

Natural Flavors & Fragrances

US Industry Study with Forecasts for 2020 & 2025

Study #3476 | October 2016 | \$5200



Increasing consumer demand for natural products, driven by health concerns about artificial ingredients and a desire for transparency in labeling, will have a strong impact on demand for natural flavors and fragrances in the US.

Essential oils & natural extracts to remain the largest segment

Essential oils and natural extracts will remain the largest natural flavor and fragrance product segment in 2020. Demand for essential oils will be driven by growing consumer desire for cleaning products and environmental fragrance goods with natural ingredients, spurred by concerns regarding exposure to synthetic chemicals. However, stronger growth will be restrained by declining carbonated soft drink production, one of the largest markets for essential oils and natural extracts in 2015. Continuing interest in foods with exotic or ethnic flavors will help drive demand for natural flavor blends, which are forecast to register the fastest gains.

Consumer preferences for natural products to fortify the food market

Growing consumer demand for food products with “clean” labels, as well as products that are free from additives such as artificial flavors, will help the food market main-

tain the leading position as the largest natural flavor and fragrance market in 2020.

“Free-from” cleaning products to stimulate growth

The natural ingredients movement has also had an impact on the cleaning product market -- where consumers are turning more often to goods without artificial fragrances or dyes -- as well as the cosmetics and toiletries market. This demand for “free-from” formulations will help drive above average demand growth for natural fragrances in laundry and dishwashing detergents, polishes and sanitation goods, and other cleaners.

Study coverage

This study analyzes the US market for natural flavors and fragrances. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by market (food, cosmetics and toiletries, beverages, environmental fragrance goods, cleaning products, other) and product (essential oils and natural extracts, natural flavor blends, natural aroma chemicals). In addition, the study examines key market environment factors, assesses the industry structure and evaluates company market share.

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TABLE OF CONTENTS

Executive Summary

Market Environment

Natural Flavor & Fragrance Overview

- Historical Market Trends
- Pricing Patterns
- Environmental & Regulatory Issues
 - Natural Flavors
 - Natural Fragrances
- Overall Flavor & Fragrance Market Overview

Markets

- Food
 - Dairy Products
 - Processed Food
 - Candy & Confections
 - Bakery Products
 - Other Food
 - Suppliers
- Cosmetics & Toiletries
 - Perfumes & Colognes
 - Skin Care Products
 - Soaps & Body Washes
 - Other Cosmetics & Toiletries
 - Suppliers
- Beverages
 - Carbonated Soft Drinks
 - Other Beverages
- Environmental Fragrance Goods
 - Candles
 - Air Fresheners & Deodorizers
 - Potpourri & Other Environmental Fragrance Goods
- Cleaning Products
 - Polishes & Sanitation Goods
 - Laundry Detergents
 - Dishwashing Detergents/Other Cleaners
- Other Markets

Products

- Essential Oils & Natural Extracts
 - Citrus Oils
 - Lemon Oil
 - Orange Oil
 - Other Citrus Oils
 - Mint Oils
 - Peppermint Oil
 - Spearmint & Other Mint Oils
 - Other Essential Oils & Natural Extracts
- Natural Flavor Blends
 - Natural Flavor Blend Demand by Type
 - Fruity
 - Savory
 - Cheese & Other Dairy

- Meat
- Other Flavor Blends
- Product Characteristics
- New Applications
- Natural Aroma Chemicals
 - Terpenoids
 - Benzenoids
 - Musks & Other Aroma Chemicals

Industry Structure

- Market Share
- Competitive Strategies
 - Product Differentiation
 - Market Segmentation
 - Cooperative Agreements
- Research & Development
 - Natural Flavors & Fragrances
 - Biotechnology
 - Delivery Systems
- Production Methods
- Marketing & Distribution
- Participating Companies

TABLES & SELECT CHARTS

Executive Summary

1 Summary Table

Natural Flavor & Fragrance Overview

1 Natural Flavor & Fragrance Market, 2005-2015
Cht Natural Flavor & Fragrance Market, 2005-2015
2 Natural Flavor & Fragrance Pricing
3 Overall Flavor & Fragrance Demand
Cht Natural vs. Overall Flavor & Fragrance Demand in the US, 2005-2015

Markets

1 Natural Flavor & Fragrance Demand by Market
2 Food: Natural Flavor Demand
3 Dairy Products: Natural Flavor Demand
4 Processed Food: Natural Flavor Demand
5 Candy & Confections: Natural Flavor Demand
6 Bakery Products: Natural Flavor Demand
7 Other Food: Natural Flavor Demand
8 Natural Flavor Suppliers to the US Food Market, 2015
9 Cosmetics & Toiletries: Natural Flavor & Fragrance Demand
10 Perfumes & Colognes: Natural Fragrance Demand

11 Skin Care Products: Natural Fragrance Demand
12 Soaps & Body Washes: Natural Fragrance Demand
13 Other Cosmetics & Toiletries: Natural Flavor & Fragrance Demand
14 Natural Flavor & Fragrance Suppliers to the US Cosmetics & Toiletries Market, 2015
15 Beverages: Natural Flavor Demand
16 Carbonated Soft Drinks: Natural Flavor Demand
17 Other Beverages: Natural Flavor Demand
18 Environmental Fragrance Goods: Natural Fragrance Demand
19 Candles: Natural Fragrance Demand
20 Air Freshener & Deodorizers: Natural Fragrance Demand
21 Potpourri & Other Environmental Fragrance Goods: Natural Fragrance Demand
22 Cleaning Products: Natural Fragrance Demand
23 Polishes & Sanitation Goods: Natural Fragrance Demand
24 Laundry Detergents: Natural Fragrance Demand
25 Dishwashing Detergents & Other Cleaners: Natural Fragrance Demand
26 Other Markets: Natural Flavor & Fragrance Demand

Products

1 Natural Flavor & Fragrance Demand by Product
2 Essential Oil & Natural Extract Demand
3 Citrus Oil Demand
4 Lemon Oil Demand
5 Orange Oil Demand
6 Other Citrus Oil Demand
7 Mint Oil Demand
8 Peppermint Oil Demand
9 Spearmint & Other Mint Oil Demand
10 Other Essential Oil & Natural Extract Demand
11 Natural Flavor Blend Demand by Market
12 Natural Flavor Blend Demand by Type
13 Natural Fragrance Blend Demand by Market
14 Natural Aroma Chemical Demand

Industry Structure

1 US Natural Flavor & Fragrance Sales by Company, 2015
Cht US Natural Flavor & Fragrance Market Share, 2015
2 Selected Acquisitions & Divestitures
3 Selected Cooperative Agreements

MARKETS

Skin Care Products

Demand for fragrances used in skin care applications is projected to continue to grow and is expected to reach 1.1 billion units by 2020. As the large baby boomer generation advances will benefit from products designed specifically for skin care, such as anti-aging and brightening active ingredients, such as retinoids and alpha hydroxy acids. The use of natural fragrances in skin care products will continue to grow as consumers seek products of natural origin and other skin care products that provide a pleasant scent rather than functional benefits. Demand for skin care products will be limited by competition from fragrance free products.

The skin care market includes anti-aging formulations; body, face, and hand creams and lotions; cleansers and scrubs; face masks; facial care products; microdermabrasion products; shaving preparations; hair care products; toners; and other products that provide care for the skin. Improved formulations and increasing concerns about sun damage and skin aging, as well as the graying of the baby boomer generation and entry of the millennial generation into their thirties (when the signs of skin aging typically begin to appear) are forecast to positively impact demand for skin care products, thus providing growth opportunities for the fragrances utilized in them.

Lotions represent the largest skin care product category. Basic lotion formulations include emollients, emulsifiers, solvents, thickeners, conditioning agents, and a variety of other smaller-volume chemicals, including fragrances. In recent years, lotion manufacturers have attempted to boost sales by touting the benefits of value-added products incorporating active ingredients, which often require fragrances to mask objectionable odors. In addition, lotion producers are using scents to sell products,

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TABLE V-11

NATURAL FLAVOR BLEND DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Total Natural Flavor & Fragrance Demand					
% flavor blends					
Natural Flavor Blend Demand					
Dairy Products					
Processed Food					
Candy & Confections					
Bakery Products					
Other Food					
Other Markets					

Source: The Freedonia Group

TABLE IV-4

PROCESSED FOOD: NATURAL FLAVOR DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Food Natural Flavor Demand					
% processed					
Processed Food Natural Flavor Demand					
Flavor Blends					
Essential Oils & Natural Extracts					
Aroma Chemicals					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Industrial & Institutional (I&I) Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals is forecast to rise 2.3% annually to \$11.7 billion in 2020. Growth in commercial revenues and establishments will fuel gains in cleaning chemical demand for the commercial sector. Cleaners used in institutional settings will constitute the fastest growing category. This study assesses the \$10.4 billion US market for I&I cleaning chemicals, providing projections for 2020 and 2025 by market, product and raw material. In addition, the study analyzes company market share and profiles participants in the US industry.

#3424.....June 2016..... \$5300

Natural Polymers

US demand for natural polymers is forecast to rise at a 4.3 percent yearly rate through 2020. Growth will be stimulated by demand in the large food and beverage industry, while most product types will also benefit from strong demand in the medical market. However, a decline in oil and gas production will restrain overall natural polymer gains. The study provides historical data plus projections for 2020 and 2025 for demand by market and product. This study also assesses key market environment factors, evaluates company market share, and profiles US industry competitors.

#3415..... May 2016 \$5300

World Flavors & Fragrances

Global demand for flavors and fragrances is forecast to grow 3.9 percent annually, reaching \$26.3 billion in 2020. Flavor blends will remain the largest segment, while essential oils and natural extracts will grow the fastest. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$21.7 billion market for world flavors and fragrances, with forecasts for 2020 and 2025 by product and market for six world regions and 20 major countries. The study also evaluates company market share and profiles industry participants.

#3397..... March 2016..... \$6300

Dental Products & Materials

US demand for dental products and materials will rise 3.4 percent yearly to \$12.7 billion in 2019. Cosmetic and repair/restorative products will be the fastest growing professional products. Among consumer products, value-added formulations will fuel the dominant toothpaste segment. Polymers, ceramics and minerals will lead gains in dental materials. This study details the \$10.7 billion US dental product and material industry, with forecasts for 2019 and 2024 by product and raw material. The study also evaluates company market share and profiles industry players.

#3359..... January 2016 \$5200

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

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