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IN THE AIR

Air care trends, including seasonal scents, aromatherapy, naturals, scent marketing and more.

plus

IFEAT highlights

Trimethyl pyrazine in flavors

Fragrance ingredients

Forward Thinking: In the Air

Innovation in seasonal and nature-inspired fragrances, surprise candles and technology that emits scents drive air care launches.

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The U.S. air care category encompasses a variety of air freshening applications including sprays, oils and gels, candles and wax melts, potpourri and sachets, reed diffusers and automotive products. Multiple distribution channels such as mass market, specialty, prestige and direct sell have a variety of price points for air care products ranging from \$3 to \$100. Despite varying price points, each application offers consumers a different function and fragrance experience, which range from malodor coverage to ambiance to home décor.

Besides the expected new seasonal air care fragrance directions and the home décor influence, marketplace activity is being driven by a renewed interest in aromatherapy and naturals, kitsch naming conventions and designer collaborations. Wax melt formulas are the newest product application, while surprise candles with jewelry are wooing the younger generation. Technology that emits scent is the latest on the air care frontier.

In the air freshener category, for the 52-week period ending August 10, 2014, sales rose 1% to \$2.6 billion in total U.S. multi-outlet w/C-store (supermarkets, drugstores, mass market retailers, gas/C-stores, military commissaries, and select club and dollar retail chains) according to IRI, a Chicago-based market research firm. Furthermore, IRI reports that the U.S. mass market candle category accounted for \$1.2 billion, a 5% decrease, over the same time period and distribution channels. In 2013, the growth in mass market air care was primarily driven by automotive/car fresheners. IRI data reveals a 13% increase in 2013 (year ending December 29), while Euromonitor reports an 18% growth in 2013. U.S. retail sales of candles are estimated at approximately \$2 billion annually, excluding sales of candle accessories, according to the National Candle Association. The Kline Group estimates that luxury candle sales grew by 1.9% in 2013.

Apart from the form or distribution channel, fragrance plays a significant factor in the air care experience, and the consumer is much more educated about scent than ever before. “Consumers are becoming more fragrance savvy and requesting more sophisticated, complex fragrances,” says Katie Bell, marketing research manager at Cosmo International Fragrances.

Kelly Jones, marketing director, home care for Takasago states that “in our fast-paced world, the air care consumer is becoming highly sophisticated.” For example, research from the National Candle Association shows that candles are used in seven out of 10 U.S. households, and fragrance is by far

the most important characteristic impacting candle purchases today, with three-fourths of candle buyers saying it is “extremely important” or “very important” in their selection of a candle. Lori Miller Burns, director of marketing of Arylessence, states, “Consumers love fragrancing their personal spaces. Today’s consumers are enticed and motivated to try new fragrances. They enjoy and appreciate variety, as well as fragrances that offer an experience.”

Seasonal Scents

Air care is seasonal, particularly candles. The National Candle Association cites approximately 35% of candle sales occur during the Christmas/holiday season, while non-seasonal business accounts for approximately 65% of candle sales. Miller Burns points out “seasonal offerings are one of the most effective ways to keep consumers enthusiastically engaged with your brand.” Traditionally, consumers gravitate toward fresh, fruity and light aromas in spring/summer months, and warmer, heavier and fuller directions like spicy and gourmand scents in the fall/winter months. Following this trend, Renuzit launched **Melon Calypso** as a limited edition spring/summer scent, while Febreze Air Effects introduced **Grapefruit Fizz**, **Nectar**, **Rain** and **Sweet Pea Petals**. Little Trees, the iconic paper car freshener, added **Pure Steel**, **Margarita** and **Sunberry Cooler** to its lineup. According to the company, **Pure Steel** is a masculine fragrance, while **Margarita** and **Sunberry Cooler** are sweet cocktail-inspired fragrances. “Clean scents sell well year-round, while fall/winter fragrance sales start picking up mid-August as consumers get tired of lighter, summery scents and crave something more grounding,” says Sue Adams, co-founder of Candles Off Main in Annapolis, Maryland.

Unsurprisingly, this fall several manufacturers launched new limited edition fall/holiday scents. Fruity apples/berries, warm gourmand, and piney/green and woody accords remain popular, while birch and pumpkin are en vogue ingredient inspirations this season. Apples are associated with the fall season, and the newest holiday scents are Glade’s limited edition **Red Apple Bakery** and **Mrs. Claus’ Apple Pie** by Air Wick. Berry is a staple variant across all distributions. In the luxury/specialty segment, Adams observes that “brands continue to battle for the über popular currant category, vying for sales from the cult classic Votivo **Red Currant**.” The latest players include **Aura Whimsical** (red currant, pomegranate and wild berries), Nest **Japanese Black Currant**, and Partylite’s **Crimson Berry**



Yankee Candle's Easy Melt Cups are available in a variety of fall/holiday scents such as **Berrylicious** and **Bay Leaf Wreath**.



Maple Tree Inn from Glade's limited edition fall collection is one recent example of a mass market gourmand seasonal scent.

(red berries, spices and caramel) and **Pomegranate Passion** (pomegranate, raspberry and vanilla) scents. Votivo even added **Pomme Dusk** to its collection, featuring raspberries, pomegranate, pink pepper, amber and cedarwood. Other new fruity launches include Air Wick Good to Be Home **Homemade Preserves**, Bath & Body Works' **Blackberry Bramble Tea**, Partylite **Cinnamon Orange**, and Yankee Candle's **Berrylicious** and **Cranberry Pear** scents.

Mass market gourmand examples include Glade's limited edition fall collection in **Maple Tree Inn** and **Pumpkin Pie Diner**, as well as Air Wick's **Frosted Vanilla & Cupcake Delight** from the company's Good To Be Home Holiday collection. In the specialty/direct sell channel, **Chocolate Layer Cake** joined Yankee Candle's range, while **Black Vanilla** and **Lemon Lime Macaroon** were added to Partylite's repertoire. Bath & Body Works launched Pumpkin Café, an entire line dedicated to pumpkin scents in **Caramel Pumpkin Swirl**, **Pumpkin Caramel Latte**, **Pumpkin Cinnamon Bun**, **Pumpkin Cupcake**, **Pumpkin Pecan Waffles**, **Pumpkin Sugared Doughnut**, **Spiced Pumpkin Cider** and **Sweet Cinnamon Pumpkin**. The company features an electronic link to nine pumpkin recipes inspired by the candle names. Adams believes "brands are taking on pumpkin fragrances following in the massive wake that Nest Pumpkin Chai created with its pumpkin that sells so well it's stocked year round."

In the outdoor, green and woody arena, Yankee Candle introduced **Bay Leaf Wreath** and **Silver Birch** variants, while



Diamond Candles offer surprise diamond rings inside en vogue seasonal scented candles such as **Pumpkin Chai**.

Partylite launched **Emerald Balsam**, **Golden Birch** and **White Cedar Leaf** scents. Glade's 2014 limited edition fall collection features **Sage & Thyme Market** and **Woodside Library** SKUs (stock-keeping units). Jones concludes, "Seasonal scents are now integral to year-round strategy, and ingredient trends are crossing over into new territory."

Home Décor & Design Influence

Air care products are often used to accent the home; therefore, packaging color and graphics are fundamental design elements. In particular, destinations, ingredients and textiles are influential in fragrance themes, stories and packaging. "We are seeing an eclectic mix of inspiration from travel, exotic ingredients and foods from elsewhere, with unexpected combinations," says Bell.

Inspired by Brazil's 2014 World Cup FIFA games and the upcoming 2016 Olympics, Colonial Candle in June added the Rio de Janeiro Collection to its Destinations line in four scents: **Caipirinha**, **Carnival**, **Guava & Papaya** and **Hibiscus & Java**. For the fall, Air Wick added **Cuyahoga Valley** (sweet pear and amber woods) and **Isle Royal Sugar** (maple and hazelnut crisp) as limited edition scents to its National Park Fall Collection.

Nest Fragrances Collection is self-described as "combining color, texture and fragrance to enhance one's everyday living and entertaining experience." **Lemongrass & Ginger**, **Vanilla Orchid & Almond** and **Woodland Truffle** are the most recent introductions. **Woodland Truffle** is the most unique and sophisticated theme. It "combines the woody essences of a lush forest where luxurious truffles grow. French truffle and black pepper are blended with rich notes of oakmoss, cedar and vetiver." Votivo's Soziety Collection is a new range with "eight uniquely sophisticated scent experiences," which highlight color and have "high visual impact with its dazzling packaging." **Beautiful Blue**, **Gracious Green**, **Gorgeous Grey**, **Outrageous Orange**, **Remarkable Red**, **Pucker Up Pink**, **Posh Purple** and **Wonderful White** are available in candles and reed diffusers. **Gorgeous Grey** is the most ethereal concept and blends birch, vetiver and amber accented with grapefruit. Influenced by current culinary trends, Bath & Body Works created **Cayenne Pepper**, **Sea Salt & Maple Popcorn** and **Wasabi Apple** candles under the Artisan Fragrances line.



Luxury and prestige brands, like Belle Fleur New York, are emphasizing the trend of decorative and premium air care.

Nicole Walker, marketing manager, home fragrance, at Mane, believes that “the concept of small batch collections from specialty foods is trickling into air care and is being translated into a niche approach in packaging, graphics, variant names and scents themselves.”

Driven by specialty and prestige brands, the air care market emphasizes luxury. From a luxury brand perspective, Tony Perez, co-founder of Belle Fleur New York, notes that “the two things our consumers consistently ask for are quality and functionality.” Aspiring to compete, mass market brands have been repackaging and updating their air care lines to look more decorative and less functional. Jones labels this trend as “a premiumization of product packaging in the marketplace such as premium room sprays and décor-friendly plug-ins.” Glade has a new look, and the line has been repackaged, while Renuzit’s Cone has been repackaged and now is offered in the original White Cone and a new Black Cone with premium scents. Air Wick launched the Good To Be Home Candle collection with peelable labels “with designs [to] complement any room” and accent consumers’ home décor. Available in the Every Day collection and the Fall collection, scents range from citrus and fruity such as **Lemonade Stand**, **Candied Citrus Peels** and **Sunset Porch Swing**, to gourmand like **Creamy Vanilla Milkshake**, **Baking Cookies** and **Iced Gingerbread Cookies**. Walker describes this trend as décor-driven and cites Bath & Body Works and Yankee Candles as examples because both offer select scents with everyday packaging along with a more upscale packaging. In the luxury market, Belle Fleur New York recently redesigned its candle package to add more value. The “addition of the gold metallic lid serves multiple purposes: aesthetics, perceived/actual value, and functionality; it acts as a snuffer and preserves the fragrance,” explained Perez. The company also added reed diffusers to round out the collection and meet the customer demands for a flameless application, particularly those in “foreign markets where candles are less desirable for cultural and safety reasons.”

Return to Aromatherapy & Interest in Naturals

Aromatherapy is not a new air care concept; in fact it became popular in air care as early as 2005. However, with consumers’ increased awareness and demand for natural products, there has been a renewed interest in ingredients and the aromatherapy concept.

Bell states, “Consumers are interested in well-being and finding products and fragrances that offer a balance. They are looking for benefits that affect mood.” Jones adds, “Benefit-specific olfactive directions such as a focus on relaxation and sleep are on-trend.” To that end, last year Yankee introduced the Relaxing Rituals line in variants such as **Calm**, **Comfort** and **Uplift**, while Febreze launched the Sleep Serenity collection in **Moonlit Lavender**, **Quiet Jasmine** and **Warm Milk & Honey**. This year, Renuzit introduced the Aromatherapy collection in three scents: **Happy** (grapefruit essence and bergamot), **Serenity** (fresh lavender eucalyptus) and **Tranquil** (chamomile and jasmine). Air Wick’s new Good To Be Home candle collection touts that the line contains natural essential oils such as almond, cedarwood, lemon, orange and patchouli. On-trend, the company’s **Unwind Time** candle description reads “Create your personal home retreat: relax and unwind with the soothing blend of gentle herbs, delicate white flowers and French lavender.” In the same vein, Glade’s new **Day Spa** wax melts copy says “Soothe your senses with a visit to your favorite place of pampering, where a clean and lightly floral fragrance combines with soft music to set a regenerative, tranquil mood. Today, it’s all about you.”

In the upscale market, Volupsa pioneered the use of naturals in air care with the introduction of a coconut wax blend candle. “In an effort to cater to the more health/environmentally sensitive consumer, there has been an exploration of different and new wax types such as coconut, apricot, beeswax, and soy blends and recycled or multi-purpose packaging such as Rewined candles,” says Christine Irven, assistant marketing manager home fragrance at Mane. Adams concurs, “We are seeing the use of 100% cotton wicks and coconut wax for candles becoming more popular. Additionally, many brands seem to be more vocal about their choice in natural fragrance oils and selecting phthalate-free fragrances.” Volupsa L. Florem Fragrance collection is a new line inspired by artisan botanicals and antique glassware. The products are formulated with cosmetic-grade ingredients and double as a room and body spray. They are offered in five scents: **Flora di Mare**, **Japanese Plum Blossom**, **Taporo**, **Temple Grove** and **Tiares**. Similarly, Aura Cacia offers Organic Yoga Mists for the Body, Mat & Room in three formulas **Awakening**, **Motivating** and **Purifying**.

In 2011, Air Wick won the UK Packaging Awards for environmental initiative of the year, for the company’s innovative



In August 2014, Method introduced a new range of Air Refreshers designed with pressurized air technology, which is powered by compressed air, not petroleum-based propellants.

aerosol. Air Wick Home Air Freshener Instant Sprays utilize compressed fresh air instead of chemical propellants. According to the company, it produces 40% less carbon footprint than its previous, traditional aerosols. Using similar technology, in August this year, Method introduced a new range of Air Refreshers designed with pressurized air technology, which is powered by compressed air, not petroleum-based propellants. Inspired by nature, the company features **Beach Sage**, **French Lavender**, **Fresh Clover**, **Sweet Tangerine** and **Wild Poppy** scents, which are described as “non-toxic that do not contain CFCs [chlorofluorocarbons] or dirty propellants.”

A notable hybrid product is Essio, a new aromatherapy diffuser designed for the shower. According to the company, the device, which attaches to the showerhead, is made with 100% recyclable material and FSC-certified packaging while the pods, which diffuse the scents, use 100% USDA-certified organic essential oils. The company offers six refillable aromas: **Breathe** (peppermint, eucalyptus and lemon), **Clear** (lavender, rose geranium and patchouli), **Night** (orange blossom and lavender), **Passion** (sweet orange, cinnamon and patchouli), **Unwind** (lavender, petitgrain and vetiver) and **Wisdom** (geranium, lime and ylang ylang).

Melt Away

Generally, consumers like candles because of their glow and the ambiance they create, coupled with their cold and hot fragrance throw. However, there has been increased activity in flameless fragrances, particularly wax melts. “Wax melts have certainly impacted the category, as consumers look to newness on shelf, and the benefits of a flameless product,” says Jones. In August, Yankee Candle launched Scenterpiece Warmers with Easy Melt Cups in 36 of the company’s most popular fragrances while Glade’s Wax Melts won “Best New Air Freshener” for Better Homes and Gardens’ best new 2014 household product awards. Trapp joined the trend and added melts in 34 scents, including the company’s six latest additions: **No. 65 Mandarin Goji**, **No. 66 Fig & Mimosa**, **No. 67 Fine Linen**, **No. 68 Teak & Oud Wood**, **No. 69 Amber & Tonka Bean** and **No. 70 Black Orchid Ylang**. Using electricity instead of fire creates a similar fragrance benefit due to the wax base. Miller Burns confirms, “Wax melts continue to gain popularity as they are a convenient format [and] the strength and fragrance diffusion of this format is outstanding.” Walmart Mainstays Triple Scented Wax Melts, Better Homes & Garden Scented Wax

Cubes and ScentSationals Wax Cubes all feature multi-pack themed fragrance stories, which enable consumers to customize by mixing and matching scents. For example, Walmart Mainstays offers **Golden Amber**, **Sunlit Woods** and **Glowing Embers**, while Better Homes & Garden features the Sweet Tooth collection in **Baked Apple Strudel**, **Butterscotch Maple Cream**, **Orange Buttercream Cupcake**, **Sugared Melon Kiwi** and **Wild Berry Cheesecake** aromas. “Besides offering the safety of a no-flame application and a simple clean up, flameless wax melts are easy to customize and switch scents often,” says Irven. “The investment is minimal, but the olfactive opportunities are big,” adds Miller Burns adds, “Consumers can easily combine two or three different wax melt fragrance variants to create their own favorite fragrance experience.”

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Kitch brands with catchy names, like Flicking Candle Company, are becoming popular in the U.S. air care segment.

Consumers, particularly Millennials, like to customize and personalize their experiences.”

Candles Are Kitsch

Regardless of category, there are always a few kitsch brands, and candles are no exception. In February 2014, Katz’s Delicatessen teamed up with Joya and created a **Chocolate Egg Cream** candle based on the restaurant’s signature drink. The 2013 Red Dot Design Award-winning **Match Candle** is designed as a large plastic matchbox with multiple candles engineered like a match with a durable strike strip. Trash Talk by Annie candles are sold at Nordstrom and packaged in mason jars with vintage black and white prints and quirky quotes such as **Bad Decisions ... Make The Best Stories!, I Don’t Repeat Gossip, So Listen Carefully, You’re Such a Bad Influence ... Don’t Ever Change, and You’re Twisted ... I Like That**. Founded in 2014, the Flicking Candle Company creates scented candles “to celebrate all of life’s moments and accomplishments” with humorously named candles, such as **Freshly Signed Divorce Papers, Surprise Baby Powder** and **Freshman 15 Poundcake**. Bored with graduate school and searching for a creative escape, Mark Vince, owner of Flicking Candle Company, began experimenting with homemade candles. Looking to differentiate, Vince “stumbled on the idea of a candle smelling like a college rejection letter.” Inspired by commemorating an experience of rejection, he developed a line of candles “as a way to bring a little humor to a situation that might not be so pleasant.” The **Freshly Signed Divorce Papers** is a best-seller and for the fall 2014 season **Fantasy Football Failure, Foreclosure French Vanilla, Frat House Basement Party, Gingerbread Broken Home, Nicotine Pumpkin Patch, Pomegranate Prostate Exam, Smells Like An Affair** and **Thanksgiving Dinner For One** joined the line.

Surprise Bling

Candles can create an ambiance, but the experience is passive. However, some manufacturers are creating an interactive experience by adding surprises such as jewelry inside the candles. Marketed to a younger audience, consumers must wait for the candle to burn to reveal the surprise and then use tweezers to remove it. Diamond Candles are handmade with locally grown soybeans and feature a tiny plastic bag wrapped in gold foil with a “surprise diamond ring inside valued at \$10, \$100, \$1,000, or

\$5,000.” The scented candles are sorted into three categories: Fresh (e.g. **Puddle Jump**), Fruity (e.g. **Apricot Fig**), and Food (e.g. **Pink Macaroon**). It takes about 10-15 hours to burn for the “ring reveal” and the company encourages customers to upload photos or videos on Facebook. Bella J. candles are crafted from natural soy candles, pure vegetable-dipped wicks and premium fragrances with playful names such as **Main Squeeze, Sugar Rush** and **Surf Shack**. Each candle contains a collectible charm, and a few contain a diamond charm worth \$10,000. According to the company, “each charm is a treasure, you can collect, stack and trade.” The **Charming Darling** scent is a Nordstrom exclusive formulated with notes of citrus leaves, orange blossoms, lemon grass, clementine leaf, lily of the valley and lilac.

Designer Collaborations

Like other consumer packaged goods categories, fashion and interior designers are branching out and collaborating with air care companies, especially candles, to design limited editions and signature collections. In February 2014, George Carr, a Texas-born designer, launched a limited edition **Naked Heart by Carr**, exclusively sold on OpenSky.com. Kim Myles, TV personality and interior designer, partnered with Seda France and designed The Kim Myles Candle Collection in three soy-based candle scents: **Lavender, Orange & Ginger** and **Sweet Berry** in March 2014. Italian-born French fashion designer Giambattista Valli teamed up with Cire Trudon this summer and created **Positano** and **Rose Poivrée** limited-edition candles, while Francois Damide of Crafting Beauty launched his own line of scented candles sold exclusively at Scoop NYC. Inspired by his longtime friend Kelly Killoren Bensimon, the **Baiser ROSE** is the first candle. British bridal fashion designer Jenny Packham collaborated with Neom Organics to design two limited-edition candles. **Real Luxury** is a heady blend of lavender, jasmine and Brazilian rosewood essential oils, while **Happiness** is a blend of white neroli, mimosa flowers and lemon essential oils. Both candles are packaged in luxury glass jars with 18-carat gold decorations.

This trend is not just happening in the prestige segment, it can be seen in direct sell and mass market channels as well. A noteworthy partnership is Jonathan Adler for Partylite, who created a line of candle accessories, including two scented candles housed in glass jars with his signature starburst design and debossed gold-tone lid with Juicy NYC-inspired scents, **Big Apple by Day** and **Big Apple By Night**. Reckitt Benckiser’s Air Wick’s Familiar Favorites scents line is inspired by signature scents and licensed from products it does not own. Currently there are three scents: **Baby Magic^a Clean Baby Fragrance, Cinnabon^b Classic Cinnamon Roll Fragrance, and Snuggle^c Fresh Linen Fragrance**, which are available in scented oils and automatic sprays.

Ambient Scenting & Scent Marketing

Ambient scenting and scent marketing are an extension of air care. Instead of consumers scenting their personal spaces, consumer brands and retailers, as well as customer services

^aBaby Magic is a trademark of Naterra International.

^bCinnabon is a trademark of Cinnabon Inc.

^cSnuggle is a trademark of Sun Products.

such as hospitality, healthcare and real estate companies, are scenting large private or public spaces. Brands are designing their own olfactive signature scents and creating “olfactory logos.” Jones says, “Scent marketing is becoming integral to many brands and retailers, with full-space fragrancing. This is starting to trickle into home: an emerging focus on an entire home-fragrancing system is going to impact the category.” According to ScentWorld Events, the global scent marketing industry generated approximately \$200 million in revenue last year and is growing about 10% annually. For example, DXL is a specialty retailer of big and tall men’s clothing in Canton, Massachusetts. In an effort to rebrand within this past year, the company incorporated a custom DXL citrus blend used in many of its locations meant to appeal to both male and female shoppers. Perfumer Darryl Do of Delbia Do Company says that his company has found substantial growth in creating custom fragrances for passive and forced-air systems. “Our customers do not want generic stock fragrances, and we are able to create custom fragrances for small retail chains and event spaces,” says Do. “Within the retail sector, we see the category growing due to technology advances with pumps, fans, and computer control boards.” Another example is Phnom Penh International Airport. It’s the first airport in Southeast Asia to implement a scent signature that, Do says, “diffuses relaxing aromas at its check-in counters, arrival hall and business lounge to enhance the passenger experience.”

Coupling ambient scenting and the trend to car air fresheners, the Lincoln Motor Company debuted *Essence of Lincoln*, “an original scent designed to create an upscale, relaxing showroom experience.” In the automobile air freshener category for 52-week period ending August 10, 2014, sales rose 1.9% to \$344 million in total U.S. Multi-Outlet w/C-Store (supermarkets, drugstores, mass market retailers, gas/c-stores, military commissaries and select club and dollar retail chains), according to IRI. A prominent and logical move is to incorporate scent through technology within the actual car versus using an accessory. And that is exactly what Mercedes-Benz did with its 2014 S-Class sedans. The company engineered the first “automotive room scent” in four custom colognes: *Freeside Mood* (light citrus), *Nightlife Mood* (spice, oud), *Downtown Mood* (floral, musk) and *Sports Mood* (green, citrus), developed by Symrise. The luxury cars offer a built-in fragrance atomizer that emits scents every five minutes with five-minute intervals to avoid fragrance fatigue. Perez predicts that “scent branding will be much more widespread in the coming years and we’ll see a surge in smaller businesses developing their own branded scents, making it more ubiquitous.”

Tech Smells

In addition to ambient scent marketing, technology is being used in unexpected ways and changing how people behave and interact with common products such as mobile devices. As a follow up to Givaudan’s successful iPerfumer fine fragrance app, Givaudan launched the iPerfumer Home Fragrance app. Consumers can browse fragrances through categories of smell, brand, season and forms and the app will suggest “products best suited to you,” as well as recommend retailers that carry their favorites. On April fool’s day in 2013, Google launched Google Nose Beta as a prank, which promised “to offer the sharpest olfactory experience available” through the Internet.



The Ophone device allows over 300,000 different “aroma messages” to be sent and received electronically.

Although, this was a prank, this type of scented technology has been explored before and continues to be explored. For example, Smell-O-Vision (1960) released scent during the projection of a movie, while Digiscents (2001) designed the iSmell scent machine, which digitized scents for e-mail, online games and the web. The “Smelling Screen” by researchers from the Tokyo University of Agriculture and Technology debuted in March 2013. According to the creators, “the smelling screen is an olfactory display that can generate a localized odor distribution on a two-dimensional display screen.” Also from Japan, Scentee, a round device that plugs into the earphone jack of an iPhone or Android and releases different fragrances with each incoming notification, launched in the fall of 2013. Scentee rolled out several scents, including *Apple*, *Cinnamon Roll*, *Coffee*, *Coconut*, *Corn Soup*, *Curry*, *Jasmine*, *Lavender*, *Mint*, *Rose*, *Strawberry* and *Ylang-Ylang*. Following the initial launch, the company released the Korean BBQ collection, which featured two different types of meat scents and a *Baked Potato* fragrance. In February 2014 it was made available in the United States.

David Edwards has received extensive press for his Ophone invention, dubbed “the world’s first aromatic telephone.” In conjunction with the “oSnap” app, which features “oNotes” that enable users to compose more than 300,000 different scents, the Ophone device allows “aroma messages” to be sent and received electronically. On June 17, 2014, a champagne and macaroon-scented message was the first aroma to be successfully transferred from Paris to New York. With the launch of the company’s Indiegogo summer campaign, The American Museum of Natural History hosted hands-on demonstrations during July. According to the company, “over 1,500 people came through and tested their noses” at this venue. Another noteworthy app that created a buzz was the Oscar Mayer Wake Up and Smell the Bacon app in March 2014. Created for a contest, winners received a bacon scent device that attached to the iPhone headphone jack and acted as an alarm clock, which used visuals and sounds of frying bacon while emitting

a bacon scent. The latest innovation is iScent, a Bluetooth 4.0 atomizer by QBlinks, which initiated a Kickstarter campaign in September. Created with a 3D printer, the iScent prototype design was inspired by a Chinese wolf tower; using the iScent app, a scented mist is released when a notification arrives, such as incoming calls, e-mails, text messages and social media updates.

Air Out

From a technical standpoint, apart from form, consumers demand strength and long-lasting scents. Bell says, “Strength is always very important to our clients, which then in turn relates to diffusion and long-lastingness.” The demand for scent is either to create ambiance or to cover malodors, which creates opportunities and challenges for air care manufacturers and fragrance suppliers. “Most fragrance houses are pursuing technologies to enable claims of long-lastingness, noticeability and malodor control,” says Jones. “These are areas of high interest to the consumer.” Meanwhile, Do says, “In the luxury market, creating ambiance is a key motivator for candle purchases. I don’t see a replacement for the tried and true candle. It still brings that warm glow that can’t be replaced.” Perez agrees: “The act of lighting a scented candle is miles ahead of plug and play applications in the romance department and will be for some time.”

To address the issue of malodor, Arylessence offers DeoEssence^d, “a proprietary odor-counteractant technology that can be used in a variety of product applications, including air fresheners, candles and wax melts,” according to Miller Burns. Similarly, Frank Lucia, Mane’s vice president of research and development, notes, “Mane’s [trademarked] Freshplex technology can change the perceived odor of any given malodor as a stand-alone captive molecule or built within a fragrance.” Within the fragrance and flavor industry, ingredients are continually becoming more and more regulated, and the air care market is no exception. According to Do, “regulatory concerns are the biggest hurdles we have and become the challenge in formulation. Because VOCs (volatile organic compounds) are on everyone’s mind, we are always working on blends to showcase our fragrances in this regulated environment. Keeping up to date with the global constraints is a full-time job, as it is constantly changing.”

^dDeoEssence is a trademark of Arylessence.

Regulatory issues aside, consumers’ shopping habits and behaviors are changing and being driven by online shopping and mobile apps. For example, Candles Off Main opened its retail shop in 2005. Aware that it couldn’t rely on walk-in traffic alone, the company first started selling online in 2006; sales were equal, 50% from the store and 50% online. In 2009, sales shifted in favor of the internet, and the ratio changed to 40% in-store sales versus 60% online. Today, the entire business has escalated; 85% of sales are driven by online purchases, with only 15% in-store. Additionally, like other markets, the air care category is crowded and competitive; brands are vying for customers. From a retailer’s perspective, “keeping consumers’ interest alive is a struggle with oversaturation of products, fragrances and brands,” says Adams. “We predict the market will become more stagnant as an overwhelming number of brands continue to compete for interest. It’s tough to be unique in this market as just about everything has been done. The brands that do well are based on reputation and recognition. New brands entering the market try to differentiate by telling their unique story, offering unusual packaging, or supporting charitable causes.” Jones foresees “a focus on full-home fragrancing and all-new, breakthrough approaches to freshness.”

The Future

The demand for air care with new seasonal directions influenced by home décor across distribution channels is a given. “Overall, brands will continue to become sophisticated and blur lines between niche, specialty and mass channels,” note Walker and Irven. “Consumers are the winners, with a wide variety of choices.” To compete, brands will continue to examine interactive ways to reach the consumer through kitsch naming conventions, designer collaborations, surprise inclusions and new applications. Consumers’ interest in natural ingredients, tied with regulatory concerns, will push manufacturers and suppliers alike to explore alternative formulas. Technology will drive ambient scenting, scent marketing and electronic fragrance-emitting devices. Do believes “passive diffusion systems that don’t require pumps, fans or electricity will be an alternative to the popular, electric systems that require wires and motors.” All of these various movements will continue to create air care opportunities and challenges for manufacturers and fragrance suppliers.

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