

Vanilla Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-06-28 | 161 pages | EMR Inc.

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Report description:

Global vanilla market size reached around USD 4.10 Billion in 2024. The market is projected to grow at a CAGR of 4.70% between 2025 and 2034 to reach nearly USD 6.49 Billion by 2034.

Global Vanilla Market Growth

Expanding vanilla production and production facilities are key drivers for the growth of the vanilla market. Industry reports suggest that Madagascar, the world's leading producer of vanilla produced 3034 tonnes of vanilla in 2022. This was followed by Indonesia and Mexico, both of which produced more than 500 tonnes of vanilla in the 2022. The rising production is not only being used to meet the domestic vanilla demand in these countries but are also readily being traded across international borders.

To meet the increasing demand for vanilla, especially in major developed and developing markets, key players are relying on investments to increase their production capacity. This is primarily being done by expanding existing production plants, installing modern and advanced equipment to raise productivity, and setting up new production plants in agriculturally rich countries. Recently, Israeli vanilla production giant, Vanilla Vida, announced that it was looking to expand its production facilities in the United States, which is a major export market for vanilla, and was reported to import 1,238 tonnes of the product between January and June 2022, a 38% year-on-year rise.

Key Trends and Recent Developments

Growing pharmaceutical industry, rising exports, and technological advancements in the production process are increasing the vanilla market value.

October 2024

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Indian consumer brand, Tata Consumer Products (TCP) launched the Tata Coffee Grand Cold Coffee product line that contained three different flavours including French Vanilla which was a perfect balance of taste, quality, and affordability.

September 2024

Hershey Company announced a new addition to its KitKat bar lineup, KitKat Vanilla. The new flavour was rich in vanilla flavoured creme and came with crispy wafers to enhance its taste. Further, it was available in both in standard and king sizes, catering to the needs of both young and adult customers.

August 2024

Bath and body brand, Plum BodyLovin' launched a new premium, unique and affordable perfume in Vanilla Caramello fragrance with notes of salted caramel, warm vanilla and nutty pistachios.

December 2023

Tom Ford launched its newest addition in its Private Blend Fragrance Product Lineup, Vanilla Sex. The perfume featured high-quality ingredients that created a long-lasting, unique scent in three specific vanilla notes, Vanilla CO2 Extract, Vanilla Tincture India and dark Vanilla Absolute.

Growing Pharmaceutical Industry Creating New Global Vanilla Market Opportunities

The pharmaceutical industry is creating new opportunities for the industry, as the ingredient is added to several medicinal drugs, especially syrups, to remove their bitter taste and typical pungent smell. This enhances their appeal, especially among young consumers, making them more desirable in comparison to their alternatives. According to the US National Centre for Biotechnology Information (NCBI), the global pharmaceutical market revenue reached approximately USD 1462 billion 2021, a growth of USD 319 billion in four years. As the trend continues, the demand for vanilla as an essential aromatic compound in medicinal drugs is further expected to witness a sharp surge, there by supporting the vanilla market growth.

Rising Exports are Leading to an Increase in Global Vanilla Market Revenue

Vanilla exports are rising around the world owing to its versatility and use in a wide range of applications across multiple industries, including food and beverages, pharmaceutical, and cosmetics. In 2021, Madagascar, France, European Union, Germany, Canada, and Indonesia were reported as the top exporters of vanilla, with a total export value exceeding USD 834,559,000. With the introduction of revised and more flexible international trade policies, the exports are expected to rise further, positively impacting the market revenue in the long run.

Health Concerns are Encouraging the Development of New Vanilla Flavours

Growing health concerns is encouraging market players to experiment with new and innovative vanilla flavours, which either have added health benefits or reduce adverse health impacts. For instance, Foodtech leader NotCo expanded its NotMilk product range to add NotMilk Unsweetened Vanilla in the United States. It had no added sugar or flavour additives, providing a healthy alternative to traditional milk and milk-based beverages. These efforts are significantly contributing to the growth of vanilla market.

Technological Advancements in Vanilla Production Processes is Fuelling Market Development

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Technological advancements such as genetic engineering and bioenzyme production are fuelling the vanilla market development by enhancing the productivity and yield generated in the process. For instance, researchers from the Tokyo University successfully developed an enzyme that generated vanillin, the essential aromatic component of vanilla using ferulic acid derived from agricultural waste such as rice bran and wheat bran, facilitating an environment-friendly vanillin production process.

Global Vanilla Market Trends

Quality Certifications are Paving the Path for the Vanilla Market Expansion

As consumers become more discerning about the origins and quality of their food ingredients, certifications such as organic, Fair Trade, and non-GMO are increasingly sought after. These certifications not only assure consumers of the quality and sustainability of vanilla they purchase but also enhance marketability for producers, allowing them to command higher prices. Furthermore, certification processes often lead to improved farming practices and supply chain transparency, which can enhance both the quality of the product and the livelihoods of farmers.

Global Vanilla Industry Segmentation

The EMR's report titled "Global Vanilla Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Type:

- Mexican Vanilla
- Madagascar Vanilla
- Indian Vanilla
- Tahitian Vanilla

Market Breakup by Form:

- Pods
- Powder
- Extracts

Market Breakup by Category:

- Conventional
- Organic

Market Breakup by Application:

- Food and Beverage
- Cosmetics
- Pharmaceuticals
- Others

Market Breakup by Region:

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

Global Vanilla Market Share

Mexican Vanilla is Increasingly Being Preferred by Key Market Players

As per the vanilla market analysis, Mexican vanilla is renowned for its rich and creamy flavor and is hence often considered the original vanilla among industry players and consumers. It typically features a spicier and more aromatic version of vanilla when compared to other types and has gained immense popularity across industries, especially the ever-expanding food and beverages sector. According to the Agricultural and Fisheries Information Service (Mexico), more than a thousand hectares of Mexican vanilla were harvested in 2021, with an average yield of 0.58 tonnes per hectare. Reportedly, it accounted for 15.19% of the total global production during this period.

Known as the most commercially significant variety, Madagascar vanilla accounts for approximately 80% of the world's supply. Its popularity and preference across industries relies on its sweet and mellow flavor, combined with a rich, creamy texture. The variety is widely used in culinary applications, including the production of ice creams, pastries, and cold beverages.

Vanilla Powder is Leading the Vanilla Market Share Owing to Its Wide Applications Across Industries

As per the vanilla market report, vanilla powder is leading the market due to its versatile use across industries, including food and beverages, cosmetics, and pharmaceuticals. Moreover, they are available in powder form which can easily be mixed with liquid as well as solid components imparting a concentrated vanilla flavor and fragrance without altering the moisture content of bases. As a result, key market players are finding it beneficial to invest in ventures that produce and use vanilla powder in their product development and applications. For instance, in 2024, Kering's beauty division invested in the French perfume brand Matiere Premiere known for creating fragrances using just one ingredient Vanilla Powder made from Madagascan vanilla absolute.

Meanwhile, vanilla extracts, which are liquid solutions of vanilla made by soaking vanilla beans in alcohol, are expanding the market opportunities due to its wide range of applications found in the confectionery sector, especially in baking and cooking pastries and cakes. They offer a consistent flavour profile without the need for labour-intensive use of whole pods or powders, encouraging market players to frequently invest in their development. Contributing to the same, Norway-based Frontier Co-op announced the release of Indonesian vanilla extract at Whole Foods Market across Norway, providing consumers with sustainable culinary choices.

Food and Beverages Sector Records the Highest Vanilla Demand Around the World

Vanilla is widely used as a key flavouring agent in a variety of food and beverage products, including baked goods, desserts, sauces, and coffee drinks. They impart a strong, pleasant and natural flavour as well as odour enhancing their appeal among a wide range of customers. Recently, the vanilla market has been witnessing the application of vanilla essence in energy drinks too, providing new opportunities for the ingredient in the food and beverages industry. For instance, Red Bull launched its new Winter Edition with Iced Vanilla Berry delivering the taste of both blueberry and vanilla without any added sugar. Such additions are expanding the scope of vanilla in the food and beverages industry.

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Besides, vanilla is also widely used in the cosmetics industry for its pleasant fragrance and potential skin benefits. It is commonly found in perfumes, lotions, and body washes, appealing to consumers looking for natural scents and ingredients that offer a luxurious experience. A suitable example of the same would be the launch of Scentaurus Vanilla by Givaudan, the global leader in fragrance and beauty sector, in lieu of expanding its perfume range in January 2024. Naturally activated by oxygen, this high-performing new product is known for delivering a wave of freshness and a long-lasting powdery, creamy vanilla scent.

Global Vanilla Market Regional Analysis

North America Hold the Largest Market Share Globally

North America holds the largest share in the vanilla market due to the high demand from the food and beverages industry, especially due to the preference for gourmet and premium baked goods, ice creams, and speciality beverages. Major retail chains and gourmet food brands are increasingly prioritising vanilla sourced from reputable suppliers, for their production, enhancing the overall market growth. Besides, in recent years, vanilla has been sourced for flavouring popular beverages in North America as well, creating new opportunities for market expansion. For instance, in June 2024, Starbucks launched Caramel Vanilla Swirl Iced Coffee, along with suitable breakfast items to enhance its taste.

Additionally, vanilla is also being widely used in Europe's pharmaceutical industry due to its aromatic properties and potential therapeutic benefits. It is often incorporated into formulations as a natural flavoring agent, helping to mask the unpleasant tastes and smell of certain medications, making them more appealing for patients. Furthermore, its antioxidant and anti-inflammatory properties adds mild health benefits as well.

Competitive Landscape

Global vanilla market key players are expanding their scope across multiple industries such as food and beverages, cosmetics, and pharmaceuticals to increase their scope of operations. Moreover, they are also investing the research and development of new and sustainable production processes for enhanced productivity and sustainability.

McCormick & Company, Inc.

McCormick, headquartered in United States produces and sells spices, seasonings, and other flavor products. Founded in 1889, the company provides its products to the entire food industry—retail outlets, food manufacturers, and foodservice businesses.

Vanilla Bean Kings

Vanilla Bean Kings sells vanilla beans to ice cream shops and other businesses, as well as directly to consumers online. Their products include vanilla beans, extracts, paste, powder, seeds, and a homemade vanilla extract kit, along with saffron threads and kitchen accessories. They also offer recipes and sell their items at cooperative prices.

Heilala

Heilala Vanilla, founded in 2008, is a gourmet brand that makes vanilla extract, bean paste, powder, and pure vanilla sugar. The company's mission is to provide high-quality vanilla while supporting the Tongan economy. They work with vanilla farmers in Tonga to ensure fair wages and provide housing, water, and education. Through the Heilala Vanilla Foundation, they also donate seeds, sanitation facilities, and school supplies to local communities.

Givaudan SA

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Givaudan SA, headquartered in Switzerland is a Swiss company that makes products for the food, beauty, and wellness industries. They create flavors and nutritional solutions for food and beverages, including products specifically for the ice cream industry. Givaudan is functional at 163 locations around the world, including 78 production sites, and employs more than 16,260 people.

Other key players considered in the global vanilla market report are Nielsen-Massey Vanillas, Inc., Madagascar Vanilla Company LLC, LE MONDE DE LA VANILLE, Blue Cattle Truck Trading Co, LLC, Penzeys Spices, The Vanilla Company, among others.

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