

## **Air Freshener - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 130 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Air Freshener Market Analysis

The air freshener market size is estimated to be USD 18.43 billion in 2025 and is expected to reach USD 24.38 billion by 2030, growing at a CAGR of 5.76%. The market is evolving from basic odor control to comprehensive indoor air management solutions that combine wellness, sustainability, and smart-home integration. The increased focus on health following the pandemic maintains strong demand for products offering both fragrance and air purification benefits, while tighter regulations on volatile organic compounds (VOCs) drive manufacturers to develop safer formulations and environmentally friendly alternatives. Additionally, North America remains the largest market by consumer spending, with households increasingly investing in multi-functional air care products, while the Asia-Pacific region shows the fastest growth in premium product adoption, particularly in urban areas. The integration of technology, including app-controlled diffusers, AI-based scent customization, and IoT-enabled devices, enables manufacturers to command premium prices and offer personalized user experiences. Moreover, consumer demand for ingredient transparency and sustainable packaging has transformed from niche preferences to essential purchasing factors, leading companies to invest in recyclable materials, refill options, and clear ingredient labeling practices.

Global Air Freshener Market Trends and Insights

Aggressive Marketing by Reputed Brands

Air freshener marketing has shifted from conventional advertising to campaigns that position these products as essential lifestyle

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

items. Companies now engage consumers through digital platforms, social media, and interactive retail displays. Procter & Gamble's strategy addresses three key consumer needs: functional (odor elimination and freshness maintenance), practical (cleanliness indication and space enhancement), and emotional (confidence building and memory association through familiar fragrances). The integration of AI and data analytics in fragrance development enables companies to offer personalized scent recommendations based on consumer preferences, cultural factors, and seasonal patterns. This technological advancement supports premium pricing strategies while fostering consumer relationships through customized experiences and precise marketing efforts. P&G's inclusion of Febreze among its 30+ brands in the 2024 Paris Olympics and Paralympics sponsorship demonstrates the elevated marketing priority of air care products, comparable to personal care items. This strategic presence in major events and enhanced marketing investment reflects the industry's focus on expanding household adoption, reaching new consumer segments, and building brand loyalty across diverse markets.

#### Sustainability Initiatives

Sustainability commitments significantly influence product development cycles and supply chain strategies across manufacturers. These commitments drive innovation in material selection, packaging design, and production processes. SC Johnson achieved its ambitious packaging goals ahead of schedule, reducing its plastic footprint by 32% and exceeding its 25% post-consumer recycled materials target before the 2025 deadline. The company's commitment to sustainable packaging is evident through its market-leading 12% share in reusable plastic packaging within the household and personal care sector. This achievement reflects extensive research, development, and implementation of eco-friendly alternatives. SC Johnson installed more than 700 Ecover refill stations in European retail locations, implementing a comprehensive circular economy model that reduces packaging waste while offering enhanced consumer convenience. The refill stations represent a significant investment in infrastructure and consumer education. The evolving regulatory environment creates consistent demand for sustainable products, enabling manufacturers to achieve substantial economies of scale and improve cost competitiveness against traditional options. This shift towards sustainability has established new industry benchmarks and demonstrates how environmental initiatives can create meaningful market differentiation through improved operational efficiency and consumer trust.

#### Proliferation of Counterfeit Products

The widespread proliferation of counterfeit air fresheners inflicts substantial damage to established brand value and creates significant consumer safety hazards across global markets. The Philippines' documented experience with counterfeit perfumes containing dangerous chemicals like phthalates, which are extensively used in both perfumes and air freshener formulations, comprehensively demonstrates how product safety concerns extend well beyond monetary losses to create potentially severe and long-lasting public health implications. The persistent limitation in fragrance ingredient disclosure requirements within product formulations makes it increasingly challenging to verify product safety standards, as numerous potentially harmful substances remain unlisted even in legitimate products, which substantially complicates the identification and detection of counterfeit items. Detailed analysis of border seizure data reveals a strong and consistent correlation with regional corruption levels, indicating that counterfeit prevalence varies considerably by geographic location and the effectiveness of local enforcement capabilities. These significant regional variations create considerable market disadvantages for legitimate manufacturers operating in territories where intellectual property protection mechanisms remain inadequate, while simultaneously presenting strategic opportunities for premium product positioning and market differentiation in regions with robust and well-implemented enforcement mechanisms.

Other drivers and restraints analyzed in the detailed report include:

Influence of Social Media Platforms / Growth in Real Estate Sector / Health Concerns Over Chemical Ingredients /

For complete list of drivers and restraints, kindly check the Table Of Contents.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Segment Analysis

Sprays dominated the market with a 31.33% revenue share in 2024, maintaining their position as an economical and effective air freshening solution across consumer segments. Their widespread adoption stems from ease of use, immediate results, and accessibility across various retail channels. Diffusers are expected to grow at a 5.96% CAGR, driven by increasing consumer preference for sustained fragrance solutions that integrate with home automation systems. The growth is particularly notable in smart homes where automated fragrance control is becoming a standard feature. Electric plug-ins continue to provide a balance between cost and duration, offering consistent fragrance delivery without frequent replacement. Candles remain a specialized segment for consumers who prioritize atmosphere, with premium and artisanal offerings driving category value. The Ceeniu F26 auto-diffuser demonstrates the evolution of air care products through features such as vibration activation, mobile application control, and variable fragrance intensity.

The market transformation reflects consumers' increasing view of fragrance management as an integral component of home comfort. Smart diffusers' compatibility with voice control systems enables users to customize fragrance distribution based on schedules and activities, from morning routines to evening relaxation settings. This functionality supports premium pricing and generates consistent revenue through refill purchases. The diffuser segment is expected to expand consistently, with primary adoption among younger, technology-oriented consumers in urban areas who value both convenience and customization in their living spaces. The integration of fragrance systems with smart home platforms has created new opportunities for manufacturers to develop innovative products and services that cater to evolving consumer preferences.

The Air Fresheners Market Report is Segmented by Product Type (Sprays, Diffuser, Electric Air Freshener, Candle Air Freshener, and Other Product Types), Ingredient (Conventional/Synthetic and Natural/Organic), End User (Residential and Commercial), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

North America dominates the air fresheners market with a 44.47% share in 2024. The region's growth stems from consumer migration from traditional aerosols to subscription-based refill diffusers through established e-commerce platforms and personalized loyalty programs. California's stringent VOC regulations and comprehensive federal sustainability guidelines drive extensive product innovation that influences global markets. Major retailers strategically prioritize natural products and smart devices in premium shelf spaces, supporting market premiumization through enhanced consumer experiences and higher-value offerings.

The Asia-Pacific region demonstrates the highest growth rate at 7.23% CAGR, driven by rapid urbanization and significant middle-class expansion. Extensive residential construction projects in China and India create substantial demand for air fresheners in new households. While local manufacturers compete aggressively on pricing strategies, international brands gain substantial market share in tier-1 cities through comprehensive safety certifications and sophisticated design features. Japan's mature market indicates evolving consumer preferences toward premium scent diffusers that complement modern interior design aesthetics and lifestyle choices.

Moreover, Europe maintains consistent growth, supported by strict environmental regulations and increasing consumer demand for ingredient transparency. The region demonstrates strong adoption of circular economy initiatives, exemplified by SC Johnson's widespread implementation of refill kiosks across multiple markets. Southern European markets show a significant shift from traditional aerosols to sophisticated diffuser sticks, particularly in the hospitality sector's post-pandemic recovery strategies and consumer experience enhancement efforts.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## List of Companies Covered in this Report:

Procter & Gamble Company / Reckitt Benckiser Group PLC / Armaly Brands Inc. / Church and Dwight Co. Inc. / Newell Brands Inc. (Yankee Candle) / S.C. Johnson and Son Inc. / The Godrej Group / Farcent Enterprise Co. Ltd. / Dabur India Ltd. / Kobayashi Pharmaceutical Co. Ltd. / Car-Freshner Corporation / ScentAir Technologies LLC / California Scents / Air Aroma International / Aura Cacia (Frontier Co-op) / Air Spencer Co. Ltd. / Bath and Body Works Inc. / Empire Candle Co., LLC / CAR MATE MFG. Co., Ltd. / Les Comptoirs de Durance /

## Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

## Table of Contents:

### 1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

### 2 RESEARCH METHODOLOGY

### 3 EXECUTIVE SUMMARY

### 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
  - 4.2.1 Aggressive Marketing by Reputed Brands
  - 4.2.2 Sustainability Initiatives
  - 4.2.3 Influence of Social Media Platforms
  - 4.2.4 Growth in Real Estate Sector
  - 4.2.5 Rising Consumer Awareness of Indoor Air Quality
  - 4.2.6 Shift Toward Natural, Organic, and Eco-Friendly Products
- 4.3 Market Restraints
  - 4.3.1 Proliferation of Counterfeit Products
  - 4.3.2 Health Concerns Over Chemical Ingredients
  - 4.3.3 High Production Costs
  - 4.3.4 Limited Fragrance Variety and Perceived Efficacy of Natural Products
- 4.4 Consumer Behaviour Analysis
- 4.5 Regulatory Outlook
- 4.6 Porter's Five Forces Analysis
  - 4.6.1 Bargaining Power of Suppliers
  - 4.6.2 Bargaining Power of Buyers
  - 4.6.3 Threat of New Entrants
  - 4.6.4 Threat of Substitutes
  - 4.6.5 Degree of Competition

### 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Product Type

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.1.1 Sprays
- 5.1.2 Diffuser
- 5.1.3 Electric Air Freshner
- 5.1.4 Candle Air Freshner
- 5.1.5 Other Product Types
- 5.2 Ingredient
  - 5.2.1 Conventional/Synthetic
  - 5.2.2 Natural/Organic
- 5.3 By End User
  - 5.3.1 Residential
  - 5.3.2 Commercial
- 5.4 By Geography
  - 5.4.1 North America
    - 5.4.1.1 United States
    - 5.4.1.2 Canada
    - 5.4.1.3 Mexico
    - 5.4.1.4 Rest of North America
  - 5.4.2 Europe
    - 5.4.2.1 Germany
    - 5.4.2.2 United Kingdom
    - 5.4.2.3 Italy
    - 5.4.2.4 France
    - 5.4.2.5 Spain
    - 5.4.2.6 Netherlands
    - 5.4.2.7 Poland
    - 5.4.2.8 Belgium
    - 5.4.2.9 Sweden
    - 5.4.2.10 Rest of Europe
  - 5.4.3 Asia-Pacific
    - 5.4.3.1 China
    - 5.4.3.2 India
    - 5.4.3.3 Japan
    - 5.4.3.4 Australia
    - 5.4.3.5 Indonesia
    - 5.4.3.6 South Korea
    - 5.4.3.7 Thailand
    - 5.4.3.8 Singapore
    - 5.4.3.9 Rest of Asia-Pacific
  - 5.4.4 South America
    - 5.4.4.1 Brazil
    - 5.4.4.2 Argentina
    - 5.4.4.3 Colombia
    - 5.4.4.4 Chile
    - 5.4.4.5 Peru
    - 5.4.4.6 Rest of South America
  - 5.4.5 Middle East and Africa
    - 5.4.5.1 South Africa

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.4.5.2 Saudi Arabia
- 5.4.5.3 United Arab Emirates
- 5.4.5.4 Nigeria
- 5.4.5.5 Egypt
- 5.4.5.6 Morocco
- 5.4.5.7 Turkey
- 5.4.5.8 Rest of Middle East and Africa

## 6 COMPETITIVE LANDSCAPE

### 6.1 Market Concentration

### 6.2 Strategic Moves

### 6.3 Market Share Analysis

### 6.4 Company Profiles (Includes Global-level Overview, Market-level Overview, Core Segments, Financials, Strategic Info, Market Rank/Share, Products and Services, Recent Developments)

#### 6.4.1 Procter & Gamble Company

#### 6.4.2 Reckitt Benckiser Group PLC

#### 6.4.3 Armaly Brands Inc.

#### 6.4.4 Church and Dwight Co. Inc.

#### 6.4.5 Newell Brands Inc. (Yankee Candle)

#### 6.4.6 S.C. Johnson and Son Inc.

#### 6.4.7 The Godrej Group

#### 6.4.8 Farcent Enterprise Co. Ltd.

#### 6.4.9 Dabur India Ltd.

#### 6.4.10 Kobayashi Pharmaceutical Co. Ltd.

#### 6.4.11 Car-Freshner Corporation

#### 6.4.12 ScentAir Technologies LLC

#### 6.4.13 California Scents

#### 6.4.14 Air Aroma International

#### 6.4.15 Aura Cacia (Frontier Co-op)

#### 6.4.16 Air Spencer Co. Ltd.

#### 6.4.17 Bath and Body Works Inc.

#### 6.4.18 Empire Candle Co., LLC

#### 6.4.19 CAR MATE MFG. Co., Ltd.

#### 6.4.20 Les Comptoirs de Durance

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Air Freshener - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 130 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

| Select license | License                  | Price     |
|----------------|--------------------------|-----------|
|                | Single User License      | \$4750.00 |
|                | Team License (1-7 Users) | \$5250.00 |
|                | Site License             | \$6500.00 |
|                | Corporate License        | \$8750.00 |
|                |                          | VAT       |
|                |                          | Total     |

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

|               |                      |                               |                                         |
|---------------|----------------------|-------------------------------|-----------------------------------------|
| Email*        | <input type="text"/> | Phone*                        | <input type="text"/>                    |
| First Name*   | <input type="text"/> | Last Name*                    | <input type="text"/>                    |
| Job title*    | <input type="text"/> |                               |                                         |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/>                    |
| Address*      | <input type="text"/> | City*                         | <input type="text"/>                    |
| Zip Code*     | <input type="text"/> | Country*                      | <input type="text"/>                    |
|               |                      | Date                          | <input type="text" value="2026-03-01"/> |
|               |                      | Signature                     |                                         |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)