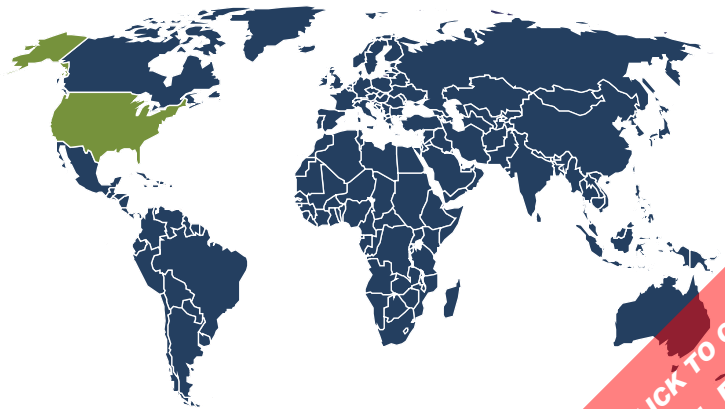


Freedonia Focus Reports
US Collection



Natural Flavors & Fragrances: United States

October 2016



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Environmental and Regulatory Factors
Research and Development Overview

Segmentation and Forecasts

Products | Markets

Industry Structure

Industry Composition and Characteristics | Companies Cited

Resources

CLICK TO ORDER
FULL REPORT
BROCHURE
CLICK TO ORDER
FULL REPORT

ABOUT THIS REPORT

Scope & Method

This report forecasts US flavor and fragrance demand in US dollars at the manufacturers' level and in pounds to 2020. Total demand in dollars is segmented by product in terms of:

- essential oils and natural extracts
- natural flavor blends
- natural aroma chemicals
- natural fragrance blends.

The value of essential oils and aroma chemicals used in the production of finished flavor and fragrance blends is included in the blends categories, instead of the individual ingredient categories, to avoid double counting. Flavor enhancers, artificial and natural sweeteners, and spices, although they are important flavoring agents, are not included in the scope of this report. However, in some instances, this report includes mixtures of flavor chemicals that contain the aforementioned items.

Total demand in dollars is also segmented by market as follows:

- food
- cosmetics and toiletries
- beverages
- environmental fragrance goods
- cleaning products
- other markets such as pharmaceuticals, over-the-counter medications and nutraceuticals, and tobacco products.

To illustrate historical trends, total demand in dollars is provided in an annual series from 2005 to 2015; total demand in pounds and the various segments are reported at five-year intervals for 2010 and 2015.

This report quantifies trends in various measures of growth. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for

the years corresponding to other reported figures. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

Sources

Natural Flavors & Fragrances: United States (FF10038) is based on [Natural Flavors & Fragrances](#), a comprehensive industry study published by The Freedonia Group in October 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311930	Flavoring Syrup and Concentrate Mfg	2087	Flavoring Extracts and Flavoring Syrups, NEC
325199	All Other Basic Organic Chemical Mfg		
325620	Toilet Preparation Mfg	2844	Perfumes, Cosmetics, and Other Toilet Preparations
325998	All Other Miscellaneous Chemical Product and Preparation Mfg	2869	Industrial Organic Chemicals, NEC
		2899	Chemicals and Chemical Preparations, NEC

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Table of Contents

Section	Page
About This Report	i
Highlights.....	1
Market Environment.....	2
Historical Trends	2
Chart 1 US Natural Flavor & Fragrance Demand Trends, 2005-2015 (US\$ mil)	3
Key Economic Indicators	4
Table 1 Key Indicators for US Natural Flavor & Fragrance Demand; 2010, 2015, 2020 (US\$ bil) ..	4
Environmental & Regulatory Factors	5
Research & Development Overview	7
Segmentation & Forecasts.....	9
Products.....	9
Chart 2 US Natural Flavor & Fragrance Demand by Product; 2010, 2015, 2020 (US\$ mil)	9
Essential Oils & Natural Extracts.....	9
Natural Flavor Blends.....	11
Chart 3 US Natural Flavor & Fragrance Demand; 2010, 2015, 2020 (mil lb).....	12
Natural Aroma Chemicals.....	12
Natural Fragrance Blends.....	13
Chart 4 US Natural Flavor & Fragrance Demand by Product Share; 2010, 2015, 2020 (%).....	14
Markets	15
Chart 5 US Natural Flavor & Fragrance Demand by Market; 2010, 2015, 2020 (US\$ mil)	15
Food.....	15
Cosmetics & Toiletries.....	17
Beverages.....	18
Environmental Fragrance Goods.....	19
Cleaning Products.....	20
Other Markets.....	21
Chart 6 US Natural Flavor & Fragrance Demand by Market Share; 2010, 2015, 2020 (%)	22
Industry Structure.....	23
Industry Composition & Characteristics.....	23
Market Share.....	24
Chart 7 US Natural Flavor & Fragrance Market Share by Supplier, 2015	24
Companies Cited	28
Resources	29

To return here, click on any Freedonia logo or the Table of Contents link in report footers.
 PDF bookmarks are also available for navigation.

RESOURCES

The Freedonia Group

www.freedoniagroup.com

<i>3476 Natural Flavors & Fragrances</i> , October 2016	see study contents
Related Industry Studies	
<i>3424 Industrial & Institutional Cleaning Chemicals</i> , June 2016	see study contents
<i>3397 World Flavors & Fragrances</i> , March 2016	see study contents
<i>3359 Dental Products & Materials</i> , January 2016	see study contents
<i>3280 Pharmaceutical Chemicals</i> , June 2015	see study contents
Related Focus Reports	
<i>Beverages: United States</i>	see report contents
<i>Flavors & Fragrances: United States</i>	see report contents
<i>Grain-Based Foods: United States</i>	see report contents
<i>Pharmaceuticals: United States</i>	see report contents
<i>Processed Food: United States</i>	see report contents
<i>Snack Foods: United States</i>	see report contents
<i>World Flavors & Fragrances</i>	see report contents
Freedonia Custom Research	see capabilities

Trade Publications

<i>Chemical & Engineering News</i>	https://cen.acs.org
<i>Food Processing</i>	www.foodprocessing.com
<i>Food Technology</i>	www.ift.org/food-technology.aspx
<i>Global Cosmetic Industry</i>	www.gcimagazine.com
<i>Happi</i>	www.happi.com
<i>ICIS Chemical Business</i>	www.icis.com
<i>IHS Chemical Week</i>	www.chemweek.com
<i>Perfumer & Flavorist</i>	www.perfumerflavorist.com

Agencies & Associations

Flavor & Extract Manufacturers' Association	www.femaflavor.org
International Fragrance Association	www.ifraorg.org
International Fragrance Association – North America	www.ifrana.org
Occupational Safety and Health Administration	www.osha.gov
Research Institute for Fragrance Materials	www.rifm.org
United States Department of Agriculture	www.usda.gov
United States Department of Health and Human Services	www.hhs.gov
United States Food and Drug Administration	www.fda.gov
United States Drug Enforcement Administration	www.dea.gov
United States Environmental Protection Agency	www.epa.gov
United States International Trade Commission	www.usitc.gov

Environmental Impact. Please consider the environment before printing this report. Freedonia Focus Report collections feature environmentally friendly products distributed entirely via electronic channels.