



Trends in the Aerosol Market

SATA, Fall 2012

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Consumers have conflicting thoughts on cleaning

72%

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

56%

“Cleaning is a thankless chore.”

Majority of consumers are reactive cleaners



Clean when something needs cleaning



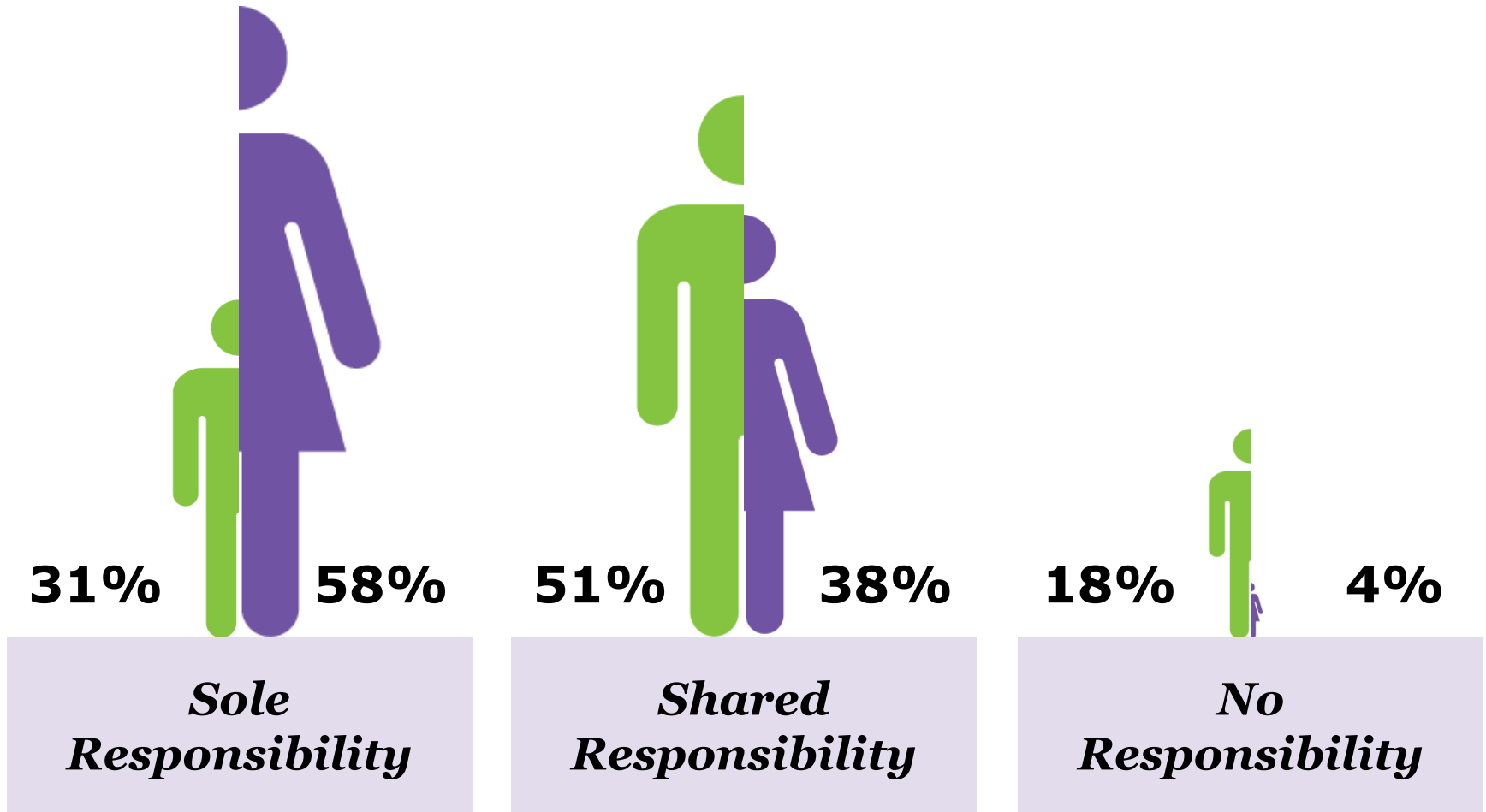
Thorough cleaning on a regular schedule



Put off cleaning as long as possible

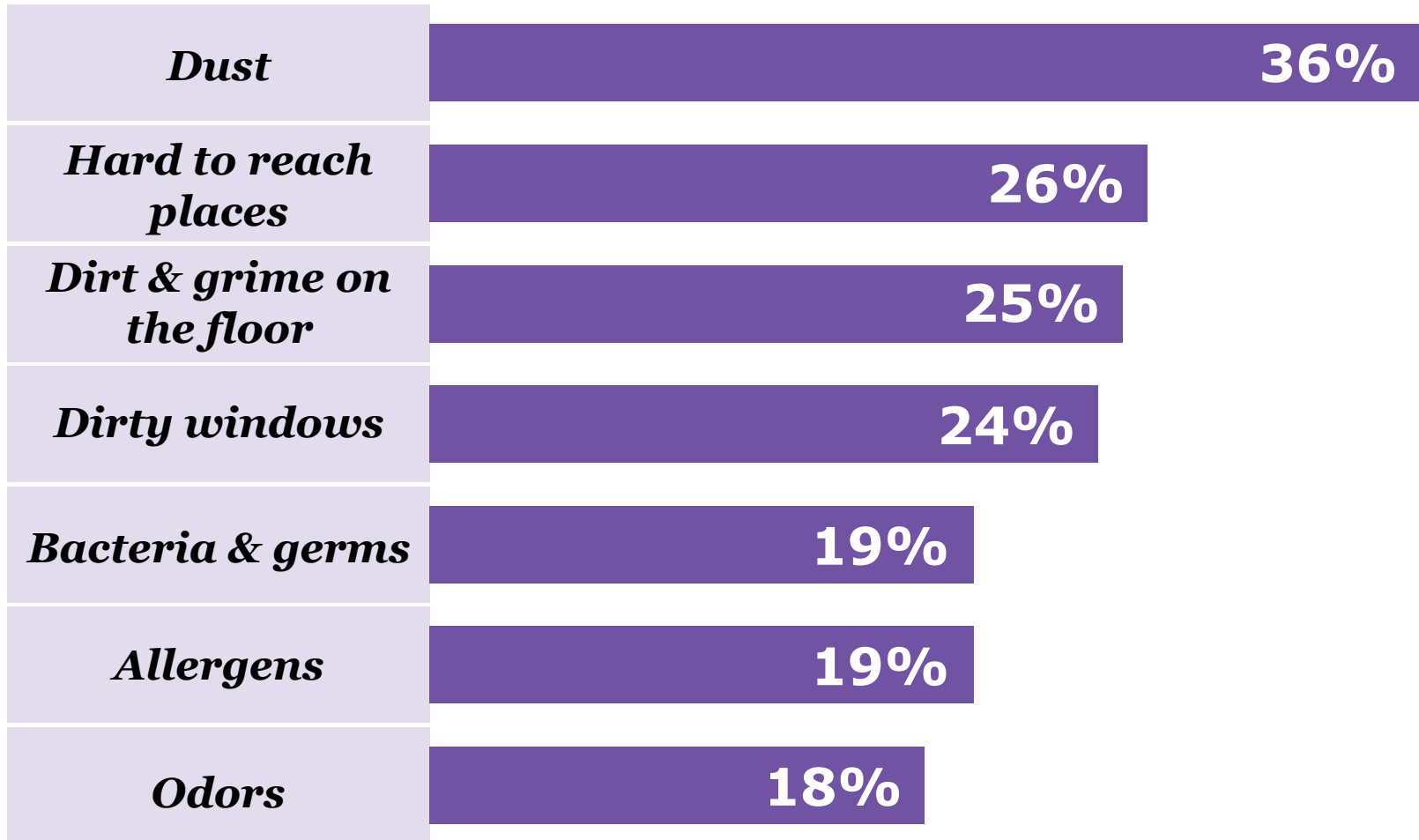
Women are still the primary cleaners

Cleaning Responsibilities by Gender, US, 2012



Consumers report range of cleaning concerns

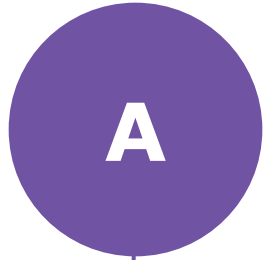
Top Cleaning Concerns of US Adults, 2012



AERO: Trends in the aerosol market



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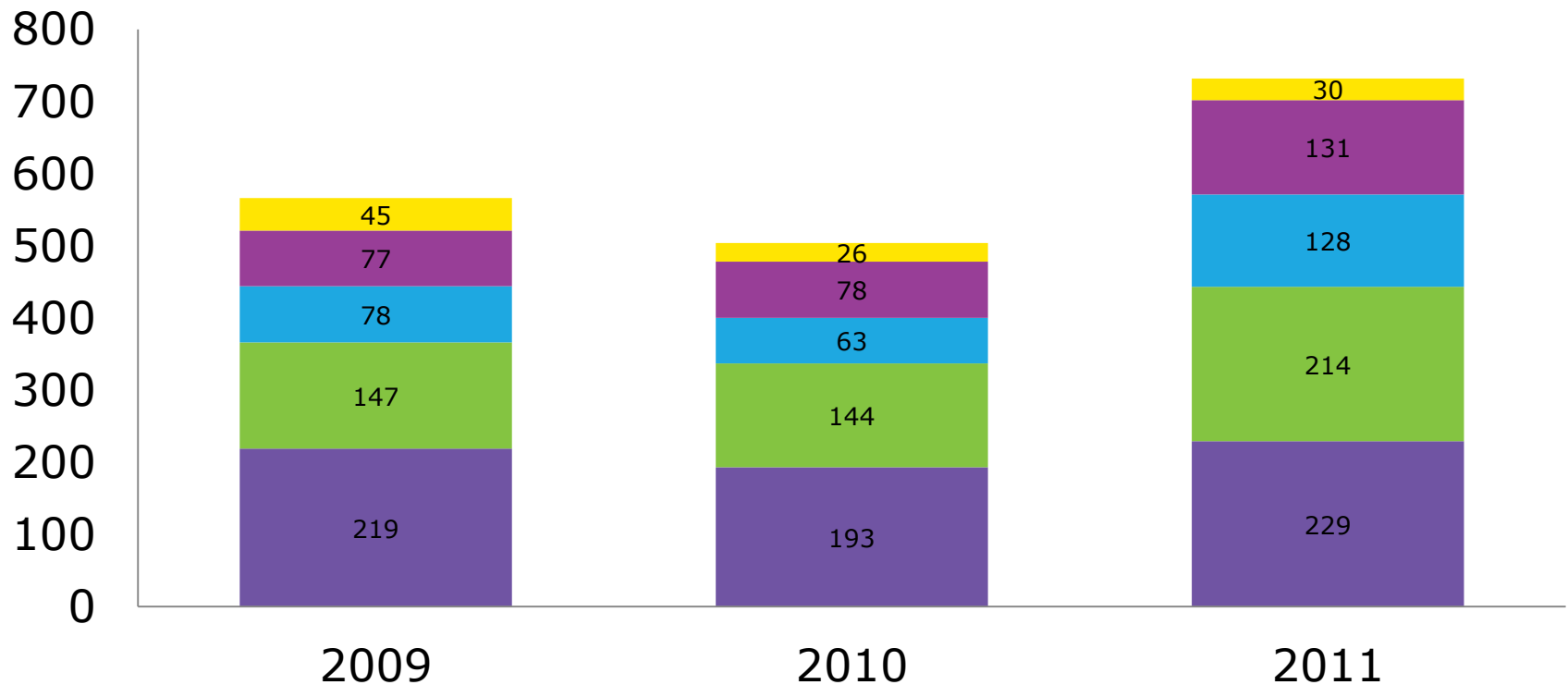


Aerosol Market Overview



Aerosol products gaining global momentum

Aerosol Household Launches by Region, 2009-2011



Regional preferences dictate category NPD

Latin America



Alex Floor Cleaning Spray (Chile)

Asia Pacific



Hit Aerosol Insecticide (India)

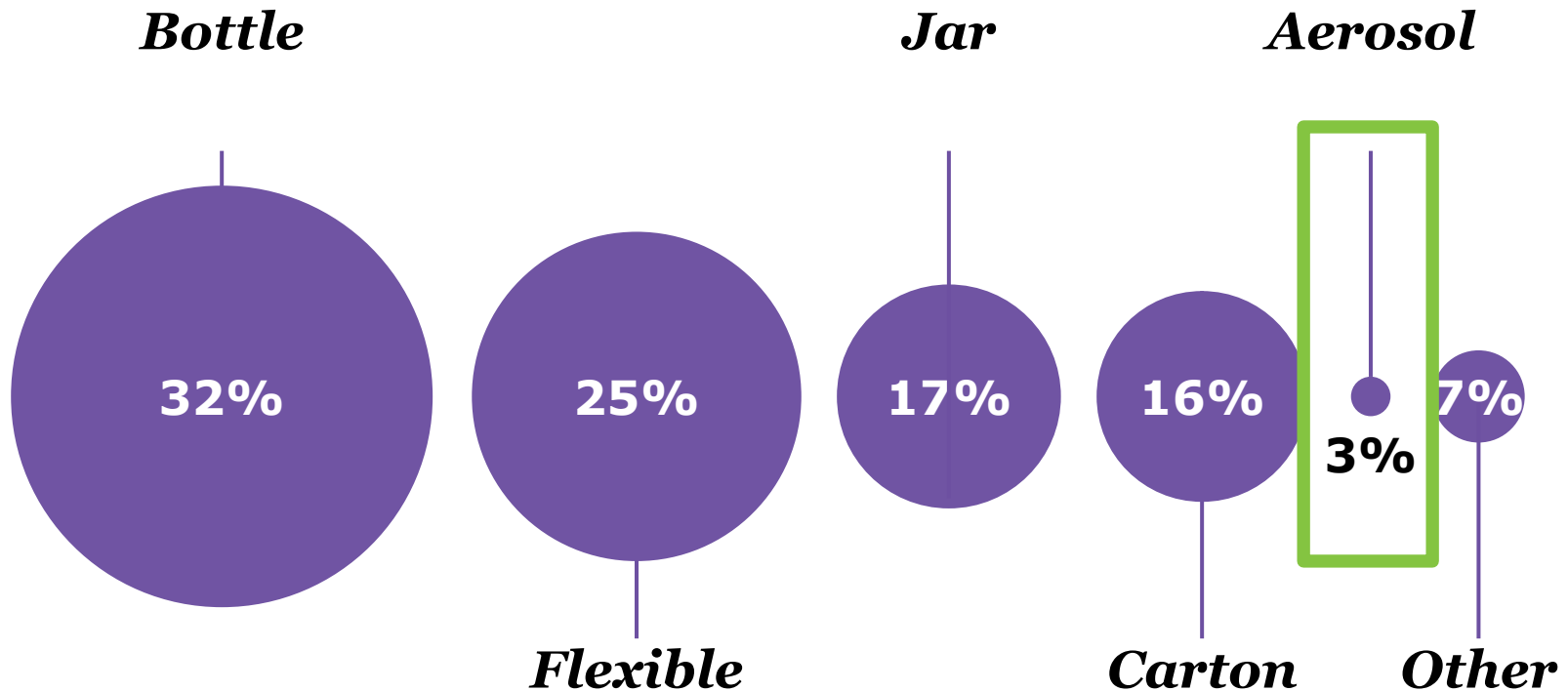
Europe



Scotch-Gard Shoe Protector (France)

Aerosol a small but growing US household segment

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



US consumers turn to aerosols for air care needs



81%

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

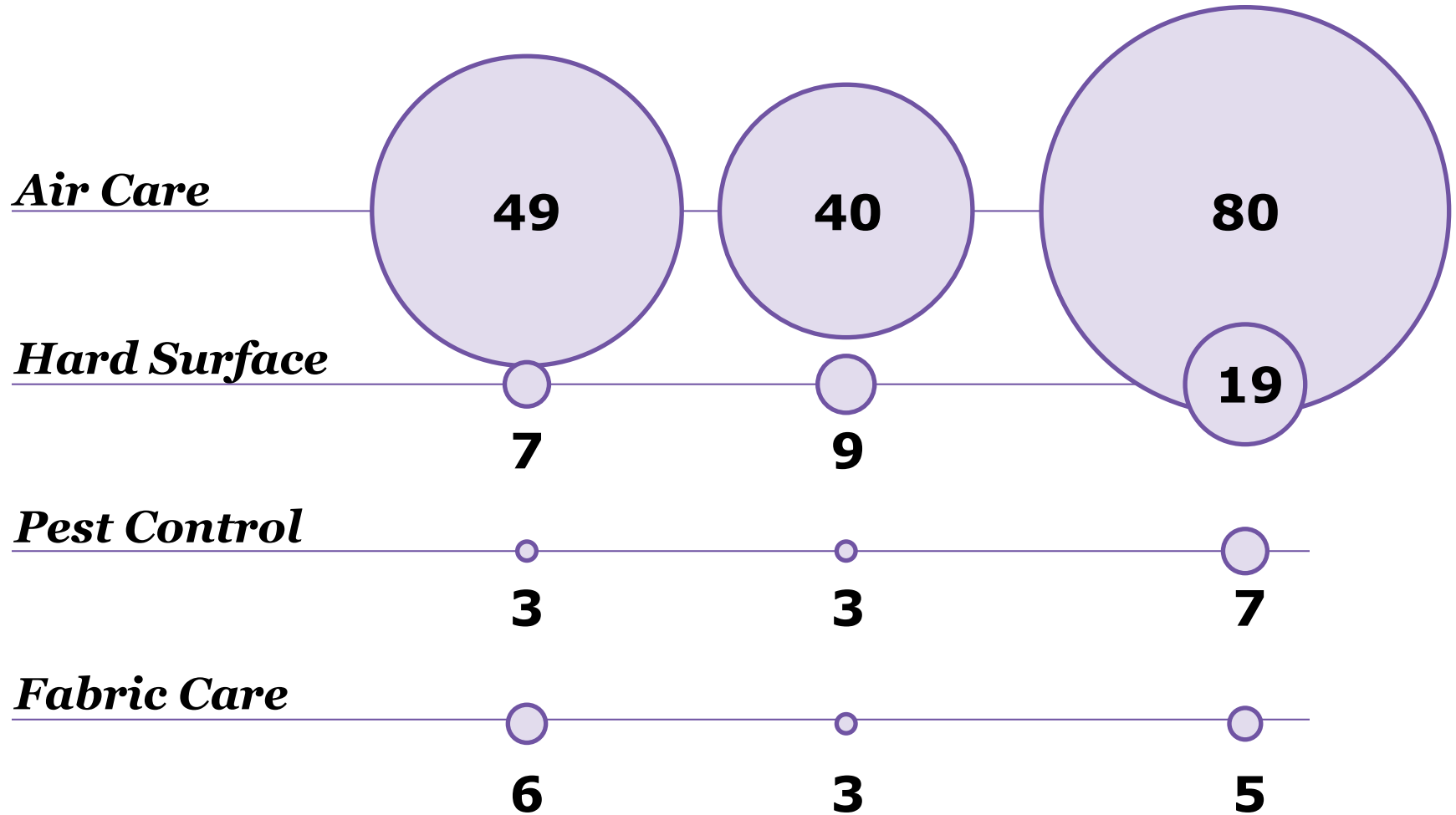
...making it the most frequently used segment of the category

31%

are highly engaged, using aerosols on most days

Air care is largest US household aerosol category

Household Aerosol Launches by Category, US, 2009-2011



Top manufacturers dominate aerosol introductions

P&G



Febreze

SC Johnson



Glade

**Reckitt
Benckiser**



Air Wick

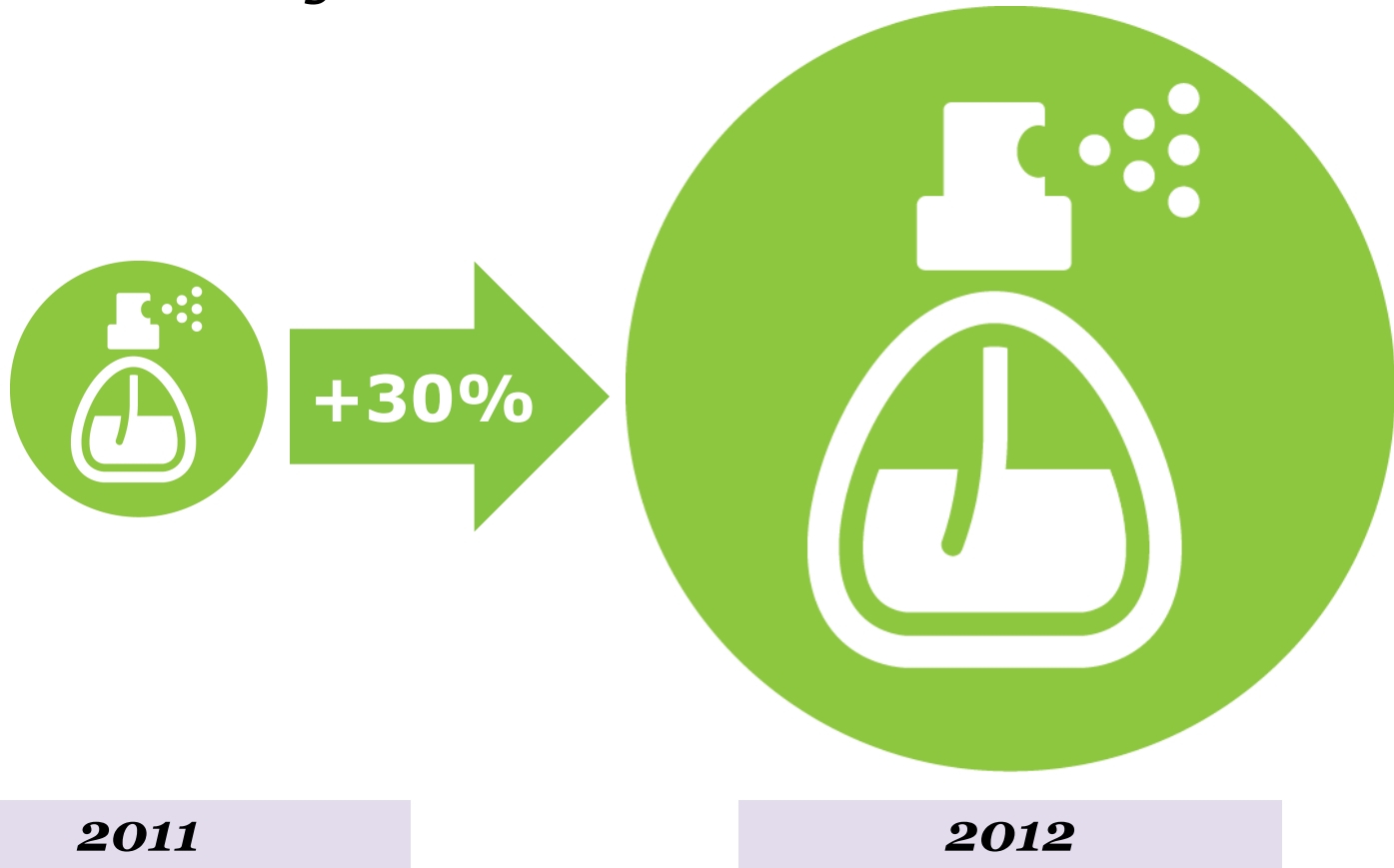
AERO: Trends in the aerosol market



Environmental Concerns

Environmentally-friendly cleaning is on the rise

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



Consumers concerned about aerosol ingredients

47%

Concerned about chemicals used in aerosol air fresheners

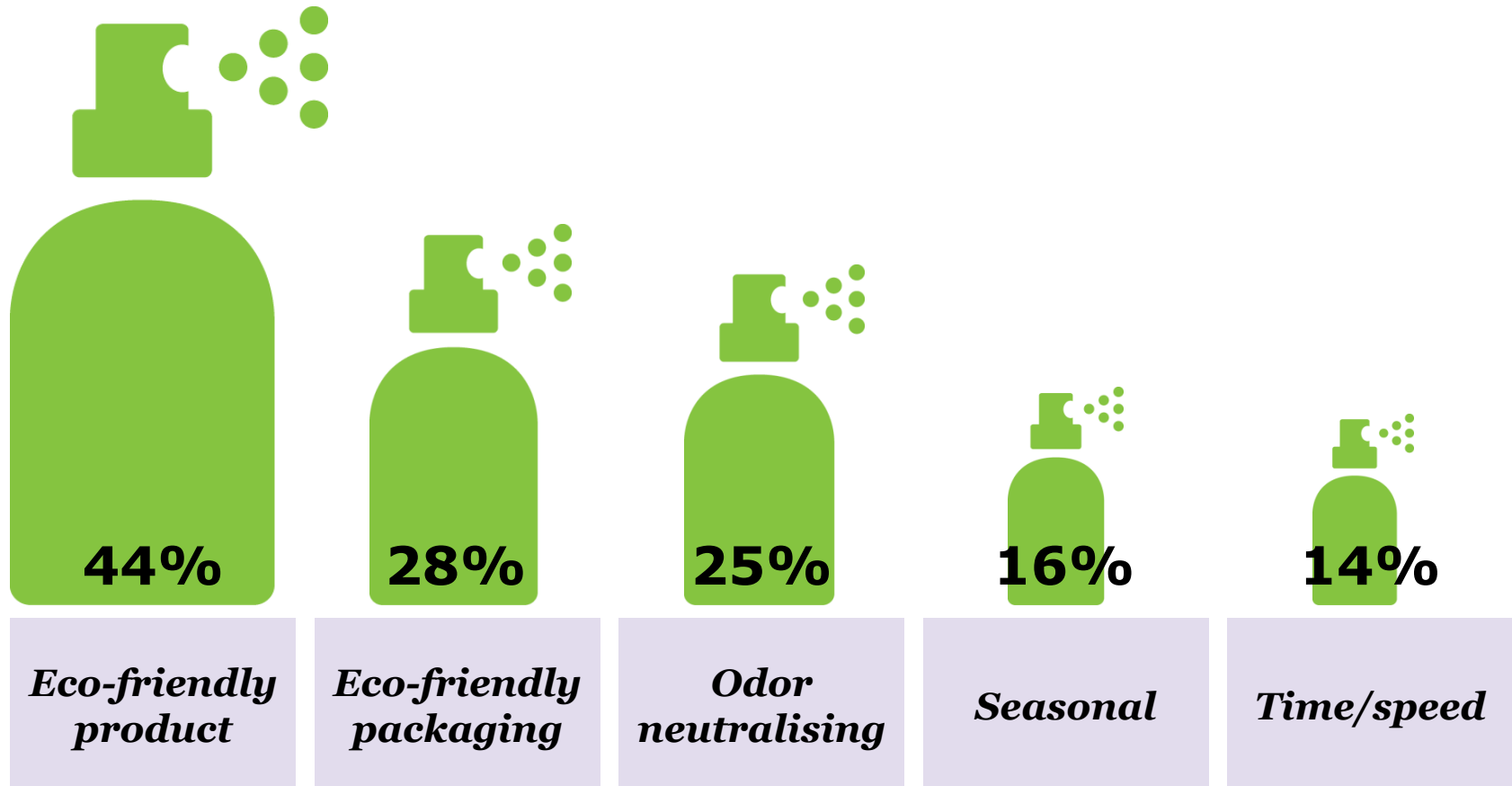


46%

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

And eco-friendly continues to be a top claim

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



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

Refill packaging encourages eco-friendly actions

Air Wick



Refill bottle in a recyclable pack

Glade



100% recyclable paperboard

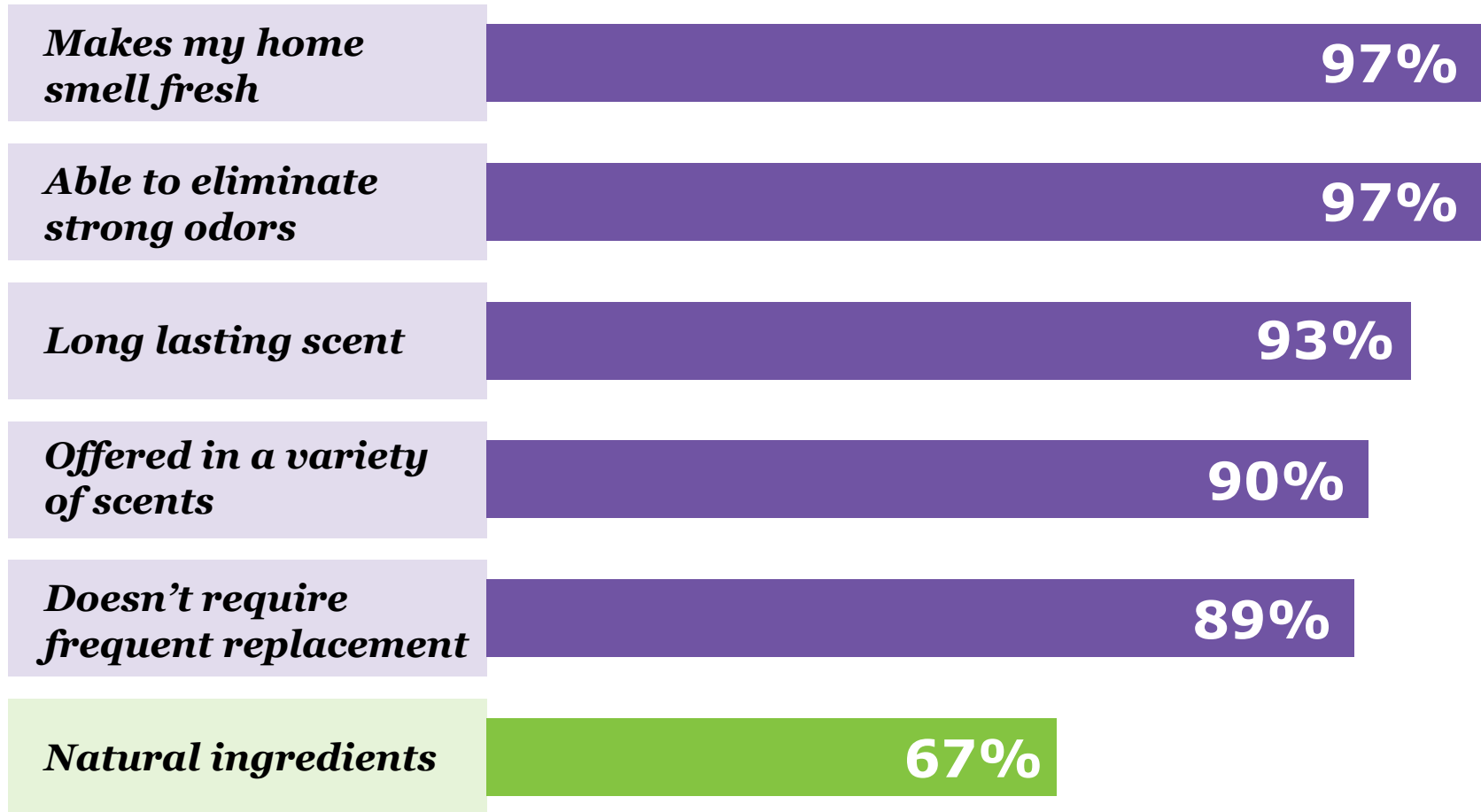
Scrubbing Bubbles



Recyclable steel aerosol

Natural is an important factor in aerosol purchases

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



Botanical & herbal ingredients convey natural positioning

Lemon Oil



Nice! Furniture Polish with Lemon Oil

Juniper Berry



Thymes Wildwood Home Fragrance Mist

Cottonseed Oil



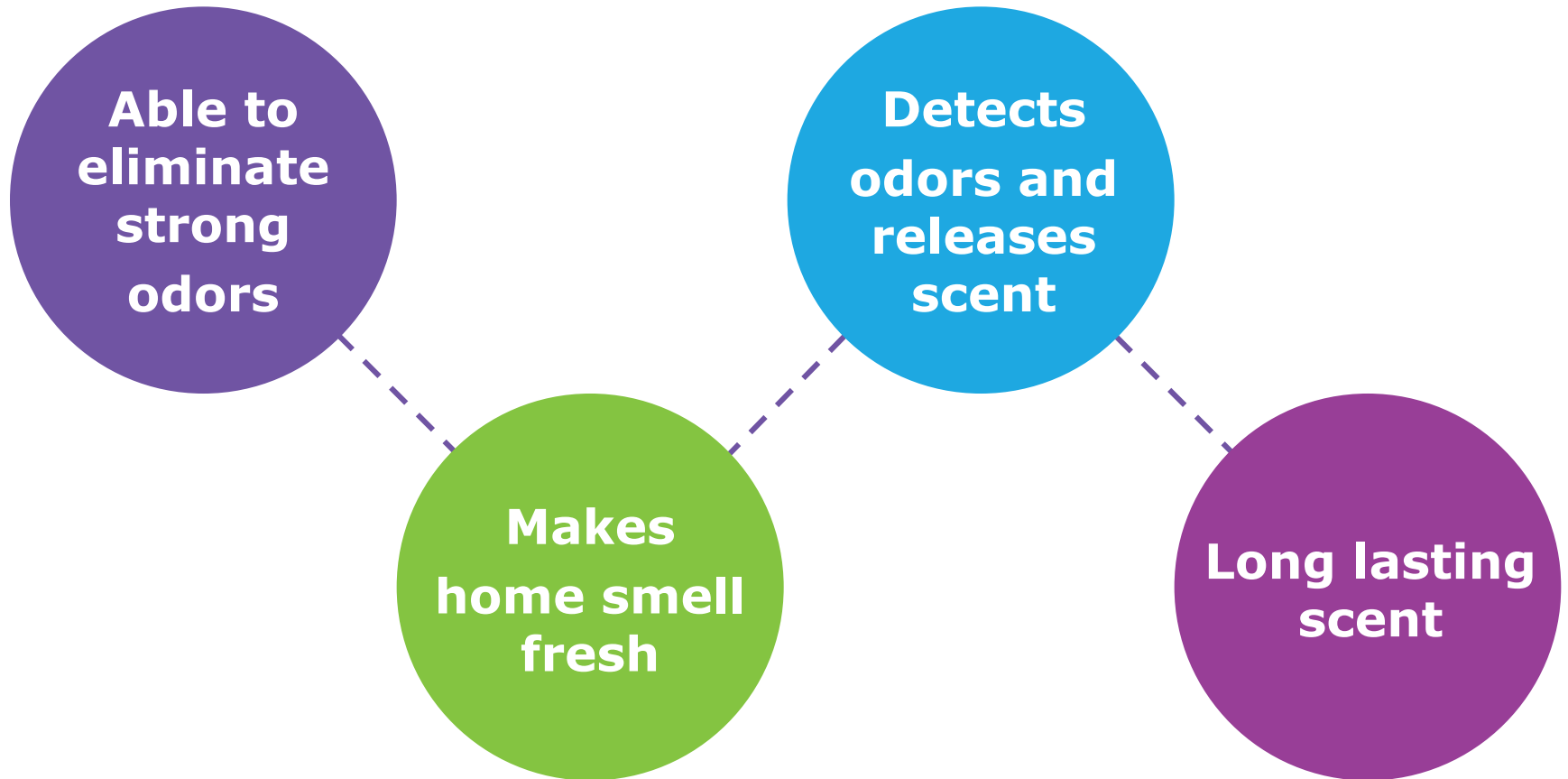
Swiffer Dust & Shine Furniture Spray

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Reasons for purchasing

Consumers turn to aerosols for odor control



Manufacturers highlight odor neutralization

Ambi Pur Air Refresher



Said to eliminate odors, not mask them

Brise Air Freshener



Eliminates odor with Oust technology

Carrefour Air Freshener



Perfumes the home and neutralizes odors for two hours

Aerosol sprays used throughout the home

43%
Living Room
or Bedroom



47%
Kitchen

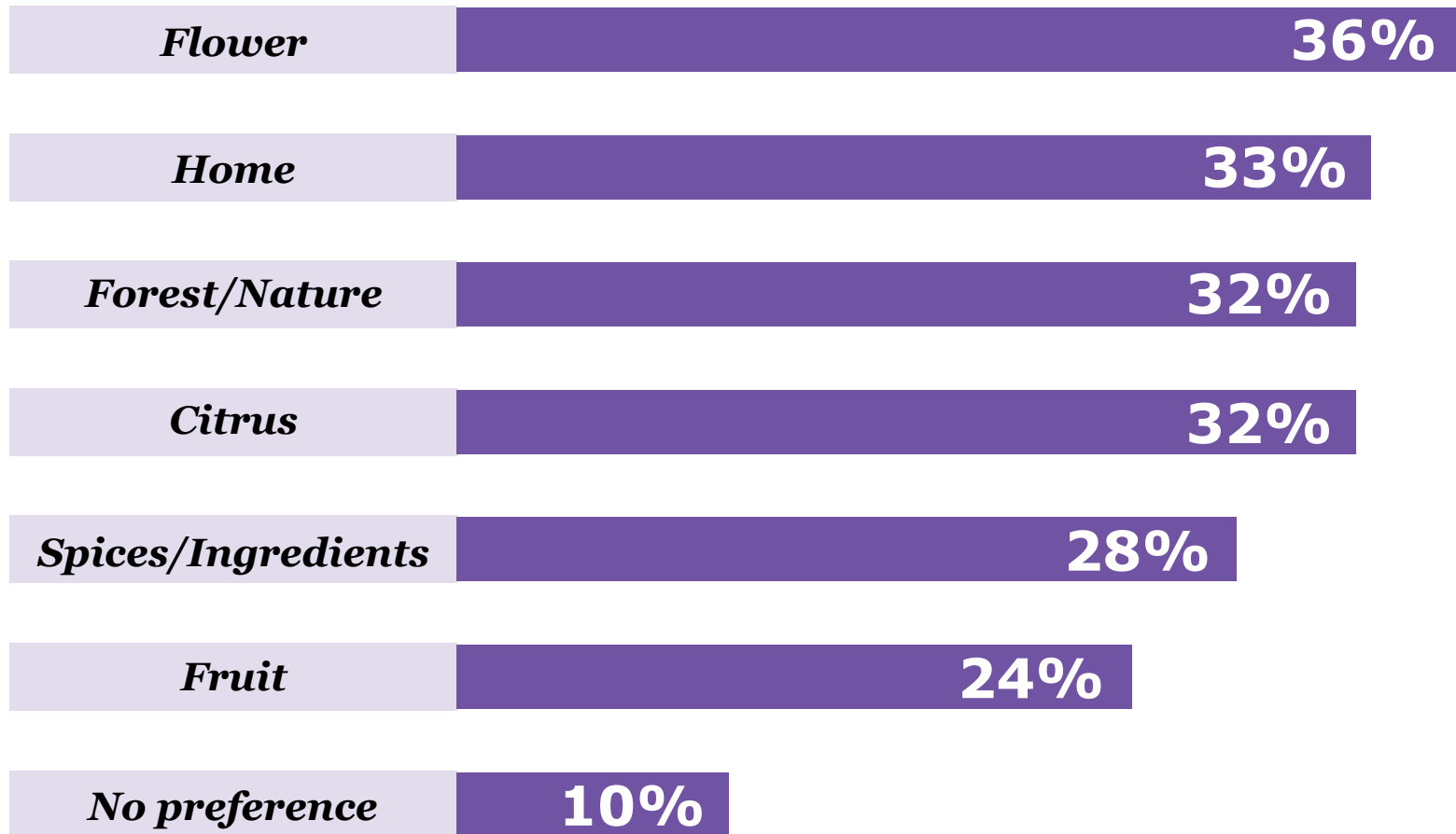


85%
Bathroom



Floral scents most popular, but wide range preferred

Preferred Scents in Aerosol Air Fresheners, US, 2012



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)

Nature scents invoke natural positioning

Nature's Field



Dis-Chem All-Purpose Cleaner
(South Africa)

Forest



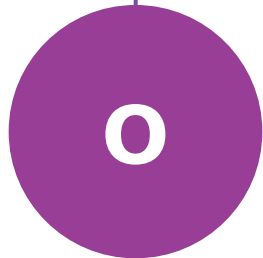
Crabtree & Evelyn Home Fragrance Spray (Hong Kong)

Smoky Mountains



Air Wick Automatic Spray Refill (US)

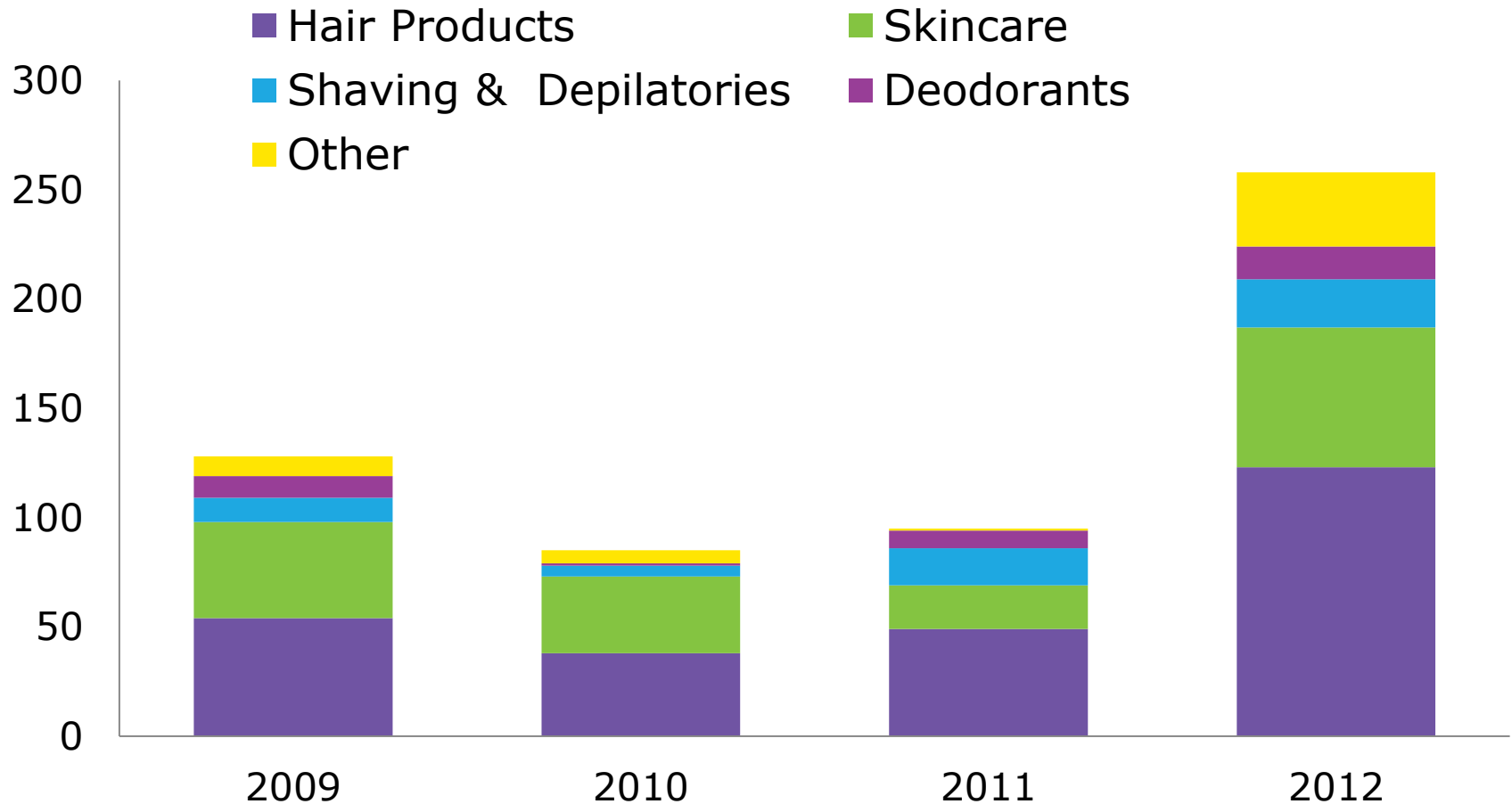
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Other Aerosol Categories

Aerosol formulations surge in personal care

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



Aerosols enable advanced haircare claims

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

Styling Products

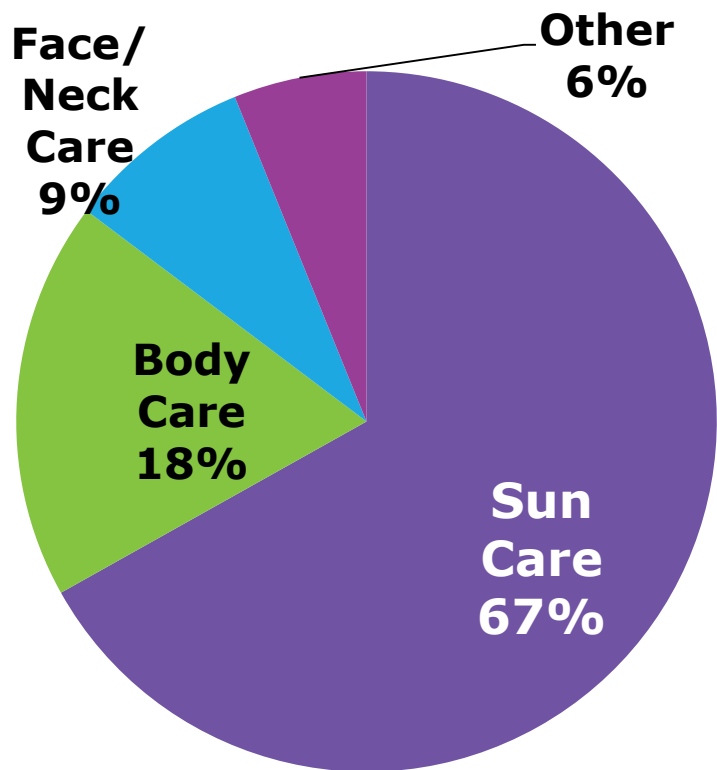


Dry shampoo enables functional cleansing benefits with aromatic attributes

Dry Shampoo



Sunscreen sprays provide convenient sun protection



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



Popular claims penetrate personal care aerosols

Aromatherapy



Avon Nature & Marche Cool Spray Deodorant

Antioxidant



L'Occitane Hydration Face Mist

Anti-Aging



Aero Hydrating Mineral Bronzer

What's next for the aerosol category?



**Elevate Eco-Friendly
Positioning**

**Cross-Category
Coordination**

**Enhance Emotional
Connection**



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