

Research Report on Chinese Flavor & Fragrance Industry, 2012

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Abstracts

Flavor and fragrance industry is an important raw material supporting industry of food, daily chemicals, tobacco, medicine and other industries. Flavors and fragrances become indispensable raw materials of the people's high-quality life in the modern society.

According to the incomplete statistics, China is in possession of more than 400 spiceberries belonging to 62 families and over 120 kinds of natural flavors in industrialization production. It is clear that China is one of the countries with the most plentiful aromatic plant resources in the world. The resource advantage effectively guarantees the long-term development of China's flavor and fragrance industry.

The production location of China's flavors mainly concentrate in the south of the Yangtze River and the output in Guangxi, Guizhou, Hunan, Yunnan, etc. is the most. At present, the output of many Chinese flavor varieties ranks among the top in the world, among which the output of pennyroyal, eucalyptus oil, litsea cubeba oil, cassia oil and fennel oil globally is in the leading position. In terms of aromatic plant resources and the varieties and volume of natural flavors, China takes up a vital status and becomes one of the biggest production countries of natural flavors in the world.

By the end of 2011, there were about 1,000 flavor and fragrance manufacturers in China, while the number of enterprises with sales amount above CNY 100 million was less than 100.

China's fragrance industry sharply develops and the varieties of fragrances are complete, involving oil-soluble, water-soluble, emulsion, powder and capsule types. The proportion of daily fragrances, edible fragrances and tobacco fragrances is 4:4:2.

In 2011, the total output of China's flavors and fragrances were around 400 thousand tons. In recent years, the market scale of China's flavor and fragrance industry increased from about CNY 10 billion in 2002 to nearly CNY 30 billion in 2011, with an average annual compound growth rate of over 10%. It is expected that the market of China's flavors and fragrances will still keep the high increase in the future years.

Famous international manufacturers of flavors and fragrances basically enter Chinese market through acquisitions, mergers and integration of Chinese domestic enterprises or the direct establishment of factories, and so on. Enterprises, such as International Flavors & Fragrances Inc., Firmenich Flavors (China) Co., Ltd., and so on all finish their strategic layout in the Chinese market. The international competition in China's flavor & fragrance industry is intensifying.

More following information can be acquired through this report:

Supply and Demand of China's Flavor & Fragrance Market

Major Enterprises of China's Flavor & Fragrance Market

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