

# **Fragrance Ingredients Market by Source, (Natural, Synthetic), Ingredient Type (Commodity, Specialty, Proprietary), Application (Personal Care, Household, Cosmetics, Food & Beverage, Industrial), Form (Liquid, Powder), Technology - Global Forecast to 2029**

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## **Abstracts**

The fragrance ingredients market is estimated at USD 17.11 billion in 2024 and is projected to reach USD 21.94 billion by 2029, at a CAGR of 5.1% from 2024 to 2029. Fragrance Ingredients are crucial for providing desirable qualities to products. Widely used across the industry, these fragrances are employed for customer attraction, more sale due to desirable qualities of products.

End-users encompass large-scale cosmetics brands, well-established personal care brands, emerging food and beverage companies, household products producers, and consumers who prioritize convenience and desirable qualities of product. The market's growth is driven by factors such as Innovation in Scent Profiles, Increase in Disposable Income, and the Advances in Technology and Extraction Processes.

“Extraction Process is popular in the fragrance ingredients market across the globe due to wide usage across manufacturers.”

The extraction process is a straightforward and widely used method in the fragrance industry for deriving scents from essential oils. Fragrance compounds, including flowers, oils, and leaves, are often processed to extract these essential oils, which serve as the foundation for many perfumes and scented products.

On November 5, 2024, Robertett, a leading supplier of natural raw materials for fragrances and flavors recently announced its acquisition of Phasex, a Massachusetts-based pioneer in supercritical CO<sub>2</sub> extraction technology. Supercritical CO<sub>2</sub> extraction enables the extraction of aromatic and functional components from solid biomass or liquid raw materials using carbon dioxide in a supercritical state, ensuring high purity and quality of the resulting extracts.

Acquisitions like this underscore the increasing prominence and adoption of advanced extraction technologies in the fragrance ingredients market. These technologies not only enhance the efficiency and sustainability of production processes but also support the growing demand for natural, high-quality fragrance ingredients. Such strategic investments reflect the market's commitment to innovation and its response to consumer preferences for eco-friendly and ethically sourced products.

“Synthetic ingredients is popular in the fragrance ingredients market across the globe due to its cost-effectiveness and it is easy to maintain quality across production.”

Perfumes crafted from synthetic ingredients offer remarkable consistency, as controlled manufacturing conditions ensure that each batch smells identical, maintaining quality across production. These lab-made ingredients are also cost-effective, typically less expensive than natural extracts, making synthetic perfumes accessible to a broader audience. Furthermore, synthetic scents unlock creative possibilities for perfumers, allowing them to design unique, innovative fragrances that are unattainable with natural ingredients alone, thanks to custom molecular engineering for specific scent profiles. Synthetic ingredients also excel in longevity and performance, with many designed for lasting scent retention and strong sillage, making them highly sought-after in commercial perfumery. Additionally, synthetic fragrances contribute to sustainability by reducing dependence on natural resources and enabling consistent supply chains, unaffected by seasonal or environmental factors that impact natural raw materials. This stability supports large-scale production and facilitates meeting the growing global demand for diverse and affordable fragrances.

“By ingredient type, commodity fragrance in the fragrance ingredients market are popular due to its mass-production ”

Commodity fragrance ingredients refer to standard, widely used aromatic compounds that are typically mass-produced and readily available in the market. They include common synthetic molecules like vanillin or linalool. Vanilla, derived from the pods of the *Vanilla planifolia* orchid, is the world's most popular flavor and fragrance. Although

it contains around 200 different compounds, its distinctive aroma and taste are primarily attributed to vanillin. This versatile ingredient is highly valued across various industries, including ice creams, confectionery, dairy products, perfumes, pharmaceuticals, and liqueurs, making it a cornerstone of a substantial multimillion-dollar market.

“Europe and its fragrance ingredient market to be affected by EU Green Deal.”

Europe’s regulatory landscape is undergoing significant changes, largely driven by the forthcoming EU Chemicals Strategy for Sustainability (CSS), part of the EU Green Deal. Over 80 regulatory updates have been proposed, including revisions to REACH and CLP (Classification, Labelling, and Packaging), with new hazard classifications such as endocrine disruption recently introduced. The CSS introduces stricter frameworks, such as the general risk approach, which aims to impose faster and more stringent restrictions on chemicals in both professional and consumer products. Additionally, the "essential use" concept provides limited exceptions to these general restrictions, while mixture toxicity assessments and the “safe and sustainable by design” initiative set standards for safer chemical innovation. These changes will bring a range of new safety and sustainability requirements, impacting the fragrance ingredients market by demanding increased compliance, reformulations, and more sustainable practices across product lifecycles.

The break-up of the profile of primary participants in the fragrance ingredients market:

By Company: Tier 1- 40.0%, Tier 2- 20.0% and Tier 3- 40.0%.

By Designation: CXO's: 26.0%, Managers: 30.0% and Executives: 44.0%

By Region: North America – 20.0%, Europe – 20.0%, Asia Pacific – 40.0%, South America – 10.0% and RoW – 10.0%

## Key Market Players

Key players operating in the fragrance ingredients market include BASF (Germany), MANE SA (France), dsm-firmenich (Switzerland), Givaduan (Switzerland), International Flavors and Fragrances (US), Sensient Technologies (US), Takasago International Corporation (Japan), Robertet Fragrances, Inc (France), Kao Chemicals (Japan), and Symrise (Germany).

## Research Coverage:

This research report categorizes the fragrance ingredients market by technology (Extraction Technologies, Biotechnology, Encapsulation and Controlled Release, Other Technology) by source (Natural (Citrus, Floral, Fruity, Woody, oriental, others) Synthetic (Citrus, Floral, Fruity, Woody, oriental, others), by Ingredient Type (commodity ingredients, specialty ingredients, proprietary ingredients) by application (personal care products, household products, cosmetics, food and beverage, industrial applications), by form (Liquid, Powder) and by region (North America, Europe, Asia Pacific, South America and Rest of the World). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the fragrance ingredients market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products and services; key strategies; contracts, partnerships, and agreements. New product & service launches, mergers and acquisitions, and recent developments associated with the fragrance ingredients market. Competitive analysis of upcoming startups in the fragrance ingredients market ecosystem is covered in this report.

## Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall fragrance ingredients market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

## The report provides insights on the following pointers:

Analysis of key drivers (Advances in synthetic fragrance ingredients , Expansion of the Cosmetics and Skincare Industry, Innovation in Scent Profiles, and Increase in Disposable Income), restraints (Limited Shelf life of natural ingredients, Stringent Regulations), opportunities (Innovation in Sustainable Fragrance Ingredients, Expanding Applications in Household and Industrial Products, Technological Advances in fragrance industry), and challenges (Managing Environmental Impact of Production, High development and testing cost) influencing the growth of the fragrance ingredients market.

**Product Development/Innovation:** Detailed insights on research & development activities, and new product & service launches in the fragrance ingredients market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the fragrance ingredients market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the fragrance ingredients market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players including Key players operating in the fragrance ingredients market include BASF (Germany), MANE SA (France), dsm-firmenich (Switzerland), Givaduan (Switzerland), International Flavors and Fragrances (US), Sensient Technologies (US), Takasago International Corporation (Japan), Robertet Fragrances, Inc (France), Kao Chemicals (Japan), and Symrise (Germany) among others in the fragrance ingredients market strategies.

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