

Global Lemongrass Oil Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 82.6 m
Forecast (2031)	USD 129.4 m
CAGR (2021-2031)	7.8%
Study period	2021-2031
Largest region	Asia-Pacific · 41.6%
Fastest-growing region	Asia-Pacific · 8.9%
Market concentration	Low
Licence	Individual / Company

The global lemongrass oil market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at a XX% CAGR. Demand is moving beyond traditional aromatherapy into premium personal care, natural household products, flavor systems and botanical wellness formulations. Asia-Pacific holds XX% of global revenue through its combined position as the principal cultivation base and a fast-expanding consumer market. Supply-chain traceability, citral consistency and certified-organic production are becoming decisive sources of margin and customer retention.

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Executive summary

The global lemongrass oil market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at a XX% CAGR. Demand is moving beyond traditional aromatherapy into premium personal care, natural household products, flavor systems and botanical wellness formulations. Asia-Pacific holds XX% of global revenue through its combined position as the principal cultivation base and a fast-expanding consumer market. Supply-chain traceability, citral consistency and certified-organic production are becoming decisive sources of margin and customer retention.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global lemongrass oil revenue reached USD XXX million in 2025 and will reach USD XXX million by 2031.
- Asia-Pacific generated XX% of 2025 market value and will record the fastest regional CAGR at XX%.
- Cymbopogon flexuosus accounted for XX% of market value because its high-citral profile and established Indian supply base suit industrial fragrance, flavor and cleaning formulations.
- Personal care and cosmetics represented XX% of demand, while aromatherapy and wellness will grow fastest at XX% annually.
- Certified-organic oil captured XX% of 2025 revenue and will grow at XX% through 2031 as premium brands tighten ingredient-origin requirements.
- Direct business-to-business contracts represented XX% of sales, reflecting the importance of specification control, sample approval and recurring industrial volumes.
- ISO 3217 specifies a minimum XX% carbonyl-compound content expressed as citral for Cymbopogon citratus oil and was reconfirmed in 2021.
- ISO 4718:2004, covering Cymbopogon flexuosus oil, was reviewed and confirmed in 2023.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Lemongrass Oil Market Trends and Growth Drivers

Lemongrass oil sits at the intersection of agricultural commodities and high-value formulation ingredients. Its economics are governed by grass yield, steam-distillation efficiency and citral composition at origin, but downstream value depends on authentication, oxidation control, documentation and the supplier's ability to deliver a repeatable sensory profile.

Demand is widening as personal-care, household and wellness brands use botanicals to make ingredient lists more recognizable. This expansion favors lemongrass oil because it provides a powerful citrus note at a more accessible cost than many premium essential oils and can serve fragrance, flavor and functional-positioning roles.

The principal competitive tension is between natural-origin differentiation and the consistency of synthetic citral. Suppliers that industrialize farm traceability and analytical quality without eroding the crop's natural identity will capture the strongest margins through 2031.

Growth drivers

Natural Fragrance Reformulation

Beauty and home-care formulators are replacing portions of synthetic fragrance systems with recognizable botanical ingredients. Lemongrass oil combines a strong citrus profile with deodorizing utility, allowing brands to support natural-positioning claims without sacrificing fragrance intensity.

Aromatherapy and Home Wellness

Diffusers, massage blends and home spa routines are broadening the consumer base for lemongrass oil. The category benefits from accessible pricing relative to scarce floral oils and from compatibility with citrus, mint, eucalyptus and woody blends.

Organic and Traceable Sourcing

Premium personal-care and wellness brands increasingly require farm origin, pesticide controls and recognized organic certification. Suppliers that connect grower records, distillation lots and analytical results are securing multi-year accounts and higher realized prices.

Natural Home-Care Ingredients

Concentrated cleaners, surface sprays, detergents and air-care products are using essential oils to deliver citrus fragrance and botanical positioning. Lemongrass oil performs particularly well in direct-to-consumer and refill-oriented brands seeking high sensory impact at low formulation dosage.

Botanical Flavor Innovation

Functional beverages, teas, confectionery and Southeast Asian flavor profiles are supporting food-grade demand. Growth is concentrated among suppliers that maintain residue controls, food-safety systems and sensory consistency across harvests.

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Digital Ingredient Distribution

Specialist e-commerce platforms are reducing minimum order barriers for artisan beauty companies, contract formulators and wellness practitioners. The channel raises value realization through smaller packs, documentation bundles and rapid sample-to-order conversion.

Restraints

Crop and Distillation Volatility

Rainfall variability, planting cycles, fuel costs and distillation timing affect both oil yield and citral composition. Short harvests create sharp procurement-price movements and complicate fixed-price contracts for processors and consumer brands.

Adulteration and Quality Variance

Dilution with synthetic citral, related grass oils or low-value fractions damages buyer confidence and increases testing requirements. Industrial customers increasingly require gas-chromatography profiles, authenticity checks and retained batch samples before approving suppliers.

Citral Compliance Burden

Citral is a regulated fragrance allergen in major cosmetic markets, requiring concentration control and ingredient disclosure at applicable thresholds. Reformulation, safety assessment and label-management costs weigh most heavily on small brands and distributors carrying numerous blends.

Synthetic Citral Substitution

Large-volume fragrance and cleaning formulations can substitute synthetic citral when natural-origin claims are not commercially essential. Predictable purity, year-round availability and pricing make synthetic material a firm ceiling on commodity-grade lemongrass oil margins.

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Driver and Restraint Impact on the Lemongrass Oil Market Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Natural Fragrance Reformulation	XXX	XXX	XXX
Aromatherapy and Home Wellness	XXX	XXX	XXX
Organic and Traceable Sourcing	XXX	XXX	XXX
Natural Home-Care Ingredients	XXX	XXX	XXX
Botanical Flavor Innovation	XXX	XXX	XXX
Digital Ingredient Distribution	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Crop and Distillation Volatility	XXX	XXX	XXX
Adulteration and Quality Variance	XXX	XXX	XXX
Citral Compliance Burden	XXX	XXX	XXX
Synthetic Citral Substitution	XXX	XXX	XXX

Source: XXX

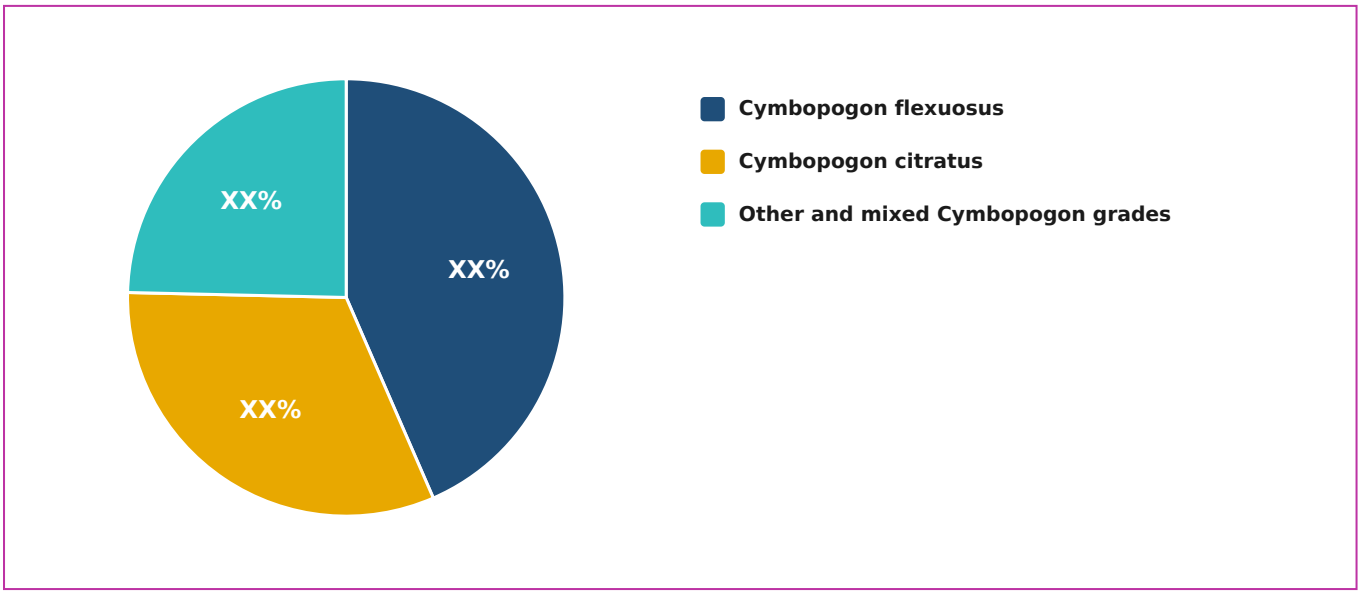
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Lemongrass Oil Market Segmentation by Species, Nature, Application and Channel

By Botanical Species

Cymbopogon flexuosus dominates commercial supply because Indian cultivation, high citral content and established export channels support repeatable industrial grades. Cymbopogon citratus is prominent in West Indian-type oil, localized tropical production and products emphasizing culinary or traditional botanical associations. Species-authenticated and chemotyped material will outperform generic mixed-origin oil.

Value share by botanical Species, 2025



Source: XXX

Value by botanical Species, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cymbopogon flexuosus	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cymbopogon citratus	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other and mixed Cymbopogon grades	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional oil remains the volume standard for household products, mass personal care, fragrances and industrial flavor applications. Certified-organic oil commands a substantial premium through controlled farm inputs, segregated distillation and chain-of-custody documentation. Organic growth is strongest in

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premium beauty, independent wellness brands and specialist European and North American distribution.

Value by nature, USD bn

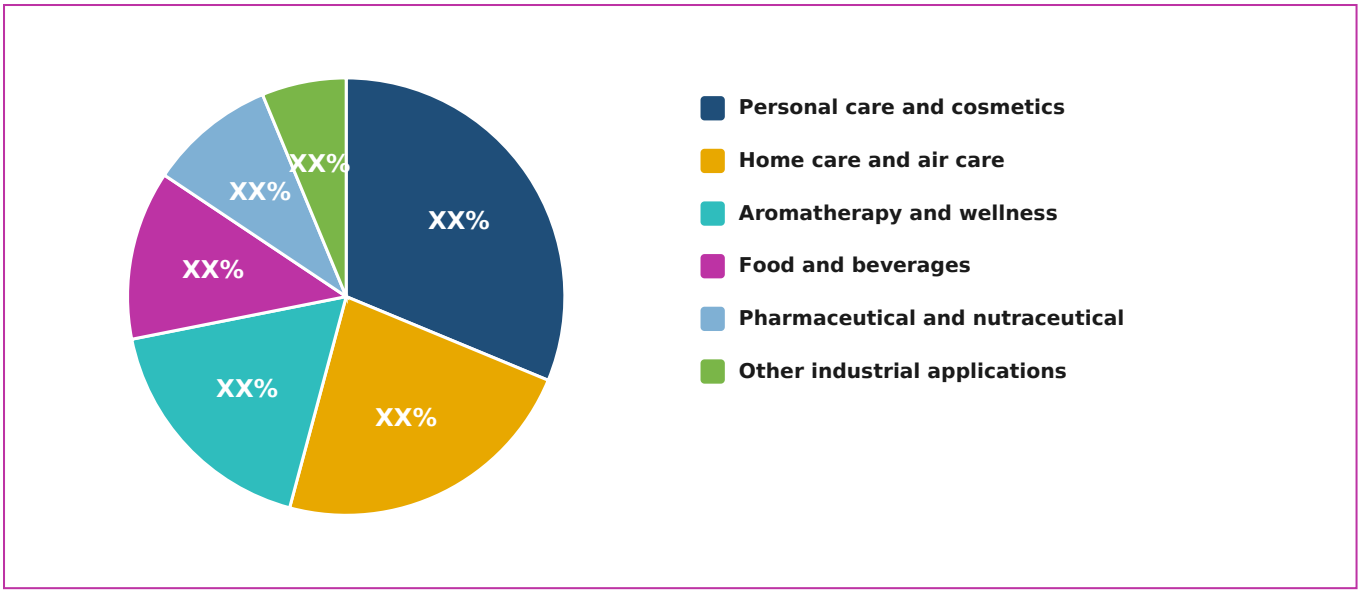
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Personal care leads through soaps, hair products, deodorants, massage preparations and natural-fragrance systems. Home care uses lemongrass oil in cleaners, air care and odor-control formulations, while food and beverage applications require tighter food-safety and residue controls. Aromatherapy is the fastest-growing application as diffusers, blends and accessible wellness routines expand across digital channels.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Personal care and cosmetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Home care and air care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aromatherapy and wellness	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical and nutraceutical	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other industrial applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct contracts dominate among fragrance houses, consumer-product manufacturers and large formulators that qualify individual suppliers and lots. Specialist distributors aggregate origins, provide local inventory and serve mid-sized customers requiring technical support. Online B2B and branded wholesale channels grow fastest by supplying samples and smaller quantities to independent formulators.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct B2B supply	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialist distributors and wholesalers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online B2B and branded wholesale	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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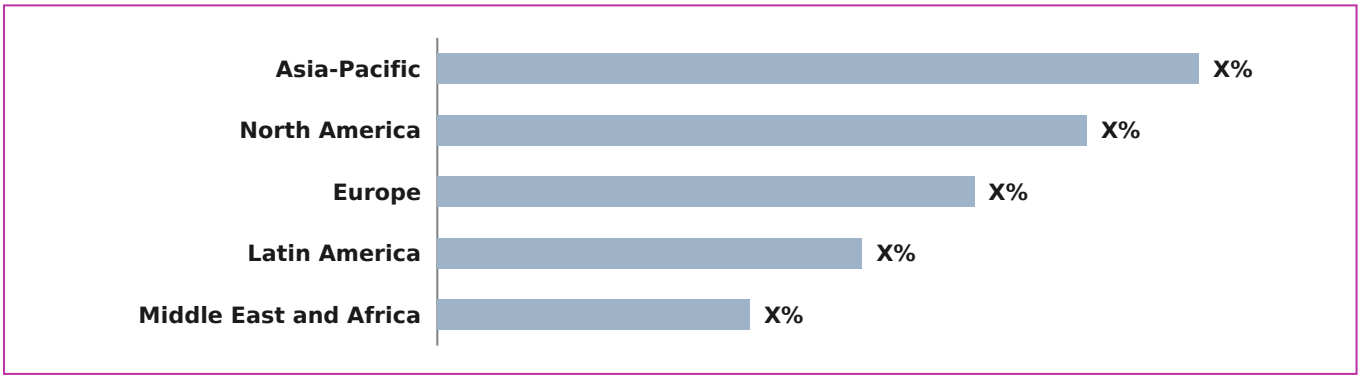
Lemongrass Oil Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global lemongrass oil revenue in 2025 and anchors both sides of the value chain. India supplies substantial volumes of Cymbopogon flexuosus oil through networks of growers, field distillers, consolidators and exporters, while China, Japan, South Korea and Southeast Asia provide expanding demand from personal care, flavor, aromatherapy and household-product manufacturers. Regional growth of XX% through 2031 will be led by formalized procurement, improved distillation efficiency and rising domestic consumption.

North America represented XX% of market value, supported by high spending on branded essential oils, natural household cleaners and independent personal-care products. The United States provides the region's principal demand pool and benefits from the FDA's established treatment of lemongrass oil as a flavoring agent or adjuvant under 21 CFR 182.20. Specialist online retail and contract manufacturing create a broad route to market, while industrial buyers increasingly favor audited and identity-preserved supply.

Europe accounted for XX% of 2025 revenue and remains a specification-intensive market for certified and documented oils. France and Germany serve as formulation, fragrance and distribution hubs, while the United Kingdom has a developed aromatherapy and natural-personal-care channel. Latin America and the Middle East and Africa start from smaller bases but present attractive cultivation, local-distillation and import-substitution opportunities, particularly in Brazil, South Africa and East Africa.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Lemongrass Oil Market Competitive Landscape and Company Share

The global market is fragmented at cultivation and primary-distillation level and more organized in export processing, analytical testing and international distribution. The ten largest suppliers captured XX% of 2025 revenue, leaving substantial space for regional distillers, traders and private-label specialists. Scale advantages arise from multi-origin sourcing, gas-chromatography capability, regulatory documentation and the ability to blend lots to a repeatable customer specification.

Givaudan, Robertet, Berjé, Ernesto Ventós and Ultra International compete through broad natural-aromatics portfolios and relationships with fragrance, beauty and flavor manufacturers. AOS Products, Norex Flavours, Kanta Enterprises and India Essential Oils connect Indian production with export markets, while doTERRA, Young Living, Plant Therapy and Edens Garden influence premium packaged demand and consumer education.

Strategic activity is moving toward extraction technology, traceable supply chains and direct digital distribution. Givaudan's House of Naturals and Robertet's acquisition of Phasex illustrate investment in differentiated natural ingredients and cleaner extraction capabilities. Future consolidation will concentrate on suppliers that control agronomy, distillation, authentication data and customer-ready regulatory dossiers.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Givaudan SA	XXX	XXX	XXX	XXX
Robertet SA	XXX	XXX	XXX	XXX
Berjé Inc.	XXX	XXX	XXX	XXX
Ernesto Ventós S.A.	XXX	XXX	XXX	XXX
Ultra International Limited	XXX	XXX	XXX	XXX
AOS Products Private Limited	XXX	XXX	XXX	XXX
Vigon International LLC	XXX	XXX	XXX	XXX
doTERRA International LLC	XXX	XXX	XXX	XXX
Young Living Essential Oils LC	XXX	XXX	XXX	XXX
Plant Therapy Essential Oils	XXX	XXX	XXX	XXX

Source: XXX

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Lemongrass Oil Market Forecast, Investment Priorities and Opportunities

The market will add USD XXX million in annual revenue between 2025 and 2031. Volume growth will remain healthy, but certified origin, higher citral consistency and customer-specific quality grades will account for a rising share of value creation. Aromatherapy, premium personal care and naturally positioned home care will provide the strongest mix uplift.

The central forecast assumes continued expansion of natural fragrance and wellness formulations, normal crop cycles and progressive formalization of South Asian supply. A stronger certification cycle and successful mainstream adoption in concentrated household products would lift growth above the central path, while repeated weather disruption and synthetic-citral substitution would slow industrial-volume gains.

Winning suppliers will combine multi-year grower relationships with efficient field distillation, rapid analytical release and transparent chain-of-custody records. Buyers will prioritize partners capable of delivering both industrial drums and development quantities under a common specification, making flexible distribution and technical service central to market-share gains.

Opportunities

- Long-term farmer contracts linked to regenerative cultivation and traceable distillation
- Standardized high-citral grades for home-care and fragrance manufacturers
- Low-oxidation and fractionated ingredients for sensitive cosmetic applications
- Certified-organic supply for premium beauty and wellness brands
- Small-format B2B distribution serving independent formulators
- Local processing investments in India, Vietnam, Indonesia, East Africa and Brazil

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