

Flavours and Fragrances Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Ingredients (Synthetic Ingredients and Natural Ingredients), By End Use (Beverages, Dairy Products, Bakery, Savory & Snacks and Others) By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/F5FD4A32657AEN.html>

Date: January 2026

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: F5FD4A32657AEN

Abstracts

The Global Flavours and Fragrances Market is projected to expand from USD 35.44 Billion in 2025 to USD 51.74 Billion by 2031, achieving a CAGR of 6.51%. Flavours and fragrances consist of specialized chemical compounds and essential oil blends used to improve sensory attributes, particularly taste and smell, in products ranging from food and beverages to cosmetics and household cleaners. The market's growth is primarily driven by a growing global population, rapid urbanization, and rising disposable incomes, which collectively boost the demand for processed convenience foods and personal care products. Additionally, the expanding middle class in developing economies is increasing consumption rates for various consumer goods, necessitating sustained industrial production to satisfy these changing requirements.

However, the market faces significant obstacles due to the volatility of raw material prices and supply chain interruptions, which are frequently worsened by geopolitical tensions and climate change impacting natural crop harvests. To demonstrate the sector's considerable economic importance, the 'Fragrance Creators Association' noted in '2025' that the United States fragrance industry is valued at over \$30 billion, acting as a vital component for a domestic consumer products sector worth more than \$2 trillion. This substantial economic contribution highlights the industry's essential role, even as it navigates current logistical and regulatory challenges.

Market Driver

The rising consumer preference for natural and clean-label ingredients is fundamentally transforming the industry, forcing manufacturers to abandon synthetic additives in favor of transparency and health-conscious options. This shift requires flavor houses to establish sustainable supply chains for botanical extracts and essential oils, often utilizing advanced extraction methods to ensure stability in final products. The economic significance of certified clean products using these natural inputs is evident; according to the Organic Trade Association's '2024 Organic Industry Survey' from May 2024, organic sales in the United States exceeded \$69.7 billion in 2023. This growth, driven by demand for goods free from synthetic pesticides and artificial ingredients, necessitates the widespread reformulation of packaged foods and beverages to include recognizable, plant-based flavor components.

A second major catalyst is the robust expansion within the personal care, cosmetics, and fine fragrance sectors, fueled by higher grooming standards and the premiumization of scent profiles. Leading beauty corporations are seeing increased sales in luxury perfumes and functional scented items, which directly boosts the volume of fragrance compounds needed by manufacturers. Illustrating this growth, Inter Parfums, Inc. reported in their '2023 Full Year Results' in February 2024 that record net sales reached \$1.32 billion, a 21% increase over the previous year. This momentum significantly aids the broader market ecosystem, while Symrise AG's 'Annual Report 2023' from March 2024 highlighted the scale of these activities with group sales of \$4.73 billion, demonstrating the massive revenue streams maintained by top suppliers amidst these shifting consumption patterns.

Market Challenge

The instability of raw material costs and supply chain disruptions presents a significant barrier to the growth of the Global Flavours and Fragrances Market. The sector depends heavily on the consistent procurement of natural ingredients, yet factors such as climate change and geopolitical unrest frequently harm crop yields and logistical routes. When the supply of critical botanical inputs fluctuates, manufacturers face immediate cost increases and production delays, compromising their ability to meet the steady volume requirements of the consumer goods industry. This economic uncertainty forces companies to operate with tighter margins and limits their capacity to invest in market expansion.

To illustrate the severity of these supply constraints, 'Fundecitrus' reported in '2024' that

orange crop production in Brazil's major citrus belt is forecast to drop by 24.36% compared to the previous season due to adverse weather conditions. Since citrus derivatives are essential in many flavor and fragrance formulations, such a drastic reduction in supply inevitably leads to sharp price hikes and availability shortages. These disruptions directly hinder market development by creating an unreliable trading environment that complicates long-term contracts and stifles the consistent industrial output necessary for sustained growth.

Market Trends

The adoption of generative AI is revolutionizing predictive flavor and scent creation, moving industry practices from manual trial-and-error to data-driven precision. Manufacturers are increasingly using sophisticated algorithms to interpret extensive proprietary chemical datasets, allowing for the rapid mapping of olfactory profiles to shifting consumer preferences while maximizing resource efficiency. This digital transformation has required significant financial investment in technological infrastructure to ensure competitive agility. For instance, Givaudan's '2024 Full Year Results' from January 2025 noted intangible asset additions of CHF 57 million in 2024, emphasizing the company's strategic focus on advancing its digital roadmap and operating platform.

Concurrently, the sector is seeing the rise of neuro-scent technologies designed to target mood and mental well-being. This trend represents an evolution from purely aesthetic fragrances to functional scents capable of triggering specific emotional responses, such as relaxation or social connection, catering to the growing consumer focus on psychological health. The demand for functional perfumery is supported by substantial consumer reliance on scent for emotional regulation. As reported by Premium Beauty News in the October 2025 article 'dsm-firmenich launches a fragrance technology that fosters social connections,' 61% of surveyed individuals stated that perfume helps them overcome feelings of isolation, validating the commercial potential of mood-modulating fragrance innovations.

Key Market Players

Givaudan SA

International Flavors & Fragrances Inc.

Firmenich International SA

Symrise AG

Takasago International Corporation

Mane SA

Robertet SA

Sensient Technologies Corporation

BASF SE

T. Hasegawa Co., Ltd.

Report Scope

In this report, the Global Flavours and Fragrances Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Flavours and Fragrances Market, By Ingredients

Synthetic Ingredients and Natural Ingredients

Flavours and Fragrances Market, By End Use

Beverages

Dairy Products

Bakery

Savory & Snacks and Others

Flavours and Fragrances Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Flavours and Fragrances Market.

Available Customizations:

Global Flavours and Fragrances Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL FLAVOURS AND FRAGRANCES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Ingredients (Synthetic Ingredients and Natural Ingredients)
 - 5.2.2. By End Use (Beverages, Dairy Products, Bakery, Savory & Snacks and Others)
 - 5.2.3. By Region
 - 5.2.4. By Company (2025)

5.3. Market Map

6. NORTH AMERICA FLAVOURS AND FRAGRANCES MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Ingredients

6.2.2. By End Use

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Flavours and Fragrances Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Ingredients

6.3.1.2.2. By End Use

6.3.2. Canada Flavours and Fragrances Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Ingredients

6.3.2.2.2. By End Use

6.3.3. Mexico Flavours and Fragrances Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Ingredients

6.3.3.2.2. By End Use

7. EUROPE FLAVOURS AND FRAGRANCES MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Ingredients

7.2.2. By End Use

7.2.3. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Flavours and Fragrances Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Ingredients

7.3.1.2.2. By End Use

7.3.2. France Flavours and Fragrances Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Ingredients

7.3.2.2.2. By End Use

7.3.3. United Kingdom Flavours and Fragrances Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Ingredients

7.3.3.2.2. By End Use

7.3.4. Italy Flavours and Fragrances Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Ingredients

7.3.4.2.2. By End Use

7.3.5. Spain Flavours and Fragrances Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Ingredients

7.3.5.2.2. By End Use

8. ASIA PACIFIC FLAVOURS AND FRAGRANCES MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Ingredients

8.2.2. By End Use

8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Flavours and Fragrances Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Ingredients
 - 8.3.1.2.2. By End Use
 - 8.3.2. India Flavours and Fragrances Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Ingredients
 - 8.3.2.2.2. By End Use
 - 8.3.3. Japan Flavours and Fragrances Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Ingredients
 - 8.3.3.2.2. By End Use
 - 8.3.4. South Korea Flavours and Fragrances Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Ingredients
 - 8.3.4.2.2. By End Use
 - 8.3.5. Australia Flavours and Fragrances Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Ingredients
 - 8.3.5.2.2. By End Use

9. MIDDLE EAST & AFRICA FLAVOURS AND FRAGRANCES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Ingredients
 - 9.2.2. By End Use

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Flavours and Fragrances Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Ingredients
 - 9.3.1.2.2. By End Use
 - 9.3.2. UAE Flavours and Fragrances Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Ingredients
 - 9.3.2.2.2. By End Use
 - 9.3.3. South Africa Flavours and Fragrances Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Ingredients
 - 9.3.3.2.2. By End Use

10. SOUTH AMERICA FLAVOURS AND FRAGRANCES MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Ingredients
 - 10.2.2. By End Use
 - 10.2.3. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Flavours and Fragrances Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Ingredients
 - 10.3.1.2.2. By End Use
 - 10.3.2. Colombia Flavours and Fragrances Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Ingredients

10.3.2.2.2. By End Use

10.3.3. Argentina Flavours and Fragrances Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Ingredients

10.3.3.2.2. By End Use

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL FLAVOURS AND FRAGRANCES MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Givaudan SA

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

- 15.2. International Flavors & Fragrances Inc.
- 15.3. Firmenich International SA
- 15.4. Symrise AG
- 15.5. Takasago International Corporation
- 15.6. Mane SA
- 15.7. Robertet SA
- 15.8. Sensient Technologies Corporation
- 15.9. BASF SE
- 15.10. T. Hasegawa Co., Ltd.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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