

Global Citronella 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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 138.6 m
Forecast (2031)	USD 203.7 m
CAGR (2021-2031)	6.6%
Study period	2021-2031
Largest region	Asia-Pacific · 38.7%
Fastest-growing region	Asia-Pacific · 7.4%
Market concentration	Moderate
Licence	Individual / Company

The global citronella oil market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by its central position in cultivation, distillation and downstream botanical processing. Insect repellents remain the largest application, while natural fragrance ingredients and traceable personal-care formulations are creating the strongest premiumization opportunities. The report quantifies market value, volume, prices, trade flows, supply concentration and competitive positioning across product types, grades, applications, sales channels and geographies.

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Executive summary

The global citronella oil market reached USD XXX million in 2025 and will expand to USD XXX million by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by its central position in cultivation, distillation and downstream botanical processing. Insect repellents remain the largest application, while natural fragrance ingredients and traceable personal-care formulations are creating the strongest premiumization opportunities. The report quantifies market value, volume, prices, trade flows, supply concentration and competitive positioning across product types, grades, applications, sales channels and geographies.

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

Key findings

- The global citronella oil market generated USD XXX million in 2025 and will reach USD XXX million in 2031.
- Global commercial demand totaled XXX tonnes in 2025 and will rise to XXX tonnes by 2031.
- Java-type oil represented XX% of 2025 market value because its higher citronellal and geraniol profile supports repellent, fragrance and fractionation applications.
- Insect repellents accounted for XX% of global value in 2025, equivalent to USD XXX million.
- Asia-Pacific held XX% of global revenue in 2025 and will record the fastest regional CAGR at XX% through 2031.
- Natural and conventional commercial-grade oil represented XX% of demand, while certified organic oil will grow at XX% CAGR.
- Direct business-to-business contracts controlled XX% of 2025 revenue as large formulators prioritized specification consistency, documentation and supply assurance.
- The US Environmental Protection Agency lists citronella oil under PC Code 021901 and identifies three EPA-registered skin-applied products containing oil of citronella as an active ingredient.

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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 Citronella Oil Market Trends and Growth Drivers

Citronella oil sits at the intersection of three structurally attractive ingredient markets: botanical insect protection, natural fragrance and wellness. Demand is moving beyond seasonal candles and coils toward standardized inputs for topical repellents, household products, personal care and natural aroma chemicals. This broadening application base supports steadier annual purchasing and raises the value of consistent Java-type material.

Supply economics remain grounded in agricultural yield and field-distillation performance. Small changes in harvest frequency, grass moisture, boiler efficiency and recovery rates translate directly into export availability, while constituent profiles determine whether oil enters bulk household applications or premium fragrance and fractionation channels. Integrated sourcing and analytical control therefore matter more than nominal distillation capacity.

The market's next competitive phase will be defined by traceability and application performance. Buyers are rewarding farm-level documentation, stainless-steel processing, GC-MS verification and credible environmental programmes, while encapsulation and fixation systems address volatility in repellent products. These shifts expand margins for technically capable suppliers and reduce the strategic value of anonymous spot-market volume.

Growth drivers

Plant-Based Mosquito Repellents Scale Globally

Consumer-goods companies are widening botanical repellent portfolios across sprays, lotions, patches, coils and outdoor products. Citronella benefits from high consumer recognition and flexible use in minimum-risk, registered and non-pesticidal fragrance formats, increasing demand from both branded formulators and private-label manufacturers.

Natural Fragrance Reformulation Supports Premium Demand

Personal-care and household-product formulators are increasing their use of recognizable botanical fragrance inputs. Java-type citronella supplies lemon, green and rosy notes while also serving as a feedstock for natural citronellol and geraniol, allowing suppliers to participate in both essential-oil and aroma-chemical value pools.

Aromatherapy and Wellness Channels Broaden Access

Specialty retailers, pharmacies and digital wellness platforms have expanded consumer access to single oils and functional blends. The channel supports smaller pack sizes and higher realized prices, while also familiarizing consumers with citronella beyond seasonal outdoor use.

Natural Aroma-Chemical Fractionation Raises Feedstock Value

Processors are fractionating citronella oil into natural citronellal, citronellol and geraniol for fragrance and functional applications. This creates an additional demand route for high-specification Java oil and rewards

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producers that maintain constituent consistency across crops.

Traceability Becomes a Commercial Differentiator

Global formulators increasingly require origin documentation, audited distillation practices and batch-level analytical data. Direct grower and distiller programmes reduce adulteration exposure and enable verified suppliers to secure longer contracts and premium pricing.

Climate and Vector Pressure Sustains Repellent Consumption

Longer warm seasons, urban mosquito exposure and increased outdoor recreation are supporting household and personal insect-protection purchases. Citronella oil captures demand in candles, spatial repellents, topical products and complementary fragrance systems.

Restraints

Smallholder Supply and Weather Volatility

Citronella cultivation and field distillation remain fragmented across major producing origins. Rainfall shifts, competing crops, labor availability and variable distillation efficiency can tighten supply rapidly and create pronounced movements in oil yield, quality and export price.

Synthetic Substitutes Cap Industrial Pricing

Synthetic citronellal, citronellol and geraniol provide standardized composition and dependable availability for cost-sensitive fragrance applications. When petrochemical-derived alternatives trade at a wide discount, formulators limit natural citronella usage or reserve it for products carrying natural-origin claims.

Allergen and Product-Claim Compliance

Citronella oil contains constituents subject to fragrance-allergen disclosure, safety assessment and product-category limits. Compliance raises testing, documentation and reformulation costs, particularly for small suppliers serving European cosmetics and skin-applied repellent customers.

Adulteration Weakens Buyer Confidence

Dilution, substitution and blending of origins create inconsistent odor and active-constituent performance. Buyers respond with stricter GC-MS specifications, retained-sample procedures and supplier audits, increasing qualification costs and excluding undocumented distillers.

Performance Limits in Topical Repellents

Volatility can shorten protection duration when citronella is used without fixation, encapsulation or complementary actives. This constrains its position in efficacy-led public-health applications while directing innovation toward controlled-release delivery systems.

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Citronella Oil Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Plant-Based Mosquito Repellents Scale Globally	XXX	XXX	XXX
Natural Fragrance Reformulation Supports Premium Demand	XXX	XXX	XXX
Aromatherapy and Wellness Channels Broaden Access	XXX	XXX	XXX
Natural Aroma-Chemical Fractionation Raises Feedstock Value	XXX	XXX	XXX
Traceability Becomes a Commercial Differentiator	XXX	XXX	XXX
Climate and Vector Pressure Sustains Repellent Consumption	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Smallholder Supply and Weather Volatility	XXX	XXX	XXX
Synthetic Substitutes Cap Industrial Pricing	XXX	XXX	XXX
Allergen and Product-Claim Compliance	XXX	XXX	XXX
Adulteration Weakens Buyer Confidence	XXX	XXX	XXX
Performance Limits in Topical Repellents	XXX	XXX	XXX

Source: XXX

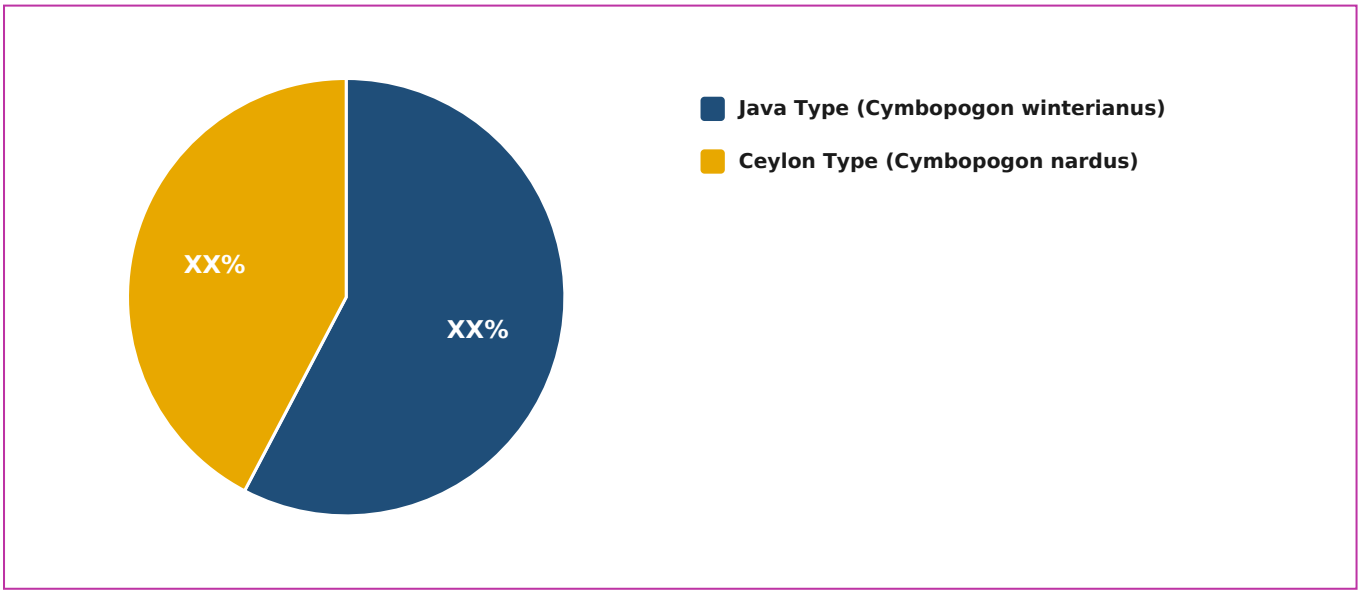
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Citronella Oil Market Segmentation by Type, Grade and Application

By Product Type

Java-type oil dominates industrial purchasing because its higher citronellal and geraniol profile suits repellents, fragrance compounding and natural-molecule fractionation. Ceylon-type oil retains demand for its softer woody-citrus profile and established use in aromatherapy and traditional formulations. Java-type growth will be reinforced by Indonesian processing investment and tighter export standardization.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Java Type (Cymbopogon winterianus)	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ceylon Type (Cymbopogon nardus)	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Conventional natural oil leads bulk repellent, soap, detergent and fragrance applications because buyers can secure it at commercial scale across multiple origins. Certified organic oil attracts a widening premium in wellness, cosmetics and specialty retail, advancing at XX% CAGR. Rectified and standardized oil remains essential for formulators requiring narrower color, odor and constituent tolerances.

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Value by grade, USD bn

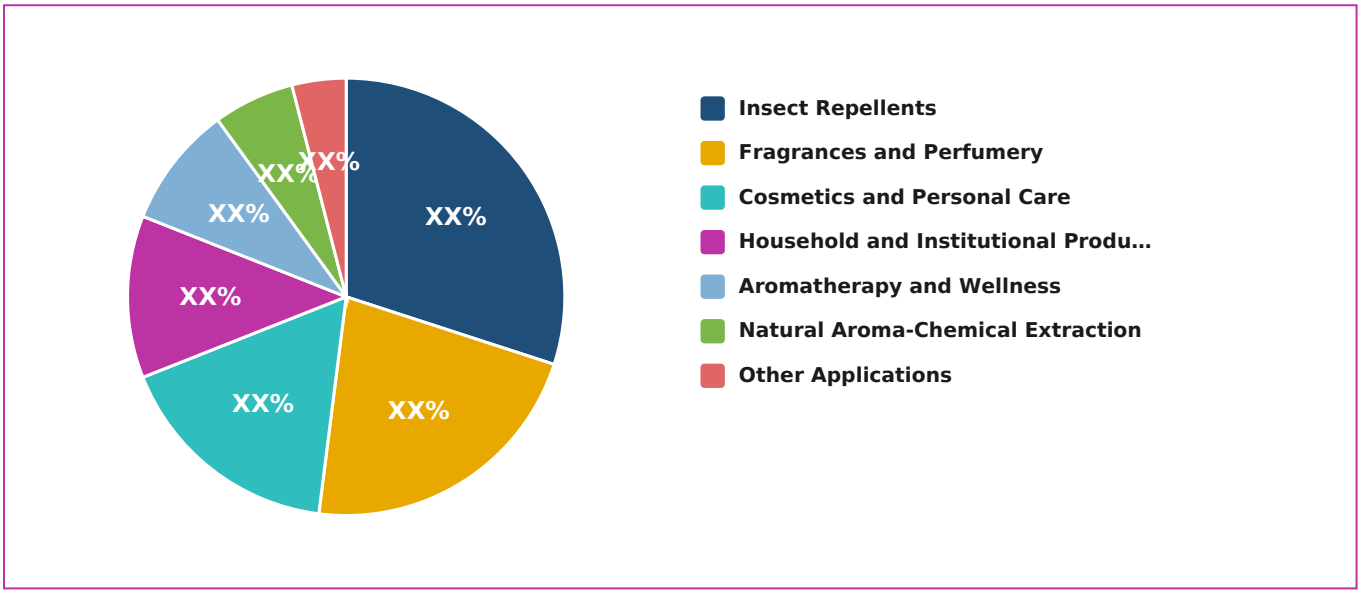
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional Natural	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rectified and Standardized	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Insect repellents lead through spatial products, topical formulations, sprays, coils and outdoor-use formats. Fragrances and household products provide broad industrial demand, while cosmetics and personal care are shifting toward standardized, traceable and allergen-documented grades. Natural aroma-chemical extraction records the fastest growth as processors monetize citronellal, citronellol and geraniol fractions.

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
Insect Repellents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fragrances and Perfumery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cosmetics and Personal Care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Household and Institutional Products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aromatherapy and Wellness	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Natural Aroma-Chemical Extraction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct contracts dominate purchases by fragrance houses, repellent formulators and household-product manufacturers because technical qualification and batch consistency are central to supplier approval. Distributors and ingredient traders remain important for regional inventory, mixed-container shipments and smaller buyers. Digital and specialty retail achieves the highest unit price and will grow fastest as aromatherapy brands and small formulators broaden online procurement.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Ingredient Traders	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Digital and Specialty Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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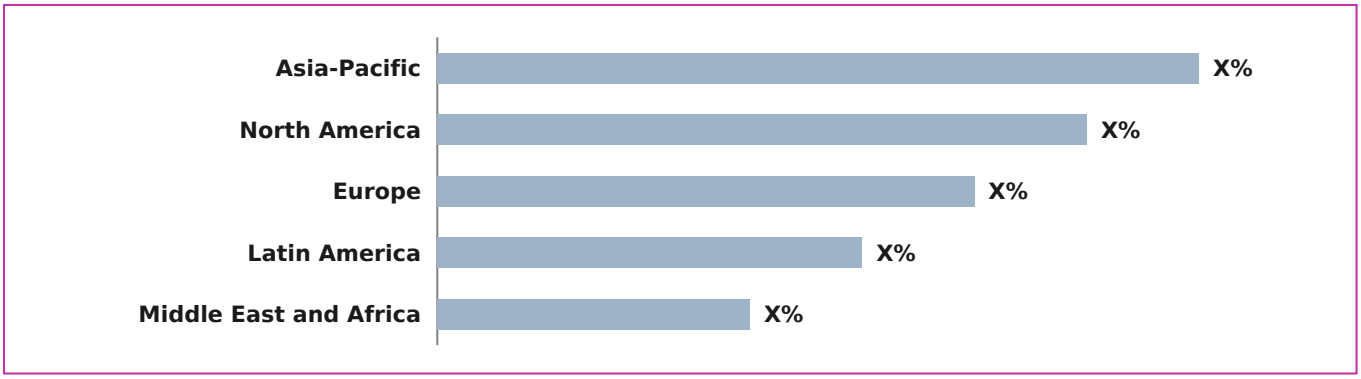
Citronella Oil Market Regional Analysis and Country Outlook

Asia-Pacific generated USD XXX million in 2025, representing XX% of global market value. Indonesia anchors Java-type cultivation, field distillation and natural aroma-chemical processing, while China and India combine local production with expanding demand from household insecticides, incense, personal care and aromatherapy. Regional revenue will reach USD XXX million by 2031 as standardized distillation, direct sourcing and domestic formulation capture a larger share of the value chain.

North America held XX% of 2025 revenue, led by the United States market for outdoor candles, sprays, topical repellents, pet products and wellness oils. The US Environmental Protection Agency's minimum-risk framework supports a broad commercial base for qualifying products, while efficacy claims and state-level requirements create a clear divide between fragrance-led products and regulated repellents. Europe accounted for XX%, with Germany, France and the United Kingdom favoring documented natural origin, allergen compliance and premium fragrance grades.

Latin America and the Middle East and Africa together represented XX% of 2025 value. Brazil is the principal Latin American demand center and an emerging botanical-processing hub, whereas tropical pest exposure supports repellent consumption across Mexico, Southeast Africa and Gulf outdoor-living markets. Investment opportunities center on local formulation, farm productivity and modern steam-distillation assets in countries with suitable climates.

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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Citronella Oil Market Competitive Landscape and Company Share

The citronella oil market is moderately concentrated at the standardized export and natural-derivative level but remains fragmented in cultivation and primary distillation. The ten leading organized suppliers controlled XX% of 2025 revenue. Indesso, Van Aroma, Robertet, MANE and Ernesto Ventós combine origin access, analytical standardization, global distribution or downstream fragrance capabilities, while hundreds of local distillers supply traders and regional blenders.

Competition is shifting from spot-volume availability toward specification control, traceability and derivative capability. Leading suppliers use direct farmer programmes, upgraded stainless-steel distillation, GC-MS authentication and multi-origin inventory to protect continuity. Natural citronellol, geraniol and citronellal portfolios also allow integrated processors to earn margins beyond bulk-oil trading.

Recent investment has centered on securing Indonesian feedstock and consolidating botanical processing. Indika Energy's acquisition of full ownership in Natura Aromatik Nusantara and Indesso's off-take partnership with PT Sekar Agrindo Semesta illustrate the strategic value placed on export networks and direct distillation access. Over the forecast period, partnerships and selective acquisitions will target auditable supply, organic certification and controlled-release repellent technologies.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
PT Indesso Aroma	XXX	XXX	XXX	XXX
Van Aroma	XXX	XXX	XXX	XXX
Robertet Group	XXX	XXX	XXX	XXX
MANE	XXX	XXX	XXX	XXX
Ernesto Ventós	XXX	XXX	XXX	XXX
Berjé Inc.	XXX	XXX	XXX	XXX
AOS Products	XXX	XXX	XXX	XXX
PT Natura Aromatik Nusantara	XXX	XXX	XXX	XXX
Phoenix Aromas & Essential Oils	XXX	XXX	XXX	XXX
Ultra International	XXX	XXX	XXX	XXX

Source: XXX

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Citronella Oil Market Forecast and Strategic Opportunities

Global citronella oil revenue will rise from USD XXX million in 2025 to USD XXX million by 2031. Volume growth will remain below value growth as certified origin, tighter analytical specifications and natural aroma-chemical demand lift the product mix. The central forecast assumes improved Indonesian crop productivity, orderly capacity additions and continuing substitution toward botanical functional ingredients.

The strongest returns will accrue to companies that connect farm-level control with application development. High-citronellal Java grades, certified organic supply, low-contaminant distillation and fractionated natural molecules will outperform undifferentiated bulk oil. Encapsulation and fixation technologies will expand citronella's usable protection window and strengthen its position in higher-value repellent formats.

A favorable-growth scenario lifts 2031 revenue to USD XXX million through faster natural-repellent adoption and stable harvests; a supply-constrained scenario produces USD XXX million as volatile crops and synthetic substitution suppress volume. Across scenarios, Asia-Pacific remains the largest and fastest-growing region, while Europe retains the highest compliance-driven premium for fully documented material.

Opportunities

- Certified organic and regenerative citronella cultivation
- Standardized high-citronellal Java-type grades
- Encapsulated and controlled-release repellent systems
- Natural citronellol and geraniol fractionation
- Direct-to-formulator supply with GC-MS and farm-level traceability
- Pet-care, crop-protection and odor-control formulations

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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