

Europe Flavours and Fragrances Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-08-13 | 115 pages | EMR Inc.

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Report description:

The Europe flavours and fragrances market was valued at USD 8.90 Billion in 2024. The industry is expected to grow at a CAGR of 4.00% during the forecast period of 2025-2034 to attain a valuation of USD 13.17 Billion by 2034.

Europe is the largest regional market for flavours and fragrances. The continent accounts for nearly 30% of the global market. Germany is the leading market on the continent accounting for over a fifth of the industry. Germany is the largest economy in Europe, and the growth in its economy is also driving the Flavours and Fragrances industry in the country. The economy in the country grew by 0.4% in the Q1 of 2020 propelled forward by the fastest growth in household spending in the last eight years. The thriving food and beverage industry in the country, along with the rising innovation in its personal care and cosmetics industry, is aiding the Flavours and Fragrances industry growth. Western Europe, overall, represents the largest market on the continent with UK and France being the other significant markets. In the coming years, however, Eastern European countries are expected to witness a faster growth and expansion in the industry.

Europe is followed by North America and the Asia Pacific as the other major markets in the industry. The North American market is being driven by the growing high-income class and the increased spending by the consumers on premium products. The industry in the Asia Pacific region is being driven by the rising demand from the emerging economies in the region. The rise in urbanisation and the growing middle class in these regions is aiding the industry growth in the Asia Pacific. While the market for premium products is rising in the region, the industry is being propelled forward by the increasing consumption of mass products and processed foods. China, Japan, and India are the leading markets in the Asia Pacific.

Europe Flavours and Fragrances Industry Segmentation

Flavour is introduced to particular products to enhance and add to the taste of the substance. Fragrance, meanwhile, refers to the pleasing scent added to augment the smell of a food or non-food product. Fragrances can either be synthetic or natural, with the

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synthetic fragrances being preferred due to their lower costs as compared to natural products. The various types of natural fragrances available in the market are:

Market Breakup by Segment

- Flavours
- Fragrances

Market Breakup by Type

- Synthetic
- Natural

Breakup by Region

- Germany,
- UK
- France
- Italy

Market Analysis

The Europe Flavours and Fragrances industry is being driven by the consumption of premium personal care products and the rising trend towards health and wellness. With the increase in the spending power of consumers, consumers are increasingly buying premium cosmetics products with a particular focus on the fragrance of the products. The rising trend towards natural ingredients is also providing further impetus to the segment growth. The rising innovation in the sector like fragrance encapsulation techniques, and controlled release techniques enhancing the fragrance experience are aiding the segment growth. With consumers increasingly seeking out animal-cruelty free and fair-trade products made of sustainable ingredients, major players in the industry are investing in sourcing ingredients that meet the consumer demand and are environmentally sustainable.

The industry in Europe is being driven by the increased consumer inclination toward experimenting new flavours and fragrances. With consumers increasingly consuming global foods, the flavour segment is witnessing a growth. The segment is finding further impetus from the thriving processed food industry on the continent. Europe is a leading market for packaged foods and beverages, globally, buoyed by the high per capita consumption in countries like Germany, France, and the UK. The spurt in the consumption of RTD beverages and ready-to-eat foods, which required added flavouring, is aiding the segment growth. The expansion of flavour applications to non-food segments like pharmaceuticals, nutraceuticals, and dietary supplements is driving the industry in Europe. With the rising health awareness, the demand for low calorie and low carbohydrate foods, which also require additional flavours has been growing, further propelling the industry forward on the continent.

Competitive Landscape

The report gives a detailed analysis of the following key players in the Europe Flavours and Fragrances Market , covering their market share, capacity, and latest developments like mergers and acquisitions, capacity expansions, and plant turnarounds:

- Givaudan SA
- Firmenich SA

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- International Flavors & Fragrances, Inc.
- Symrise AG
- WILD Flavors, Inc.
- Takasago International Corp
- The MANE Group
- Sensient Technologies Corp.
- The Robertet Group
- Dauper S.A
- Kerry Group plc

The EMR report assesses the market based on SWOT analysis and an analysis of Porter's Five Forces.

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