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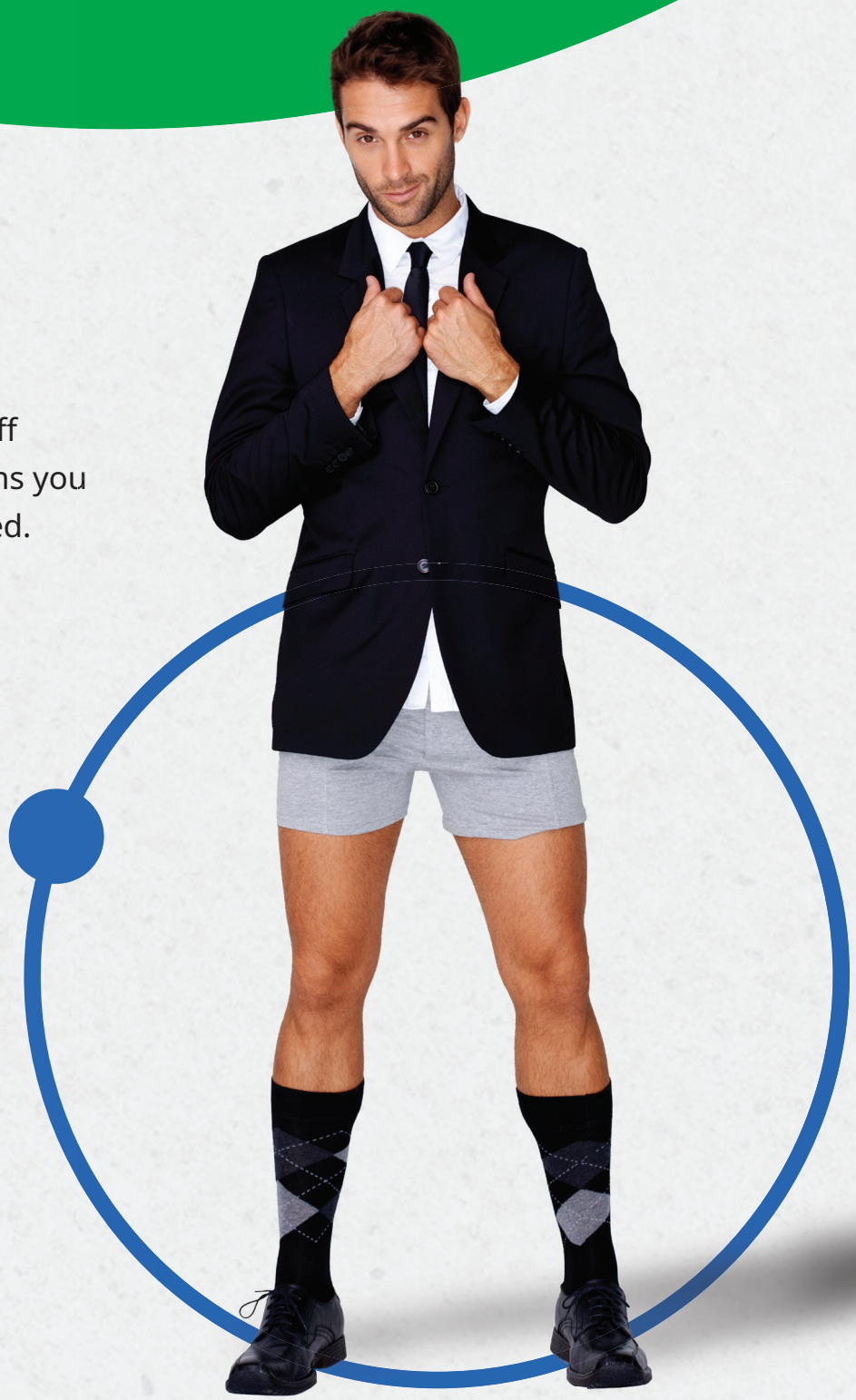
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Fragrance at an Inflection Point

Recent signals point to an industry entering an era of augmented creativity and new horizons.



Across leaders and disruptors, the same pattern emerges: the industry is shifting from intuition-led creation to predictive, purpose-driven design.

Welcome to the 2026 *Fragrance Leaders & Newsmakers* issue, our annual snapshot of the companies setting the pace for an industry in motion. This year's report makes one thing unmistakably clear: fragrance is no longer defined by scent alone. It is being rebuilt—structurally, technologically and culturally—into a system that blends creativity with computation, emotion with evidence and global scale with hyper-local nuance.

Editor's note: This report was compiled prior to the escalation of the conflict in Iran; as such, the potential market, supply chain and geopolitical impacts of that situation are not reflected in the insights below.

Across leaders and disruptors, the same pattern emerges: the industry is shifting from intuition-led creation to predictive, purpose-driven design. Artificial intelligence is not replacing perfumers, but it is recalibrating how they work. Development cycles are compressing. Discovery is becoming computational. And formulation is increasingly guided by data models that anticipate performance, safety and even emotional impact before a formula is ever produced.

At the same time, leadership transitions are reshaping strategic direction. New CEOs and generational handovers are reinforcing heritage, whether in naturals or customer intimacy, which are being reframed through the lens of technology and resilience. The message is consistent: future growth will depend on how effectively companies integrate innovation into their core identity.

One of the most striking shifts across this year's report is the elevation of fragrance into a measurable wellness tool. Neuroscience platforms, from mood mapping to biometric testing, are transforming how scent is positioned and



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validated. Fragrance is being asked to do more: to calm, energize, connect and even heal. This is not just marketing evolution; it is a redefinition of value. Consumers, particularly younger ones, are buying a feeling, a function, a state of mind.

Sustainability, meanwhile, has moved beyond aspiration to infrastructure. Biotechnology, vertical integration and regenerative sourcing are now foundational. Companies are investing heavily in fermentation, biotransformation and end-to-end traceability to meet regulatory demands and secure creative freedom in a world of constrained natural resources. The result is a new kind of ingredient ecosystem, where nature and science operate in tandem rather than opposition.

Geographically, the map is being redrawn. Growth is accelerating in the Middle East, Africa, Asia and Latin America, forcing a shift toward multi-local operating models. Relevance—cultural, olfactive and emotional—is now built region by region, often city by city. The rise of Dubai as both a commercial and creative hub is emblematic of this broader decentralization.

Finally, consumer behavior continues to fragment and expand. Premiumization is rising even in historically price-sensitive markets, while Gen Z and Gen Alpha are reshaping fragrance as a medium of self-expression—layered, playful and deeply influenced by digital culture. Gourmand profiles, gaming platforms and social storytelling are now central to how fragrance is discovered and experienced.

Taken together, these forces point to an industry entering an era of augmented creativity and new horizons.

We hope you enjoy reading this month's issue—and if you have any thoughts on companies who should be included in future editions—send us a note.

And keep an eye out for next month's 2026 *Flavor Leaders & Newsmakers* issue.



Ingredients

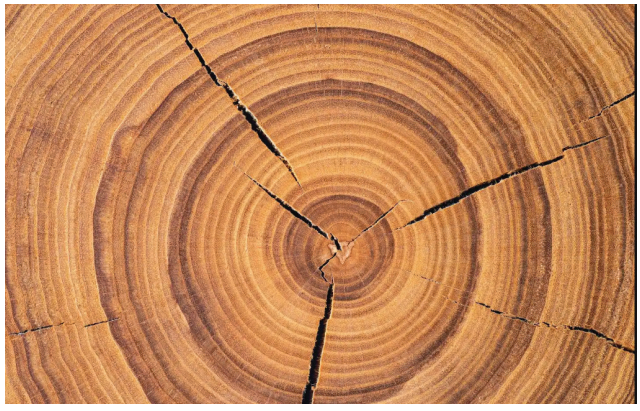


Raspberry, Reimagined and Refined

Agrumaria Reggina

https://www.linkedin.com/company/agrumaria/

Raspberry Essenza extract is obtained from enzymatic treatment of by-products used in food production. After a strong infusion and clarification, the result is a solution that offers impactful notes of a fresh and gourmand fruit. Raspberry Essenza brings a juicy, playful facet to fruity accords. It enriches floral or gourmand compositions with a tangy twist and delicate sweetness. When combined with musky or powdery notes, it reveals a velvety, luminous character, infusing the fragrance with modern charm and a refined, expressive signature.



Amyris BYP Turns Plant By-Products into a Warm, Balsamic Woody Signature

Ernesto Ventós

https://www.ventos.com/index.php/en/producto/17560/AMYRIS+BYP/223

Amyris BYP is a new specialty born from natural plant by-products, transformed into a unique aromatic signature that captures the essence of amyris essential oil, balsamic, woody, and wrapped in warm, sweet nuances. This is a step forward in our journey towards sustainable innovation, where creativity meets responsibility.

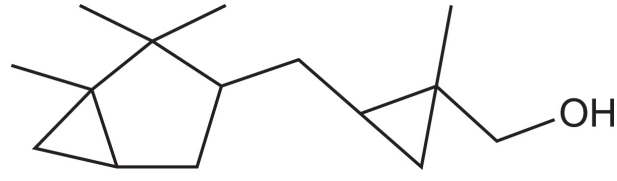


Elevating Perfumery with Sustainably Sourced Texas Cedarwood Oil

Mane

https://www.mane.com

Sustainably sourced in Texas, MANE Cedarwood Rectified Essential Oil (Juniperus mexicana; natural; CAS# 68990-83-0) offers a dry, woody profile enhanced by aromatic freshness. This natural, upcycled ingredient brings authenticity and warmth to creations. Its remarkable olfactory versatility—spanning from spicy, floral and citrus facets, makes it a key ingredient in modern perfumery.



Hangzhou Grascent Launches Islandol, a Powerful Sandalwood Aroma Ingredient

Hangzhou Grascent Co., Ltd.

www.hangzhougrascent.com

Hangzhou Grascent Co., Ltd. has introduced Islandol (1-methyl-2-(1,2,2-trimethylbicyclo[3.1.0]hex-3-ylmethyl)cyclopropyl)methanol), a sandalwood aroma ingredient with a woody, creamy, rosy profile. It is recommended at trace levels up to 2% for fine fragrance, personal care, fabric care and home care applications.

Images courtesy of the manufacturers



Cinnamyl Isobutyrate: Tropical Fruit, Soft Spice & Warm Almond Lift

Avant Organics

www.avantorganics.com

Cinnamyl isobutyrate (FEMA# 2297) is a beautifully nuanced material that opens with a soft, floral-fruity lift, quickly revealing notes of ripe pineapple and tropical fruit layered over a gentle almond-like sweetness. A warm, rounded cinnamon spice runs underneath, adding depth without harshness, while a light balsamic facet ties everything together. The result is a smooth, elegant profile that moves seamlessly between fruity, floral and spicy making it especially effective for adding juicy brightness and complexity to fruit systems, or a refined warmth to sweet applications. Avant Organics provides this material as EU natural, kosher and non-GMO. For a free sample please email info@avantorganics.com.



Warm, Creamy, Unmistakably Vanilla

Axxence USA

www.axxence.com

Natural vanillin ex vanilla beans (FEMA 3107, CAS 121-33-5) delivers the unmistakable sweet, creamy character of cured vanilla beans. Warm vanilla notes with soft balsamic undertones enhance confectionery, dairy and baked flavors while adding smooth, creamy sweetness. EU and U.S. natural, kosher, vegetarian and non-GMO. Usage level: 0.05 ppm-200 ppm.



Tonka Bean CO_2 Absolute LMR

IFF

https://www.iff.com/scent/lmr-compendium/tonka-bean-co%e2%82%82-abs/

IFF's LMR Naturals has launched Tonka Bean CO_2 Absolute, a sustainably extracted ingredient for its Conscious Collection. Produced in France using supercritical CO_2, it cuts carbon footprint by 34% versus traditional methods. The gourmand profile blends roasted almond, hay and cocoa notes, delivering high performance, traceability and improved cost efficiency.



Geosmin Unleashed: Trace-Level Power, Deep Earth Impact

Penta Fine Ingredients

https://www.pentafineingredients.com/

Natural geosmin (FEMA 4682; CAS 23333-91-7) from Penta Fine Ingredients delivers an unmistakable petrichor profile, evoking wet earth, freshly turned soil and humus. Detectable at parts-per-trillion, it offers exceptional impact even at trace levels. In flavor applications, it brings authentic earthy-terroir character to root-vegetable and mushroom flavors and acts as an umami modifier in savory systems. In perfumery, it is essential for rain accords and enhances chypre, fougère, and vetiver compositions, adding depth, realism, and a naturalistic forest-floor and living-earth effect.



In the natural passionfruit, hexyl hexanoate is present at more than twice the level of hexyl butyrate and is the key recognition chemical amongst the main hexyl esters. It plays an interesting, but less dramatic, role in many other flavors, combining odor strength and a significant taste effect.



BY JOHN WRIGHT
johnwrightflavorist@gmail.com

Hexyl Hexanoate—The Ester That Anchors Tropical Authenticity

From savory depth and contrast to realism and balance in fruits, hexyl hexanoate is a unique and versatile ingredient.

Hexyl hexanoate (FEMA# 2572, CAS# 6378-65-0, COE# 316, DG Sainte# 09.066), also known as hexyl caproate, has an immediately recognizable passionfruit profile. In the natural passionfruit, hexyl hexanoate is present at more than twice the level of hexyl butyrate and is the key recognition chemical amongst the main hexyl esters. It plays an interesting, but less dramatic, role in many other flavors, combining odor strength and a significant taste effect.

Where hexyl hexanoate is used at relatively high levels, as in pineapple flavors, it is often helpful to use it in combination with other hexyl esters, such as hexyl butyrate, hexyl isobutyrate and hexyl acetate. Where it is used at subtle levels it is generally better if it is used alone.

Note that the dose rates given throughout this article are the levels suggested for use in flavors intended to be dosed at 0.05% in ready-to-drink beverages or in a simple bouillon.

Image by ApiFoto at Adobe Stock

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Dialing In the Dose Across Tropical Profiles

- **Banana:** Hexyl hexanoate adds useful complexity and background taste effects to all types of apple flavors. One hundred ppm is a reasonable starting point.
- **Guava:** This ingredient plays a more important role in guava flavors, adding significantly to the odor profile at 500 ppm.
- **Kiwi:** The impact in kiwi flavors is subtle but, at around 100 ppm, hexyl hexanoate adds depth of taste.
- **Mango:** A range of levels provide interesting effects in mango flavors. My preference is at the higher end of the range, around 1,000 ppm.
- **Papaya:** One hundred is an attractive, subtle level for hexyl hexanoate in papaya flavors.
- **Passionfruit:** In contrast, 5,000 ppm is just a starting point for this ingredient in passionfruit flavors.
- **Pineapple:** Pineapple flavors also benefit from relatively high levels of hexyl hexanoate, balancing the lighter esters. One thousand ppm is ideal.



A range of hexyl hexanoate levels provide interesting effects in mango flavors. My preference is at the higher end of the range, around 1,000 ppm.

Fine-Tuning Berry Profiles

- **Blackberry:** Hexyl hexanoate plays an important part within the ester profile of blackberry flavors at a range of levels, from 300-900 ppm, depending on the use of other hexyl esters.
- **Blackcurrant:** Esters do not exactly dominate blackcurrant flavors. One hundred ppm is an attractive level of addition for hexyl hexanoate.
- **Blueberry:** Fifty ppm is all that is required in blueberry flavors to add complexity and interest. This is particularly helpful in blueberry flavors, given the strong linalool related components.
- **Cranberry, fresh:** This raw material is most useful in fresh cranberry flavors. Levels are, as always, determined by creativity, but 200 ppm is very effective.
- **Raspberry:** Three hundred ppm of hexyl hexanoate is optional in raspberry flavors, enhancing the taste effects.
- **Strawberry:** Strawberry flavors are, understandably, dominated by ethyl esters, most of them fairly light. Hexyl hexanoate adds depth and taste at 200 ppm.

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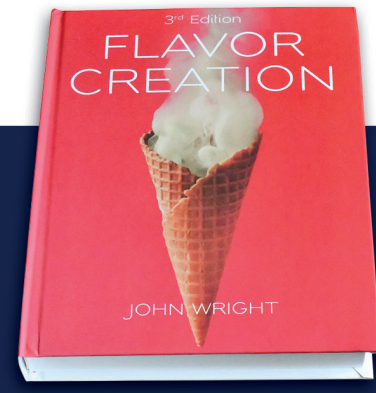


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From Orchard to Melon: Precision Dosing for Realism and Balance

- **Apple:** Hexyl hexanoate is an attractive counterbalance to ethyl 2-methyl butyrate in all types of apple flavors at around 1,000 ppm.
- **Apricot, fresh:** This ingredient can be used in both fresh and dried apricot flavors, but fresh flavors are the most obvious fit. One hundred ppm is ideal.
- **Cherry:** Fifty ppm is all that is required in cherry flavors to add significantly to authenticity and complexity. Overly benzaldehyde based flavors do not really benefit significantly from this raw material.
- **Grape, Concord:** Higher levels, around 200 ppm, balance the aggressive anthranilates in Concord grape flavors.
- **Melon, cantaloupe:** Hexyl hexanoate is at home in all melon flavors, but none more than cantaloupe melon flavors. Levels of addition start at 1,000 ppm.
- **Peach:** Apricot and peach flavors are obviously similar, but hexyl hexanoate fits a little better into the peach profile. Four hundred ppm is a perfect level.
- **Pear:** One hundred ppm of hexyl hexanoate adds depth to pear flavors and works particularly well helping to balance hexyl acetate with the decadienoate esters.
- **Plum:** Plum flavors are hardly lacking in heavy notes, but hexyl hexanoate adds realism at around 500 ppm.
- **Pomegranate:** This raw material fits particularly well into the profile of pomegranate flavors. Levels of addition vary considerably and 1,500 ppm is only a starting point.



Most watermelon flavors are derived more from fantasy than authenticity, but hexyl hexanoate can help boost the authentic element at around 200 ppm.



Fifty ppm of hexyl hexanoate is all that is required in blueberry flavors to add complexity and interest.

- **Watermelon:** Most watermelon flavors are derived more from fantasy than authenticity, but this ingredient can help boost the authentic element at around 200 ppm.

The 20–50 ppm Trick for Savory Depth and Contrast

- **Bacon:** Hexyl hexanoate is a much less obvious ingredient outside the fruit flavor category, but it can play a useful part. Bacon flavors are a good example. Fifty ppm adds attractive complexity.
- **Brandy:** Brandy flavors derive much of their character from higher ethyl esters. Hexyl hexanoate balances this effect with a softer, smoother profile at around fifty ppm.
- **Cheese, cheddar:** This raw material also enhances most dairy flavors. Twenty ppm works well in cheddar cheese flavors, providing an alternative to the key delta lactones.
- **Chicken:** Hexyl hexanoate is not really an obvious addition to chicken flavors, but it does add an attractive note at around 20 ppm.
- **Cream:** A rather higher level, around 50 ppm, has a very similar effect in cream flavors.
- **Ham:** Ham flavors benefit from the same, 50 ppm, level of addition as bacon flavors. It works as a very attractive contrast to the dominant savory notes.
- **Milk:** Subtle levels, in the region of 20 ppm, are effective in fresh and processed milk flavors.

From top: Images by 5second; Anastassiya at Adobe Stock

- **Rum, dark:** The ester components of rum flavors are mainly clustered in the very volatile end of the category, and are nicely balanced by a modest, 50 ppm, addition of hexyl hexanoate. This ingredient can also work in white rum flavors, but the effect is not so obvious.
- **Tea, black:** Fifty ppm also works well in black tea flavors. This raw material can also be used in green tea flavors, but in that category it is distinctly optional and falls into the realm of creative license.
- **Tomato, fresh:** The same, 50 ppm, also balances the profile and adds taste effects to tomato flavors. It can be used in all types of different profiles, but is most effective in fresh tomato flavors.
- **Whisky:** Finally, 50 ppm also adds the finishing touch to whisky flavors. This level is effective in all the many styles of whisky (or whiskey) flavors.

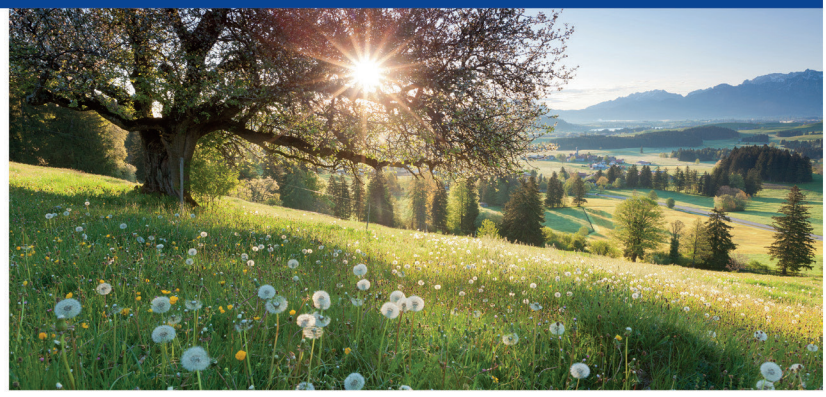


Hexyl hexanoate enhances most dairy flavors. Twenty ppm works well in cheddar cheese flavors, providing an alternative to the key delta lactones.

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FRAGRANCE LEADERS & NEWSMAKERS 2026:

The Great Reset—Leadership Shifts and the 4 Forces Driving the Industry's Future

Insights from major fragrance houses and upstarts reveal a future defined by the complex, yet integrated, dynamics of human creativity, scientific precision and hyper-local market relevance.



The fragrance industry is navigating a defining period of transformation, marked by significant shifts in corporate leadership, a profound integration of advanced technology and an industry-wide commitment to a new definition of consumer value centered on emotion, wellness and sustainability.

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Welcome to the 2026 Fragrance Leaders & Newsmakers issue, a profile of the largest or most innovative companies shaping the market. What did we learn from this year's profiles? The fragrance industry is navigating a defining period of transformation, marked by significant shifts in corporate leadership, a profound integration of advanced technology—most notably artificial intelligence (AI)—and an industry-wide commitment to a new definition of consumer value centered on emotion, wellness and sustainability.

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AI is enabling a fundamental shift from reliance on trial-and-error to a more predictive, science-based approach to creation.

Editor's note: This report was compiled prior to the escalation of the conflict in Iran; as such, the potential market, supply chain and geopolitical impacts of that situation are not reflected in the insights below.

Insights from major fragrance houses, including **Givaudan**, **Iberchem**, **IFF**, **Robe**rtet, **Symrise**, **Takasago**, **Mane**, **dsm-firmenich** and **CPL Aromas**, as well as upstart **Osmo**, reveal a future defined by the complex, yet integrated dynamics of human creativity, scientific precision and hyper-local market relevance. The trajectory suggests an industry moving away from traditional trial-and-error methods toward predictive, purpose-driven and resilient operating models.

- *Rewind: 2025 Fragrance Leaders & Newsmakers.*

Leadership Shifts and Strategic Direction

The reports highlight a period of significant leadership transition, serving as a catalyst for new strategic cycles built on reinforcing heritage while embracing technological and cultural change. These shifts emphasize continuity, accountability and the application of fresh, outside perspectives.

At Givaudan, the transition from Gilles Andrier, who led the company to exceed all financial ambitions during the 2021–2025 cycle, to the new CEO, Christian Stammkoetter, marks a pivotal moment. Stammkoetter, new to Givaudan and the fragrance industry, plans to leverage nearly 30 years in the consumer goods sector to bring an outside perspective to identify new opportunities and risks. His strategy is encapsulated by



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three concepts—"Optimize. Future-proof. Together."—focusing on applying deep customer understanding to optimize the business today and integrating innovation and technology to secure its future. This leadership transition signals an increased strategic focus on innovation and technology as essential tools for growth in an environment characterized by geopolitical and economic uncertainty.

Similarly, Robertet experienced an important transition with a fifth-generation family member, Julien Maubert, taking over operational responsibilities for the fragrance division from Christophe Maubert. This change is deeply rooted in the company's family DNA, emphasizing not just continuity, but also accountability to teams, partners, clients and the natural resources central to their craft. The new leadership intends to fully leverage Robertet's expertise in natural ingredients, elevating fragrance by combining nature, creativity and innovation. These examples show that while corporate shifts are occurring, they are strongly linked to strengthening foundational expertise—in Givaudan's case, customer-centric technology; in Robertet's, natural ingredients—to drive the next phase of growth.

AI as an Accelerator of Discovery and Efficiency

Across the industry, artificial intelligence (AI) is consistently described not as a replacement for the perfumer, but as a power tool and creative catalyst that dramatically enhances speed, efficiency and discovery. AI is enabling a fundamental shift from reliance on trial-and-error to a more predictive, science-based approach to creation.



A central theme in 2026 is the evolution of fragrance beyond mere scent to a medium for emotional well-being, identity and functional benefits.

Image by Thurstan H/peopleimages.com at Adobe Stock

The most immediate impact of AI is in accelerating the development cycle and optimizing processes. Symrise utilizes a global Data & AI Hub in Barcelona, where AI-enabled predictive tools streamline formulation, inform regulatory design and speed up development. A practical example is their AI-supported flash-point prediction model, which reduces a traditionally lengthy laboratory step to mere seconds. IFF views AI as helping the company move faster, embedding it deeply across teams to accelerate learning, iteration and delivery. The strength of IFF's AI lies in its proprietary data foundation, the company argues, built on decades of real-world olfactive, formula and consumer learning captured at scale.

The startup Osmo exemplifies this predictive shift through its core technology, Olfactory Intelligence, which screens billions of potential molecules computationally. This reportedly allows the company to predict a molecule's scent characteristics, safety and performance before any physical synthesis, drastically increasing the efficiency of ingredient discovery and opening the door to entirely new fragrance molecules. Osmo's 2026 plan to open a 60,000-square-foot manufacturing headquarters in New Jersey, integrating robotics, fragrance development and AI-powered manufacturing, demonstrates the commitment to scaling this predictive, data-driven approach from concept to production quickly. Similarly, Mane has launched a global AI transformation program, including the implementation of ManeGPT, an internal generative AI assistant, to accelerate adoption across the business, using generative AI to help perfumers rapidly brainstorm new concepts and directions.

AI is proving critical for navigating the increasing regulatory complexity and consumer demand for safer, more sustainable products. Mane's GenAI regulatory assistant helps teams anticipate regulatory constraints, ensuring product safety. Osmo highlights the use of AI to transform safety testing by training models on validated human-relevant lab data—rather than animal testing—to evaluate the safety of thousands of chemicals. dsm-firmenich uses digital eco-design tools, such as EcoScent Compass, to integrate sustainability insights directly into the perfumer's creative process, guiding informed decisions from ingredient selection to final formulation. For Symrise, AI-enabled real-time compliance and prediction capabilities are essential for streamlining reformulation required for localized launches or retailer-specific briefs.

AI is also being leveraged to decode language, emotion and preference, making fragrances more relevant and culturally resonant. IFF uses AI to



Essence of Excellence

Natural Phenethyl Alcohol FEMA 2858
~ floral, rose, sweet, honey

Natural Benzyl Acetate FEMA 2135
~ sweet, floral, fruity, jasmine

Natural Anethol FEMA 2086
~ sweet, anise, licorice, mimosa

Natural p-Mentha-8-thiol-3-one FEMA 3177
~ sulfurous, minty, berry, buchu, peach

Natural 3-Phenylpropionaldehyde FEMA 2887
~ fresh, green, floral, melon

Natural 3-Mercaptohexyl Acetate FEMA 3851
~ floral, fruity, pear, tropical, passion fruit

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Biotechnology is a critical response to structural challenges like regulatory evolution, supply security and the need for new, safe ingredients. Instead of replacing nature, biotech is used to work intelligently alongside it.

accelerate decision-making earlier in the process by decoding consumer language, emotions and preferences across markets. CPL Aromas anticipates AI's most meaningful impact in formulation support and market/consumer forecasting, helping to accurately predict trends and regional nuances. Ultimately, as AI democratizes fragrance creation by automating mundane tasks and enabling access for emerging brands (Osmo), the core value it provides is strengthening the co-creation process, moving from insight to a successful solution faster.

The Primacy of Emotional Connection and Neuroscience

A central theme is the evolution of fragrance beyond mere scent to a medium for emotional well-being, identity and functional benefits. This is driven by deep investment in neuroscience and sensory science technologies.

Fragrances are increasingly seen as wellness companions, with consumers seeking emotional and functional benefits like relaxation, enhanced focus or stress reduction. The industry has responded by pioneering neuroscience-driven platforms to scientifically validate these emotional claims:

- Mane's Wellmotion platform uses salivary biomarkers paired with AI-assisted consumer insights to measure emotional responses and design scents that demonstrably support well-being.
- Givaudan introduced ChériScentz in 2025, a tool that uses neuroscience and consumer studies to assess fragrance sensuality and evoke feelings of attraction and intimacy. This complements the company's existing suite of neuroscience innovations, including MoodScentz+, VivaScentz and DreamScentz.
- dsm-firmenich launched emotiOn Social Connection, building on more than 30 years of neuroscientific research to scientifically link specific scents to emotional responses, addressing the growing trend of emotional well-being.
- Iberchem's neuroscience department is actively exploring how to shape emotions through scent with its Wavemotion program, recognizing the swift and powerful connection between smell and feeling.
- Symrise introduced Optacool Fuji, an advanced cooling substance validated through neuroscience, which illustrates how precisely designed sensory effects can enhance emotional perception in fragrance-adjacent applications like personal care and wellness products.

This focus on emotion is intrinsically linked to consumer behavior, particularly among younger generations. Youth, including Gen Z and Gen Alpha, view fragrance as a key form of self-expression and identity,

Image by Parilov at Adobe Stock

leading to trends like scent wardrobing and layering. Givaudan's creation of *Guardians of Memories* on Roblox, a leading gaming platform, is a strategic move to engage Gen Z and Alpha in their preferred digital environment, helping to demystify fragrance composition and foster a community of future enthusiasts. This integration of fragrance into multisensory storytelling and wellness underscores the expectation that future scents must deliver functional, measurable emotional value alongside olfactive beauty.

Sustainability, Biotechnology and Supply Chain Resilience

Sustainability has evolved from an incremental goal to a core element embedded across the value chain, driven by regulation, climate pressure and conscious consumer purchasing. This is leading to massive investment in biotechnology and end-to-end supply chain integration.

Biotechnology is a critical response to structural challenges like regulatory evolution, supply security and the need for new, safe ingredients. Instead of replacing nature, biotech is used to work intelligently alongside it.

- IFF uses biotransformation, fermentation and enzyme catalysis to design ingredients with exceptional precision, consistency and scalability, reducing reliance on scarce natural resources without sacrificing olfactive quality. Examples include the biodegradable encapsulation technology, Envirocap, for long-lasting scent with reduced environmental impact and the ingredient BioTropicalia. IFF's Scent R&D views biotech as a science-based way to protect creative diversity while strengthening supply security against climate-vulnerable raw materials.
- Mane sees biotechnology as opening new creative horizons, exemplified by Antillone, a natural biotech ingredient found in pineapple that delivers a powerful fruity-green note, ensuring consistency and long-term availability. Mane reinforced this strategy through the acquisition of Avoca in 2025 to increase its expertise and production capacity in biotechnology.
- dsm-firmenich complements its ingredients with biotechnology solutions such as Clearwood Prisma and focuses on developing high-performance molecules like Amberever, Amberever Neo and Heliobliss, which offer strong scent qualities paired with high biodegradability.
- Robertet utilizes biotechnology as a complementary solution to its naturals focus, helping to protect biodiversity and secure access to rare raw materials.

Vertical integration and transparent sourcing are also essential for brand credibility. Robertet operates a fully vertically integrated "seed to scent" model, ensuring traceability and sustainability, supported by more than 65 certified sustainable sourcing programs worldwide. IFF defines the future through its end-to-end sourcing operating model, which integrates sourcing, science, perfumery, sustainability and regulatory teams to embed sustainability by design into all innovations.

Mane is intensifying efforts to secure risk-free supply chains, implementing systematic risk mapping for all natural ingredient supply chains and investing in regenerative and agroecological farming models to address climate change impacts. dsm-firmenich achieved a





Fragrance houses are aggressively expanding capabilities in high-growth regions, particularly the Middle East and Africa (MENA/SAMEA).

major milestone in 2025 by having a product carbon footprint available for 100% of its Perfumery & Beauty ingredients, establishing a foundation for its decarbonization journey. Even with revised European legislation like the Corporate Sustainability Due Diligence Directive (CS3D), companies recognize that sustainable sourcing and decarbonization remain non-negotiable long-term issues.

Market Dynamism, Localization and Consumer Trends

The future of the fragrance industry is characterized by accelerated growth in emerging markets, a focus on regional relevance and consumer shifts toward premiumization and expression.

Fragrance houses are aggressively expanding capabilities in high-growth regions, particularly the Middle East and Africa (MENA/SAMEA), Asia (China, India, Southeast Asia) and Latin America. Givaudan notes that local and regional brands in SAMEA are growing 30-35% a year, fueling fine fragrance growth and providing protection against fluctuations in prestige brand sales. Iberchem's growth is especially strong in the Middle East and Africa, driven by engagement with local and regional customers who are growing twice as fast as multinational competitors.

The Middle East's growing importance as a creative and commercial hub is demonstrated by multiple strategic investments:

- Mane celebrated 20 years in the Middle East by opening a new perfumery creative center in Dubai and a branch in Riyadh, Saudi Arabia.
- Takasago is making the MENA region a key focus for 2026, with a new creative center opening in Dubai.
- IFF's Perfumery Art Studio in Dubai provides an open space for co-creation with customers, translating cultural insights into relevant fragrances.
- CPL Aromas opened a new office in Saudi Arabia.

This multi-local operating model is a key asset in navigating a volatile global landscape, enabling companies to quickly adapt formulations and creative

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Consumers across historically mass-oriented markets, including China, India and Brazil, are increasingly seeking greater quality, authenticity and emotional value, driving a trend of premiumization.

approaches to local realities and cultural nuances. dsm-firmenich emphasizes that combining global innovation platforms with deep regional expertise allows for speed, relevance and authenticity in markets where cultural nuance is critical for success.

Premium Meets Play: How Upscaling and Youth Culture Are Rewriting Fragrance Demand

Two key market shifts are defining consumer purchasing: premiumization and the influence of youth-driven trends.

1. **Premiumization and differentiation:** Consumers across historically mass-oriented markets, including China, India and Brazil, are increasingly seeking greater quality, authenticity and emotional value, driving a trend of premiumization. Consumers are trading up to premium formats and layering scents, which supports value growth. This demand for differentiation is supported by new technologies like CPL Aromas' AromaHydro, an alcohol-free, water-based fragrance platform designed for gentler, skin-friendly formats and proprietary captive ingredients that offer distinctive creative tools.
2. **Youth and olfactive profiles:** Younger consumers (Gen Z and Alpha) are driving acceleration toward layering, playful scent profiles and social-media-driven discovery. The growth of the gourmand frenzy, translating indulgent food flavors (like latte, strawberry matcha, and marshmallow) into creamy, dessert-like scent profiles, is one clear example of a trend amplified by social media (Iberchem). Furthermore, perfumery drawing on Middle Eastern culture, is increasingly becoming a global trend, spreading rapidly to regions like Latin America, Europe, and China due to social media.

Image by Nirja at Adobe Stock

Augmented Creativity: Where AI, Emotion and Art Redefine Fragrance's Future

The fragrance industry is heading toward an era of augmented creativity, where the human intuition of the perfumer is powered by the precision and speed of predictive science. The consensus among top fragrance houses is that AI, neuroscience, and biotechnology are not threats to the artistry of scent, but essential tools for unlocking its future potential. The path forward is characterized by a three-pronged integrated strategy:

1. **Seamless integration of art and science:** Integrating science, creativity, and responsibility into a single operating model is the "real challenge" and the key to industry leadership.
2. **Functional and emotional value:** Fragrance will deliver scientifically validated, multi-sensory experiences that blur the lines between beauty, health, and personal well-being (Symrise's Care & Wellness fusion).
3. **Resilient localization:** Global scale will be maintained through a multi-local approach, focusing investment on high-growth hubs (like Dubai) to translate deeply regional consumer insights into culturally relevant, fast-to-market solutions.

This complex future demands agility and resilient supply chains to manage volatility, ensuring that creativity can thrive within the tightening constraints of sustainability and regulation. By embracing this intersection of human talent, advanced technology, and a responsibility to nature, the industry is positioned for sustained growth driven by greater personalization and emotional resonance.



Fragrance will deliver scientifically validated, multi-sensory experiences that blur the lines between beauty, health, and personal well-being



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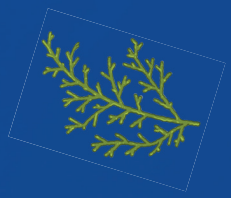
BERGAMOT OIL BLEND VENTÓS (ITALY - BRAZIL - CÔTE D'IVOIRE)

60% Italian Bergamot
20% Brazilian Bergamot
20% Ivorian Bergamot



CARDAMOM OIL BLEND VENTÓS (GUATEMALA - INDIA)

80% Guatemalan Cardamom
20% Indian Cardamom



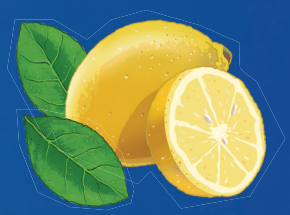
CYPRESS OIL BLEND VENTÓS (SPAIN - MOROCCO)

80% Spanish Cypress (60% Murcia, 20% Catalonia)
20% Moroccan Cypress



SPIKE LAVENDER OIL BLEND VENTÓS (SPAIN, DIFFERENT REGIONS)

100% Spanish Spike Lavender
Different regions
- Andalucía
- Murcia
- Castilla la Mancha



LEMON OIL BLEND VENTÓS (SPAIN - ARGENTINA - BRAZIL SOUTH AFRICA)

20% Spanish Lemon
40% Argentinian Lemon
20% Brazilian Lemon
20% South African Lemon



MANDARIN OIL, GREEN BLEND VENTÓS (BRAZIL - ITALY)

50% Italian Green Mandarin
50% Brazilian Green Mandarin



ORANGE OIL SPAIN BLEND VENTÓS (SPAIN - BRAZIL - EGYPT)

34% Spanish Orange
33% Brazilian Orange
33% Egyptian Orange



ROSEMARY OIL BLEND VENTÓS (SPAIN - TUNISIA - MOROCCO)

25% Spanish Rosemary
35% Tunisian Rosemary
40% Moroccan Rosemary



THYME OIL, RED BLEND VENTÓS (SPAIN, DIFFERENT REGIONS)

100% Spanish Red Thyme
Different regions
- Andalucía
- Murcia

CPL Aromas

Fiscal year 2024-2025 turnover: £187.5 million

Bishops Stortford, United Kingdom

CPL Aromas Charts Its Own Path as Fragrance Enters a New Era of Innovation and Independence

CPL's strategy is built around targeted geographic growth, proprietary capabilities and a differentiated approach to perfumery.

BY NICK PICKTHALL, COO, CPL Aromas

As the global fragrance industry navigates a period of profound transformation, CPL Aromas continues to stand apart as an independent fragrance house shaped by innovation, agility and long-term vision. With an expanding global footprint, a strong commitment to technology-led development and a people-first creative culture, CPL is helping redefine what a modern fragrance house can be.

Looking toward 2026 and beyond, CPL's strategy is built around targeted geographic growth, proprietary capabilities and a differentiated approach to perfumery—one that responds directly to evolving consumer expectations, regulatory realities and the need for more meaningful innovation.

High-Growth Regions and Tech-Driven Innovation Powering Next-Gen Fragrance Growth

CPL Aromas sees its strongest growth opportunities across Latin America, the Middle East, India and China—regions where population growth, rising fragrance adoption and cultural relevance intersect.

Across these markets, consumers are becoming increasingly sophisticated and emotionally invested in the brands they choose. Rather than simply exporting Western fragrance models, CPL focuses on locally relevant solutions, supported by regional expertise, cultural insight and proximity to customers.



"CPL's growth strategy is grounded in investment, innovation and independence," says Nick Pickthall.

Courtesy of CPL Aromas

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Beyond geography, growth is being driven by capability-led innovation. Key pillars include:

- AromaHydro, CPL's alcohol-free, water-based fragrance platform, designed to meet demand for gentler, skin-friendly and multifunctional formats while maintaining strong olfactive performance.
- AromaWellness, a suite of well-being-driven fragrance concepts responding to the growing intersection between scent, emotion and personal care.
- EcoBoost and efficiency-driven technologies, supporting improved performance with reduced environmental impact.
- Exclusive captive ingredients, offering perfumers distinctive creative tools while reinforcing regulatory robustness and long-term supply security.

Fragrance Industry Reset: Regulation, Localization and Wellness Redefine the Rules

Together, these elements reflect CPL's belief that future growth will be defined not by scale alone, but by relevance, agility and genuine differentiation.

The fragrance industry is evolving rapidly across multiple dimensions.

One of the most significant forces shaping the sector is the accelerating pace of regulatory change, impacting ingredient availability, formulation strategies and long-established perfumery practices. This is further compounded by global tariffs, supply-chain volatility and logistical complexity, prompting fragrance houses to rethink sourcing, manufacturing and development models.

At the same time, there is a noticeable simplification of fragrance—not in creativity, but in how scent is communicated and experienced. Consumers increasingly favor products that are transparent, easy to understand and purposeful in their benefits.

Another key shift is the rise of local-led and culturally anchored brands, often challenging historically dominant global players. These brands succeed by being authentic, emotionally resonant and closely aligned with their communities. Today's consumers want a real connection with the brands they buy—and they are quick to disengage from messaging that feels generic or insincere.

Finally, fragrance is expanding beyond scent alone. Demand is growing for functional and wellness-oriented fragrances, where emotional benefits, skin comfort and sensorial balance play a central role. This evolution is reshaping how fragrance is conceived, formulated and positioned.

Accelerating a Global Expansion and Innovation-Led Growth Strategy

CPL's growth strategy is grounded in investment, innovation and independence.

A central focus has been the development of proprietary platforms that challenge conventional fragrance formats and open new creative and commercial opportunities. Technologies such as AromaHydro, AromaWellness and EcoBoost illustrate CPL's ability to translate emerging consumer needs into scalable, high-performing solutions.

Alongside this, CPL continues to expand its captive ingredient portfolio, giving perfumers access to distinctive materials while reinforcing supply resilience and regulatory readiness.

Geographically, CPL has made several strategic investments to support long-term growth:

- The opening of a new office in Saudi Arabia, reinforcing CPL's commitment to the Middle East — one of the industry's most dynamic and fast-growing regions.
- The launch of a Creative Center in Bangkok, strengthening CPL's presence in Southeast Asia and enabling closer collaboration with local customers and creative communities.
- The establishment of a Fine Fragrance Center of Excellence in Shanghai, underscoring CPL's long-term investment in China and its role as a key innovation and development hub.

Underlying all of these initiatives is continued investment in perfumery talent, creative infrastructure and cross-regional collaboration. CPL firmly believes that technology should enable creativity, not replace it, and that the future of fragrance depends on giving perfumers the freedom, tools and confidence to push boundaries.

AI in Fragrance: From Efficiency Engine to Creative Catalyst—Without Replacing the Perfumer

Artificial intelligence is frequently discussed as a disruptive force in fragrance, yet its real impact is still unfolding.

So far, widespread and successful AI implementation across the industry has been gradual, particularly in areas directly linked to creative output. Where AI is already delivering value is in improving efficiency and process optimization — from data management and formulation analysis to internal workflows.

Looking ahead, the most meaningful impact is expected in:

- Formulation support, helping perfumers explore new creative directions and optimize performance.
- Market and consumer forecasting, enabling more accurate prediction of trends, preferences and regional nuances.

CPL views AI as a tool to enhance human creativity, not replace it. Perfumery remains an emotional, intuitive and deeply human craft. Technology's role is to reduce complexity, increase insight and unlock new possibilities—while keeping creative vision firmly in human hands.

Fragrance Sustainability Enters Its Next Phase: From Incremental Gains to Systemic Change

The fragrance industry has already made significant sustainability advances, but the next phase of progress will require deeper structural change.

A key focus is the origin and sourcing of raw materials used to produce aroma chemicals, with increasing emphasis on traceability, responsibility and long-term resilience.

There is also a clear move toward greater local sourcing and reduced global transportation, helping lower environmental impact while improving supply security.

Innovation in extraction and processing methods will be critical—particularly technologies that are less water-intensive and more resource-efficient.

Another important evolution is the industry's gradual shift toward reduced alcohol usage in fragrance products, driven by both sustainability considerations and consumer demand for skin-friendly solutions. Alternative fragrance delivery systems and efficiency-driven technologies play a growing role in this transition.

For CPL, sustainability is not a standalone initiative, but a principle embedded across technology development, ingredient strategy and long-term planning.

"The Alternative" in a Scale-Driven Fragrance Industry

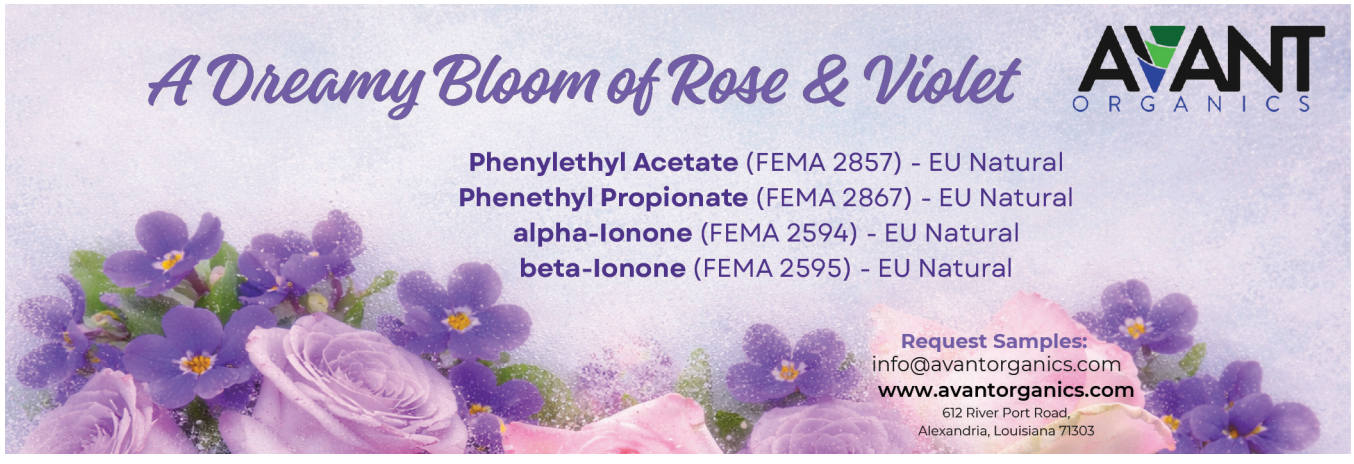
In an industry often shaped by scale and standardization, CPL Aromas has deliberately positioned itself as "the alternative."

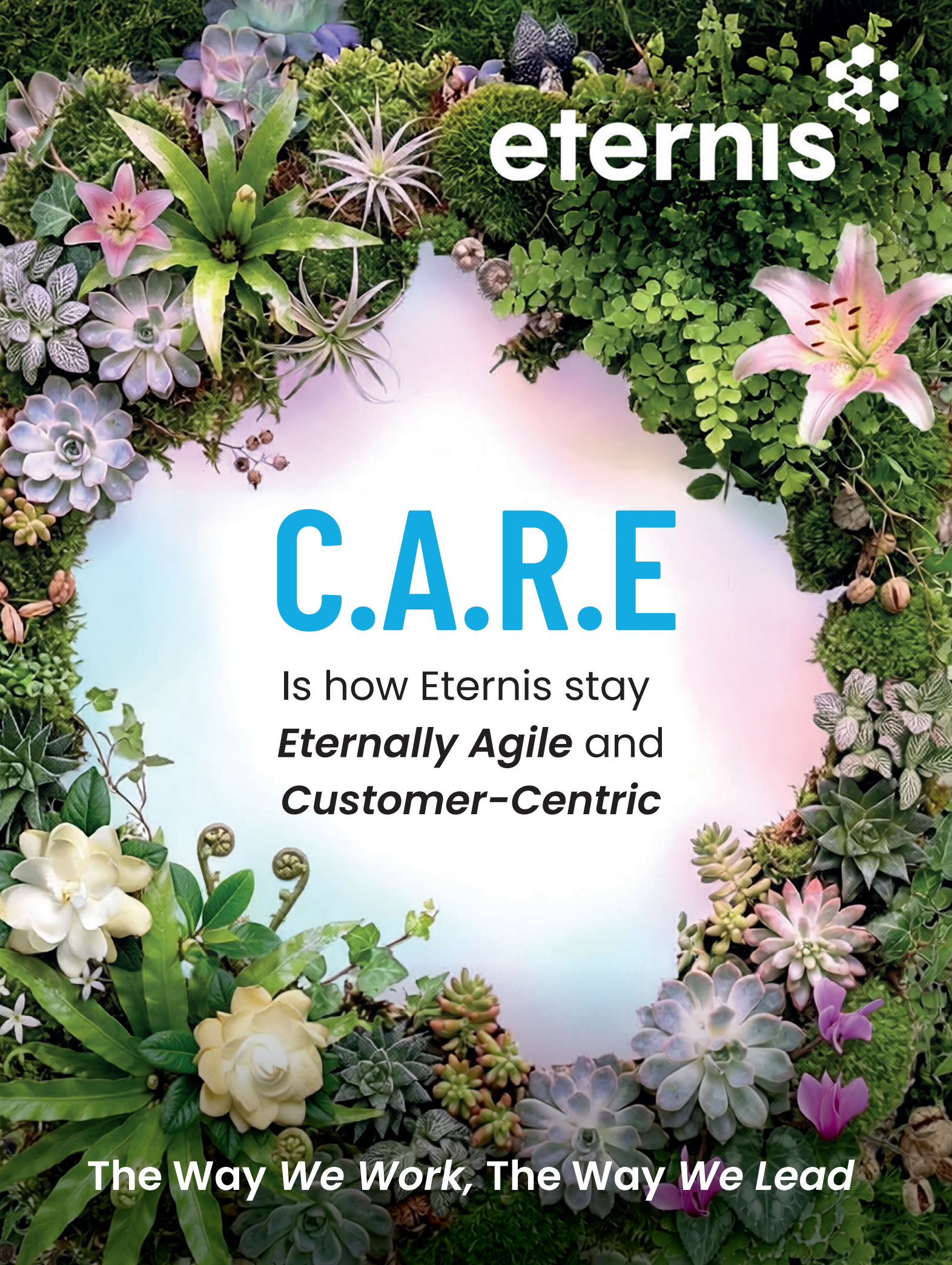
This positioning is rooted in:

- Family ownership and management, enabling stability, long-term thinking and responsible decision-making.
- An independent mindset, allowing faster decisions and greater creative freedom.
- A focus on proprietary solutions that address real market challenges.
- A belief that performance, sensorial quality and sustainability must coexist.
- A culture that places perfumers, collaboration and creativity at the center.

Being family-owned allows CPL to invest with a long-term horizon, prioritizing innovation, people and partnerships over short-term returns. Rather than following established models, CPL continues to challenge assumptions around how fragrance is created, delivered and experienced.

As the industry enters its next chapter, CPL Aromas remains committed to shaping fragrance that is emotionally resonant, responsible and future-ready—not by chasing trends, but by redefining what is possible.




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dsm-firmenich

2025 Perfumery & Beauty business sales: 3,760 million euros

Dual headquarters: Maastricht, the Netherlands/Kaiseraugst, Switzerland

**Commentary courtesy of dsm-firmenich*

dsm-firmenich: Rewriting the Fragrance Playbook with AI, Neuroscience and Full-Stack Sustainability



Fragrance today is about more than scent alone: it's becoming a medium for emotion, identity and connection.

Dsm-firmenich's Perfumery & Beauty (P&B) business is shaping the future of fragrance, partnering with leading global and regional brands across consumer goods, lifestyle, and luxury beauty.

With a vertically integrated supply chain and one of the industry's most comprehensive ingredient palettes, the business combines creativity, science, and scale to meet evolving consumer expectations.

As fragrance evolves beyond scent alone, P&B is focused on delivering solutions that are not only immersive and high-performing, but also sustainable and connect more deeply with consumers.

Reinventing Fragrance Creation and Experience Through Technology

New technologies are transforming not only how fragrances are created, but how they are experienced and that is where we see some of the most exciting opportunities today.

For example, digital eco-design tools, such as EcoScent Compass, integrate sustainability insights directly into the perfumer's creative process, guiding informed decisions from ingredient selection through to the final formulation. By making environmental data accessible at the point of creation, perfumers are better

Courtesy of dsm-firmenich

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equipped to explore new ideas while considering sustainable impact from the outset.

Meanwhile, immersive experiences bring fragrance innovation to life. Platforms such as Sensorium—presented for customers across Asia—and exhibitions like the House of Musks presented in Paris, Shanghai and more, translate complex science into multisensory storytelling, strengthening collaboration with brands and offering new ways to experience fragrance innovation beyond the lab.

In Beauty & Care, technology is also bridging the gap between science and consumer understanding. Our proprietary 3D Skin Mapping technology, launched in 2025, bridges scientific data and consumer language to help customers develop science-backed, winning solutions.



Younger consumers, particularly Gen Z, are reshaping fragrance consumption through social media–driven discovery, the rise of niche brands, and growing interest in emotional well-being and functional scent.

Expanding the Ingredient Palette

Advances in green chemistry, biotechnology and ingredient engineering are continuously expanding the creative possibilities of the perfumery palette.

Innovative molecules such as Amberever and Amberever Neo provide powerful ambery scents, whereas Heliobliss pairs intense olfactive qualities with excellent biodegradability. Initially found as an unexpected by-product during exploratory research, Heliobliss not only paved the way for Mimosal, but also inspired the creation of roughly 60 related structural analogues and Josenol.

These high-performance ingredients enable perfumers to use less material for equivalent performance, whilst reducing the fragrance's footprint and advancing eco-design principles.

Ingredient discovery is also increasingly guided by life cycle assessment (LCA) insights and circular innovation principles. By designing ingredients for high impact at lower dosage and complementing these with biotechnology solutions such as Clearwood Prisma, perfumers can create expressive fragrances while contributing to a reduced environmental footprint - without compromising quality or performance.

Responding to Evolving Consumer Expectations

Fragrance today is about more than scent alone: it's becoming a medium for emotion, identity and connection. Younger consumers, particularly Gen Z, are reshaping fragrance consumption through social media–driven discovery, the rise of niche brands, and growing interest in emotional well-being and functional scent.

dsm-firmenich is responding through neuroscience-driven innovation and personalization. Digital consumer engagement tools make discovery more intuitive, while AI- and data-enabled platforms support more tailored, emotionally resonant creations aligned with evolving need states.

A key example is emotiOn Social Connection, launched in 2025. Harnessing the power of science to push the boundaries of fragrance creation, our emotiOn program draws on more than 30 years

of neuroscientific research and academic partnerships to addresses the growing trend of emotional well-being, deepening the scientific understanding of how specific scents can be linked to emotional responses.



With our integrated expertise in science, sustainability, creativity and emotional insight, dsm-firmenich is well positioned to guide the fragrance industry toward more immersive, responsible and human-centered experiences.

Embedding Sustainability Across the Value Chain

Sustainability is not treated as an add-on, but as a core element of how P&B creates.

In 2025, we reached a major milestone: 100% of our Perfumery and Beauty & Care ingredients have a product carbon footprint available, based on Life Cycle Assessment. Every ingredient in this scope now carries a complete sustainability assessment profile. Much more than a target achieved, this comprehensive data is the foundation of our decarbonization journey.

Progress is also being made toward long-term goals, including 90% ultimate biodegradability for washable products and responsible sourcing of key natural ingredients. The company's Due Diligence framework, audited and recognized by the Fair Labor Association, supports transparency and continuous improvement across the naturals value chain. In recent years, on-site due diligence has expanded across key P&B naturals, alongside growth in certifications that enhance supplier collaboration and performance.

Initiatives such as the Naturals Perfumers Council are designed to strengthen dialogue between sourcing and creation, supporting responsible, transparent and scalable approaches to naturals over time.

Regional Relevance, Global Scale

Regional preferences are also playing an increasingly important role in global fragrance strategy. While global brands continue to seek consistency and scale, growth is increasingly driven by highly localized expressions—particularly in Asia—where cultural nuance and olfactive preferences shape success.

By combining global innovation platforms with deep regional expertise, dsm-firmenich is able to respond with speed, relevance, and authenticity. Close collaboration between local teams and global creation hubs allows insights from specific markets to influence fragrance development, helping brands adapt quickly while maintaining a coherent global identity.

The Future of Fragrance

We believe that the future of fragrance will be defined by richer, more layered emotional experiences, with fragrances that are designed to offer subtle benefits, enhancing mood, presence, and a sense of well-being.

At the same time, consumer expectations are shifting. Rather than targeting broad demographic groups, brands will increasingly use AI and personalization to meet the preferences and values of communities defined by shared needs.

Consumers are also making more deliberate choices, which encourages fragrances that range from gentle, second-skin scents to bold, expressive compositions, supported by advanced ingredients and expert perfumery.

Advances in AI, neuroscience, and ingredient innovation will continue to expand what is possible.

Bringing Progress to Life

With our integrated expertise in science, sustainability, creativity and emotional insight, dsm-firmenich is well positioned to guide the fragrance industry toward more immersive, responsible and human-centered experiences.

Through innovative ingredients, digital tools, and personalized approaches, the focus remains on creating fragrances that matter - for consumers, for customers, and for the world they live in.

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Givaudan

2025 sales: CHF 7.47 billion

Headquarters: Geneva, Switzerland

**Commentary courtesy of Givaudan*

Givaudan
Human by nature

Givaudan's Next Era of Growth, Innovation and Fragrance Excellence



Givaudan delivered strong results in 2025, with sales of CHF 7.5 billion, up 5.1% on a like-for-like basis.

Courtesy of Givaudan

Givaudan delivered strong results in 2025, with sales of CHF 7.5 billion, up 5.1% on a like-for-like basis. Growth was broad-based across all markets, segments, and customer groups, with high-growth markets increasing by 8.0% and mature markets by 2.4% LFL. CEO Christian Stammkoetter said the performance, achieved despite tough comparables and a volatile environment, reflects the company's unique ability to support customer growth and the dedication of its teams, and noted that Givaudan exceeded all its financial ambitions for the 2021–2025 strategic cycle period.

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Preserving a 250-Year Legacy While Shaping the Future of Fragrance and Taste

Commentary by Christian Stammkoetter, CEO, Givaudan

Building on a 250-Year Legacy to Drive the Next Era of Growth and Innovation

I can't speak about legacy without acknowledging how grateful we all are to Gilles Andrier for his contribution to Givaudan over the last 30 years. His visionary leadership helped the Company consistently deliver industry-leading performance and create significant shareholder value. I am excited to build on his work to drive growth and innovation with our talented teams, customers, and partners worldwide. Givaudan's creativity, customer-centricity, unique culture, and 250-year heritage in crafting extraordinary scents and tastes provide an excellent basis for the future.

Optimize. Future-Proof. Together: Building Givaudan's Next Chapter

As I start my first year as CEO, my priority is to build the future in line with Givaudan's new 2030 strategy cycle and our shared purpose—creating for happier, healthier lives with love for nature—together with our teams.

The months ahead will be about listening and learning. I am new to Givaudan, and new to this industry and so I will ask questions—not to challenge for the sake of it, but to bring an outside perspective and help us see opportunities and risks in new ways.

With nearly 30 years in the consumer goods industry, I aim to apply deep customer understanding to help optimize our business today, while also bringing my passion for innovation and technology to future-proof it for tomorrow. Always together with our people, customers and partners.

Three words you will hear me say often: Optimize. Future-proof. Together.



"As I start my first year as CEO, my priority is to build the future in line with Givaudan's new 2030 strategy cycle and our shared purpose—creating for happier, healthier lives with love for nature—together with our teams," says Christian Stammkoetter, CEO, Givaudan.

Turning Global Complexity into Sustainable Growth and Innovation Opportunities

Identifying key themes in our operating environment helps us shape our business and develop innovative solutions, as global challenges also present opportunities. These include geopolitical and economic uncertainty and evolving regulatory and transparency requirements, as well as shifting consumer trends, such as more conscious purchasing and changing demographics. All of these create new avenues for growth and value creation. We aim to drive sustainable growth with our customers—partnering with the existing ones as well as extending our customer reach, deepening our geographical presence and expanding our portfolio.

Fact Sheet

At the end of 2024, Givaudan had:

- More than 17,500 employees
- 167 sites worldwide
- 65 creation and research centers
- A procurement spend over CHF 4 billion
- Over 2,800 raw material suppliers in more than 100 countries
- Over 15,600 global partners supplying indirect materials and services

And here innovating for differentiating solutions will play a very important role. I have confidence in our proven business model, and I am optimistic about the opportunities ahead.

Fragrance & Beauty Momentum: Growth, Innovation and a Diversified Edge

Commentary courtesy of Givaudan, featuring Maurizio Volpi, President, Fragrance & Beauty, Givaudan

Diversified Growth Driving Resilient Momentum Across Fragrance & Beauty

Fragrance & Beauty sales reached CHF 3,830 million in 2025, representing 7.9% growth on a like-for-like basis. Fine Fragrance continued its strong momentum, rising 18.3% following 18.4% growth in 2024, while Consumer Products also delivered solid performance with 6.8% growth, building on a particularly strong 13.5% increase the previous year. Overall sales of Fragrance Ingredients and Active Beauty declined slightly, by -1.4%, as double-digit growth in Active Beauty helped offset softer demand in Fragrance Ingredients.

Givaudan was extremely happy about its Fine Fragrance results, said Maurizio Volpi, President of the business activity, noting that the company has doubled the business around the world in the last five years in absolute value. While competitors have noted slowing in Fine Fragrances, the natural hedges provided by Givaudan's diversified fragrance portfolio offers protection, he said.

"The uniqueness of Givaudan's business model, especially in Fine Fragrances, is that it is highly diversified across all the different fine fragrance categories as well as the fine fragrance channels," he said.

While prestige brands count for 30-35% of sales, Givaudan also focuses on specialty retail as well as a portfolio of local and regional brands that have emerged in the last three to five years in many parts of the world, especially in South Asia, the Middle East, and Africa (SAMEA). This category is fascinating right now, Volpi said, growing at 30% to 35% a year.

"Our exposure to this business is fueling the growth of Fine Fragrances, and so we have some immunity to the fluctuations that other companies might be seeing in the prestige brands," Volpi said.

Consumer Products, which accounts for 61% of Fragrance & Beauty sales, saw sustained solid growth across all categories in 2025, building on a very strong prior year and driven by strong performance in high-growth markets and pricing actions. Navigating higher input costs while focusing on sustainable, high-value products, strong customer engagement, innovation, and effective pricing continues to drive success, enabling Givaudan to meet evolving consumer needs and support customer growth.



"The uniqueness of Givaudan's business model, especially in Fine Fragrances, is that it is highly diversified across all the different fine fragrance categories as well as the fine fragrance channels," said Maurizio Volpi, President, Fragrance & Beauty, Givaudan.

Reimagining Beauty: Upcycled Marine Science Meets the Future of Skin Longevity

In 2025, Givaudan introduced innovative products to meet diverse customer needs. Among them is Givaudan Active Beauty's Evernityl, a marine-derived ingredient from the macroalgae *Laminaria hyperborea*. Produced through an upcycling process, it transforms fresh algae into a high-precision active that combats skin aging and supports youthful skin. Universal and inclusive, Evernityl targets existing signs of aging while helping prevent future damage, building on the company's research into skin microbiomes and harmful metabolites.

"The concept of beauty is evolving," said Volpi. "Today, people celebrate every stage of life, and approach ageing more proactively, with a growing focus on prevention. Skin health is now a cornerstone of beauty, and consumers are increasingly seeking brands that support their pursuit of longevity."

From Scent to Screen: Immersive Fragrance Discovery for Gen Z and Alpha

Givaudan also advanced customer-centered digital solutions with Guardians of Memories, a new experience on Roblox, the most important gaming platform in the world with 90 million daily users.

Designed for Gen Z and Alpha, Guardians of Memories demystifies fragrance by letting players experiment with ingredients and composition in a safe, interactive environment. The game explores the link between scent, memory, and emotion, fostering a community of future fragrance enthusiasts. Developed in collaboration with Givaudan's Fine Fragrance and Digital teams, Guardians of Memories engages young consumers in their preferred digital environment and builds on their growing interest in perfumes.

"As part of our global digital strategy, we are developing innovative tools that strengthen Givaudan's position as the creative partner of choice," said Volpi. "With Guardians of Memories, we are engaging a new generation through a playful and educational experience that highlights the artistry and craftsmanship at the heart of perfumery, while helping us better understand evolving consumer expectations."

Neuroscience Meets Fragrance: Designing Sensuality Through Data and Emotion

Givaudan Fragrance & Beauty also introduced in 2025 ChériScentz, a revolutionary fragrance design tool that allows perfumers to evoke sensuality among consumers and evoke feelings of attraction and intimacy in their creations. Adding to the company's leadership and expertise, this groundbreaking tool complements the already extensive range of neuroscience technology innovations, including MoodScentz+, VivaScentz and DreamScentz.

Based on neuroscience and consumer insights, ChériScentz assesses fragrance sensuality through visual stimuli, enabling consumers to explore sensory pleasure in everyday life. Aligned with Givaudan's focus on enhancing emotional connection through perfume, ChériScentz shows how scents evoke attraction, intimacy, and shared experiences. The patent-pending tool, developed with the Health and Wellbeing Centre of Excellence, also helps Givaudan meet growing demand for authentic, inclusive, and emotionally resonant fragrances that extend beyond fine fragrance into bath, body, laundry, and home applications.

"This innovative tool draws on advanced research from global consumer studies and uses our specialized methodology for assessing fragrance sensuality," said Volpi. "The result is a robust approach that delivers highly discriminating, high-quality insights with strong consumer relevance across markets."



In 2025, Givaudan introduced innovative products to meet diverse customer needs. Among them is Givaudan Active Beauty's Evernityl, a marine-derived ingredient from the macroalgae Laminaria hyperborea.

Confidence in Craft: Innovation, Sustainability and the Future of Fragrance & Beauty Growth

Volpi is positive about the outlook for Fragrance & Beauty overall, despite the volatile macro environment. Innovations that anticipate customer needs and consumer trends, and a perfumer's palette featuring the best, safest and most sustainable molecule innovation will continue to drive Givaudan's solid growth, he said.

"I remain confident in our portfolio and in the breadth of capabilities we bring to supporting our customers' growth," he said. "The artistry of our perfumers brings a wide range of fragrance stories to brands around the world. At the same time, our beauty innovations continue to push the boundaries of the industry, inspiring and empowering customers with tailored products designed to enhance well-being."

Iberchem

2025 sales: €380 million

Headquarters: Murcia, Spain

**Commentary courtesy of Iberchem*

Scaling Fragrance: Iberchem on Growth, Emotion and the New Creative Tech Era



"The fragrance industry is evolving into a high-growth, emotionally resonant, and digitally enabled sector," says José Balibrea, Managing Director Iberchem/ Vice President, F&F Croda. "With our positioning, craftsmanship, and strategic execution, we are well placed to capture opportunities and outperform the global market over the next five years. I am confident the best is yet to come for us."

Scaling Fast: A Record Year and a New Fragrance Growth Phase

Commentary by José Balibrea, Managing Director Iberchem/ Vice President, F&F Croda

A Year of Momentum in Fragrance

Over the past year, we achieved key milestones that strengthen our position as a leading agile and innovative mid-sized fragrance supplier. In 2025, we set a new sales record of €380 million, driven by strong engagement with Local and Regional (L&R) customers and a robust portfolio. Growth was especially strong in high-potential markets such as the Middle East and Africa, supported by organic expansion and strategic white space opportunities. Our team of 42 perfumers increased both the volume and speed of new fragrance launches and expanded the use of fragrance technologies across our portfolio.

We began construction of our second fully robotized fragrance manufacturing site in Murcia, Spain, and broke ground on a new Parfex facility in Grasse. At the same time, we have opened a new R&D center in Barcelona, equipped with advanced perfumery technology and evaluation cabins. We are preparing to transfer manufacturing to a new site in Guangzhou,

Courtesy of Iberchem

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which will significantly increase capacity and support ongoing growth in China. The end of 2025 also marked our fifth anniversary with Croda, during which we achieved our goal of doubling the business. This success demonstrates the strength of the Iberchem business model, built on agility, innovation, and strong customer relationships. These qualities enable us to consistently deliver value to our partners and achieve double-digit growth.

How Regional Preferences Are Shaping the Future of Global Fragrance Strategy

Regional preferences are central to our global fragrance strategy, with conversationalist and customization on the rise across markets. In the Middle East, consumers prefer rich, long-lasting scents such as oud, amber, musk, rose, and incense. Western Europe favors niche-inspired compositions, woody aromatics, and elegant florals. In Asia, lighter, cleaner, and more subtle fragrances, including florals, citrus, green notes, and skin-like musk, are preferred.

The Middle East is expanding as both a major consumer market and a cultural and creative influencer, shaping global trends. This understanding informs our approach to functional fragrances for home care and the sophistication required in personal care. We expect ongoing innovation in both fragrances and flavors to ensure our portfolio meets evolving consumer expectations worldwide.

Fragrance's Next Five Years: Premiumization, Emotion and Outperformance Ahead

Over the next five years, the fragrance industry is expected to outperform the broader beauty market, driven by premiumization, emotional consumption, and strong demand in emerging economies. While global growth is projected at a steady CAGR of approximately 3.5% between 2025 and 2030, and potentially up to 5%, the main momentum will come from emerging markets. Rising middle classes, urbanization, and increased digital exposure to global brands are accelerating adoption in these regions. Given our relatively small market share, we have significant potential to grow above industry averages. Strategic focus and effective execution will be critical to our success.

Fragrances are increasingly seen as tools for personal expression and emotional well-being. Consumers



José Balibrea, Managing Director Iberchem/Vice President, F&F Croda

are purchasing more frequently, trading up to premium formats, and layering scents, which supports value growth. Local and Regional (L&R) customers, who make up most of our base, are growing twice as fast as multinational competitors. This presents opportunities for agile, premium-focused partnerships. Companies such as Iberchem, Parfex, and Scentium show that targeted strategies and strong customer relationships can deliver above-market performance. Looking ahead, four forces will shape the industry: wellness and emotional engagement, sustainability and supply chain transparency, AI-driven creation and personalization, and demographic and cultural shifts amplified by social media. AI will enhance our teams' productivity by optimizing processes and uncovering insights, but it will not replace the craftsmanship of a perfumer. The art of scent remains a profound human experience.

The fragrance industry is evolving into a high-growth, emotionally resonant, and digitally enabled sector. With our positioning, craftsmanship, and strategic execution, we are well placed to capture opportunities and outperform the global market over the next five years. I am confident the best is yet to come for us.



Luz Vaquero, Iberchem's Fragrance Creation Director

Where Technology Meets Emotion: Rewriting the Future of Fragrance Creation

Commentary by Luz Vaquero, Iberchem's Fragrance Creation Director

From Performance to Emotion: How Technology Is Redefining Fragrance Creation

Technology breathes new life into fragrances. We now expect more than just a pleasant scent; we seek perfumes that linger, perform brilliantly, and even solve physical or chemical challenges.

Technology has become the perfumer's trusted companion. With its help, we craft fragrances that unfold beautifully (blooming), last longer, neutralize unwanted odors, and even harness the power of neuroscience.

What captivates me most is the chance to shape emotions through scent. Smell and feeling are intertwined in a swift, powerful dance, with fragrance reaching the emotional core of the brain almost instantly. A single whiff can lift your spirits or unlock a memory from long ago. At Iberchem, our Neuroscience department is delving deeper with the Wavemotion program, aiming to harness this connection and inspire positive emotional shifts. For perfumers, this is a fascinating challenge.

Fragrance as Identity: How Younger Generations Are Reshaping the Market

Younger generations have embraced perfume as an essential part of daily life. While older generations waited until adulthood to explore fragrances, today's youth make scent a signature, as vital as their favorite sneakers or hairstyle. They switch up their perfumes to match every mood and occasion, never settling for just one. This shift is reflected in the growing number of fragrance launches and an increasingly dynamic market. Young people view fragrance as a way to express their individuality and creativity, often layering scents or seeking out unique, niche brands to stand out from the crowd.

At Iberchem, we thrive on adaptability and speed. We meet soaring demand with unwavering quality, always tuning in to the latest trends to craft fragrances for every moment. Our team collaborates closely with clients to deliver bespoke scent solutions, ensuring that each fragrance resonates with consumers' evolving preferences. By embracing innovation and creativity, we remain a step ahead in the ever-changing world of perfumery.

3 Trends Shaping the Next Wave of Fragrance: Gen Alpha, Gourmand and Global Oriental Influence

There are three trends that I can now think of. The first one would be the switch from Gen Z to Gen Alpha: Generation Alpha is increasingly becoming an influential consumer cohort and is rapidly becoming a motor of growth across nearly all categories. With their digitally native habits, early brand awareness, and strong social influence, they are reshaping demand, particularly in the perfume and fragrance industry, where younger audiences are accelerating trends toward layering and wardrobing, playful scent profiles, personalization, and social-media-driven discovery.

The second trend would be the Gourmand frenzy: Food culture is becoming increasingly gourmand, with flavors like latte, strawberry matcha, dates and marshmallow gaining popularity through social media and coffee culture. This growing appetite for sweet, comforting, and indulgent tastes is now extending into the world of perfumery, where fragrance houses are translating these edible inspirations into scent profiles that evoke creamy, milky, and dessert-like sensory experiences.

Finally, oriental perfumery is increasingly becoming a global trend. Social media fasten the spread of information, and, as a result, local trends are easily becoming global. Perfumery with oriental touches that draws on Middle Eastern culture is increasingly present in Latin America, Europe and even China.

















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IFF

2025 sales: $10.9 billion

Headquarters: New York

**Commentary courtesy of IFF*

Inside IFF: Where Nature, Biotech and AI Converge in Fragrance

As a global leader in taste, scent, food ingredients and biosciences, IFF creates sustainable, high-performance solutions that make a meaningful impact for customers, consumers and the planet.

Today, technology is reshaping fragrance not for its own sake, but in response to fundamentally changed expectations for speed, sustainability, performance and compliance. Brands want faster cycles, consumers want more responsible products, and regulators expect higher standards—all at the same time.

For IFF's Scent business, three technology families are particularly transformative: biotechnology, digital and AI-enabled tools, and next-generation sustainable manufacturing. The impact lies not in each technology on its own, but in their end-to-end integration—from molecule design to industrial scaleup.

Below, leaders from IFF Scent—Ana Paula Mendonça, president, IFF Scent; Charbel Bouez, senior vice president of Scent R&D; and Valery Claude, senior vice president of Scent Digital—share how IFF is helping customers succeed in a faster, more regulated, sustainability-driven world.



"If I step back, what defines the past year is our indisputable leadership in naturals, built on a unique ability to take craftsmanship from Grasse to the world, and bring the world back to Grasse to continuously enrich perfumery's future," says Ana Paula Mendonça, president, IFF Scent.

Courtesy of IFF

Leading the Natural Way with Continued Investment

Commentary by Ana Paula Mendonça, president, IFF Scent

If I step back, what defines the past year is our indisputable leadership in naturals, built on a unique ability to take craftsmanship from Grasse to the world, and bring the world back to Grasse to continuously enrich perfumery's future.

At the heart of this is LMR Naturals. Expanding our site in Grasse was a deliberate choice. It was not just about capacity, but about reinforcing a long-term commitment to naturals that are responsibly sourced, scientifically mastered, and creatively inspiring. With the new pilot hall, our perfumers, agronomists, and scientists have more room to experiment, scale, and innovate, while protecting the integrity of the ingredients.

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"Expanding our site in Grasse was a deliberate choice," says Ana Paula Mendonça, president, IFF Scent. "It was not just about capacity, but about reinforcing a long-term commitment to naturals that are responsibly sourced, scientifically mastered, and creatively inspiring."

In parallel, our partnership with Reservas Votorantim in Brazil reflects how we think about the future of naturals. Working in one of the world's most important biodiversity regions requires patience, rigor, and humility. It allows us to explore new olfactive territories responsibly, while protecting ecosystems and securing long-term access to ingredients. Together, LMR and Brazil signal something very clear: naturals are not a legacy topic for us: they are a pillar of future leadership.

We also remain committed to advancing innovation at the intersection of performance and sustainability. Envirocap, our biodegradable encapsulation technology, is designed to deliver long-lasting scent performance in fabric care while reducing environmental impact, with a scalable platform that extends across categories, including beauty and home.

Biotechnology has become a powerful, creative and industrial engine for us. By combining biotransformation, fermentation, and enzyme catalysis with deep bioscience expertise, we can design ingredients with exceptional precision, consistency, and scalability, while reducing reliance on scarce natural resources. Importantly, this does not come at the expense of olfactive quality.

Ingredients like BioTropicalia build on familiar signatures while offering new facets and more responsible production routes.

Digital tools and AI accelerate learning and iteration, helping teams explore a broader creative space and move more efficiently from concept to formula. And in manufacturing, sustainability is no longer incremental. At Benicarló, Spain, our on-site green hydrogen facility demonstrates how industrial excellence, scale, and environmental responsibility can move together.

Finally, we continue to invest in co-creation with customers, where creativity thrives. The Perfumery Art Studio in Dubai reflects the Middle East's growing importance as a creative and commercial hub and provides an open space where our teams and customers work side by side to translate cultural insight into fragrances that feel modern, relevant and meaningful.

An End-to-End Sourcing Operating Model

For IFF, the question is not whether naturals should be sourced responsibly, but how responsibility can enable creativity at scale. Our answer is a distinctive end-to-end operating model in which sourcing and procurement, science, perfumery, sustainability, regulatory



"[I]n manufacturing, sustainability is no longer incremental," says Ana Paula Mendonça, president, IFF Scent. "At Benicarló, Spain, our on-site green hydrogen facility demonstrates how industrial excellence, scale, and environmental responsibility can move together."

and commercial teams operate as one integrated system. This approach allows us to move beyond risk management and compliance.

By embedding sustainability by design into our innovation platforms and decisions, we protect creative freedom while anticipating regulatory and supply challenges. It also enables perfumers to create with confidence, knowing materials are responsibly developed from origin to application.

Through LMR Naturals, we stay close to origin and build long-term partnerships rooted in trust, science, and shared value, including biodiversity initiatives such as our work in Brazil.

Ultimately, this model exists for one reason: to help our customers succeed responsibly, delivering products that do more good for consumers, communities, and the future of perfumery. This way of working also shapes how we view the decade ahead. As complexity increases, the industry will be tested on its ability to integrate creativity, science, and responsibility at scale, not treat them as separate challenges.

Bioscience As a Tool: a Science-Based Way to Protect Consumer Safety and Create Diversity and Innovation

Commentary by Charbel Bouez, Ph.D., senior vice president of Scent R&D

Biotechnology has become a critical response to some of the biggest structural challenges our industry faces, from regulatory evolution and supply security to sustainability and long-term creative freedom.

As certain ingredients become more constrained, biotechnology gives us a science-based way to protect both consumer safety and creative diversity. It helps us meet future requirements while preserving the olfactive richness perfumers need to create distinctive fragrances.

Biotech also strengthens supply security by reducing dependency on climate-vulnerable raw materials.



"As certain ingredients become more constrained, biotechnology gives us a science-based way to protect both consumer safety and creative diversity," says Charbel Bouez, Ph.D., senior vice president of Scent R&D.

What fascinates me is how this energizes our scientists, chemists and perfumers, expanding the creative palette and opening new olfactive territories. It is not about replacing nature, but about working intelligently alongside it, combining science, sustainability and creativity.

AI Helps Us Move Faster, and Allows Our Perfumers to Focus on Creation

Commentary by Valery Claude, senior vice president of Scent Digital

What excites me most about AI is not the technology itself, but how deeply it is embedded as an enabler across our teams. AI is helping us move faster (and speed has become cultural) giving our perfumers, evaluators, and scientists more time to focus on what truly matters. AI is not an end in itself, but a means: it enhances creativity, accelerates delivery, unlocks new opportunities, and truly enables new forms of innovation.

A big part of why this works at IFF is our proprietary data foundation. In an industry increasingly striving to build a shared language for scent, our advantage lies in decades of real-world olfactive, formula, and consumer learning captured at scale within IFF. This experience-based foundation is what gives our AI real strength.

Rather than defining AI in abstract terms, we use it very practically: to remove friction from the creative process, accelerate iteration, and support better decision-making earlier. This keeps human intuition, emotion, and storytelling at the center of creation.

On the consumer side, AI helps us decode language, emotions, and preferences across markets; enabling fragrances that are more relevant and culturally resonant. Ultimately, its value lies in strengthening co-creation: moving from insight to solution faster, with a higher chance of success when a fragrance reaches the consumer.

IFF Scent Digital focuses on helping the world feel more; by connecting science, creativity, and consumers through AI-powered scent design."

The Future of the Fragrance Industry Is Complex, but Full of Opportunities

Commentary by Ana Paula Mendonça, president, IFF Scent

The industry's future depends on turning regulation, climate pressure and consumer change into engines of innovation. That belief sits at the core of how we lead IFF Scent, and why my leadership team and I view the growing complexity of the next decade as an opportunity, not a constraint.



"What excites me most about AI is not the technology itself, but how deeply it is embedded as an enabler across our teams," says Valery Claude, senior vice president of Scent Digital.

The real challenge will be end-to-end integration. Companies that can connect science, creativity, responsibility, and scale into a single operating model will be best positioned to adapt and lead, and this is where IFF Scent is positioned to thrive.

Regulation will intensify, and consumer safety is non-negotiable. The challenge is preserving innovation through science-based, proportionate regulation. Climate change and biodiversity loss will also reshape access to raw materials, requiring investment in regenerative agriculture, biotechnology, and more resilient supply models.

At the same time, we must not underestimate the importance of talent and the human touch. Technology and data are essential, but people turn complexity into meaning. Perfumers, scientists and creators bring intuition, emotion and cultural sensitivity that no algorithm can replace.

I remain deeply optimistic. Fragrance has always lived at the intersection of art and science, and its future will be shaped by how closely we partner with our customers to turn complexity into progress. By working side by side with our customers, combining human creativity with science, data, and responsibility, we co-create solutions that are relevant, scalable, and meaningful for consumers. That partnership, grounded in trust and powered by people, is the true engine of innovation and growth in the decade ahead.

Mane

2025 revenue: €2.012 billion ($2.273 billion), representing 6.5% growth at constant exchange rates and scope

Headquarters: Le Bar-sur-Loup, France

**Commentary courtesy of Mane*



Mane's Growth Playbook for a Fragmented Fragrance Economy

From AI-driven creation and insight to the power of biotech acquisitions.

After a strong performance in 2025, with revenues exceeding €2,012 billion ($2.273 billion), representing +6.5% growth at constant exchange rate and scope, Mane enters 2026 in a markedly more complex global environment.

Ongoing economic and geopolitical uncertainties are reshaping markets worldwide. Inflationary pressures, currency volatility and shifting global trade dynamics are affecting both consumer confidence and industry value chains. This context calls for agility, resilience and a clear long-term vision.

For Mane, these challenges also represent strategic opportunities.

Mane's longstanding multi-local operating model is a key asset in navigating this increasingly volatile landscape. With a global presence supported by 54 R&D centers worldwide, Mane is uniquely positioned to respond quickly to evolving market conditions while remaining close to customers and consumers.



"Rather than applying a one-size-fits-all approach, Mane co-creates fragrances that are deeply rooted in local usage, rituals and aspirations," says Samantha Mane.

Courtesy of Mane/Justine Nenni

This decentralized organization enables faster decision-making, greater flexibility and the ability to adapt formulations, creative approaches and innovation pipelines to local realities. In times of uncertainty, proximity to markets is more critical than ever.

One of Mane's strongest differentiators lies in its deep understanding of local cultures and scent preferences. Supported by robust consumer insight capabilities, the group continuously invests in regional expertise and local talent to translate cultural nuances into relevant olfactive solutions.

Rather than applying a one-size-fits-all approach, Mane co-creates fragrances that are deeply rooted in local usage, rituals and aspirations. This ability to interpret local consumer expectations, while leveraging global creative and scientific excellence represents a decisive growth lever for the coming years.

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Asia, Africa, Latin America and the Middle East remain at the center of Mane's growth strategy. These regions continue to show strong demographic fundamentals, and an increasing appetite for fragrance across all categories.

Mane has reinforced its footprint in these markets by expanding R&D capabilities in Bangladesh, opening a new perfume creation center in Thailand to further strengthen local creative teams, and celebrating 20 years of presence in the Middle East with the opening of a brand-new perfumery creative center in Dubai as well as the opening of a branch in Riyadh, Saudi Arabia. These investments reflect Mane's long-term commitment to building sustainable, locally anchored growth platforms.

Local R&D centers act as innovation hubs that combine creativity, technical expertise and market intelligence. This model allows Mane not only to anticipate emerging trends, but also to respond rapidly to changing consumer behaviors. Perfumers have the voice of consumers at their fingerprint.

While 2026 presents undeniable challenges, Mane approaches the future with confidence. Its global yet local organization, strong vertical integration particularly into natural ingredients, unique creative culture, and continuous investment in talent, insights and infrastructure provide a solid foundation for sustainable growth.

By combining local relevance with global excellence, pursuing its strategy of continuous investments, Mane is well positioned to shape the future of fragrance.

Tapping Neuroscience, Biotech and AI to Redefine Fragrance's Role

On the consumer side, one of the most significant changes is the growing demand for fragrances that go beyond scent. Consumers increasingly view fragrance as a wellness companion, seeking emotional and functional benefits such as relaxation, stress reduction, or enhanced focus.

At Mane, this shift is addressed through the integration of neuroscience into fragrance creation. Our Wellmotion platform, a unique technology based on salivary biomarkers, paired with AI-assisted consumer insights, allows us to measure emotional responses and design fragrances that demonstrably support well-being. This science-backed approach enables perfumers to create scents that are not only beautiful but also validate claims and are emotionally resonant.

In parallel, fragrance is increasingly used as a tool for self-expression. Consumers are moving away from the idea of a single "signature scent" toward curated fragrance wardrobes. Layering, personalization and mood-based rituals are becoming the norm, with collections reflecting the many versions of oneself throughout the day or across life moments. Fragrance is no longer static, it is fluid, intimate and identity driven.

The evolution of the beauty market is shaped by several major trends: heightened demand for sensory performance, credible and emotionally resonant sustainability, and a multi-dimensional approach to wellness and longevity. Inclusive culture driven by demographic shifts and new innovation territories also plays a pivotal role.

On the ingredients side, innovation is accelerating at the intersection of green chemistry, biotechnology and artificial intelligence as a tool to accelerate research. These technologies such as Mane Jungle Essence and E-Pure Jungle Essence are expanding the olfactive palette available to perfumers.

Biotechnology is opening new creative horizons. A clear illustration of this shift is Antillone, Mane's natural biotech ingredient. Naturally found in certain fruits, particularly pineapple, Antillone delivers a powerful fruity-green note with outstanding vibrancy. It exemplifies how biotechnology can preserve the essence and emotion of nature, while ensuring consistency, sustainability and long-term availability. This is where the future of fragrance lies: at the meeting point of sustainability and craftsmanship.

At the global market level, the fragrance industry is becoming more fragmented, faster and increasingly local. While globalization remains a reality, growth is now driven by regional dynamics, cultural specificity and local consumer behaviors.

In this context, proximity to markets has become a strategic advantage. Local creation, supported by global expertise, enables Mane to respond quickly to trends while maintaining creative excellence and consistency.

Fueling Growth with Biotech Acquisitions, AI Investment and Market Expansion

Recent initiatives that best illustrate our current growth strategy reflect a strong focus on innovation, sustainability, and digital transformation, while continuing expanding on markets.

The acquisition of Chemosensoryx, renowned for its expertise in olfactory and gustatory receptor chemistry

and sensory biotechnology, enables MANE to accelerate research into the intricate mechanisms of scent and taste perception, paving the way for more effective and distinctive fragrance and flavor creations.

In parallel, we continue to invest in biotechnology capabilities, further expanded by our acquisition of Avoca in 2025, which has significantly increased our expertise and production capacity. These initiatives underscore our commitment to strengthening our R&D capabilities and pioneering sustainable innovation in flavors, fragrances, and ingredients.

Mane growth strategy is also based on expanding our customer portfolio across all market segments while remaining resilient and committed to growth within our core business. This balanced approach sets us as a unique partner in the industry, ensuring both diversification and strength in our foundational expertise.

Finally, we are accelerating our digital transformation, with increased investments in artificial intelligence, digitization and operational process optimization.

Supercharging Fragrance Innovation with AI-Driven Creation and Insight

Mane sees artificial intelligence as a transformative force reshaping many facets of the fragrance sector. AI and machine learning are now central to our innovation strategy, enabling us to create more relevant fragrances, faster, and to better align them with both technical requirements and consumer expectations. We launched a global AI transformation program to accelerate adoption across the business while ensuring robust governance and responsible use.

Through generative AI, our perfumers and evaluators can rapidly brainstorm new concepts and generate alternative directions based on olfactive briefs or market needs. AI-driven formula optimization allows us to predict and enhance key technical properties such as blooming, long-lastingness, and overall sensorial performance, enabling earlier performance prediction and reducing time-consuming trial and error. In addition, our GenAI Regulatory Assistant helps teams anticipate regulatory constraints, ensuring safe products for consumers.

AI also empowers deeper consumer understanding: with our Wellmotion platform, we combine neuroscience with advanced algorithms to predict the emotional responses specific fragrance profiles may elicit, allowing us to design scents that evoke targeted feelings. Our AI analytics further enable us to better listen to consumers, scanning online reviews and social conversations to detect emerging scent preferences, faster triggering business answers to market trends for our clients. This year, we launched ManeGPT, our internal Generative AI assistant, as a global acculturation program to maximize the impact of our initiatives. ManeGPT is not just a tool, it is the starting point of our digital transformation all within a secure and responsible framework.

From Source to Scent: Mane Accelerates Regenerative, Risk-Free Fragrance Supply Chains

To achieve this, we are intensifying our efforts to secure sustainable supply chains that are free from major human, social, and environmental risks and ensuring compliance with upcoming regulations, such as the Corporate Sustainability Due Diligence Directive (CS3D). We have implemented systematic risk mapping across all our natural ingredient supply chains, allowing us to identify strategic high-risk areas and take focused action through tailored remediation plans. This continuous improvement approach requires working hand in hand with our suppliers to address challenges and build long-term resilience.

At Mane, we also consider sustainability to be inseparable from our responsibility toward people. We aim to foster an inclusive, equitable, and diverse industry while actively engaging all our employees in our sustainability journey, in programs such as MANEkind in the Americas.

Climate change is another critical issue, already impacting yields and harvests. In response, we are actively supporting more sustainable farming practices by investing in regenerative and agroecological farming models. These initiatives not only strengthen the resilience of our supply chains but also help restore ecosystems and support local communities. Our partnership with The Red List Project illustrates our engagement and allows us to bring the scents of endangered plant species to consumers in a form that both protects and supports these precious habitats.

Following our involvement in the Climate Convention for Businesses, we are drawing an even more ambitious ESG strategy. Our new ten-year compass is built around planetary boundaries, living systems, and regenerative (positive net impact) ambition, with the goal of fully integrating socioeconomic and environmental considerations into every facet of our corporate decision-making.

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Osmo

Latest full-year fiscal results: undisclosed
2026 series B funding: $70 million
Total capital raised: $130 million
Headquarters: Elizabeth, New Jersey

Osmo Accelerates Fragrance Innovation Through AI, Molecular Discovery and Scalable 'Olfactory Intelligence' Platform

BY ALEX WILTSCHKO, Founder and CEO of Osmo

Democratizing Fragrance Creation and Unlocking Molecular Discovery

One of the biggest opportunities we see is expanding access to fragrance creation. Historically, developing a custom scent required years of training, specialized industry connections and significant investment, which meant only the largest brands could participate. With Olfactory Intelligence, we're democratizing fragrance design so that emerging brands, creators and companies across industries can develop signature scents.

Another major opportunity is helping brands move faster and differentiate through proprietary scent molecules. By combining large-scale molecular data with machine learning, we can screen billions of potential molecules and identify new ingredients that are safe, sustainable and unique. This allows brands to develop truly differentiated scents while reducing development timelines and costs.

The Shift from Trial-and-Error to Predictive, Personalized Design

The fragrance industry is going through a significant shift as technology and data begin to play a larger role in how scents are created and evaluated. Traditional fragrance development has relied heavily on trial-and-error and manual experimentation. Today, AI and machine learning are enabling a more predictive approach to fragrance design.



"As digital olfaction technology continues to advance, we believe it will significantly expand the palette of safe and sustainable fragrance ingredients available to perfumers, while making fragrance development faster and more responsible overall," says Wiltschko.

Courtesy of Osmo

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We're also seeing increased demand for customization and differentiation. Brands want scents that are uniquely their own and consumers are looking for more meaningful sensory experiences that connect to emotion and memory. That's pushing the industry toward tools that allow for more creative exploration while still maintaining speed and scalability.

Another major shift is the growing emphasis on safety and sustainability in product ingredients. Research is finding that some of the ingredients used in products are unhealthy and even toxic. Advances in data science and predictive modeling now make it possible to evaluate thousands of potential molecules digitally before they're ever produced, to find safer and more sustainable alternatives to existing ingredients and dramatically change how the industry can innovate responsibly.

Scaling AI-Driven Scent Innovation with Funding, Massive Data Platform and New Smart Factory

A few recent milestones illustrate how we're building the future of scent.

- Earlier this year we closed a $70 million Series B funding round, bringing total capital raised to $130 million. That investment is helping us accelerate research and expand our olfactory technology platform.
- We're continuing to scale our scientific and technical capabilities. Osmo has built the industry's largest structured scent data library and is using Olfactory Intelligence to screen billions of molecules to predict how they will smell, perform and behave before any physical molecule is created.
- In addition, our collaboration with the Institute for In Vitro Sciences demonstrated how AI can transform safety testing for fragrance ingredients. The study showed that AI models trained on validated human-relevant lab data could generate safety insights that would have historically required large-scale animal testing.
- Finally, we are investing heavily in infrastructure to support that growth. In 2026, Osmo will open a 60,000-square-foot manufacturing headquarters in Elizabeth, New Jersey that integrates robotics, fragrance development and AI-powered manufacturing. That facility will allow us to scale from concept to production more quickly and support a much broader ecosystem of partners.

Together, these efforts reflect our strategy of combining data, machine learning and human perfumery expertise to build a new foundation for fragrance creation.

AI Becomes Perfumery's Power Tool, Expanding Creative Possibilities and Accelerating Discovery

We see AI as a tool for expanding what's possible for fragrance and gives perfumers a new tool in their kit.

Fragrance creation involves a huge amount of experimentation and manual work. Olfactory Intelligence automates many of the repetitive and data-heavy tasks involved in fragrance development, which allows perfumers to spend more time on the creative aspects of their work.

AI also enables us to explore an enormous chemical space that would be impossible to navigate through traditional methods. By screening billions of molecules computationally, we can predict scent characteristics, safety and performance before synthesis. This dramatically increases the efficiency of discovery and opens the door to entirely new fragrance ingredients.

In that sense, AI functions more like a powerful creative tool—similar to how power tools transformed woodworking. It enhances the capabilities of perfumers rather than replacing them.

AI and Predictive Science Power the Next Wave of Sustainable, Animal-Free Fragrance Innovation

The next phase of sustainability in fragrance will come from better data and predictive science.

AI allows us to assess fragrance molecules virtually before they are ever created in the lab, helping us identify ingredients that meet high standards for safety, sustainability and performance much earlier in the process. This process will continue to become faster and more precise over time.

Our work with the Institute for In Vitro Sciences is one example of how this approach can transform safety testing. By training AI models on validated human-relevant lab data rather than animal testing data, we can evaluate the safety of thousands of chemicals without relying on traditional animal testing methods.

As digital olfaction technology continues to advance, we believe it will significantly expand the palette of safe and sustainable fragrance ingredients available to perfumers, while making fragrance development faster and more responsible overall. For the market, this will result in more diverse and personalized scents for consumers and more brands, from any industry, will be able to access and employ scent as part of their brand communication strategy.

Robertet

2025 revenue: €843.9 million

Headquarters: Grasse, France

Robertet Enters New Era of Growth, Innovation and Leadership

BY JULIEN MAUBERT, Global Head of Fragrance Division & Sustainability at Robertet

The past twelve months have marked a defining period for Robertet: one that combines strong performance, clear ambition, and an important generational transition. In 2025, the group once again delivered excellent results, clearly outperforming industry benchmarks and confirming the resilience and relevance of its long-term vision. This performance was driven by solid momentum across divisions, with ingredients and flavors posting particularly robust growth.

The past twelve months have marked a defining period for Robertet: one that combines strong performance, clear ambition, and an important generational transition. In 2025, the group once again delivered excellent results, clearly outperforming industry benchmarks and confirming the resilience and relevance of its long-term vision. This performance was driven by solid momentum across divisions, with ingredients and flavors posting particularly robust growth.

After an exceptional career leading the fragrance division, Christophe Maubert stepped down from his operational responsibilities. Over the years, Christophe has played a decisive role in shaping the creative, strategic, and cultural foundations of Robertet Fragrance. His leadership has delivered remarkable results and, just as importantly, has built a solid platform for future growth. I would like to express my deepest gratitude to him, for his vision, his commitment, and the legacy he leaves behind.

I now have the great honor of taking over this responsibility. Stepping into this role is both a source of immense pride and a profound sense of responsibility. As a fifth-generation member of the family,



Julien Maubert, Global Head of Fragrance Division & Sustainability at Robertet

Courtesy of Robertet

I am acutely aware of what this heritage represents: not only continuity, but accountability to our teams, our partners, our clients, and to the natural resources that define our craft. This responsibility is demanding, but it is also an extraordinary source of motivation. It drives me to approach this role with humility, ambition and a clear sense of purpose.

This new chapter allows me to fully leverage my deep expertise in natural ingredients, a cornerstone of

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Robertet's headquarters in Grasse, France.



More than ever, our ambition is to elevate fragrance by combining nature, creativity and innovation while staying true to what makes us unique.



Naturals remain at the very core of Robertet's strategy. Our fully vertically integrated "seed to scent" model ensures traceability, quality, and sustainability at every stage of the value chain.

Robertet's identity. More than ever, our ambition is to elevate fragrance by combining nature, creativity and innovation while staying true to what makes us unique.

Innovation and technology play a central role in this ambition. At Robertet, we see them not as tools to replace creativity, but as powerful enablers of perfumery. Our strategy is built around three core pillars: artificial intelligence, neuroscience, and advanced delivery systems. Artificial intelligence supports perfumers by accelerating exploration and opening new creative territories, while always keeping human intuition at the heart of creation. Neuroscience helps us better understand emotional responses to scent, enabling fragrances that connect more deeply with consumers. Delivery systems, meanwhile, enhance performance, longevity, and sensorial expression across all applications.



Responsible sourcing is not a recent commitment for Robertet; it has been part of our philosophy since our founding in 1850.



The next five years will be defined by a deeper connection between nature, innovation and emotion.

What makes this approach particularly exciting is our ability to combine these technologies with our long-standing mastery of naturals. Through our startup accelerator, VillaBlu, we also collaborate with emerging innovators on longer-term, sometimes disruptive projects initiatives that may take time to mature but are strategically essential for the future of perfumery.

Naturals remain at the very core of Robertet's strategy. Our fully vertically integrated "seed to scent" model ensures traceability, quality, and sustainability at every stage of the value chain. Biotechnology plays an increasingly important role as a complementary solution, helping us protect biodiversity, secure access to rare raw materials, and address specific sustainability challenges, always with a focus on high-quality, specialty ingredients with strong olfactive value.

Responsible sourcing is not a recent commitment for Robertet; it has been part of our philosophy since our founding in 1850. Working with naturals requires a long-term vision ensuring that harvest after harvest, resources remain available and ecosystems preserved. Today, this commitment is reinforced through rigorous certifications and audits such as Ecocert FFL and UEBT. With more than 65 certified sustainable sourcing programs worldwide, Robertet is a recognized leader in building responsible, resilient supply chains that support both local communities and biodiversity.

Looking ahead, the fragrance industry is entering a period of transformation. One of the most significant shifts is the premiumization of markets that were historically more mass-oriented, including China, Indonesia, India, and Brazil. Across all categories, consumers are seeking greater quality, authenticity, and emotional value. For Robertet, this evolution represents a tremendous opportunity: to bring more naturals, more sophistication, and more storytelling into fragrance creation.

The next five years will be defined by a deeper connection between nature, innovation and emotion. Fragrance will continue to play an increasingly central role in personal expression and well-being. As we move into 2026 and beyond, I am both proud and deeply motivated to help shape this future honoring our heritage while confidently building the next chapter of Robertet Fragrance.


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Symrise

2025 sales: €4.9 billion

Headquarters: Holzminden, Germany

**Commentary courtesy of Symrise*

Symrise Strengthens Fragrance Leadership with Strong Results, AI-Driven Innovation and Global Creative Expansion

Navigating volatility, delivering emotional benefits and sustainable materials, and the implications of augmented creativity.

Symrise delivered solid performance with 2.8% organic growth, €4.9 billion in sales, a 21.9% adjusted EBITDA margin, and a record business free cash flow margin of 15.8%. A €400 million share buyback and the 16th consecutive dividend increase underline our financial strength and long-term confidence.

Strategically, we advanced phase 2 of our One Sym transformation, sharpening commercial excellence, accelerating innovation, and reinforcing digitalization and AI across the group. Within Scent & Care, we introduced the Care & Wellness division, reflecting the growing convergence of beauty and health and complementing our fragrance, cosmetic ingredients and aroma molecules activities.

A major milestone for fragrance creation was the opening of SFA Neroli's new fragrance campus in Grasse, the cradle of modern perfumery. The new site brings together creation, application, production, and commercial teams under one roof and unites the expertise of SFA Romani, Créations & Parfums and Floressence, complemented by Symrise's heritage brands Maison Lautier 1795 and DeLaire 1876. This unique ecosystem strengthens customer proximity, accelerates collaboration and provides exclusive access to high-quality natural raw materials—enabling brands to develop fragrances that combine authenticity, performance and sustainability at scale.

Alongside this, we broadened our naturals portfolio, strengthened our global creative network and accelerated adoption of digital creation tools—helping customers bring fragrances to market faster, more confidently and with enhanced olfactive differentiation.



Symrise CEO Dr. Jean-Yves Parisot.

Courtesy of Symrise

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Accelerating Fragrance Creation with Digital Precision and Predictive Science

Our customers increasingly benefit from tools that combine perfumery artistry with scientific precision. Digital and AI-assisted creation platforms allow perfumers to explore broader olfactive spaces, refine formulas more quickly, and ensure consistency from concept to market. These capabilities are complemented by new high-performance and sustainable ingredients that elevate both sensory richness and environmental profile.

Our global Data & AI Hub in Barcelona supports this shift. AI-enabled predictive tools streamline formulation, inform regulatory design, and speed up development cycles. One practical example is our AI-supported flash-point prediction model, which reduces a traditionally lengthy laboratory step to seconds, enabling safer, compliant formulations with greater agility.



Digital and AI-assisted creation platforms allow perfumers to explore broader olfactive spaces, refine formulas more quickly, and ensure consistency from concept to market.



Michael Friede, president of the Scent & Care division and a member of the Executive Board.

Designing the Next Generation of Sustainable Sensory Innovation

Breakthroughs in green chemistry, biodegradable molecules, and data-driven ingredient design are allowing brands to build distinct, future-proof olfactive signatures. In our Aroma Molecules division and Holzminden Lab, innovative captives such as Frostwood and Ambronova demonstrate how sustainability and modern perfumery reinforce each other.

Advances in sensory science also extend beyond traditional fragrance ingredients. With Optacool Fuji, Symrise introduced an advanced cooling substance that delivers fast-onset freshness combined with long-lasting cooling. Developed using patented technology and validated through neuroscience, it illustrates how precisely designed sensory effects can enhance emotional perception, a capability increasingly relevant for fragrance-adjacent applications such as oral care, personal care and wellness-focused products.

In parallel, tools such as our Houston CO_2 tracking platform and our broader bioeconomy commitments enable clearer lifecycle visibility and support design-for-impact decisions across the fragrance value chain.

Scaling Fragrance Creativity with Precision, Speed and Emotional Relevance

AI helps us better understand what different consumer groups value, supporting customers in developing tailored scent experiences across regions and demographics. It enhances perfumers' creative processes by predicting ingredient interactions and identifying promising formula directions while giving the human craft the space for enhanced creativity.

Real-time compliance and prediction capabilities also streamline reformulation for localized launches or retailer-specific briefs, making personalization scalable and efficient as consumers increasingly expect fragrance to reflect individuality and emotion.

Renewable Ingredients Driving Resilient, Low-Carbon Fragrance Innovation

Biotechnology enables us to develop high-purity, renewable, and consistent ingredients with a reduced environmental footprint. These bio-based routes complement our green chemistry initiatives and strengthen both Aroma Molecules and naturals portfolios. For customers, this means dependable sourcing, new scent profiles, and sustainability stories supported by credible science.

These approaches also help mitigate risk where naturals face climate or geopolitical volatility, ensuring quality and continuity across global supply chains.



Within Scent & Care, we introduced the Care & Wellness division, reflecting the growing convergence of beauty and health and complementing our fragrance, cosmetic ingredients and aroma molecules activities.

Fragrance as Bold Self-Expression, Well-being and Multisensory Storytelling

Younger consumers use fragrance as a form of self-expression, gravitating toward bold signatures, emotional resonance, and purposeful brand narratives. They value creativity combined with health-conscious and eco-aware positioning.

We translate these insights including cross-category learnings from Generation Alpha into concepts that pair expressive olfactive profiles with neuroscience-backed benefits and sustainability credentials. A recent example is our Middle East "Beach Club" collection, built around juicy fruits, aquatic freshness, and sun-kissed warmth, enriched with Actimood technology and Flavorscent co-creations. These formats illustrate how younger audiences embrace multisensory experiences that blur category boundaries.

Co-Creating Fragrance Through a Connected Worldwide Network

Scent preferences vary strongly by culture, climate, and lifestyle. Our 15+ fragrance creative centers across major hubs such as Paris, New York, São Paulo, Shanghai, Dubai, Singapore, and Mumbai allow us to co-create with customers in ways that reflect local olfactive codes while maintaining global brand coherence.

This regional strategy is further reinforced by investments such as the Neroli campus in Grasse, which connects creative talent, naturals expertise, and production capabilities in one integrated ecosystem. Together, these structures enable faster translation of regional insights into globally scalable fragrance solutions.

Building Resilient, Low-Carbon Fragrance Supply Chains with Science-Backed Transparency

A secure and transparent naturals supply is essential to brand credibility. Through long-term grower partnerships, regenerative agriculture programs, and ingredient-level traceability, we ensure consistent quality and strong sustainability backing across florals, resins, spices, and citrus.

Our CDP ratings reflect this commitment. Beyond certification, tools like Houston enable more precise CO_2

tracking and decarbonization planning helping customers build stronger climate narratives and future-ready sourcing strategies.

Three Shifts Defining Fragrance's Future

We see three major shifts shaping the industry's evolution:

1. Augmented creativity: AI becomes a natural extension of the perfumer's craft, accelerating ideation, compliance, and localization while preserving artistic intuition.
2. Beauty-wellness fusion: The establishment of Care & Wellness strengthens our ability to deliver neurosensory benefits, skin- and hair-compatible scent technologies, and emotionally resonant solutions.
3. Impact by design: Lower-carbon, traceable, and circular ingredients increasingly guide fragrance creation alongside olfactive beauty.

Navigating Volatility: Building Resilient, Transparent Supply Chains for a Complex Global Fragrance Market

The industry will have to manage resource volatility, evolving global regulations, rising expectations for transparency, and increased supply chain challenges driven by geopolitical shifts and varying trade conditions. In this environment, ensuring supply chain safety and managing complexity across a volatile trade landscape becomes a critical success factor. Symrise supports customers through forward-looking ingredient design, robust compliance tools, and resilient sourcing models that strengthen security of supply and reduce complexity enabling confident growth.



A secure and transparent naturals supply is essential to brand credibility.

The Trends Gaining Momentum

High-growth markets in the Middle East, Latin America and Southeast Asia continue to embrace bold olfactive profiles and fast-evolving retail formats. Our local creative presence and cross-category showcases such as Beautyworld Middle East help brands capture this momentum.

Younger consumers globally reward fragrances that blend joyful sensoriality with credible sustainability, an area where Symrise benefits from its naturals heritage, neuroscience expertise, and open-innovation mindset.

Four trends are gaining particular momentum:

- Emotional benefits, supported by technologies such as Actimood
- Sustainable and traceable ingredients, backed by science and certification
- New olfactive territories, driven by modern captives like Ambronova and Frostwood
- Cross-sensory convergence, including food-and-fragrance inspirations such as Flavorscent

In addition, sensorial well-being and emotional refreshment are becoming key purchase drivers. Technologies such as Optacool Fuji demonstrate how cooling, freshness, and emotional response can be precisely designed to support confidence and well-being across fragrance-adjacent categories.

We help our customers translate these trends into market-ready, emotionally resonant scent experiences that stand out both on shelf and online.



Younger consumers globally reward fragrances that blend joyful sensoriality with credible sustainability, an area where Symrise benefits from its naturals heritage, neuroscience expertise, and open-innovation mindset.

Takasago International Corp.

Total group revenue (fiscal year ended March 31, 2025): 229.2 billion of yen

EBITDA: 23.5 billion of yen

Headquarters: Tokyo, Japan

Takasago Targets High-Growth Markets, Doubles Down on Innovation and Regional Expansion

BY SATOSHI MASUMURA, President & CEO, Takasago

Accelerating Global Expansion Through Strategic Market Hubs and Consumer-Driven Innovation

Unlocking growth and expanding remain Takasago's overarching goal. We have limited market presence in the fast-growing markets of India and China and we are investing in our creative and manufacturing infrastructure; new creative center in Mumbai to support customer engagement in India, new production facility in China to provide excellent service and support to our key partners.

In 2026, the MENA[a] region will be a key focus, with a new creative center opening in Dubai to enhance our presence in the fast-growing fine fragrance market. This capability will be a growth engine delivering Takasago value to our key partners.

Takasago remains focused on innovating for the consumer and significant growth opportunities exist when real and claimable benefits can be delivered. Innovating in "emotion, performance and green chemistry" continue to yield growth across multiple categories and markets and this investment will support our growth plans in 2026 and beyond.

The best illustration of our "unlock growth and expand strategy" is the establishment of a capability in Dubai to access the fast-growing markets of MENA region and beyond.

[a]Middle East and North Africa



Satoshi Masamura, president and CEO, Takasago

Courtesy of Takasago

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The Brazil affiliate focused on increasing market penetration, developing new partnerships, resulting in significant growth in 2025. This growth momentum will be sustained through 2026 and beyond.

Finally, we were able to introduce innovation in the Home & Personal Care categories to deliver superior performance; from malodor control to enhanced deposition and long lasting, need states required by consumers every day.

Digital Market Drivers: e-Commerce, Social Media and AI

The role of e-commerce is having a growing impact in some SEA markets, and social media recommendation can drive high trial leading to unpredictable demand.

AI is already influencing the industry, from market research to fragrance creation or reformulation and ingredient development. It is still early days to judge the degree of disruption. For now, it is more an aid or support, rather than a replacement, but it certainly shows promise for both aggregating historic learning and replacing more mundane tasks.

Sustainability Recalibrates but Remains Central

With the various political and economic issues facing the world and consumers, sustainability has been a lower profile this past year. In Europe the CSRD[b] and CS3D[c] pieces of legislation have been revised and reduced in scope. Nevertheless, sustainable sourcing of naturals and decarbonization are issues which are not going away, and it is worth remembering that many fragrance industry customers have public carbon reduction targets for 2030.

[b]CSRD (Corporate Sustainability Reporting Directive)
[c]CS3D (Corporate Sustainability Due Diligence Directive)



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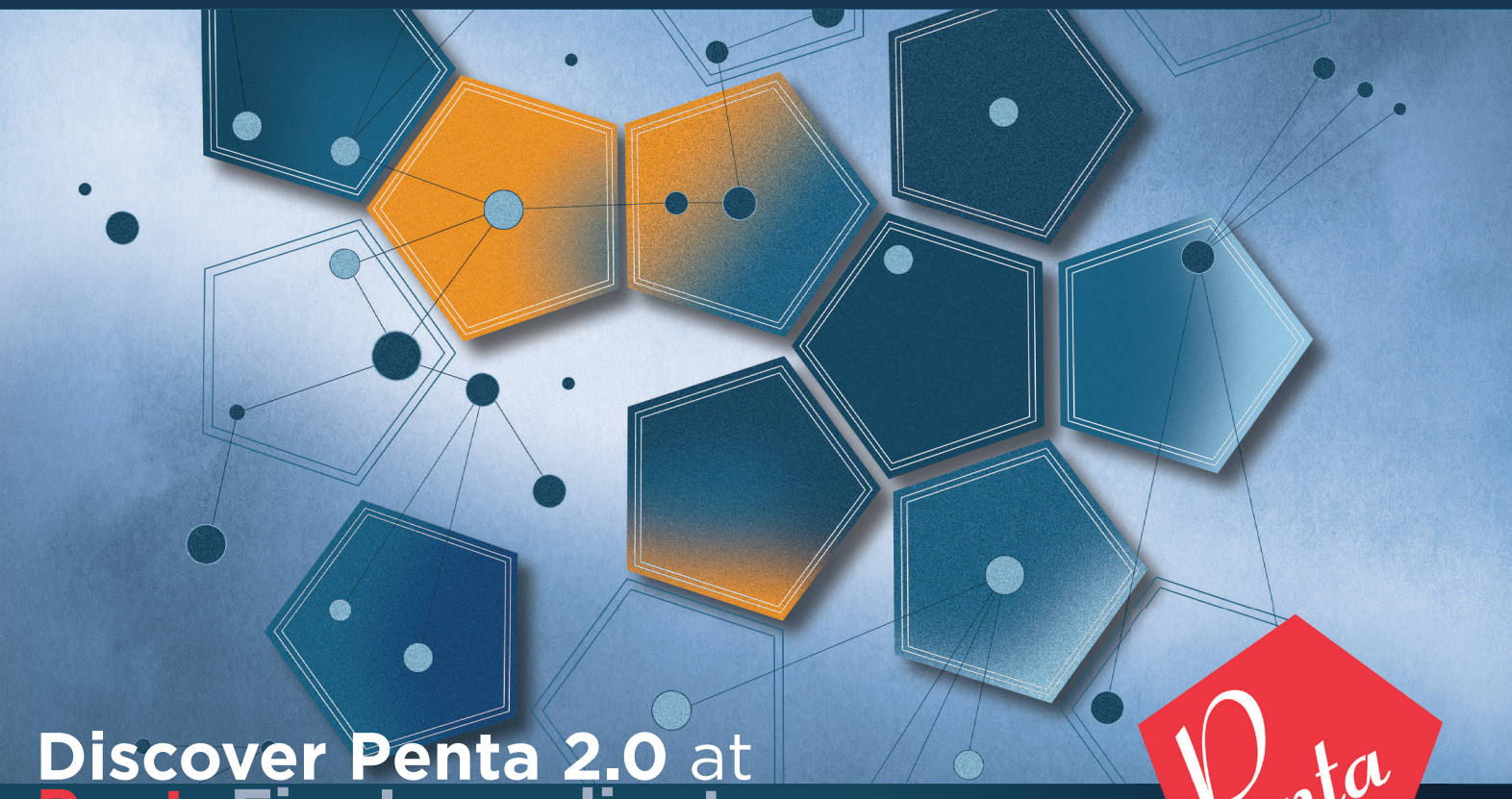
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