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# Top 10

## World's Leading FLAVOR AND FRAGRANCE Companies

A THOUGHT-PROVOKING REPORT ON PERFORMANCE, CAPABILITIES, GOALS AND STRATEGIES OF THE MAJOR COMPETITORS IN THE WORLDWIDE FLAVOR AND FRAGRANCE MARKET

- Firmenich
- Frutarom
- Givaudan
- T.Hasegawa
- IFF
- Mane
- Robertet
- Sensient
- Symrise
- Takasago

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# ABOUT THIS REPORT

## Rationale

Strategic assessment of the competitive environment is becoming widely recognized as one of the highest priority management responsibilities -- the task crucial to business survival, growth and profitability. Timely and factual competitive intelligence is vital to the success of all business functions, particularly Marketing, Planning, R&D and Manufacturing.

In a highly dynamic and fragmented flavor and fragrance market, besieged by intense competition, the ability to anticipate new product introductions and marketing strategies is particularly important... and spells the difference between success and failure.

## Objectives

"**The Top 10 World's Leading Flavor and Fragrance Companies**" is a unique multi-client study prepared by Venture Planning Group in order to provide industry executives with strategically significant competitor information, analysis, and insight crucial to the development and implementation of effective business, marketing, and R&D programs. The study's major objectives include:

- To establish a comprehensive, factual and cost-effective information base on performance, capabilities,

goals and strategies of the world's leading flavor and fragrance companies.

- To help current suppliers realistically assess their financial, technological, and marketing capabilities vis-a-vis leading competitors.
- To assist potential market entrants in evaluating prospective acquisitions and joint venture candidates.
- To complement organizations' internal competitor information gathering efforts with strategic analysis, data interpretation, and insight.

## Methodology

The **Top 10** report is based on a combination of primary and secondary information sources, including interviews with executives, industry experts, financial analysts, and others knowledgeable of the companies' current operations and future strategic directions.

The report also includes information generated at industry shows, marketing conferences, and scientific symposia that occurred during the course of the study.

In addition to primary information sources, the study is based on data retrieved from Venture Planning Group's proprietary information base, which was developed

in the course of continuous monitoring of the industry, as well as over 100 previous syndicated studies and numerous single-client assignments. This database contains current information on major companies, technologies, products, and executives worldwide

Moreover, a comprehensive review of the Top 10 companies' product and financial literature, business and technical periodicals, and pertinent industry analyst reports was conducted.

## Special Features

- Over **550** pages of vital market intelligence.
- **65** tables and figures.
- **Worldwide Market Overview**, including sales forecasts for major market segments and geographic regions.
- **Comparative Analysis** ranking the **Top 10** companies according to their sales, operating profit, R&D expenditures, and sales force size.

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# STUDY CONTENT

## Worldwide Market Overview

A concise **20-page** worldwide market analysis, including:

- Review of major geographic regions (USA, Europe, Asia) and product categories (flavors, fragrances, aroma chemicals, essential oils).

- The 2009-2014 sales forecasts for the worldwide flavor and fragrance market, by product category and geographic region.

## Company Strategic Assessments

The report provides an approximately **50-page** strategic

### SECTION I: EXECUTIVE SUMMARY

- A 4-9 page synopsis of key sections.

### SECTION II: OWNERSHIP

- Background of parent companies, private owners, and shareholder information.

### SECTION III: BUSINESS EVOLUTION

- History of the company's formation, which is important to understanding the corporate culture, management mentality, and future strategies.
- Business evolution milestone charts.

### SECTION IV: ORGANIZATION AND MANAGEMENT

- Most recent acquisitions, divestitures, and organizational changes.
- Current organizational structure.
- Background of senior managers.

### SECTION V: MAJOR FACILITIES AND EMPLOYEES

- Production, compounding, creative, and R&D facilities by country.
- Workforce size.

### SECTION VI: PRODUCT PORTFOLIO AND TECHNOLOGICAL KNOW-HOW

- Major products and services, including fragrances (fine, technical), flavors, aroma chemicals (high-volume standard products, high-volume specialties, low-volume specialties), essential oils, and others.
- Know-how in chemical technology, biotechnology, aromacology and related fields.

### SECTION VII: MARKETING CAPABILITIES

- Sales force size by country.
- Major sale office locations.
- Marketing tactics.

### SECTION VIII: FINANCIAL ANALYSIS

- The 2009 sales estimates by product category and geographic region.
- Five-year sales and operating profit performance.

### SECTION IX: STRENGTHS AND WEAKNESSES

- Organizational
- Technological
- Marketing
- Financial

### SECTION X: STRATEGIC DIRECTION

- Business goals and strategies, including internal expansion, acquisitions, and divestitures.

## Comparative Analysis

In this section of the report, the **Top 10** companies are ranked according to the following criteria:

- Worldwide sales of flavors and fragrances.
- Sales estimates for North America, Europe, and the rest of the world.

- Sales estimates by product category.
- Operating profit and margins.
- Sales force size in North America, Europe, and the rest of the world.

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