

ESSENTIAL OILS AND OLEORESINS  
MARKET INSIDER



Indonesian tropical garden

April 2016 Report

## Market Insider

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# Essential Oils

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## Market Update & News

### **Vitafoods celebrates 20<sup>th</sup> anniversary**

Vitafoods (Geneva, 10-12 May 2016) is celebrating its 20<sup>th</sup> anniversary this year. It is an important trade fair for the nutraceutical industry – an important user of essential oils and oleoresins. Medicinal/health support uses of essential oils, not just aromatherapy, are an increasingly important market for essential oils, and driving demand and supporting prices.

### **IFEAT 2016 conference details**

IFEAT 2016 conference will be held over 25-29 September 2016 in Dubai, at the Madinat Jumeirah resort. The theme of the conference will be 'The Middle East – Challenges at the historical crossroad of the F&F trade'. The format of the conference is changing this year, so that the first 2 days will comprise technical presentations, and the final 2 days will be devoted to the IFEAT Trade Exhibition. The Conference and Trade Exhibition provides an ideal opportunity for producers to get wide market exposure and meet buyers from all over the world in one place, personally.

Source: IFEAT

### **Organic market for cosmetics forecast to grow strongly**

According to the Global Organic Cosmetics Market Forecast & Opportunities, 2021: TechSci Research Report, the global organic cosmetics market is shown to be growing to reach a CAGR of about 10%, or USD 16 billion by 2021. The growing need for chemical-free products in the market is correlated with the changing lifestyle of consumers who have an increased disposable income and rising social awareness. The organic skin care market is anticipated to be a major contributor to revenue growth, with hair care following in second due to rising hair concerns, such as dandruff and hair loss. One problem that comes with this growth is the products' limited shelf-life. That, along with raw material supply and regulatory policies is some of the factors that can pose a challenge to the market.

Organic cosmetics products are retrieved from organically grown ingredients and processing it naturally without any addition of chemical. An organic cosmetic are being treated as an essential element of the beauty and personal care & plays a significant role in industry growth. Organic cosmetics have a wide product array sophisticated products focused on antioxidant properties, exfoliation, etc. Rising concerns regarding the wellness and hygiene of a consumer, growing disposable income, new product development, are few of the major growth drivers of the global organic cosmetics market.

The Global Organic Cosmetics market is pegged to grow at a CAGR of about 10% during the forecast period and is expected to reach around USD16 Billion by 2021. Growing need for chemical-free personal care products coupled with changing lifestyle of consumers regarding organic care, increasing consumer disposable income in emerging economic systems, rising consumer awareness are the major elements which would fuel the development of the organic cosmetics market. Likewise, a growing number of regulatory experts and certification providers offer a friendly regulatory environment which is also driving the development of the marketplace. Also, continuous product innovation is one of the biggest opportunities which is expected to influence the global organic cosmetics market.

The organic skin care segment is dominating the global market and is anticipated to be a major contributor in the organic cosmetics market. Hair care segment is another major contributor in the market which rising on the back of hair related concerns like hair fall, dandruff, etc. However, limited

shelf-life of organic cosmetics, raw material supply and stringent regulatory policies are few of the factors which pose a challenge to organic cosmetics ecosystem.

The Global Organic Cosmetics Market is classified on the basis of type, distribution channel and region. Major types are:

- Skin Care
- Hair Care
- Makeup Cosmetics
- Fragrances
- Toiletries

Currently, North America accounted for the largest share in the organic cosmetics market. Europe and Asia-Pacific region govern the second largest and third largest market share, respectively. The demand of organic cosmetics in Latin America is expected to witness promising growth over the next few years in light of increasing consumption of cosmetic products, new product launches, rising disposable income. However, Countries like China and India, in Asia-Pacific region, is expected to witness significant gain over the forecast period. Factors like rising concerns towards ageing, UV effects and hair fall will fuel growth in this region.

The major distribution channels relevant to the organic cosmetics include department stores, franchise outlet, beauty specialist store, direct selling, chemists or pharmacies, online shopping and others. Currently, franchise outlet is expected to come out as the most dominating distribution modes and record a double digit growth for the forecast period. Following franchisee outlet is the department store format which is expected to hold second place in terms of growth. The Body Shop, Burt's Bee, Estee Lauder, The Hain Celestial Group, Yves Rocher, Amway, Aveda Corp., Arbonne International, Kiehl's, Natura Cosméticos S.A., and L'Occitane en Provence are some of the major players operating in organic cosmetics market.

### **Want to learn to be a perfumer?**

IFF and ISIPCA have announced their partnership to educate future perfumers and food flavorists by establishing a Master of Science Scent Design and Creation Manager program. ISIPCA describes the program as "a unique three years' course in English with the ability to access career opportunities within the exciting world of fragrances upon graduation." Students entering into the full-time program are offered global internship opportunities. During the three years, students are offered a chance to explore various career specializations, including perfumer, evaluator and technologists. This will be offered at ISIPCA's campus in Versailles, France.

In a press release, Cecile Ecalle Montier, managing director, ISIPCA, said, "We are very proud of having trained so many of the world's most successful and influential perfumers, including many at IFF. There is a beautiful symmetry to bringing IFF's talent onto our campus and offering their unique and practical expertise in this new program. Their fresh perspective and proven success will be a valued addition to our offerings," Nicolas Mirzayantz, president, IFF, added, "This partnership breaks new ground in our industry, building on IFF's legacy of pioneering firsts. We look forward to expanding and diversifying our fragrance talent pipeline to meet the increasing demand of consumers for new and exciting scent experiences. This is an incredible time for our industry and we are thrilled to partner with ISIPCA to help power our ability to meet the opportunities of the future."

Source: ISIPCA

### **Organic sectors continue to grow – US and global markets**

The U.S. Department of Agriculture (USDA) has announced a significant increase in the number of certified organic operations, continuing the trend of double digit growth in the organic sector. According to new data, there are now 21,781 certified organic operations in the United States and 31,160 around the world.

"Organic food is one of the fastest growing segments of American agriculture," said Agriculture Secretary Tom Vilsack. "As consumer demand for organic products continues to grow, the USDA organic seal has become a leading global standard. The increasing number of organic operations

shows that USDA's strong support for the vibrant organic sector is helping to create jobs and opportunities in rural communities."

According to data released by the Agricultural Marketing Service's (AMS) National Organic Program (NOP), the number of domestic certified organic operations increased by almost 12% between 2014 and 2015, representing the highest growth rate since 2008 and an increase of nearly 300% since the count began in 2002. The total retail market for organic products is now valued at more than \$39 billion in the United States and over \$75 billion worldwide.

Along with consumer demand for organics, increasingly they are asking for local foods. USDA has supported providing consumers a stronger connection to their food with more than \$1 billion in investments to over 40,000 local and regional food businesses and infrastructure projects since between 2009. Industry data estimates that U.S. local food sales totaled at least \$12 billion in 2014, up from \$5 billion in 2008.

USDA said it has strengthened programs that support organic operations over the past seven years, helping to make organic certification more accessible, attainable, and affordable through a "Sound and Sensible" approach. This initiative includes streamlining the certification process, focusing on enforcement and working with farmers and processors to correct small issues before they become larger ones.

USDA has also established a number of resources to help organics producers find technical and financial resources to help them grow domestically and abroad. The site [www.usda.gov/organic](http://www.usda.gov/organic) creates a one-stop-shop for operators, and USDA has made market and pricing information for approximately 250 organic products available free of charge through USDA's Market News. In 2015, USDA made more than \$11.5 million available to assist organic operations with their certification costs.

Source: USDA

## **Givaudan rebrands cosmetic business as 'Active Beauty'**

Givaudan's active cosmetics business is rebranded as 'Active Beauty', with the mission to bring beauty to the world. The unveiling of the new identity coincides with in-cosmetics Paris, the leading global business event for personal care ingredients. Following the acquisition of French bio-sourced active cosmetic ingredients company Soliance in 2014 and science-based cosmetic ingredients firm Induchem in 2015, Givaudan now offers customers and consumers around the world a range of innovative products and technology under one single identity, Active Beauty.

"Establishing one unified identity is a key step towards our 2020 ambition to make Givaudan a significant player in the fast-growing active cosmetics business. Our customers remain at the heart of what we do and the new identity will enhance the proximity of our business relationship with customers and consumers alike." Maurizio Volpi, President of Givaudan's Fragrance Division said: "Our new Active Beauty business offers an expanded portfolio of products supported by a strong R&D and marketing platform to drive future development and innovation in the active cosmetics space. The new identity will further strengthen the integration of Soliance and Induchem as well as our capabilities to bring business benefits to our customers and beauty to consumers." Frédérique Lafosse, Head of Active Beauty said: "This is an important moment for Givaudan Active Beauty as we launch our new single identity for our growing business, which is crucial to building a distinctive brand. We're delighted to share it with the industry, beginning with in-cosmetics Paris, where customers from around the world will be able to experience the brand up close and explore our newly integrated range of products."

### **About Givaudan**

Givaudan is the global leader in the creation of flavours and fragrances. In close collaboration with food, beverages, consumer products and fragrance partners, Givaudan develops tastes and scents that delight consumers the world over. With a passion to understand consumers' preferences and a relentless drive to innovate, Givaudan is at the forefront of creating flavours and fragrances that 'engage your senses'. The Company achieved sales of CHF 4.4 billion in 2015. Headquartered in

Switzerland with local presence in over 80 locations, the Company has more than 9,500 employees worldwide.

### **Companies continue to give importance to sustainability**

For the second consecutive year Firmenich was awarded a gold rating for sustainability by EcoVadis. Firmenich's rating puts the company among the top 2% of the suppliers assessed for sustainability performance. Firmenich received particular praise for its achievements in the area of environmental protection. From 2010 to 2015, Firmenich reported a 20,000 ton decrease in absolute Scope 1 and 2 CO<sub>2</sub> emissions, a 12% decrease in energy use and a 13% decrease in water use.

#### **About EcoVadis:**

EcoVadis aims at improving environmental and social practices of companies by leveraging the influence of global supply chains. EcoVadis operates the first collaborative platform providing Supplier Sustainability Ratings for global supply chains. With a focus on maintaining quality and integrity, EcoVadis has managed to also grown quickly to meet this growing need.

Since its founding in 2007, EcoVadis has become a trusted partner for procurement organizations in more than 120 leading multinationals worldwide including Verizon, Nestlé, Johnson & Johnson, Heineken, Coca-Cola Enterprises, Nokia, L'Oréal, Bayer, Alcatel-Lucent, ING Bank, Air France-KLM, Centrica/British Gas, BASF, and Merck. Combining People, Process and Platform, EcoVadis' has developed the industry-leading team, innovative technology, and a unique CSR assessment methodology that covers 150 purchasing categories, 110 countries, and 21 CSR indicators. More than 20,000 companies use EcoVadis to reduce risk, drive innovation and foster transparency and trust between trading partners.

EcoVadis is driven by a young team of more than 300 people from over 32 nationalities committed to a real impact on the environmental and social practices of companies around the world. Professionalism, integrity, customer focus and a drive for innovation are the key enablers of our success.

Source: EcoVadis

### **Natura Cosmetics and Symrise Amazon gain UEBT certification for their Amazon ingredients**

Natura Cosmetics and Symrise Amazon obtained certification for a total of 40 natural ingredients from the Amazon. This new certification attests that the ingredients are ethically sourced from 14 supplier communities based in the Brazilian Amazon, following the internationally recognized UEBT standard. More Amazon communities will be certified in the course of the year.

Andiroba and maracujá oil, cupuaçu butter and acai pulp are just some examples of the ingredients that make it to national and international markets from deep in the Amazon forest. The UEBT certification assures the conservation of biodiversity in the sourcing area and that provided communities are supported through equitable prices and local projects for sustainable development. Rik Kutsch Lojenga, UEBT Executive Director, said that UEBT is pleased about the leading role of Natura and Symrise Amazon among UEBT members in adopting this new UEBT certification for natural ingredients.

Ingredients are certified after an independent audit of the company and the practices in supplier communities. Moreover, an ABS assessment is conducted to assure that companies have a good understanding of the regulation on Access and Benefit Sharing, which may apply to these products.

Natura Cosmetics has long positioned itself to consumers around Brazilian biodiversity. Its successful Ekos line is based on Amazon ingredients that respect biodiversity and local communities. UEBT's Biodiversity Barometer shows that 44% of Brazilian consumers associate Natura Cosmetics with respect for biodiversity. 'We are proud to have gained the UEBT certification for 14 Amazon supplier communities, which further reinforces our commitment to ethical sourcing from this important ecosystem', said Marcelo Alonso Director of Sustainability at Natura.

Symrise opened a new production plant, Symrise Amazon Ecoparque in Belém, Pará, in the Amazon region in 2015. Eder Ramos, global president of Symrise cosmetic ingredients division, welcomed the UEBT certification as an important step in the company's strategy to 'bring the richness of Amazon ingredients to consumers around the world'. He stated that 'it shows our commitment to ethical sourcing of biodiversity, as stipulated in the Biodiversity Agenda that Symrise adopted last year'. The new certification was presented by Symrise Amazon at In-Cosmetics in Paris and will be discussed at the UEBT Sourcing with Respect conference that will take place on 26 May in Paris.

Source: UEBT

### **UEBT Biodiversity Barometer and ABS discussed with Indian stakeholders**

UEBT was invited to join the kick-off conference of the southern chapter of the India Business & Biodiversity Initiative (IBBI) in Bangalore, India. UEBT presented the outcomes of the 2015 Biodiversity-Barometer and discussed the Nagoya Protocol as well as ABS rules in Brazil, India and South Africa with high-level industry representatives and policy makers.

Source: UEBT

### **UEBT launches 2016 Biodiversity Barometer on 26 May**

UEBT will launch its 2016 Biodiversity Barometer at the UEBT Beauty of sourcing with respect conference on 26 May. Gain insights into:

- Trends on biodiversity awareness among consumers
- Consumer expectations on ethical sourcing
- Brands recognized for ethical sourcing biodiversity
- Biodiversity reporting of top 100 beauty and food companies.

Source: UEBT

# PRODUCT & MARKET NOTES

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## Indonesia: The essential oil production centre of Asia

### INTRODUCTION

Indonesia is a major country in Asia – encompassing over 18,000 islands, of which over 1,000 are inhabited, with a rapidly growing population of almost 300 million. This is a country with global importance both as a producer, and as a market.



### **Indonesia: many islands, large and small, spread along the equator**

Indonesia has the largest economy in SE Asia, with around 14% of GDP coming from agriculture, and over 40% of the workforce employed in the agricultural sector. GDP growth is around 5%/annum. Soils are mostly fertile, with the humid tropical environment providing both rainfall and sunshine to support high levels of crop production. The downstream processing sector is also well developed, with the production of a broad range of sophisticated manufactured products. Based on the production of a very diverse range of spices and essential oils, export revenues of essential oils, natural extracts, derivatives and isolates are estimated at around US\$500 million per year. A diverse range of international flavours and fragrance companies have operations there, joining a large number of substantial Indonesian companies with an international presence.

Set against this positive agricultural production story, however, are a range of increasingly serious environmental issues. There has been an 8% decrease in forest areas since 2009/2010 as a result of illegal logging activities, forest fires and mining, and it is estimated that if this continues at this rate the country will have lost 30% of its forest cover by 2050 with serious adverse impact on both climate and agricultural production. Rising sea levels also present a major problem for many small islands – it is estimated that up to 40 million people live within 3 kms of the coast.

## Essential Oil Production

Essential oil	Estimated production levels (tonnes)
Clove (leaf, stem & bud oils)	3,500 to 4,000
Patchouli oil	1,100 to 1,300
Nutmeg oil	350 to 400
Citronella oil	350 to 400
Cajeput oil	300 to 350
Gurjun balsam oil	30 to 40
Vetiver oil	25 to 30
Cananga oil	12 to 15
Massoia bark oil	12 to 15
Fresh ginger oil	5 to 7

### Cloves

The largest essential oil production by volume. Indonesia is a major clove producer, based in the demand for cloves in kretek cigarettes. The clove production area is estimated at around 440,000 ha, producing around 80,000 tonnes of clove buds. Clove oil production is around 3,500 to 4,000 tonnes, and there is a major downstream processing sector for eugenol, vanillin and other derivatives for the flavour and fragrance industry. Main production areas are East and West Java, and Sulawesi.

### Patchouli

Indonesia supplies around 90% of global demand. There are no other significant producers supplying the international markets. Java and Sumatra (mainly Sumatra) have dominated production in the past, but in recent years a lot of production has shifted to Sulawesi, with Sulawesi now accounting for around 80% of total production.

### Nutmeg

Indonesia exports around 350 to 400 tonnes/yr of nutmeg oil, accounting for around 80% of global production. Since the hurricane in Grenada in the early 2000's, when Grenada's nutmeg plantings were decimated, Indonesia has become the dominant producer for the international market. Production is primarily based in Sumatra and Java, with some new plantings taking place in northern Sulawesi. Nutmeg takes a long time to come into bearing (7 to 9 years from planting), and yields continue to be small up to 13 to 15 yrs, which presents a considerable barrier to new entrants.

### Citronella

Indonesia is a major producer of citronella, but most of it is taken by the domestic market, rather than for export. China is also a major producer, and Indonesia's competitiveness against China depends in large part on relative exchange rates.

### Vetiver

Vetiver production is dominated by Haiti. However, Haiti is an uncertain source, having many environmental and social problems, such that the global fragrance industry would like secondary back-up sources. As prices for vetiver oil from origins outside Haiti have risen, so production has increased. Production of vetiver is costly, both in terms of field labour requirements for harvesting, the long production period (at least 12 months before harvest and often much longer) and for distillation (fuel costs for a long distillation). Production in Indonesia is primarily centered around West Java.

# PRICE INFORMATION

## Conventional oils

PLEASE REMEMBER THAT THESE ARE ONLY PRICE INDICATIONS.

Price indications collected from the markets are given for a range of essential oils, below. The oils are grouped *for convenience only* into Spice Oils, Seed Oils, Citrus Oils, Herb Oils and Perfumery Oils. Prices are wholesale for quantities of 25kg or more unless otherwise stated.

### Spice Oils

Product	Origin/Grade	Prices per KG (US\$)
Clove bud	Indonesian	\$24/kg 1 tonne lots
	Indian	\$84/kg 1 kg lots
	Madagascan	\$75/kg 1 kg lots
Clove stem	Indonesian	\$15/kg container
	India	\$50/kg
	Madagascar	\$36/kg 200 kg lots
Clove leaf	Indonesian min. 73%	\$12.00/kg, container
	Indonesian min. 80%	\$13.00/kg
	Indonesian min. 82%	\$14.00/kg
	Madagascan	\$17/kg
	Indonesian	\$46/kg
	Indonesia	\$18/kg container
Cinnamon bark	Sri Lankan 60/65%	n/a
Cinnamon leaf	Sri Lankan	\$70/kg 1 kg lots
	India	\$20/kg
Cassia bark	China	\$38/kg; \$70 1 kg lots
Black pepper	Sri Lankan	\$218/kg 1 kg lots
	Indian	\$125/kg; \$195 1 kg lots
Nutmeg	Indonesian (myristicin 7%)	\$38/kg
	Indonesian (myristin 8%)	\$48/kg
	Indonesian (myristin 10%)	\$54/kg
	Indonesian(myristicin 2%)	\$33/kg
	Indonesian (safrole free)	\$67/kg
Ginger	Chinese	\$105/kg
	Indonesia	\$115/kg
	Indian	\$80/kg
	Indonesia (red)	\$98/kg
Pimento leaf	Jamaican	\$140/kg
	Jamaican	\$90 container
Pimento berry	Jamaican	€210/kg
	Jamaican	\$154 1 tonne lots
Cardamom	Guatemala	\$185/kg container
		\$210/kg spot

## Spice Seed Oils

Product	Origin/Grade	Prices per KG
Aniseed	China	\$13-16 CIF NW Europe; \$75/kg 1 kg lots
	India	\$25/kg
Star Anise	India	\$120/kg
Coriander seed	Russian	\$35/kg
Coriander herb	Egypt	\$140/kg drum
Cumin seed	Egypt	\$95; \$285/kg 1 kg lots

## Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Brazilian	\$16/kg; \$30/kg 1 kg lots
	Italy (b/orange c/pressed)	\$33/kg
	Brazil (pera)	\$9/kg container
Orange (bitter)	Italian (c/pressed)	\$58/kg
Bergamot oil	Ivory Coast/Italy	\$80/kg; \$135/kg 1 kg lots
Lemon	Italian	\$58/kg 1 kg lots
	Italian (c/pressed)	\$35
	Argentina	\$30/kg container
Lime (distilled)	Brazil	\$30/kg
	Italian	n/a
	Mexico/Peru	\$35/kg container; \$62/kg
		\$25/kg
Lime (cold pressed)		\$25/kg
Mandarin (red)	Italy	\$85/kg
Grapefruit (pink)	Argentina	\$42/kg; \$50/kg 1 kg lots
Grapefruit (white)	France	\$40/kg

## Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Comores	\$125/kg
	Egypt	\$82/kg; \$150/kg 1 kg lots
Lavender	Bulgaria	\$75/kg
	French	\$250/kg
	English	\$200/kg
	Russia	\$95/kg drum
Lavandin	French Grosso	\$35/kg
Spike Lavender	Spain	\$110/kg
Mints	India piperita menthofuran 8%	\$29/kg
	India, mentha arvensis crude, L-menthol 72%	\$15/kg
Menthol	Indian, bold crystals	\$18/kg
	Indian, medium crystals	\$17/kg
	China	\$18/kg
Peppermint menthofuran 3%	China	\$23.50/kg
Peppermint	China	\$15/kg container
Peppermint dementholised	Indian	\$14/kg
Menthone 80/20	Indian	\$15/kg
Menthone 90/10	Indian	\$16/kg
Spearmint	China 60% carvone	\$23/kg
	India 55% carvone	\$20/kg
	India 60% carvone	\$22/kg
Chamomile (German)	German blue	\$670/kg

	Morocco (wild)	\$450/kg
	Egypt (blue)	\$1,200/kg
Chamomile (Roman)	UK	\$1000/kg
Sage	Croatia	\$130/kg
Rosemary	Portugal/Spain/Tunisia	\$55
	Spain	\$68/kg drum
	France	\$78
Marjoram	Spain (wild)	\$210/kg 1 kg lots
Thyme	Spain	\$67/kg; \$85 1 kg lots

## Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus globulus & other high cineole types	China	\$15/kg container; \$35/kg 1 kg lots
	Australian	\$44/kg
	India, 85%	\$16/kg
	India, 60%	\$15/kg
	China	\$38/kg 1kg lots
	Madagascar	\$31/kg
Eucalyptus citriodora	China	\$49/kg 1 kg lots
	Madagascar	\$25/kg
Litsea cubeba	Spain	\$22/kg
	China	\$21/kg container
Ylang ylang	Comores: Extra S	n/a
	Comores : Première	\$225/kg
	Comores : Deuxième	\$180/kg
	Comores : Troisième	\$95/kg
	Comores: Complet	\$150/kg 1 kg lots
	Madagascar (grade II)	\$80/kg
Ylang (cananga)	Indonesia	\$61/kg 1 ton lots
Patchouli - Indonesia	Sulawesi min 26% pa	\$48kg
	Sulawesi min 30% pa	\$50/kg
	Sulawesi min 30% pa, light	\$54/kg
	Sumatra min 30% pa	\$56/kg
	Sumatra min 32% pa	\$60/kg
	Sumatra min 34% pa	\$65/kg
	Sumatra min 30% pa, light	\$64/kg
Rose	Bulgaria	\$10,000/kg
Geranium	Egypt	\$85/kg
	Egypt	\$120/kg
	China	\$165/kg
	Madagascar	\$310/kg
Rose Geranium	Madagascar/France	\$225/kg
Niaouli (Cineole 1,8) (Malaleuca quinquenervia type I)	Madagascar	\$16/kg; \$60/kg 1 kg lots
Niaouli Viridiflora (Malaleuca viridiflora type II)	Madagascar	\$20/kg
Petitgrain	Paraguay	\$58/kg drum; \$98/kg 1 kg lots
Sandalwood	India	\$2,900/kg
	East Indies	\$2,500/kg
	Australian	\$1,600-2,000/kg
Cedarwood	USA	\$52/kg
	China	\$13/kg container; \$50/kg 1 kg lots

Frankincense	Somalia/France	\$270/kg
Citronella	Chinese	\$18/kg container; \$23/kg; \$53 1 kg lots
	Sri Lanka	\$40/kg container
	Indonesia	\$16/kg
Lemongrass	Indian 80%	\$17/kg
	Indian	\$22/kg container; \$37/kg 1 kg lots
	Madagascar ( <i>C. giganteus</i> )	\$55/kg
Palmarosa	Indian	\$26/kg; \$130/kg 1 kg lots
Vetiver	Indonesian	\$220/kg; \$380/kg 1 kg lots
	Indonesian	\$240 rectified
Tea Tree	Indonesian, molecular dist.	\$260/kg
	Australia	\$44/kg; \$90/kg 1 kg lots
Guaiacwood	Australia, lemon scented	\$140/kg
	Paraguay	\$25/kg drum
Fennel, bitter	Spain	\$97/kg
Juniperberry	India	\$120/kg; \$260/kg 1 kg lots
Myrrh	India (extract)	\$133/kg
	India (distilled)	\$270/kg; \$395/kg 1 kg lots

# Price Information

## Organic essential oils

PLEASE REMEMBER THAT THESE ARE ONLY PRICE INDICATIONS.

Price indications collected from the markets are given for a range of essential oils, below. The oils are grouped *for convenience only* into Spice Oils, Seed Oils, Citrus Oils, Herb Oils and Perfumery Oils. Prices are wholesale for quantities of 25kg or more unless otherwise stated.

### Spice Oils

Product	Origin/Grade	Prices per KG (US\$)
Clove bud	Indian	\$150/kg
Clove leaf	Indian	\$75/kg
Cinnamon bark	Sri Lankan	\$420/kg
Cinnamon leaf	Sri Lankan	\$110/kg
Nutmeg	Indonesian	\$172/kg
Ginger		\$270/kg
	India	\$170/kg drum

### Spice Seed Oils

Product	Origin/Grade	Prices per KG
Star Anise	China	\$180/kg
Cumin seed	Egypt	\$90/kg

### Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Italian (c/pressed)	\$36/kg
Orange (bitter)	Italian (c/pressed)	\$135/kg
Bergamot	Italy (c/pressed)	\$195/kg
Lemon	Italian (c/pressed)	\$60/kg
	Italian (c/pressed)	\$71/kg
	Argentina	\$75
Mandarin (red)	Italy	\$225/kg
Mandarin (green)	Italy	\$187/kg
Clementine	Italy	\$120/kg
Petitgrain (C. aurantium)	Paraguay	\$110/kg

### Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Egypt	\$187/kg
	India	n/a
Lavender	France	\$210/kg
Lavandin	French Grosso	\$55/kg
Mint, peppermint	USA	\$90/kg
	India	\$65/kg drum
Mint, Cornmint	India, mentha arvensis	\$52/kg
Mint, spearmint, M. spicata	USA	\$112/kg
Chamomile (German)	Nepal	\$780/kg
	India	\$1,250/kg

Chamomile (Roman)	Hungary	\$1,500/kg
Sage	Croatia	\$240/kg
Rosemary	Spain	\$42/kg
	Tunisia	\$25/kg
Marjoram	Spain	\$330/kg
Thyme	Hungary	\$300/kg
	India	\$65/kg
Fennel	India	130/kg

## Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus radiata & other high cineole types	China	\$64/kg
E. globulus	India	\$45/kg (60%)
	India	\$50/kg (80%)
E. polybractea	Australian	\$135/kg
E. smithii	South Africa	\$75/kg
Eucalyptus citriodora	Brazil	\$52/kg
	India	46/kg
Litsea cubeba	Spain	\$35/kg
Ylang ylang	Comores: I	\$225/kg
	Comores : II	\$180/kg
	Comores : III	\$210/kg
	Comores: Complet	\$330/kg
Patchouli	Indonesia	\$175/kg;
Geranium	Egypt	\$375/kg 1 kg lots
Sandalwood	Sri Lanka	\$1,950/kg 1 kg lots
Cedarwood	USA	\$63/kg
Naouli		\$97/kg
Ravinsara	Madagascar	\$275/kg 10 kg lots
Frankincense	Somalia/France	\$525/kg 1 kg lots
	India (B. serrata)	\$78/kg drum
Pine (P. silvestris)	Hungary	\$190/kg
Citronella	Sri Lanka	\$100/kg
	India	\$63/kg
Lemongrass	Nepal	\$75/kg
Palmarosa		\$80/kg
	India	\$70/kg
Vetiver	Indonesian	\$450/kg 1 kg lots
	Indian	\$350/kg
Tea Tree	Australia	\$90/kg;
	Australia, lemon scented	\$225/kg
Fennel, sweet	Bulgaria	\$150/kg
Juniperberry	India	\$225/kg
Myrrh	Africa	\$1,800/kg

# SUPPLIERS OF EQUIPMENT

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## Suppliers to the African market

The distillation and extraction industry in Africa is relatively small and localised outside of the North African centers of Egypt and Morocco, and Southern Africa (South Africa, Swaziland). New entrants to the industry can find it hard to identify suppliers of equipment (stills, condensers, extractor vessels etc) in stainless steel, steam boilers, and other necessary materials (drums, jugs, filter papers etc).

The development of the industry in Africa would benefit greatly if there was greater sharing of information on the location of suppliers. New entrants would find it easier to identify necessary suppliers, and the concentration of orders on particular suppliers would encourage the development of skills and expertise – this is particularly necessary in the areas of fabrication of stainless steel vessels and condensers.

Some contacts of companies involved in the manufacture of distillation/extraction equipment or the capability to do so (primarily the capability to work with stainless steel) or supply of materials based in East Africa are given below.

**The Newsletter would welcome information from Readers on other suppliers of relevant equipment and materials from all regions of Africa, so that the listing can be expanded.**

Please send any information to [marketinsider@intracen.org](mailto:marketinsider@intracen.org)

The contacts are provided as a service only. NO RECOMMENDATION IS IMPLIED.

### 1. MANUFACTURE OF STAINLESS STEEL DISTILLATION EQUIPMENT:

#### KENYA:

ASL – Heavy Fabrication Division  
Ramco Industrial Park  
Mombassa Road  
PO Box 18639-00500  
Nairobi. Kenya  
Tel: +254 20 821567/820296/820394  
Fax: +254 20 820169/651893  
[bm@heavyfab.co.ke](mailto:bm@heavyfab.co.ke)  
Attn: Mr Ve Balamurali, General Manager

Warren Enterprises Ltd  
PO Box 8251  
Nairobi. Kenya  
Tel: +254 20 8561 932/3/4  
Fax: +254 20 8561 013  
Attn: Mr S Ramaswamy, Managing Director

Morris Steel & Company  
Mogadishu Road  
PO Box 18310  
Nairobi. Kenya  
Tel: +254 20 533 627  
Attn: General Manager

## **UGANDA:**

### **Specialised Welding Services** (previously Kasise Kleinsmedie Uganda Ltd)

Jinja Road, Plot 96  
PO Box 40115  
Nakawa Vocational Training Center  
Kampala  
Uganda  
Tel: +256 (776) 405060/405070/405080  
+256 (772) 227 003 (Samantha Moray)  
[sam.moray@sws.co.ug](mailto:sam.moray@sws.co.ug)  
Attn: Samantha Moray, General Manager  
[www.sws.co.ug](http://www.sws.co.ug)

## **MADAGASCAR:**

Societe Aris Trading  
Lot VB 81X Ambatoroka  
101-Antananarivo. Madagascar  
Tel: +261 20 24 264 96  
Fax: +261 20 22 290 24  
[aristrading@freenet.mg](mailto:aristrading@freenet.mg)  
Attn: Mr James Davidson

ATICOM  
Lot IT 91A Itaosy  
102 Antananarivo – Atsimondrano. Madagascar  
Tel: +261 32 07 744 34  
[orasatajoso@yahoo.fr](mailto:orasatajoso@yahoofr)  
Attn: Josoa Andriamorasata

## **SOUTH AFRICA:**

EDESA (Essential Distillation Equipment)  
PO Box 123  
Riebeeck Kasteel 7306  
Western Cape. South Africa  
Tel: +27 (82) 334 3324  
fax: 0866 088508  
[info@edesa.co.za](mailto:info@edesa.co.za)  
[werner.ede@vodamail.co.za](mailto:werner.ede@vodamail.co.za)  
[www.edesa.co.za](http://www.edesa.co.za)  
[www.stillpure.co.za](http://www.stillpure.co.za)  
Skype: werner.bester2  
Attn: Werner Bester  
Manufacture of distillation equipment and sales of used equipment.

BENCO PLANT & ENGINEERING (PTY) Ltd  
159 Van Eeden Crescent, Rosslyn, Karin Park  
P O Box 59. Pretoria, Gauteng. South Africa  
Tel: +27 (12) 541-0398  
Fax: +27 (12) 541-0399  
Attn: Sloam Durbach  
Manufacturer of distillation equipment and steam boilers

POWERSAVE  
PO Box 699  
Hilton 3245. South Africa  
Tel (cell): +27 82 493 8670  
Fax: +27 33 34 33 755

Attn: Greg Rowe  
[gregrowe@telcomsa.net](mailto:gregrowe@telcomsa.net)  
Manufacture of steam distillation plants

Henry S Komar & Associates CC  
2 Hebel Road, Roodepoort, Gauteng, South Africa  
Postal address: PO Box 994, Honeydew 2040, South Africa  
Tel: +27 11 760 2718  
Fax: +27 11 760 1079  
Attn: Stan Kumar, CEO  
[info@komar.co.za](mailto:info@komar.co.za); [sales@komar.co.za](mailto:sales@komar.co.za)  
[www.komar.co.za](http://www.komar.co.za)

Manufacture of stainless steel distillation and processing equipment. Also sales of secondhand equipment.

THE PROCESS TEAM CC  
37 Nelson Road, Amanzimtoti  
Kwa-Zulu Natal 4126. South Africa  
Attn: Peter Myburg

Design and manufacture of stainless steel distillation equipment.

## **2. SUPPLIERS OF STEAM BOILERS**

### **MADAGASCAR**

ARTICOM  
Lot IT 91A Itaosy  
102 Antananarivo – Atsimondrano. Madagascar  
Tel: +261 32 07 744 34  
[orasatajoso@yaho.fr](mailto:orasatajoso@yaho.fr)  
Attn: Joso Andriamorasata

ARTICOM make a simple, low pressure, wood fired steam boiler.

### **KENYA:**

Industrial Boiler Products Co. Ltd.  
Kampala Road, Industrial Area  
Nairobi, Kenya.  
+254 733 700175  
[mail@industrialboilerproducts.co.ke](mailto:mail@industrialboilerproducts.co.ke)  
[peter.fernandes@industrialboilerproducts.co.ke](mailto:peter.fernandes@industrialboilerproducts.co.ke)  
Peter Fernandes  
[www.ibp.co.ke](http://www.ibp.co.ke)  
Indian manufactured steam boilers; biomass fired.

Boiler Consortium Africa (BCA) Ltd  
PO Box 60780. Nairobi. Kenya  
Tel: +254 20 557837/ 536793/ 4349310  
Tel: +254 722 750131/ 703511/  
Fax: +254 20 735 331177  
Barry Corlines  
[info@boilersafrica.com](mailto:info@boilersafrica.com)  
[www.boilersafrica.com](http://www.boilersafrica.com)

BCA design, manufacture and commission boilers, included wood fired steam boilers, and are agents for Riello in East Africa.

## **SOUTH AFRICA:**

Combustion Technology South Africa  
PO Box 30047. Tokai, 7966 Cape Town, South Africa  
Tel: +27 21 715 3171  
Fax: +27 21 715 6297  
[www.combustiontechnology.co.za](http://www.combustiontechnology.co.za)

Combustion Technology are the exclusive Southern African distributors of Riello burners and Garioni Naval Boilers.

BENCO PLANT & ENGINEERING (PTY) Ltd  
159 Van Eeden Crescent, Rosslyn, Karin Park  
P O Box 59. Pretoria, Gauteng. South Africa  
Tel: +27 (12) 541-0398  
Fax: +27 (12) 541-0399  
Attn: Sloam Durbach  
Manufacturer of distillation equipment and steam boilers

CAPE BOILER  
16 Natal Street, Parden Island, Cape Town, South Africa  
Tel: +27 21 511 6652  
Fax: +27 511 4415  
Attn: Mr Nic Kellerman

## **INDIA:**

Firetech Boilers Pvt Ltd  
FIRETECH HOUSE, No.211, 2nd Cross, 38th Main,  
B.T.M Layout, 2nd Stage, Bangalore 560 068. India  
Tel: +91-80-6683686; Fax: +91-80-6683921  
Email: [firetech@vsnl.net](mailto:firetech@vsnl.net)  
Manufacture of wood fired steam boilers. Indian manufacturer, but has supplied boilers to Africa.

## **AUSTRIA:**

Binder GMBH  
Mitterdorferstr. 5  
8572 Barnbach  
Austria  
Email: [office@binder-gmbh.at](mailto:office@binder-gmbh.at)  
Tel: +43 3142 22544-0  
Fax: +43 3142 22544-16  
[www.binder-gmbh.at](http://www.binder-gmbh.at)

Binder Agents in UK:  
Wood Energy Ltd, Severn House, 1-4 Fountain Court, Bradley Stoke, Bristol. BS32 4LA  
[www.woodenergyltd.co.uk](http://www.woodenergyltd.co.uk)

Kohlbach Group  
Grazer StraBe 23  
A-9400 Wolfsberg  
Austria  
Email: [office@kohlbach.at](mailto:office@kohlbach.at)  
Tel: +43 4352 2157-0  
Fax: +43 4352 2157-290  
[www.kohlbach.at](http://www.kohlbach.at)

## **USA:**

Hurst Boiler & Welding Company, Inc.  
100 Boilermaker Lane  
Coolidge, GA 31738-0530  
USA  
Phone: +1 229-346-3545  
Fax: +1 229-346-3874  
Email: [info@hurstboiler.com](mailto:info@hurstboiler.com)  
[www.hurstboiler.com](http://www.hurstboiler.com)

### **3. SUPPLIERS OF MATERIALS AND EQUIPMENT**

#### **(a) Forklift trucks/pallet trucks**

Forktruck Solutions  
16 Kiewiet Close, Okavango Park, Brackenfel 7560, Cape Town. South Africa  
Postal address: PO Box 3221, Durbanville 7551. South Africa  
Tel: +27 21 982 1142 and +27 21 981 2649;  
Cell: +27 83 2848 557  
Fax: +27 21 982 1141  
Attn: Dirk van der Westhuizen  
[dirk@forktrucksolutions.co.za](mailto:dirk@forktrucksolutions.co.za)  
[www.forktrucksolutions.co.za](http://www.forktrucksolutions.co.za)

Sales and rental of new and used forklift trucks. Also pallet jacks/stackers and range of other warehouse equipment.

#### **(b) Hoists and lifting equipment**

Blue Cranes,  
Crane House, 10 Mansell Road, Killarney Gardens, Minerton, Cape Town, South Africa  
Postal address: PO Box 702, Melkbosstrand 7437. South Africa  
Tel: +27 21 556 0498/9  
Fax: +27 21 556 0486  
Attn: Mr Kobus Steyn  
[joseph@bluecranes.co.za](mailto:joseph@bluecranes.co.za)  
[www.bluecranes.co.za](http://www.bluecranes.co.za)

Manufactures full range of hoists, beam girder cranes and lifting equipment. Sole supplier of Liftket electric chain hoists and wire rope hoist units. Repairs and spare parts supply service. Supply of associated slings, chains, blocks etc.

#### **(c) Essential oil drums:**

Greif supply a range of steel and coated drums, and are present in 45 countries around the world.

Greif Kenya Ltd  
Box9036 - Unga Street  
Shimanzi – Mombasa. Kenya  
Tel: +254 41 2495591  
Fax: +254 41 2494038  
[pascal.wanyonyi@greif.co.ke](mailto:pascal.wanyonyi@greif.co.ke)  
Attn: Pascal Wanyonyi

Greif Nigeria Ltd  
Apapa, Nigeria  
Phone +234 (01) 587 0866  
Fax +234 (01) 587 3084  
[vanleer@linkserve.com.ng](mailto:vanleer@linkserve.com.ng)  
Attn: Olukunle Obadina,

Greif South Africa Ltd  
Vanderbijlpark, South Africa  
Phone +27 (0) 16 930 1100  
Fax +27 (0) 16 930 1106  
[carl.williams@grief.com](mailto:carl.williams@grief.com)  
Attn: Carl Williams  
Website: [www.greif.co.za](http://www.greif.co.za)

Greif Mozambique  
Maputo, Mozambique  
Phone +258 21 720153  
Fax +258 21 720724  
[vanleer@vironn.com](mailto:vanleer@vironn.com)

Greif Egypt  
Cairo, Egypt  
Phone +20 2588 1110  
Fax +20 2593 3889  
E-mail: [koracons@link.com.eg](mailto:koracons@link.com.eg)  
Attn: Ayman Korra

Greif Algeria  
Arzew, Algeria  
Phone + 213 41473723 / + 213 41473724  
Fax + 213 41473730  
[Mohamed.Gherbi@Greif.com](mailto:Mohamed.Gherbi@Greif.com)  
Attn: Mohamed Gherbi

**China:**

**Guangzhou New Jinrong Coopery Co. Ltd.**  
No.7 Huancui xi road  
Cuishanhu new district  
Kaiping  
Guangdong, China  
**Ms. Lucinda Lux**  
Tel : +86 159 14338971,+86 18620468156, 0750-2889978  
Fax: +86 7502889978  
Email: [newjinrong@163.com](mailto:newjinrong@163.com); [paul\\_chew@163.com](mailto:paul_chew@163.com)  
SKYPE: xpyllj74

**India:**

**Al-Can Exports Pvt Ltd**  
Sheetal Industrial Estate, Kashmirira Road,  
Bhayander East District,  
Thane 401 105  
India.  
Tel: +91 22 2819 3122  
Fax: +91 22 2814 2477  
Email: [info@alcanexports.com](mailto:info@alcanexports.com)  
Large range of aluminium flasks and bottles.

**France:**

**Tournaire SA**

70, Route de la Paoute

Le Plan.

BP 71004

06131 Grasse Cedex

France

Tel: +33 493 09 34 34

Fax: +33 493 09 34 00

Email: [tournaire@tournaire.fr](mailto:tournaire@tournaire.fr)

Tournaire do a very wide range of aluminium bottles.

**(d) Secondhand/used equipment**

Secondhand equipment, particularly stills and condensers, can represent very good value. Details are given for 2 companies which have experience of shipping worldwide, and sometimes have distillation equipment in stock.

Perry Process Equipment Ltd

Station Road

Aycliffe Business Park

Newton Aycliffe

County Durham. DL5 6EQ. UK

Phone: +44 1325 315111

Fax: +44 1325 301496

[info@perryprocess.co.uk](mailto:info@perryprocess.co.uk)

Website: [www.perryprocess.co.uk](http://www.perryprocess.co.uk)

Perry Process Equipment is the European headquarters of the Perry Group of companies, which has operations around the world and is one of the worlds largest dealers in secondhand process equipment.

Centriplant Ltd

Littlemead Industrial Estate

Alfold Road

Cranleigh

Surrey. GU6 8ND

UK

Phone: +44 (01483) 271507

Fax: +44 (01483) 278183

Contact: Mark Williams [markw@centriplant.co.uk](mailto:markw@centriplant.co.uk)

Website: [www.centriplant.co.uk](http://www.centriplant.co.uk)

Centriplant has distillation plants on an occasional basis, but always have a range of stainless steel tanks, and bottling/packing lines that could also be of interest to producers.

# Events Calendar

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Food Ingredients (Fi) Istanbul  
4-6 May 2016. Istanbul, Turkey  
[www.figlobal.com/istanbul/](http://www.figlobal.com/istanbul/)

Vitafoods Europe 2016  
10-12 May 2016. Geneva, Switzerland  
[www.vitafoods.eu.com](http://www.vitafoods.eu.com)

European Federation of Essential Oils, AGM  
2-3 June 2016. Grasse, France  
[www.efeo-org.org](http://www.efeo-org.org)

World Perfumery Congress 2016  
13-15 June 2016. Florida, USA  
<http://wpc.perfumerflavorist.com>

Health Ingredients (Hi) China  
21-23 June 2016. Shanghai, China  
[www.figlobal.com](http://www.figlobal.com)

Cosmobeaute Asia  
18-21 July 2016. Kuala Lumpur, Malaysia  
[www.beauty-events.com/Cosmobeaute-Asia](http://www.beauty-events.com/Cosmobeaute-Asia)

Cosmoprof N America  
24-26 July 2016. Las Vegas, USA  
[www.cosmoprofnorthamerica.com](http://www.cosmoprofnorthamerica.com)

Food Ingredients (Fi) & Health Ingredients (Hi) South America  
23-25 August 2016. Sao Paulo, Brazil  
[www.figlobal.com/southamerica/](http://www.figlobal.com/southamerica/)

Vitafoods Asia  
1-2 September 2016. AsiaWorld-Expo, Hong Kong  
[www.vitafoodsasia.com](http://www.vitafoodsasia.com)

IFEAT 2016 Conference  
25-29 September 2016. Dubai.  
[www.ifeat.org](http://www.ifeat.org)

Cosmoprof Asia-Hong Kong  
15-18 November 2016. Hong Kong  
[www.cosmoprof-asia.com](http://www.cosmoprof-asia.com)

Health Ingredients (Hi) Europe  
29 November – 1 December 2016. Frankfurt, Germany  
[www.figlobal.com/hieurope/](http://www.figlobal.com/hieurope/)

Food Ingredients (Fi) Europe  
29 November – 1 December 2016. Frankfurt, Germany  
[www.figlobal.com/hieurope/](http://www.figlobal.com/hieurope/)

BiobasedWorld Tradeshow  
15-16 February 2017. Cologne, Germany  
[www.boiobasedworld.de/en/home.html](http://www.boiobasedworld.de/en/home.html)

Fi & Hi Russia  
28-30 March 2017. Moscow, Russia  
[www.figlobal.com/russia/](http://www.figlobal.com/russia/)