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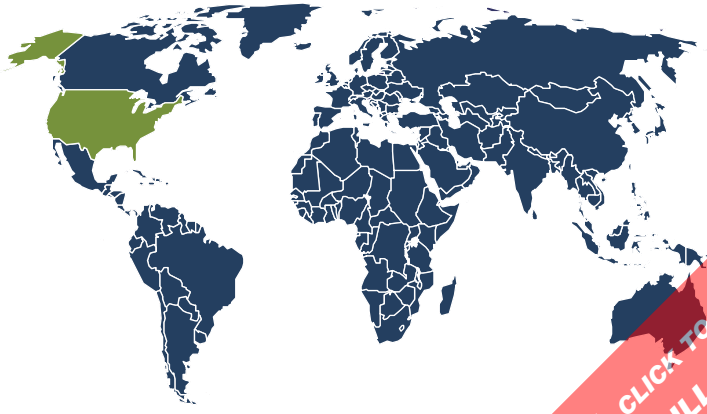
Flavors & Fragrances: United States



March 2016

Highlights

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

Segmentation and Forecasts
Products | Markets

Industry Structure
Industry Composition and Characteristics | Additional Companies Cited

Resources

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ABOUT THIS REPORT

Scope & Method

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

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

Although they are important flavoring agents, flavor enhancers, artificial and natural sweeteners, and separately sold spices 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 is also segmented by market as follows:

- food and beverages
- toiletries and cleaners
- other markets such as pharmaceuticals, environmental fragrances, and tobacco.

To illustrate historical trends, total demand and total production are provided in annual series from 2005 to 2015; the various demand 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

Flavors & Fragrances: United States (FF35020) is based on *World Flavors &*

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Fragrances, a comprehensive industry study published by The Freedonia Group in March 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 North American Industry Classification System		SIC 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

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Table of Contents

Section	Page
About This Report	i
Highlights	1
Market Environment	2
Historical Trends	2
Chart 1 | US Flavor & Fragrance Demand Trends, 2005-2015 (US$ mil)	2
Key Economic Indicators	3
Table 1 | Key Indicators for US Flavor & Fragrance Demand; 2010, 2015, 2020 (US$ bil)	3
Environmental & Regulatory Factors	4
Research & Development	6
NAFTA Overview	8
Chart 2 | NAFTA Flavor & Fragrance Demand by Country, 2015	8
Segmentation & Forecasts	9
Products	9
Chart 3 | US Flavor & Fragrance Demand by Product; 2010, 2015, 2020 (US$ mil)	9
Chart 4 | US Flavor & Fragrance Production; 2005-2015, 2020 (US$ mil)	10
Flavor Blends.	10
Fragrance Blends.	11
Essential Oils & Natural Extracts.	13
Aroma Chemicals.	14
Chart 5 | US Flavor & Fragrance Demand by Product Share; 2010, 2015, 2020 (%)	15
Markets	16
Chart 6 | US Flavor & Fragrance Demand by Market; 2010, 2015, 2020 (US$ mil)	16
Food & Beverages.	16
Toiletries & Cleaners.	18
Other Markets.	19
Chart 7 | US Flavor & Fragrance Demand by Market Share; 2010, 2015, 2020 (%)	20
Industry Structure	21
Industry Composition & Characteristics	21
Company Profile 1 | Firmenich SA	22
Company Profile 2 | Givaudan SA	23
Company Profile 3 | International Flavors & Fragrances Inc	24
Additional Companies Cited	25
Resources	26

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

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RESOURCES

The Freedonia Group

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3397 World Flavors & Fragrances, March 2016 — see study contents

Related Industry Studies

3280 Pharmaceutical Chemicals, June 2015 — see study contents
3264 World Dyes & Organic Pigments, April 2015 — see study contents
3207 World Industrial & Institutional Cleaning Chemicals, November 2014 — see study contents

Related Focus Reports

Beverages: United States — see report contents
Grain-Based Foods: United States — see report contents
Pharmaceuticals: United States — see report contents
Processed Food: United States — see report contents
Snack Foods: United States — see report contents
World Flavors & Fragrances — see report contents

Freedonia Custom Research — see capabilities

Trade Publications

Beverage World — www.beverageworld.com
Chemical & Engineering News — http://cen.acs.org
Food Processing — www.foodprocessing.com
Household and Personal Product Industry (HAPPI) — www.happi.com
ICIS Chemical Business — www.icis.com
IHS Chemical Week — www.chemweek.com
Perfumer & Flavorist — www.perfumerflavorist.com

Agencies & Associations

Flavor and Extract Manufacturers Association — www.femaflavor.org
International Fragrance Association — www.ifraorg.org
Occupational Safety and Health Administration — www.osha.gov
Research Institute for Fragrance Materials — www.rifm.org
United States Census Bureau — www.census.gov
United States Department of Agriculture — www.usda.gov
United States Drug Enforcement Administration — www.dea.gov
United States Environmental Protection Agency — www.epa.gov
United States Food and Drug Administration — www.fda.gov
United States International Trade Commission — www.usitc.gov

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