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Global Jasmine Absolute Market Growth 2026-2032

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Abstracts

The global Jasmine Absolute market size is predicted to grow from US$ 40.89 million in 2025 to US$ 63.65 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

Jasmine Absolute is a high-value natural aromatic ingredient derived primarily from the flowers of Jasminum grandiflorum and Jasminum sambac. Commercial production typically begins with solvent extraction of freshly harvested flowers to produce jasmine concrete, followed by ethyl alcohol purification, chilling, filtration, dewaxing and concentration to obtain the final absolute. The product is characterized by an intense floral profile with varying fruity, green and indolic facets depending on botanical species and origin. Jasmine Grandiflorum Absolute and Jasmine Sambac Absolute represent the two principal commercial product types, while geographic origin and certified organic status provide additional differentiation. Jasmine Absolute is generally traded by weight in kilograms and priced in US$/kg because of its low extraction yield and high unit value. Core applications include fine fragrances, skin care, hair care, bath and cleansing products, home fragrance and aromatherapy, with selected grades also serving beverage, tea and other flavor formulations. IFF documents that approximately 800 kg of Grandiflorum flowers and around 1,200 kg of Sambac flowers may be required to produce 1 kg of corresponding absolute, illustrating the material-intensive nature of commercial production.

Key Findings

Global Jasmine Absolute sales volume is estimated at 12.65 tons in 2025 and 13.08 tons in 2026

Average market pricing rises from approximately US$3,305/kg in 2025 to US$3,401/kg in 2026

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Jasmine Grandiflorum Absolute accounts for roughly two-thirds of 2026 global sales volume

Fine fragrance remains the leading value application while beauty and home fragrance broaden downstream demand

Market Trends

The Jasmine Absolute industry is moving toward stronger botanical differentiation, origin traceability, responsible sourcing and higher processing transparency. Buyers increasingly distinguish Grandiflorum and Sambac rather than treating jasmine as a homogeneous floral raw material, reflecting their different olfactory characteristics and geographic supply structures. Givaudan identifies Grandiflorum and Sambac as the two principal jasmine species used in perfumery, while IFF commercializes differentiated India and Egypt origins and traceable For Life grades. Processing innovation is also developing around lower-impact extraction technologies. IFF has introduced a jasmine absolute using a proprietary bio-sourced and biodegradable solvent extraction process, reflecting broader demand for reduced environmental impact in high-value natural ingredients. At the customer level, documentation covering origin, extraction route, certification, residual solvent control and batch consistency is becoming increasingly important. This trend favors vertically integrated producers and specialist extractors capable of combining secure flower sourcing with purification, analytical control and standardized sensory quality.

Market Dynamics

Drivers

Growth in premium fragrance consumption remains the principal demand driver for Jasmine Absolute. The material provides a complex natural white-floral character that combines floral intensity, diffusion, fruitiness and indolic depth, allowing perfumers to build structures that cannot be replicated by relying on a single synthetic aroma molecule. Premiumization in fragrances, greater use of recognizable natural ingredients and rising demand for traceable raw materials support continued consumption. Expansion into prestige skin care, hair care, bath products and home fragrance further diversifies demand. Jasmine Absolute also has a limited but established role in flavor systems; IFF identifies both fragrance and flavor applications for Grandiflorum and Sambac grades.

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Restraints

Supply expansion is constrained by very low extraction yields, seasonal flowering cycles and labor-intensive harvesting. dsm-firmenich indicates that approximately 660 kg of flowers are required to produce 1 kg of Jasmine Absolute and that about six million flowers may be needed for the same output. IFF reports comparable material intensity of around 800 kg for Grandiflorum and approximately 1,200 kg for Sambac. Flowers also require rapid processing after harvesting to preserve odor quality and extraction yield. Consequently, labor costs, crop conditions, weather, flower prices and proximity between plantations and extraction facilities have a disproportionate influence on manufacturing economics. These structural constraints limit the speed at which natural Jasmine Absolute supply can respond to downstream demand.

Opportunities

The strongest market opportunities lie in premium differentiation rather than commodity-volume expansion. Traceable India, Egypt and China origins, certified sourcing programs and higher-transparency supply chains provide manufacturers with opportunities to target prestige fragrance customers that increasingly evaluate sustainability and raw-material provenance. Sambac offers additional growth potential because its greener, fruitier and orange-blossom-like character provides a distinct formulation profile compared with conventional Grandiflorum. Process improvements using alternative solvents and more efficient purification methods can further increase differentiation. Additional opportunities exist in premium personal care, home fragrance and carefully selected flavor applications, allowing producers to develop customer-specific grades based on species, origin, aroma profile, certification and processing documentation.

Challenges

The principal long-term challenge is maintaining consistent sensory and analytical specifications from an inherently variable agricultural raw material. Botanical species, growing location, weather, harvest timing and processing conditions can materially affect composition and odor profile, requiring rigorous quality control and batch standardization. The industry also operates through complex supply chains in which flower cultivation, concrete production and final absolute purification may occur in different locations. IFF, for example, documents India-origin Grandiflorum concrete that is subsequently converted into absolute at its LMR facility in Grasse. This structure increases the importance of traceability and manufacturing-responsibility verification. At the same time, synthetic jasmine molecules and reconstructed floral bases provide

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lower-cost, scalable and highly consistent alternatives, increasing pressure on natural Jasmine Absolute to justify its premium through authenticity, sensory complexity and documented origin.

Industry Chain Analysis

The Jasmine Absolute industry chain begins with jasmine cultivation and manual flower harvesting, principally involving Jasminum grandiflorum and Jasminum sambac. Fresh flowers are highly perishable and are therefore normally processed near cultivation areas. The first industrial stage uses volatile-solvent extraction to obtain jasmine concrete. The concrete can then be purified locally or transported to specialist processors, where alcohol washing, chilling, wax separation, filtration and concentration convert the material into Jasmine Absolute. Givaudan describes this structure for Indian Sambac, with flowers converted into concrete at a local facility before the concrete is washed with ethanol to obtain the final absolute.

Value creation is concentrated in access to reliable flower supply, extraction yield, purification expertise, aroma quality, batch repeatability and traceability. Agricultural raw materials and manual harvesting form major upstream cost components, while solvent use, energy, yield losses, laboratory testing and quality standardization influence midstream economics. Producers with direct farming relationships or vertically integrated extraction operations benefit from greater supply security, while specialist European processors create additional value through purification, standardization and close technical interaction with fragrance customers. Downstream, Jasmine Absolute is sold primarily to fragrance houses, formulators and finished-product manufacturers serving fine fragrance, beauty and personal care, home fragrance, aromatherapy and selected flavor applications.

Segment Insights

By product type, Jasmine Grandiflorum Absolute remains the largest segment, accounting for approximately 65% of estimated global volume in 2026, while Jasmine Sambac Absolute represents around 30%; other Jasminum species account for the remaining small share. Grandiflorum retains a strong position in classical fine fragrance because of its warm floral, fruity and indolic profile, whereas Sambac provides a greener and more fruit-forward profile with characteristic orange-blossom nuances. The distinction is commercially meaningful because these materials perform different functions in fragrance formulation rather than acting as direct substitutes in every application.

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Origin represents another important segmentation dimension. Egypt and India dominate Grandiflorum supply, while India has a particularly important position in Sambac and China has developed a meaningful Sambac-based extraction industry. Certified organic and responsible-sourcing grades represent a smaller premium segment, while conventional products continue to account for the majority of commercial supply. Increasing customer requirements for provenance and traceability are likely to support faster development of documented and certified grades, although supply availability remains constrained by cultivation practices and certification costs.

Downstream Market Opportunities

Fine fragrance remains the most commercially important application because Jasmine Absolute delivers strong olfactory impact and natural complexity at relatively low formulation levels. Prestige skin care, hair care, bath and cleansing products represent additional opportunities where natural floral ingredients can contribute both fragrance performance and premium product positioning. Home fragrance, particularly premium candles and diffusers, provides another attractive outlet, while aromatherapy supports smaller-volume specialty demand. Selected food and beverage formulations represent a narrower opportunity: IFF lists fragrance and flavor as applications for both Grandiflorum and Sambac absolutes. This diversified application structure allows suppliers to develop differentiated grades according to botanical species, origin, certification, sensory characteristics and customer documentation requirements.

Regional Insights

Global Jasmine Absolute supply is concentrated around a limited number of agricultural and processing clusters. For Grandiflorum, dsm-firmenich identifies Egypt as representing approximately 60% of global supply and India approximately 40%, with worldwide Grandiflorum jasmine concrete production around 16 MT. Egypt benefits from established Nile Delta cultivation and integrated extraction, while India combines Grandiflorum and Sambac resources with a broad network of floral extraction manufacturers. India is particularly important in Sambac production, supported by Tamil Nadu cultivation and established local processing capabilities. Givaudan notes that most Indian jasmine flowers still serve ceremonial and garland uses, which limits the share available for fragrance extraction.

China represents an important additional Sambac-oriented production base, particularly through jasmine-growing and natural fragrance processing clusters in Guangxi and

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related extraction regions. France occupies a different position in the global industry: its competitive advantage lies less in large-scale flower cultivation and more in absolute purification, standardization, fragrance formulation support and integration with the fine-fragrance ecosystem. North America, Japan, South Korea and Southeast Asia are comparatively more important as formulation, distribution and consumption markets than as primary Jasmine Absolute extraction centers.

Competitive Landscape Analysis

The Jasmine Absolute market is characterized by a combination of multinational fragrance ingredient groups, specialist European natural extractors and source-country manufacturers in India, Egypt and China. dsm-firmenich, Givaudan, IFF, Robertet and MANE benefit from global customer relationships, technical perfumery expertise, analytical capabilities and structured sourcing programs. Specialist European producers including BIOLANDES, PAYAN BERTRAND and Bontoux compete through expertise in natural extraction, purification and standardized ingredient supply. Indian manufacturers such as Jasmine Concrete Exports, Synthite Industries, Plant Lipids, Natural & Essential Oils, Encee Aromatics and Greenleaf Extractions occupy strategically important positions closer to flower cultivation and primary extraction. Egyptian producers including A. Fakhry, Hashem Brothers, Fridal and LISHA Essential Oils benefit from direct access to the world’s principal Grandiflorum production cluster, while Chinese manufacturers such as Guangzhou Baihua and Guangxi Hengzhou Zhengda participate principally through the Sambac-oriented natural fragrance supply chain. Competitive advantage depends not only on production volume but also on stable flower access, extraction efficiency, sensory consistency, regulatory documentation, certified sourcing, traceability and the ability to support downstream fragrance formulation.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Jasmine Absolute Industry Forecast” looks at past sales and reviews total world Jasmine Absolute sales in 2025, providing a comprehensive analysis by region and market sector of projected Jasmine Absolute sales for 2026 through 2032. With Jasmine Absolute sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Jasmine Absolute industry.

This Insight Report provides a comprehensive analysis of the global Jasmine Absolute landscape and highlights key trends related to product segmentation, company

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formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Jasmine Absolute portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Jasmine Absolute market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Jasmine Absolute and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Jasmine Absolute.

This report presents a comprehensive overview, market shares, and growth opportunities of Jasmine Absolute market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Jasmine Grandiflorum Absolute

Jasmine Sambac Absolute

Other

Segmentation by Cultivation and Certification Type:

Certified Organic Jasmine Absolute

Conventional Jasmine Absolute

Segmentation by Application:

Fine Fragrance Products

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Skin Care Products

Hair Care Products

Bath Products

Shower Cleansing Products

Home Fragrance Products

Aromatherapy Products

Beverage Flavoring

Tea Flavoring

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

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Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

dsm-firmenich AG

Givaudan SA

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International Flavors & Fragrances Inc.

Robertet SA

MANE

BIOLANDES

PAYAN BERTRAND S.A.

Bontoux S.A.S.

J. Gazignaire

Argeville SAS

Floral Concept

Citroflor S.r.l.

Jasmine Concrete Exports Private Limited

Synthite Industries Private Limited

Plant Lipids Private Limited

Natural & Essential Oils Private Limited

Encee Aromatics Pvt Ltd

Greenleaf Extractions Private Limited

Ajmal Biotech Private Limited

Amiti? Fleur Products LLP

AOS Products Private Limited

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Nishant Aromas Private Limited

Edadi Agro Chem Pvt Ltd

Aromatic and Allied Chemicals Private Limited

ASEAN Aromatics Private Limited

Katyani Exports

A. Fakhry & Co.

Hashem Brothers for Essential Oils and Aromatic Products

Fridal

LISHA Essential Oils

Cairo Aromatic Import, Export & Supplies

Pure Essential Oils & Herbs Co.

MAG Aromatic Company

Egypt Aromatic for Essential Oil & Aromatic Products

Herbal Family Group LLC

MUSK for Aromatics & Essential Oils

EgyNatX

Guangzhou Baihua Flavours And Fragrances Company Ltd.

Guangxi Hengzhou Zhengda Spice Co., Ltd.

Hengxian Ruifeng Spices Co., Ltd.

Kunming Yuexin Biotechnology Co., Ltd.

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Guilin Four Seasons Sunshine Flavours & Fragrances Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Jasmine Absolute market?

What factors are driving Jasmine Absolute market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Jasmine Absolute market opportunities vary by end market size?

How does Jasmine Absolute break out by Type, by Application?

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