2009 Flavor & Fragrance Leaderboard

In a year of unprecedented financial upheaval, *P&F* magazine ranks and profiles the top-tier industry players and presents first-person insights into their resilience amidst challenges and opportunities

In 2008, the top 10 flavor and fragrance companies combined claimed about 71.2% of the market on sales of $14.586 billion—up from 2007's $13.598 billion. The remaining 28.8% of the market totaled about $5.913 billion in sales. The estimated grand total for the industry in 2008 was about $20.5 billion.* Looking at the challenging 2009 facing the industry, and assessing first quarter results and forward-looking statements, most are predicting a single-digit decline in overall sales. John Leffingwell, in particular has cited a potential 3–6% sales decline for the industry in 2009. In recent correspondence, he noted, "It has been clear for the last several quarters that flavor sales seem remarkably resilient (not great, but resilient), while fragrances and ingredients are suffering. However, overall the flavor and fragrance industry appears relatively healthy compared to many other industries."

In that spirit, *Perfumer & Flavorist* magazine presents its 2009 Flavor & Fragrance Leaderboard, a ranking—by 2008 sales—of the top 10 companies, with exclusive insights from key executives regarding their organizations' strategic initiatives and challenges, and where the industry is heading. The picture that emerges is one of unprecedented difficulties, remarkable opportunities and, most of all, resilience.

**Givaudan's 2008 annual report estimates the total F&F market to be CHF~17–18 billion, or up to $15.565 billion.*

A Note on Rankings

The 2009 Flavor & Fragrance Leaderboard rankings are based on 2008 sales data—including estimates*—gathered by *Perfumer & Flavorist* magazine and John Leffingwell, who provided the majority of the tabulations and market share estimates.** Rank is based on US dollar equivalents. Conversions are based on major currency rates as of Dec. 31, 2008, unless otherwise noted.

** See individual rankings for details.*

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1 Givaudan

Geneva
2008 sales: $3.828 billion; 4.087 billion CHF
Estimated 2008 market share: 18.7%
CEO, member of the executive committee:
Gilles Andrier (see First Person: Gilles Andrier)

"Our objective is and remains to improve EBITDA margin to its pre-[Quest] acquisition level by the end of 2010, which was 22.7%," said Givaudan head Gilles Andrier, announcing the company's full-year 2008 sales. To accomplish this, the fragrance division—accounting for 46% of sales—is focusing on a number of key categories:

> Although developing markets are not immune to the economic downturn, they remain a key opportunity for growth and, in some cases are expected to recover faster than more developed markets. –Gilles Andrier, Givaudan

"selected" consumer products and fine fragrance companies, feminine fine fragrances, air care and household, and US regional and local clients. Meanwhile, the flavor division—accounting for 54% of sales—will pursue the top 100 food and beverage companies, health and wellness opportunities, and food service clients. Notably, both divisions will target developing markets, which currently account for about 36% of the company's sales.

Meanwhile, Givaudan has reinvested 8.4% of sales in R&D, producing a number of technologies, including its TasteEssentials programs for citrus, vanilla and chicken; a clean label lemon oil replacer; fragrance impact and tenacity booster ScentEvolve; a biodegradable fragrance formula that enabled the first-ever Cradle to Cradle (*www.c2ccertified.com*) certification for a beauty product; the Europe-based ByNature natural chicken, beef and pork flavor technology; low sodium "salt curve" technology; the sustainable production of benzoin in Laos; and the newly launched musk, *Cosmone.*[a]

Meanwhile, destocking has taken its toll, particularly in North America and Europe, with fine fragrances and ingredients taking significant hits. Conversely, Givaudan has already reported double-digit fragrance sales growth in developing regions in the first quarter of 2009, particularly Latin America. The mature Asia-Pacific flavor markets were flat, while India, Indonesia, Thailand and the Philippines showed good results.

[a] *TasteEssentials, ScentEvolve, ByNature and* Cosmone *are trademarks of Givaudan.*

First Person: Gilles Andrier

CEO and member of the board, Givaudan

Challenges and Opportunities

Customer and consumer intimacy: Against the backdrop of the current economic downturn, it is clear that we operate in a more challenging business environment than ever before. Focusing on our customers' short-term market needs as well as their longer term strategic opportunities is critical. At the same time, both our biggest opportunity and challenge is to understand consumers' changing demands so we can partner with our customers to help them adapt and prosper. Keeping and expanding this close intimacy with our customers, supported by our knowledge, expertise and creativity, will be key to their success and will help them to weather the storm. ***Developing markets:*** As the largest player in the fragrance and flavor industry, Givaudan benefits from a unique global perspective and a local presence, particularly in the developing markets. Although those markets are not immune to the economic downturn, they remain a key opportunity for growth and, in some cases, are expected to recover faster than more developed markets. In this context, growth stemming from the developing markets, for example, will remain an important trend in our industry. ***Technology:*** Fragrance and flavor technology is increasingly important as consumers demand performance from the products they buy. In foods and beverages, innovative flavor technology, ingredients and flavors shape Givaudan's TasteEssentials and TasteSolutions[b] programs while beauty products are enhanced by technologies such as ScentEvolve, which intensifies the fragrance experience. ***Sustainability:*** Despite the economic downturn, sustainability remains a key topic in our industry and is important for us and for our clients. New concentrated product formats for example, benefit the environment by being smaller to transport but also entail challenges that our perfumers have to address. With around 40% of the industry's flavorists and the largest number of perfumers working for Givaudan, we are well-placed for sustainable growth. ***Naturals:*** Natural products are increasingly popular but can create pressures on scarce resources. Givaudan is working to ensure that we are able to meet demands for key flavors (such as citrus, vanilla and mint) and fragrance ingredients, such as sandalwood oil, in a sustainable and equitable way. The company currently takes all the necessary measures to be best-placed once the economy recovers.

The Industry in the Evolving Climate

Consolidation: We expect that [in] the current climate an important trend we have observed during the past years—the ongoing consolidation of our client base—may continue and even accelerate. ***Consumer behavior:*** We also observe that consumers' consumption patterns have changed as the economy has forced people to revise purchasing habits, shop in different places and look for bargains, and this in turn puts pressure on brands and on the fragrance and flavor industry. Consumers are well-informed and demanding. They seek brands that they can trust and companies must invest appropriately. ***Raw material costs:*** Raw material costs are a concern—especially with the conflicting demands of increased regulation, ethical sourcing, environmentally responsible production and falling brand value. Givaudan is investing in supplier relationships to mitigate the effects of rising costs and ensure quality, ethics and timely supply at the right price. This is a trend that reflects the heritage of an industry in which many of the fragrance and flavor companies originally started as raw material suppliers. ***Regulations:*** Regulatory pressures continue to increase for both fragrances and flavors. Having a strong regulatory compliance program will be a key differentiating factor in our industry. ***Innovation:*** However, we expect one fundamental of our industry to remain constant: We will always be asked to deliver the latest innovations in flavors and fragrances. We see critical mass, combined with passionate creative teams, guided by accurate consumer understanding and backed with an outstanding global organization and efficient supply chain as the key components to success.

[b] *TasteSolutions is a trademark of Givaudan.*

Estimated market share of top 10 F&F companies combined: 71.2%

2 Firmenich

Geneva
2008 sales: ~$2.93 billion; ~CHF 2.847 billion[c]
Estimated 2008 market share: 13.3%
CEO and director: Patrick Firmenich


Patrick Firmenich

Following the 2007 acquisition of Danisco's flavor division, this leading family owned company has expanded its reach into categories such as natural ingredients (including those for fragrances), ice cream, beverage and juice compounds, and fats and oils (leading to key gains in savory). The company's leading flavor categories included beverages (especially soft drinks), desserts, dairy foods, bakery and oral care. For the year, all geographic regions were up, particularly in Europe and the Americas. Firmenich enjoyed healthy fine fragrance sales in 2008, with additional strong sales in home care, particularly laundry, and body care, particularly hair care, toilet soaps and deodorants.

Like its competitors, Firmenich has highlighted a number of ongoing ingredient and technology initiatives, filing last year a total of 36 patent applications for ingredients, delivery systems (fragrance microencapsulation for fabric softeners, hard surface cleaners and liquid detergents) and processes (zero-carbon synthesis of a novel perfumery ingredient.) The company's sales of proprietary materials such as Hedione[d] have been strong in developing markets, while also launching seven new perfumery ingredients and other natural extracts. Meanwhile, the company has leveraged a number of key partnerships in developing novel flavor ingredients for taste modification and cooling (with Senomyx) and Reb-A flavoring and sweetening solutions (with PureCircle) in confectionery, foods, oral care and beverages.

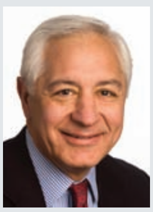
[c] *Accounting period July 1 to June 30*

[d] *Hedione is a trademark of Firmenich.*

3 IFF

New York
2008 sales: $2.389 billion
Estimated 2008 market share: 11.7%
Chairman and CEO: Robert Amen

IFF's sales roughly break down into 46% flavor products and 54% fragrance products, and in order to support these, the company undertook several global-minded initiatives in the last year. The company has opened a creative center in Santana do Parnaiba, Brazil, boosting its Latin American presence. The company also unveiled a creative center in Shanghai to service customers in greater Asia. The center houses flavor and fragrance creation and application facilities, and a consumer insights center. Moving forward, the company recently experienced some downturn in results, in part related to the strength of the US dollar. IFF has announced that it expects some of these challenges to continue for much of 2009. Flavors benefited from higher volumes and wins in North America and Asia, while fragrances were hit by destocking. Fragrance sales for the period were down 5% in local currency, driven in part by destocking, while the functional category held steady. For insights into IFF's strategy for the future, see **First Person: Robert Amen**.



First Person: Robert Amen

Chairman and CEO, IFF

Our creative and technical colleagues are the heart of IFF, and their concerns are naturally our concerns. Some of the challenges facing our flavorists and perfumers come under the umbrella of the economy while others relate to new legislation. For example, the economic downturn has impacted our customers' interest in risk-taking and increased speed to market for new launches. It is more important than ever that our perfumers and flavorists push their creativity in order to captivate the consumer with their unique olfactive vision or authentic flavor profiles. Both sides of our business are clearly feeling the pressures from regulatory legislation. Flavorists and perfumers alike are seeing their palettes of compliant materials reduced, and this is impacting their work. So now, more than ever, it is imperative that we invest in our R&D to discover new molecules that are both compliant with the new regulations and give our colleagues the material edge over the competition. Compliance alone won't capture the imagination and taste buds of the consumer, but unique materials, combined with the extraordinary talents of our perfumers and flavorists, will.

4 Symrise

Holzminden, Germany
2008 sales: $1.837 billion; €1.319 billion
Estimated 2008 market share: 9%
CEO: Heinz-Jürgen Bertram

"My objective is to further develop the inherent strengths of Symrise and to pursue a dynamic, cross-divisional approach of innovation in order to provide the new ideas and added impetus needed to continue the successful course of recent years," said Heinz-Jürgen Bertram, following the recent announcement of his appointment to CEO. Bertram's background in R&D and flavor and nutrition make him uniquely positioned to carry out his ambitions. The appointment follows Symrise's acquisition of Manheimer Fragrances (2007 sales: $40 million) and Intercontinental Fragrances (2007 sales: $16 million), strengthening its air care capabilities, particularly on the core lists of key candle customers.[e] As expected, the purchases have already impacted fiscal 2009 results, with a 48% gain in North American sales and a 14% gain in South America. By all accounts, the company is now in the very top tier of fragrance suppliers/marketers in the $300 million US air care market. Symrise's overall share of the US fragrance market has also grown with the moves. While Manheimer's activities were primarily US-based, Intercontinental brought with it modest footholds in Asia, Latin America and Europe—in part reflected in the initial 2009 results above. In addition, Symrise has entered into a partnership with First Choice Ingredients to expand its enzyme modified dairy flavor portfolio to boost the flavor and seasonings business it acquired from Chr. Hansen. The acquisition and partnership serve the prepared food, dairy, savory and snack segments. The company has also pursued several internal technological and business initiatives, including the establishment of sales offices and application laboratories in Dubai, pursuit of USDA Organic Certification for the launch of organic fragrances, opening a new pilot plant for flavor encapsulation in Singapore, and expanding its Vienna site to serve the southeastern European market.


Heinz-Jürgen Bertram

To date in 2009, the company has managed relatively healthy sales despite raw material prices, integration costs from last year's acquisitions and weaker sales development. Scent and care sales are flat, while flavor and nutrition saw relatively strong gains. The company has acknowledged the tough market environment facing the industry in light of customers cutting inventory levels and volatile orders. Despite this, the company has stated its goal to pursue growth that outpaces the market.

[e] *Mastertaste's natural products and flavor components were not part of the Manheimer deal; these have been folded into Kerry Ingredients and Flavors.*

5 Takasago

2008 sales:[f] $1.365 billion
Estimated 2008 market share: 6.7%
President and CEO: Ritaro Igaki

This past March, the industry was shocked to learn that Hiroki Take, president and CEO of Takasago International Corp., had passed away suddenly at age 65. The company acted quickly, installing Ritaro Igaki at the helm. The change in the top position came just months after Takasago's acquisition of Wessel Fragrances in the United States. The purchase boosted Takasago's access to "targeted clients" in the beauty care and home care segments, while also expanding its services portfolio and technology. For insights into Takasago's strategy moving forward, see **First Person: Paul Ireland**.

[f] *Accounting period of April 1 to March 31*

First Person: Paul Ireland

Senior vice president and general manager, fragrance division, Takasago

Biggest opportunities and challenges in the current marketplace

Today's economic conditions will reshape our industry as we seek to expand market share in a marketplace characterized by falling consumer demand, greater regulatory constraints and seismic shifts in consumer behavior. Typifying this shift is the change experienced in the past 12 months in the fine fragrance segment where demand has fallen due to destocking and "value-seeking" by consumers as a result of economic conditions. The key challenge is to identify how we as an industry can help to restore consumer demand by offering fewer, but better targeted creative fragrances to the marketplace. This is not the time to proliferate and enter the market with many line extensions, but to search for the "new classic" of tomorrow. Takasago's strategy has always been to provide better value to its customers and consumers through the development of new technology. Despite the global economic difficulties, we continue to invest heavily in R&D for the development of new materials, delivery systems and consumer research.

The biggest opportunities for growth exist within the low-income markets where consumer spending power continues to grow at a pace not seen in the developed and saturated markets for some time. To capitalize on this market growth, Takasago is investing in the BRIC [Brazil, Russia, India and China] countries to provide a full-service solution from marketing to manufacturing. Without this level of business investment, growth and security in these markets will be much harder to attain.

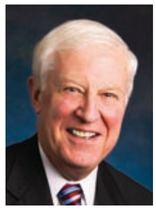
Changes ahead

Clearly, the industry will continue to consolidate and drive manufacturing scale, seek synergistic partnerships in R&D, and minimize costs. In addition, the industry will elevate its creative focus on delivering relevant fragrance and flavors for the developing markets. We believe that the REACH legislation in Europe and other new safety regulations will impact the wide variety of materials currently available on the perfumer's palette and require substantial reformulation in coming years. Contrary to what one might think, Takasago sees this as an excellent opportunity because it plays to our strength of creativity and technology. The good news is that the industry's commitment to the safety of our products through the Research Institute for Fragrance Materials and International Fragrance Association will benefit consumers and the industry on a global basis.

6 Sensient Flavors and Fragrances

Milwaukee; Indianapolis (flavors)
2008 sales:[g] ~$591 million
Estimated 2008 market share: 2.9%
Chairman and CEO: Kenneth Manning

Sensient Technologies posted record revenues for flavors and fragrances in 2008, despite a fourth quarter year-over-year drop and currency translation impacts. The group saw particular strength in the United States and Canada in the areas of dairy and savory and noted it expects to grow even in a tough 2009. In fact, in the first quarter of this year, Sensient's flavor and fragrance business posted healthy local currency growth throughout all major markets. Kenneth Manning has noted that, "The actual demand for our products is increasing as [our customers] go to maybe less expensive products to attract consumers. This gives us a chance to reformulate [in a way] that's always a win-win. We can use other ingredients—we generally get a higher margin and the customer gets a product that's more suitable for his customers." Meanwhile, the company launched a natural Reb-A off-note masking solution called Smoothenol.[h] The move is in line with an industry-wide response to the growing application of stevia in products such as beverages, delivering on consumer desires for healthier products.


Kenneth Manning

[g] *According to John Leffingwell, Sensient's flavor sales encompass dehydrated products, "which are not flavors or fragrances in the conventional sense." Thus, they have been removed from the sales results.*

[h] *Smoothenol is a trademark of Sensient Technologies.*

7 T. Hasegawa

Tokyo
2008 sales:[i] $500.3 million
Estimated 2008 market share: 2.4%
Chairman and CEO: Tokujiro Hasegawa

In its 105th year, this leading company merged with T. Hasegawa Fine Foods Co. Ltd., in line with its ongoing program of launching some 10,000 flavor and fragrance products annually. Supporting this, the company continuously expands its basic research into the arena of aroma technology for "aroma components, aromatic chemicals, and bio and medication related products." Meanwhile, the company has stated it is working to provide solutions for shortened product life cycles and growing consumer interest in health and safety. Moving forward, the company has reported first quarter 2009 revenue of ¥10.0 billion and estimates its full-year results will come in somewhere around ¥42.80 billion.


Tokujiro Hasegawa

[i] *Accounting period of September 1 to August 31*

8 Frutarom

Haifa, Israel
2008 sales: $473.3 million
Estimated 2008 market share: 2.3%
President and CEO: Ori Yehudai

Frutarom has continued its program of expansion via strategic acquisitions, most recently Oxford and Flavor Specialties Inc. (FSI), thus enhancing its position among the top 10 flavor and fragrance companies. The Oxford deal grew its fine ingredients holdings, with emphasis on natural flavor applications, and added key personnel in R&D, sales, production and marketing, in addition to boosting its client base. The FSI deal boosts Frutarom's flavor and botanical extracts activities in the Americas and supports its Western market growth of 9%. The company has stated that the global economic crisis will likely spur further strategic acquisition opportunities. Moving forward, Frutarom faces weakness from food manufacturing customers in Russia, Ukraine, Turkey and Korea, and falling inventory levels in North America and Europe. The company, however, remains confident that it will double turnover and reach $1 billion by 2012.

For further insights, see **First Person: Ori Yehudai** and **First Person: Rafi Friedman**.

First Person: Ori Yehudai

President and CEO, Frutarom

Frutarom will continue to act determinedly to implement its rapid growth strategy that combines organic growth and strategic acquisitions. We consider the challenging and complex period that the global economy is undergoing an opportunity for further strengthening. Frutarom entered this challenging and crisis-related economic period as a leading, global, stronger-than-ever company with a solid capital structure. Frutarom's core businesses are mostly intended for the food industry—a basic human need. This places Frutarom in a stable and defensive field. Frutarom's ability to generate cash from current activities will enable it to successfully glide through this global economic crisis. Frutarom will also be in a strong position to exploit opportunities that have emerged, and continue to emerge, as a result of the crisis. The large variety of products Frutarom has built as a result of the growth strategy becomes a powerful asset in generating organic growth.

First Person: Rafi Friedman

President, Frutarom USA Inc.

In the short term, the industry will have to adjust to the changes in behavior of food and fragrance consumers. The focus of many companies will move from product development to increasing efficiencies and cost design. In the long term, food consumption, a basic human need, will continue to grow and evolve toward healthy and innovative food. When this trend resumes, we will see the industry resume regular, steady growth.

9 Mane

Le Bar-sur-Loup, France
2008 sales: $462.9 million; €332.5 million
Estimated 2008 market share: 2.3%
President: Jean Mane

Mane saw its 2008 sales rise 8% year-over-year, and continued its focus on creative and technological expertise (see **First Person: Michel Mane**). The company launched its Aquafine technology in collaboration with Dow and based on a Dow patent. The innovation is a water-based microemulsion technology with a fragrance load capacity that can reach 20%. The concept of alcohol-free systems is not a new one, but the company believes it has achieved a new level of efficacy. The clear system is biodegradable and allows for lower VOC content. This eco-friendly stance mirrors efforts the company is making in ethical raw material sourcing. Meanwhile, the company won the 2009 FiFi for "Perfume Extraordinaire," an honor based on blind judging of unmarked fragrances submitted by fragrance houses and manufacturers with in-house perfumers. This new award recognizes fragrance craft itself, divorced of packaging, marketing, etc.

First Person: Michel Mane

President, Mane USA

In the current environment more than in any other, we must offer the very best. If innovation is not the isolated answer to the crisis, it should remain at the core of our strategy. As fragrance designers, our mission is to delight an increasing number of consumers and enhance their well-being while empowering them and making them feel good about their choices. Until we can prove that we can correlate the right gene sequence with fragrance preference, we will heavily rely on the fundamentals that drive value perception and capture the positive emotions of our unconscious: quality, safety and diversity of our ingredients, the creativity of our perfumers, the expertise and inventive spirit of our teams and partners. The external forces that we are inflicting on ourselves add a conscious dimension to our challenge: it is urgent that we integrate the potential consequences of our acts on our social environment and on our planet from the design phase throughout the execution phase. This calls for an overhaul and reengineering of our supply and manufacturing chains to embed ethical sourcing principles in the selection of our most basic ingredients and in the way we engineer them and add value to them before delivering them to the consumer. Mane is engaged on this model of sustainable use of renewable natural resources and supports communities and suppliers who share the same commitment toward ethical biotrade and the use of green agriculture and chemistry technologies.

As Mane continues to strengthen its personal and home care pillars, it is now putting a special emphasis on integrating its natural ingredients division with its fine fragrance business unit. As a result of this focus under its new leadership, and thanks to its unwavering commitment to creativity and innovation, Mane has been the first company to be awarded [both] the "Technological Breakthrough of the Year" and "Perfume Extraordinaire" FiFis from the Fragrance Foundation.

Mane's flavor division is driven by the same set of values and entrepreneurial spirit; there is an unshakable belief in science and marketing driving innovation, and a passion for enhancing consumers' well-being while feeling good about our responsible social and environmental behavior.

10 Robertet

Grasse, France
2008 sales: $422 million; €303.17 million
Estimated 2008 market share: 2.1%
Chairman and managing director: Philippe Maubert

Robertet's reported 2008 sales—including Charabot results—of €303.17 million represented a gain year-over-year, whether or not one factored in the combined Charbot 2007 results: €241.14 million (sans Charabot) or €300.39 million (combined with Charabot). Moving forward, the company has reported first quarter 2009 turnover of €74.7 million, down from €76.8 million in 2008. Despite this drop, flavors posted a year-on-year gain, totaling €30.25 million (2008: €28.7 million). Perfumery sales reached €27.1 million (2008: €28.7 million), while raw materials totaled €16.8 million (2008: €18.8 million). Other turnover results totaled €515,000 (2008: €635,000). For more insights into the company's strategy for the future, see **First Person: Joseph Lattarulo**.

First Person: Joseph Lattarulo

Senior vice president of sales and marketing, Robertet

Opportunities and challenges

Due to the economic environment, challenges for the industry are keeping raw material costs under control. Always looking to keep costs down and deliver the best possible product to our consumers, Robertet is constantly looking for quality raw materials around the globe. As a leader in natural raw materials, it has always been our philosophy to be the best [when it comes to our] carbon footprint. On the supply side, the way we do business is changing, and purchasing needs to be smarter and better—in terms of purchasing power and strong global contracts—to make sure we can surpass consumer expectations. Economic uncertainty will affect consumer purchasing, which of course will affect new product launches. Consumers are thinking twice before making any purchases, which will penetrate and affect all markets. The opportunity in this kind of environment is that consumers are shying away from premium priced products, and the shift toward lower priced goods will continue to increase the market share within value. There has never been a better time to be in value or private label, which are key segments in driving business today.

Regulatory concerns seem to be on everyone's mind as well. New laws come into play, almost on a daily basis, and challenge us to be more creative in what materials we can use. Having fewer materials on the palette creates a challenge of being smarter with how we develop. What is also changing is the consumer mind-set and concern for the environment. New programs of sustainability and giving back to the environment have been on the tip of everyone's tongues. For Robertet this has been our concern since inception and will continue to lead the way in giving back and being green conscious.

Looking forward

Unfortunately, we feel there will be more consolidations on the supplier and consumer product side. Brands and consumers are hesitant to invest and spend money at the moment; so many companies are refocusing the depth and scope of their portfolios as consumers streamline purchases. Times are tough and will continue to get tougher for some time. We also see more regulations becoming tougher and tougher. This will not stop in our industry. As new rules and regulations are amended we will need to change accordingly. In many ways this is an advantage for Robertet as we are able to respond quickly and effectively to consumer and industry expectations. Our size allows us to turn things around quickly, which is beneficial to our consumers and the fast-paced marketplace. Our creativity and service is unsurpassed. In addition, more and more progress will be made in the green movement and sustainability. Consumers will almost expect to see how and in what ways their favorite brands are giving back. It will be the supplier's responsibility to show their green willingness as well.