

Natural Fragrance Market Report and Forecast 2025-2034

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Report description:

The global natural fragrance market size attained a value of USD 3.58 Billion in 2024 . The market is expected to grow at a CAGR of 9.80% in the forecast period of 2025-2034 to reach a value of USD 9.12 Billion by 2034 .

The key producing countries for natural fragrances are India and China, producing 80% of menthol, and 40% of vanillin, respectively. China also accounts for 45% of the production of gum turpentine. India and China are also the major exporting countries for natural fragrances, with India accounting for 80% of the menthol export and China accounting for 50% of vanillin and 40% of gum turpentine exports. The new trends coming up in the natural fragrance market include the development of drought/disease/pest resistant and superior-yield potential varieties of fragrances, like mint. The new trends also include the utilisation of innovative synthetic technologies to create cost-effective production and processing of products like mint, vanillin, and turpentine.

The emerging countries of the Asia Pacific region, Africa, the Middle East, and Central and South America are expected to witness a robust growth in the forecast period due to the growing awareness of the positive health impact of natural fragrances on the senses. Eastern Europe is predicted to grow alongside the global average, although it will grow considerably faster than the developed economies due to the rising consciousness of personal hygiene in the region. The industry in India and China are expected to have an accelerated growth due to the rise in the disposable incomes in these countries.

Natural Fragrance Market Segmentation

Natural fragrances are complex aromatic compounds derived from natural sources.

On the basis of type, the industry is segmented into:

- Flowers
- Fruits

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- Musk
- Wood
- Spice
- Others

On the basis of application, the industry is divided into:

- Soap and Detergents
- Cosmetics and Toiletries
- Fine Fragrances
- Household Cleaners and Air Fresheners
- Others

Market Breakup by Region:

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

Natural Fragrance Market Analysis

The global natural fragrance market is being driven by the rapidly increasing income and an increased per capita spending on grooming. The changing consumer habits and the rising demand for fragrances from developing countries are aiding the market growth. The industry is offering various innovations in the products to cater to the consumers' demands for new and exciting fragrances. In the metropolitan cities of emerging economies, the grooming segment has significantly shown a huge demand for fragrances over the past two years, further invigorating the market for natural fragrances. The demand for fragrances from the detergent and cleaner industry in the emerging economies is further expected to drive the industry growth due to its constant demand from the toiletry and cleaner segment. The industry is also expected to be driven by the introduction of new and innovative products for niche and standard applications.

The demand for processed foods around the globe is increasing, further augmenting the market growth. The increasing population of health-conscious people across the world is driving the demand for natural fragrances owing to its positive health impacts. The multi-functional compounds are expected to increase in the forecast period as a consequence of the rising demand for health and wellness products. The industry has grown significantly due to its consumption in food and other industries, which are developing new encapsulation technologies. Encapsulation enables fragrances to be more constant and to be widely used in applications. The manufacturers of natural fragrances are seeking out raw materials that are new and innovative, such as flavours and fragrances extracted from yeast, for the application in the food industry.

The demand for menthol, particularly, is driven by the increasing demand for menthol cigarettes in emerging economies such as China, India, Indonesia, and other regions. The category of perfume is expected to increase the demand for synthetic menthol in the developing markets. The use of mint fragrances in the cosmetic industry is expected to further support the market growth for natural fragrances. A rising inclination towards the use of natural ingredients in medicines and related products is expected to drive the industry in the coming years.

Competitive Landscape

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The report gives a detailed analysis of the following key players in the global natural fragrance market, covering their competitive landscape, capacity, and latest developments like mergers, acquisitions, and investments, expansions of capacity, and plant turnarounds:

- Givaudan SA
- Firmenich SA
- International Flavors & Fragrances, Inc.
- Symrise AG
- Wild Flavors, Inc.
- Takasago International Corp
- Mane SA
- Others

The comprehensive EMR report provides an in-depth assessment of the industry based on the Porter's five forces model, along with giving a SWOT analysis.

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