



# Analysis of Attractive F&F Products

<b>Client</b>	A leading raw material supplier for aroma chemicals
<b>Industry</b>	Chemicals
<b>Products</b>	Raw materials for the production of aroma chemicals

## Background

- The client wanted to understand the business expansion opportunity if they were to forward integrate into F&F products / aroma chemicals or molecules, and position itself as a F&F product manufacturer

## Key Business Questions

- Which are the most attractive F&F products based on parameters such as global production volume, regional preference, pricing, growth outlook, etc.?
- What's the competitive intensity for the selected F&F products?
- What's the customer universe for the selected F&F products?
- What are various route-to-market channels for the selected F&F products?

## Engagement Scope

1	Selection of Top 20 F&F Products	2	Analysis of Top 20 F&F Products	3	Analysis of Route-to-Market Channels
	<ul style="list-style-type: none"> <li>▪ To cluster the universe of 108 F&amp;F products into low (&lt; 100 tonne), medium (100–1,000 tonne), large (1,000–5,000 tonne) and very large (&gt; 5,000 tonne) buckets based on global production.</li> <li>▪ To selection of top 20 F&amp;F products</li> </ul>		<ul style="list-style-type: none"> <li>▪ To analyze top 20 F&amp;F products focusing on the following parameters:               <ul style="list-style-type: none"> <li>- Estimated global production volume.</li> <li>- Global average price or price range.</li> <li>- Which are the 2–3 major competitors?</li> <li>- Which are the 4–5 major customers?</li> </ul> </li> <li>▪ Global estimated annual consumption volume.</li> </ul>		<ul style="list-style-type: none"> <li>▪ What are the typical routes-to-market?               <ul style="list-style-type: none"> <li>- Ratio of direct vs. indirect and how that varies from large to medium to small F&amp;F house / compounder?</li> <li>- Does the ratio vary from region to region?</li> <li>- Is the trend same for the select 20 F&amp;F products as a whole?</li> </ul> </li> </ul>

## Research Methodology

### Secondary Research

- Conducted desk research studying players' websites, annual reports, press releases, etc.
- Referred paid data sources such as market research reports, association reports

### Primary Research

- 60+ interviews with major F&F product manufacturers and distributors and major F&F houses and compounders as well as consultation with frontline industry experts.

## Sample Analysis

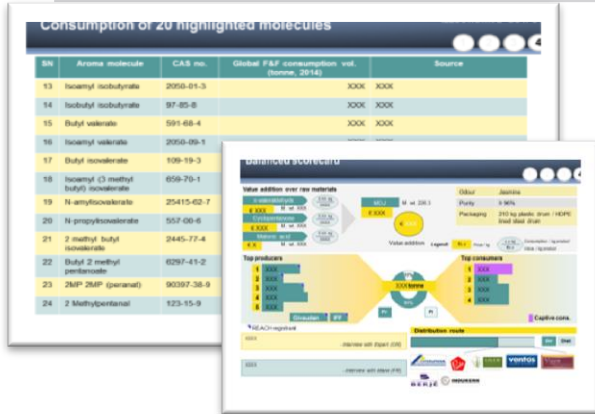
1

### Selection of Top 20 F&F Products



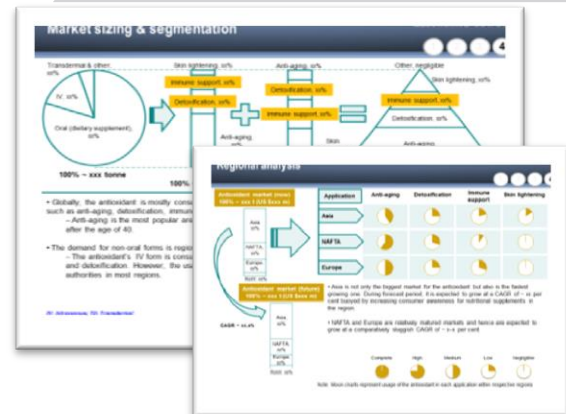
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### Analysis of Top 20 F&F Products



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### Analysis of Route-to-Market Channels



# Thank you

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