

Global Civet Musk Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Civet Musk market size is expected to reach \$ 455 million by 2032, rising at a market growth of 13.7% CAGR during the forecast period (2026-2032).

Civet Musk refers to the yellowish to dark brown paste-like secretion from the perineal gland of male animals of the family Viverridae (primarily African civet *Civettictis civetta*, Large Indian civet *Viverra zibetha*, and Small Indian civet *Viverricula indica*). Its primary active component is civetone ($C_{15}H_{26}O$, 2.5-3.4% content), along with cyclopentadecanone, indole, skatole & others. Undiluted, it has a strong, pungent, fecal odor; when diluted, it reveals a warm, sweet, animalic scent. It is a classic fixative in perfumery, ranking among the "four great animalic perfumery materials" alongside musk, castoreum & ambergris. In traditional Chinese medicine, it promotes qi circulation, removes blood stasis & alleviates pain, serving as a substitute for natural musk. African civets produce 3-4 grams per week, the highest yield, making them the primary global source; Large & Small Indian civets have lower yields.

Civet musk is one of the most legendary natural animalic materials in global perfumery and traditional medicine. Its core value lies not in market size (roughly USD 200 million globally), but in its "irreplaceable" scarcity within top-tier luxury supply chains. Price and value are not set by supply-demand balance, but by cultural heritage and formula tradition. Ethiopian highland absolute, with superior complexity and fixative power, is treated as a "secret weapon" by the top four fragrance giants (Givaudan, Firmenich, IFF, Symrise). Asian farmed civet musk, of much lower quality, trades at a tenth of that price or less and goes mainly into traditional Chinese medicine. Margin distribution reflects the industry's power structure: upstream farmers (Ethiopian smallholders, Vietnamese and Chinese micro-enterprises) are extremely fragmented, produce tiny volumes, have little bargaining power, and capture the smallest share of

value. Midstream processors and traders (a handful of Ethiopian exporters) possess extraction know-how and export channels, earning higher added value. Downstream, the four giants leverage formulation dominance and brand premium to extract extreme profits from finished perfumes containing minute amounts of civet absolute. Downstream primary applications: fine fragrances consume the bulk of natural civet musk, but at extremely low concentrations (0.01-0.1%), and only top luxury houses (Chanel, Guerlain) insist on natural material for heritage authenticity. Traditional Chinese medicine (civet musk powder, linxian tablets) provides stable but low-value demand. The rest (high-end cosmetics, incense) is niche. Incremental demand is very limited - synthetic civetone has fully replaced natural material in mid-low segments, and animal welfare pressure (live extraction) is pushing major brands to phase out natural sources. Upstream-downstream structure is a classic 'funnel': thousands of micro-farmers (Ethiopia supplies ~90% of global output) produce tiny batches, a few traders aggregate and export, and four multinationals dominate downstream. This structure is extremely fragile - any disruption in Ethiopian political stability or trade policy directly threatens global supply. Landscape: there is no large-scale civet farming enterprise anywhere in the world. China and Vietnam have small-scale captive operations, but their combined output is less than 5% of global supply and of lower grade, used mainly for domestic TCM, not international fine fragrance. Uncertainties centre on three fronts: (1) rising animal welfare regulations and consumer ethical sensitivity, which suppress long-term demand for natural civet; (2) potential CITES trade restrictions on civet species; (3) synthetic biology - if engineered civetone can match the quality of Ethiopian absolute, the last stronghold will be undermined. Conclusion: Natural civet musk is a deliberately preserved traditional niche in the midst of modern chemical substitution. Its survival does not depend on economic rationality, but on luxury brands' devotion to heritage formulas and consumers' willingness to pay for 'truly natural' ingredients. The structural features are: upstream cannot scale, midstream relies on fragile channels, downstream oligopoly is gradually moving away from natural sources. In the long run, the market will continue to shrink to a tiny, ultra-high-end rigid demand, but it will not disappear entirely because its cultural-symbolic value exceeds its functional utility.

This report studies the global Civet Musk production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Civet Musk and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Civet Musk that contribute to its increasing demand across

many markets.

Highlights and key features of the study

Global Civet Musk total production and demand, 2021-2032, (kg)

Global Civet Musk total production value, 2021-2032, (USD Million)

Global Civet Musk production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Civet Musk consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Civet Musk domestic production, consumption, key domestic manufacturers and share

Global Civet Musk production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Civet Musk production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Civet Musk production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Civet Musk market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Givaudan, dsm-firmenich, International Flavors & Fragrances, Symrise, Taiji Group Zhejiang Dongfang Pharmaceutical, Zellgen, Feysel Kemal Suraka General Trading, EAEHFEZ EXPORT WILD ANIMAL PRODUCT, Baoshan Maorong Breeding, Baoshan Fuyin Coffee Manor, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Civet Musk market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/g) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Civet Musk Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Civet Musk Market, Segmentation by Type:

Raw Civet Paste

Civet Concrete

Civet Absolute

Civet Tincture

Civetone (Synthetic)

Global Civet Musk Market, Segmentation by Function:

Odor Fixative

Animalic Accent

Musk Substitute

Blend Enhancer

Base Note Anchor

Global Civet Musk Market, Segmentation by Application:

Fine Fragrance

Traditional Chinese Medicine

High-end Cosmetics & Personal Care

Aromatherapy & Incense

Others

Companies Profiled:

Givaudan

dsm-firmenich

International Flavors & Fragrances

Symrise

Taiji Group Zhejiang Dongfang Pharmaceutical

Zellgen

Feysel Kemal Suraka General Trading

EAEHFEZ EXPORT WILD ANIMAL PRODUCT

Baoshan Maorong Breeding

Baoshan Fuyin Coffee Manor

Thanh Hoa Civet Farm (Mr. Dao Phan Tuan)

Tuyen Quang Civet Farm (Mr. Nguyen Van Thinh)

Kangdisi Chemical (Hubei)

Hubei Guang'ao Biotechnology

Hubei Cheng Hai Chemical

Wuhan Yuancheng Group

Key Questions Answered:

1. How big is the global Civet Musk market?
2. What is the demand of the global Civet Musk market?
3. What is the year over year growth of the global Civet Musk market?
4. What is the production and production value of the global Civet Musk market?
5. Who are the key producers in the global Civet Musk market?
6. What are the growth factors driving the market demand?

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