

North America Flavours and Fragrances Market Report and Forecast 2025-2034

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Report description:

The North America flavours and fragrances market was valued at USD 11.10 Billion in 2024. The industry is expected to grow at a CAGR of 4.35% during the forecast period of 2025-2034 to attain a valuation of USD 16.99 Billion by 2034.

Globally, the market is led by Europe, accounting for over a quarter of the industry. The industry on the continent is being driven by its thriving personal care and beauty sector along with its growing food and beverage sector. The regional industry is dominated by Western European economies like Germany, UK, and France. However, in the coming years, Eastern Europe is projected to witness a faster growth than the more mature Western European market. The Asia Pacific and North America are also significant regional markets for the region. The Asia Pacific is expected to witness a robust growth with expanding opportunities for growth in its emerging economies. The industry in this region is being aided by the customisation of products by manufacturers to suit the diverse taste of consumers in the region. With global players increasingly investing and expanding in the region, the industry in the Asia Pacific is expected to grow further. China, Japan, and India are the major markets in the Asia Pacific.

North America is the second largest flavour and fragrance regional market after Europe. The region is dominated by the industry in the US, which accounts for over three-fourths of the market. While North America, like Western Europe, is a mature market, the industry in the region is being driven by the rising high-income class, especially in the US. Nearly half of the world's high-income population is expected to reside in North America by 2030. The high-income class is driving the demand for premium products like high-end cosmetics and organic foods. While the growth of the middle class has slowed down in the US, they still account for over half the population. The middle classes, which have been witnessing an increase in their disposable incomes, are aiding the industry by consuming more processed food and beverage product, which are imbued with additional flavours.

North America Flavours and Fragrances Market Segmentation

Flavour is added to a product to alter or enhance the taste of the substance as perceived by the mouth. Fragrance, on the other hand, refers to the compounds added to impart a sweet or pleasant smell to products like foods, cosmetics, and detergents,

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among other items.

Market Breakup by Segment

- Flavours
- Fragrances

Market Breakup by Type

- Synthetic
- Natural

Market Breakup by Region

- USA
- Canada

Market Analysis

The North America flavours and fragrances industry is being driven by the increasing demand for consumer products and the rise in GDP. The GDP of the United States grew at a rate of 3.1% per annum in the first quarter of 2020. The rise in the consumer willingness to try out new flavours and fragrances is also aiding the industry growth in the region. With the rise in disposable incomes, consumers are increasingly buying non-essential food products with innovative and unusual flavours and combinations like chili chocolate. As consumers are becoming more health conscious with the rise in the population afflicted by obesity and diabetes, the demand for low-calorie and low-carbohydrate food and beverage products are rising. This is further aiding the growth of the flavour segment as these products need additional flavours. The segment is also being aided by the rising demand for juices and RTD beverages. The increase in the consumption of flavoured milk, as a substitute to carbonated drinks, is further propelling the segment growth.

The flavours and fragrance industry in North America is also being aided by the thriving personal care and cosmetics industry in the region. In 2018, the region accounted for nearly a quarter of the cosmetics industry, globally, with the US being its major market. The cosmetics industry in this comparatively mature market is being driven by the rise in the consumption of premium cosmetics. The fragrance segment, in particular, is being aided by the continuing growth in the cosmetics sector, as fragrance has become an indispensable part of personal care products. Consumers are also seeking out natural or organic fragrances. As the consumers are becoming more aware about the environment and more conscious about the ingredients in the products they are using, manufacturers are working to create a sustainable and eco-conscious supply chain. The fragrance segment is also being aided by the rising demand from the soaps and detergents sector.

Competitive Landscape

The EMR gives an in-depth analysis of the following key players in the North America flavour and fragrance market, covering their market share, capacity, and latest developments like mergers and acquisitions, plant turnarounds, and capacity expansions:

- Givaudan SA
- Firmenich SA
- International Flavors & Fragrances, Inc.
- Symrise AG

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- WILD Flavors, Inc.
- Takasago International Corp
- The MANE Group
- Sensient Technologies Corporation
- The Robertet Group
- Kerry Group

The comprehensive report assesses the market based on Porter's Five Forces. A SWOT analysis has also been provided.

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