat protection products are driving aerosol growth

Styling Products

Dry shampoo enables functional cleansing benefits with aromatic attributes

Dry Shampoo

Source: Mintel GNPD
Sunscreen sprays provide convenient sun protection

Aerosol Skincare Launches by Sub-Category, US, 2009-2012 YTD

Source: Mintel GNPD
Popular claims penetrate personal care aerosols

**Aromatherapy**
- Avon Nature & Marche Cool Spray Deodorant

**Antioxidant**
- L’Occitaine Hydration Face Mist

**Anti-Aging**
- Aero Hydrating Mineral Bronzer

Source: Mintel GNPD
What’s next for the aerosol category?

- Elevate Eco-Friendly Positioning
- Cross-Category Coordination
- Enhance Emotional Connection
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Global Personal Care Analyst

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