Market Insider

ESSENTIAL OILS AND OLEORESINS
MARKET INSIDER

Limes, ready for harvest for distillation.

Market Insider

Essential Oils & Oleoresins

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Essential Oils

Market Update & News

Biodiversity & Business – Sourcing with Respect' conference announced

Union of Ethical Biotrade will put on its 5th Brazilian conference, August 11, in Sao Paulo, Brazil. The focus will be on innovation and tendencies from businesses when dealing with biodiversity in South America and how it is reflected in the international arena. The conference is sponsored by L'Oreal, Native, Natura and Weleda. For registration, send an email to brazil@uebt.org

Final report of 'Beauty of Sourcing with Respect' conference available

The final report of the 'Beauty of Sourcing with Respect' conference held in Paris, France, on 8 April 2014 is now available for download. The conference focused on the human dimension of biodiversity.
(http://ethicalbiotrade.org/dl/bsr_2014/The_Human_Dimension_of_Biodiversity_Final_Report.pdf)

International rules governing biodiversity-based research and development enter into force in October

With 51 countries now having signed up to its provisions, the Nagoya Protocol on Access and Benefit Sharing (ABS) is set to become legally binding in October 2014. Companies working with biodiversity, including in the cosmetics, food and pharmaceutical sectors, need to prepare for new rules on researching the properties of genetic resources from plants, animals or micro-organisms and developing related products and processes. Further information is available at:
http://ethicalbiotrade.org/new-international-rules-on-biodiversity-based-rd-to-enter-into-force-in-october-2014/

New Tool - Guidelines to engage with communities

Ethical BioTrade requires actors along the supply chain to engage in dialogues – processes that promote respectful, balanced and inclusive discussions and build sustainable and ethical partnerships. The guidelines on 'Dialogues in Ethical BioTrade' provide companies working with the Ethical BioTrade Standard with practical guidance on establishing dialogues with local partners in the context of their sourcing activities. A copy is available for download at:
http://ethicalbiotrade.org/dl/public-and-outreach/UEBT_Community_Dialogues.pdf

Organic farming on the rise in Europe

The organic farming sector has grown rapidly over the past 10 years according to EU statistics, with both number of farm holdings and area cultivated growing by 50%. The majority of holdings (83%) and land (78%) are in the EU15 (States that joined before 2004), including UK, France, Italy, Germany and Belgium. An estimated 500,000 ha are being added each year to the area under organic cultivation. The largest share of organic farming is permenant pasture (45%), followed by cereals (15%) and permanent crops (13%).

Döhler developing portfolio of South African extracts

Döhler (German based multinational producer of extracts of natural ingredients for the food and beverage industry, www.doehler.com) is developing a range of extracts based on the South African flora – including aloe, rooibos, honeybush, hoodia, pelargonium, buchu and baobab. Although Döhler has been present in South Africa since 2009, it recently for a joint venture with local company Afriplex. A newly established application center in Paarl gives it the capability to develop region-specific solutions and deliver customized product samples within a short time to local & regional customers. This development shold provide a boost to the natural products production sector both

locally in South Africa, and in the region. Döhler is headquartered in Germany, and has 23 production sites, 48 sales offices and application centers, and sales activities in over 130 countries, and employs over 3,000 people worldwide.
Source: Döhler

Essential oils may provide good source of food preservation

A new study in the Journal of Food Science found that essential oils may be able to be used as food preservatives in packaging, helping to extend the shelf-life of food products. Essential oil incorporation into packaging may improve water vapour barrier properties, decrease transparency and help prevent food spoilage by interacting with the films other properties.
Source: Food Ingredients First

Kancor opens Technical Application Center in New Jersey, USA

Kancor America, a division of Kancor Ingredients (Cochin, India) has opened an applications laboratory at Rutgers University Food Innovation Center. The unit is USDA and FDA inspected, and has a range of key lab and pilot equipment to support customer product development in sweet, savory and beverage development. Kancor Ingredients (www.kancor.in) is a major Indian-based company focused and spice ingredients, natural food colours, essential oils and speciality flavours dealing with both conventional and organic products, and having a full range of extraction (solvent, CO_2) and distillation technologies.
Source: Food Ingredients First

Argentine lemon crop severely reduced

Severe adverse weather conditions earlier in the year have resulted in a sharp reduction in the Argentine lemon crop. Harvesting of the current crop is coming to an end, and total volumes are expected to be around 500,000 tonnes, as against typical crop volumes of around 800,000 to 1 million tonnes. Fruit prices have increased sharply, and this will translate directly into increased prices for lemon oil.

Firmenich names new CEO

Firmenich has named a new CEO, Gilbert Gilbertine, to succeed Patrick Firmenich who is moving to take up the position of Deputy Chairman. Mr Gilbertine is coming from Diagio, the multinational drinks company, where he worked for 19 years, and was laterly President Diagio India and Greater China, and Chief Corporate Development Officer. Firmenich is one of the top 3 global flavours and fragrances companies, headquartered in Switzerland.

IFF reports increasing sales

IFF has reported a 4% increase in Q2 sales, with fragrance business sales inceasing by 8%. Net sales for Q2 were US$757.6 million, with Operating Profit up 8% to US$153.1 million. Sales to emerging markets accounted for 49% of total company sales, and if Fragrance Ingredients were excluded, accounted for 52% of sales, illustrating clearly the importance of emerging markets in the flavours and fragrances business.

Naturex Personal Care Unit becomes UEBT member

The personal care unit of Naturex has become a member of UEBT (Union for Ethical BioTrade) – as part of its sustainability strategy.

Sandalwood sold by international tender

Tropical Forest Services (TFS, Australia) offered for sale by international public tender approximately 180 tonnes of Indian sandalwood (*Santalum album*). The wood has come from 12 to 15 year old trees in plantations managed by TFS in Western Australia. TFS has over 9,000 hectares of Indian Sandalwood (*Santalum album*) trees established in the tropical north of Australia of which TFS has an effective ownership of over 3,100 hectares. TFS plantations are owned and managed on behalf of shareholders and both retail and institutional investors. Through the acquisition of the distiller Mt Romance, TFS can also offer organic Sandalwood oil (*Santalum spicatum*) to buyers in the global fragrance market.

IFEAT 2015 to be held in Colombo, Sri Lanka

IFEAT have announced that the 2015 annual conference will be held in Colombo, Sri Lanka from 27 September to 1 October 2015. Further information will be available at the Rome, Italy conference later this month (21-25 September 2014).

Product & Market Notes

Aromatherapy: characteristics of the market

1. Introduction[i]

Aromatherapy is frequently talked about as an important market for small scale essential oil producers at origin, and an important driver for overall demand and sales growth in their target markets. By far the bulk of demand and usage of essential oils is accounted for by the flavours and fragrances industries, with many oils being used as a feedstock for industry of certain natural compounds – citronellal, geraniol etc. However, the aromatherapy market can be an important niche market particularly for small essential oil producers and as such it is important to have some understanding of the markets and their requirements.

Technically, aromatherapy means the use of aromas as therapy, the use of aromas for their healing properties. However there is an increasing move to use the term 'essential oil therapy' which more accurately describes the actual market as not all therapeutic use of essential oils is based on their aroma, and usage includes internal use of the oils.

There is widespread evidence to support the therapeutic usage of essential oils. Importantly, essential oils have both physiological (inducing metabolic changes) and psychological activity on the body, and it is a unique characteristic of aromatherapy that its actions can be on both the physiological and psychological functions simultaneously. Measurements to quantify physiological and psychological effects include peripheral blood pressure, changes in heart rate, skin temperature, epidermal activity, cerebral blood flow and others. More recently the full range of technologies used to investigate the effects of drugs on cellular and body systems are being applied to the therapeutic use of essential oils. Key indications where aromatherapy is seen to provide benefits include cognitive performance (memory, attention speed etc), mood (sedating or stimulating), and performance ability. The broader term essential oil therapy widens the areas of therapeutic use to include medicinal activity across a broad range of indications, including skin conditions and wound healing, anti-microbial activities etc. Essential oils work through a range of methods: a pharmacological type mechanism where the essential oil constituents enter the blood stream and affect physiological function; and then a number of more direct associations linked to the aroma itself – aroma conditioning where memory of a situation is linked to the aroma, pleasant or unpleasant feelings caused by an aroma etc.

2. Quality of Essential Oils

The quality of an oil is of particular and specific importance where it is to be used for therapeutic purposes. These uses are almost wholly based on the use of the whole, unmodified essential oil, rather than standardized oils, or fractionated oils. As a result, all practices from selection of the plant material through harvest, handling, distillation and subsequent storage and handling practices are of particular importance – and so their standardization and repeatability. As a general rule also all oils used in aromatherapy are steam distilled (or cold pressed for many of the citrus oils). Solvent extracted oils are rarely used (although CO_2 extracted oils are gaining some usage as in this case there is no residual solvent, all the CO_2 evaporating at normal atmospheric pressure and temperature).

Key quality factors include both those that directly affect the chemical composition of the oil itself, as well as environmental and sustainability concerns about the biological resource itself. Key factors for users, and therefore passed back down the supply chain to producers include:

- **The genetic identity of the plant material**

The species, sub-species, variety and chemotype, as relevant. Many herbs – lavender, sage, geranium, cinnamon etc – actually cover a range of species, each with significantly different chemical composition and therefore of different interest to and use for aromatherapy. The essential oil of *Lavendula angustifolia* does not contain 1-8 cineole or camphor and is used for its sedating properties, while *L. intermedia* (a hybrid of *L. angustifolia* and *L. latifolia*) can have 6-20% cineole and 7-40% camphor and has different uses (stimulating). Basil (*Ocimum basilicum*) has 2 distinct chemotypes – a methyl chavicol type, and a linalool type, with the latter being the preferred type and in some indications the only type that can be used. For the producers, an absolute understanding of the botanical source of the oil, and the chemical composition is essential if this market is to be targeted.

- **Production environment and practices**

Chemical composition of an oil is also affected by a range of factors including:

  - Environment of production (climate, soils etc). In addition to broad environmental characteristics of the area of production, seasonal variations – excessive rains, droughts etc – can have an important impact on composition.
  - Time of harvest. When in the life-cycle the harvest of the plant part to be distilled is made – pre-flowering, early flowering, full flowering etc for annual crops; age of crop for some perennial crops etc. These factors can have a major impact on chemical composition of any distilled oil as composition of the oils changes dynamically seasonally and through a plants life.
  - Crop handling practices – whether harvested material is dried or distilled fresh; length of storage before distillation and storage conditions etc. It is essential that standard protocols are developed and adhered to.
  - Distillation protocols. Distillation conditions – times, temperatures, pressures, type of steam – and methods have a major impact on oil composition and the distillation protocol must be standardized and kept to.
  - Storage conditions for the essential oil.

- **Sustainability**

Many aromatherapists would have a preference for essential oils distilled from wild harvested material, but this can bring a range of sustainability issues around the management and maintenance of the resource and the difficulties of getting a uniform material (age of material etc) to distill. Uncontrolled over-harvesting of wild resources can create severe crop sustainability issues – classic cases include Indian Sandalwood and Rosewood, but issues can be locally common on a wide range of species and buyers of essential oils coming from wild harvested material will certainly want proof of sustainable wild crafting practices being implemented.

In addition to these resource management issues, a number of plants are on International lists of endangered species and their trade is controlled to a greater of lesser extent. CITES (Convention on International Trade in Endangered Species) has 3 classifications of endangered plants: Appendix 1 plants are threatened with extinction and trade is only permitted in exceptional circumstances; Appendix 2 plants require trade to be controlled to prevent a threat of extinction arising; Appendix 3 plants are protected in one or more countries. Producers need to assure themselves that if they are dealing with a plant listed in Appendix 3 it is not controlled in their country, as the market will not accept the product. The IUCN (International Union for Nature Conservation) has a Red List of Threatened Species, and this is widely respected in the markets, and buyers would be reluctant to take essential oils from plants on this list without evidence of a successful sustainability programme in place locally.

- **Quality and purchasing**

Overall, the key factors that the industry reports as influencing purchasing decisions by professional aromatherapists (based on a recent 2013 survey in the US) are, in order of importance:

i. Chemical analysis (GC/MS) available
ii. Organic certification
iii. Sustainably grown and harvested
iv. Traceability to show grown organically, but no certification
v. Price
vi. Country of origin
vii. Plant at-risk status (endangered status)
viii. Age of oil
ix. Storage conditions used for oil
x. Wild crafted

The list shows clearly that the primary purchasing criteria for users in the sector are the chemical composition of the oil, how the crop was cultivated with a very strong requirement for an organic cultivation whether or not actually certified under a formal scheme, and the sustainability of production.

3. Market Characteristics

Aromatherapy covers both use of essential oils by professional aromatherapists and personal use by consumers based on retail purchases. In a recent 2013 survey of trends in the aromatherapy market in the US, over 62% of professional aroma therapists also made up products for re-sale in additional to their professional use. Almost all aromatherapists are self-employed, running their own small practices, but many also worked in education role (40%) and in retail/wholesale (26%). The market is therefore very fragmented, made up of large numbers of small operators. This is reflected in typical purchase volumes, with a significant % (43%) only purchasing each oil in small quantities (0.5 to 1 litre/yr) as opposed to 50 litre to drum quantities by the others.

The 21 essential oils most commonly purchased by professional aromatherapists (not ordered by volume of purchase) are listed in the Table below, and include many of the important tropical oils.

Essential oils most commonly purchased by aromatherapists

Essential oil	% of aromatherapists using
Lavender (Lavendula angustifolia)	97
Geranium (Pelargonium graveolens)	93
Eucalyptus (Eucalyptus globulus)	91
Chamomile (Chamaemelum nobile)	90
Tea Tree (Malaleuca alternifolia)	89
Peppermint (Mentha piperita var vulgaris)	88
Lemon (Citrus limonum)	88
Rosemary (Rosmarinus officinalis)	84
Bergamot (Citrus aurantium var. bergamia)	84
Clary Sage (Salvia sclarea)	83
Sweet orange (Citrus sinensis)	81
Ylang Ylang (Cananga odorata)	80
Frankincense (Boswellia caterii)	79
Grapefruit (Citrus paradisi)	77
Rose (Rosa damascena)	74
Ginger (Zingiber officinale)	74
Patchouli (Pogostemon cablin)	73
Vetiver (Vetiveria zizanoides)	71

Essential oil	% of aromatherapists using
Marjoram (Origanum majorana)	69
Immortelle (Helichrysum italicum)	69
Black Pepper (Piper nigrum)	69

In professional practice of aromatherapists, the top essential oils used, by volume, are listed in the Table below. The presence of the essential oil of black pepper is notable, as is peppermint, as both are typically associated with flavour and fragrance use rather than aromatherapy.

Top essential oils used by aromatherapists by volume

Rank	Essential oil
1	Lavender (*Lavendula angustifolia*)
2	Bergamot (*Citrus aurantium var. bergamia*)
3	Immortelle (*Helichrysum italicum*)
4	Chamomile (*Chamaemelum nobile*)
5	Eucalyptus (*Eucalyptus globulus*)
6	Frankincense (*Boswellia caterii*)
7	Tea Tree (*Malaleuca alternifolia*)
8	Black Pepper (*Piper nigrum*)
9	Peppermint (*Mentha piperita var vulgaris*)

On the retail side, the top selling essential oils in the US (SPINS survey, 2012) are shown in the Table below, and shows reasonable correspondence with the Table showing oils most commonly purchased by most professional aromatherapists.

Top selling essential oils in US retail aromatherapy market, by value

Rank	Essential oil
1	Lavender
2	Peppermint
3	Eucalyptus
4	Tea Tree
5	Rosemary
6	Patchouli
7	Blend – other
8	Lemon
9	Rose
10	Frankincense
11	Blend – calming
12	Clove
13	Orange
14	Sandalwood
15	Geranium
16	Grapefruit
17	Ylang Ylang
18	Bergamot
19	Blend – medicinal
20	Lemongrass

Data from the SPINS survey shows strong annual growth in US retail aromatherapy demand (13%), though the organic sector far outpaced this giving growth in excess of 40%. Organic certification is a major driver in accessing demand in this market.

A major factor frequently identified is that sales are closely tied to consumer education – the more consumers are informed of how and why to use essential oils, the greater the sales and growth. For producers wanting to target this market the use of websites and the full range of social media enables them to target both the professional aromatherapists and the retail consumers. In addition these channels provide a powerful tool to communicate directly to buyers on the key factors that influence purchases, particularly sustainability issues.

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	$26/kg 200kg lots
	Indian	$84/kg 1 kg lots
	Madagascan	$82/kg
Clove stem	Indonesian	$31/kg container
	India	$50/kg
	Madagascar	$36/kg 200 kg lots
Clove leaf	Indonesian	$16/kg, container
	Indonesian	$46/kg
Cinnamon bark	Sri Lankan 60/65%	n/a
Cinnamon leaf	Sri Lankan	$18/kg container; $77/kg
	Madagascar	$31/kg
Cassia bark	China	$40/kg
Black pepper	Sri Lankan	$218/kg 1 kg lots
	Indian	$155/kg
Nutmeg	Indonesian	$80-90/kg
Ginger	Chinese	$70/kg container; $100/kg
	Indian	$168/kg 1 kg lots
	Indonesia	$100/kg
Pimento leaf	Jamaican	$185/kg
	Jamaican	$90 container
Pimento berry	Jamaican	€170-180/kg 1 kg lots
	Jamaican	$154 1 tonne lots
Cardamom	Guatemala	$185/kg container

Spice Seed Oils

Product	Origin/Grade	Prices per KG
Aniseed	China	$13-16 CIF NW Europe; $50-84/kg 1 kg lots
Star Anise	India	n/a
Coriander seed	Russian	$105/kg container; $160/kg
Cumin seed	Egypt	€168/kg

Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Brazilian	$14/kg
	Italy (b/orange c/pressed)	$33/kg
	Brazil (pera)	$5/kg container
Orange (bitter)	Italian (c/pressed)	$45/kg
Bergamot oil	Ivory Coast/Italy	$50/kg
Lemon	Italian	$63/kg 1 kg lots
	Italian (c/pressed)	$35
	Argentina	$49/kg container
Lime (distilled)	Italian	$45/kg
	Mexico/Peru	$56/kg container; $70/kg 1 kg lots
Mandarin (red)	Italy	$45/kg
Grapefruit (pink)	Argentina	$29/kg
Grapefruit (white)	France	$50/kg

Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Italy	$42/kg
	Egypt	$160/kg 1 kg lots
Lavender	Bulgaria	$135/kg
	French	$150/kg
	English	$200/kg
Lavendin	French Grosso	$50/kg
Spike Lavender	Spain	$203/kg
Mints	Indian piperita	$63/kg
	India, mentha arvensis crude, L-menthol 72%	$16/kg
Menthol	Indian, bold crystals	$17/kg
	Indian, medium crystals	$15/kg
	China	$18
Peppermint	China	$16/kg
Peppermint dementholised	Indian	$16/kg
Menthone 80/20	Indian	$20/kg
Menthone 90/10	Indian	$21/kg
Spearmint 60% carvone	Chinese	$35/kg
Spearmint 80% carvone	Chinese	$40/kg
Chamomile (German)	German blue	$670/kg
	Morocco (wild)	$460/kg
Chamomile (Roman)	UK	$560/kg
Sage	Croatia	$105/kg
Rosemary	Portugal/Spain/Tunisia	$45
	France	$75
Marjoram	Spain	$133/kg
Thyme	Spain	$67/kg

Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus globulus & other high cineole types	China	$13/kg container; $25/kg
	Australian	$44/kg
	China	$38/kg 1kg lots
	Madagascar	$31/kg
Eucalyptus citriadora	China	$53/kg
	Madagascar	$25/kg
Litsea cubeba	Spain	$42/kg
	China	$20/kg container
Ylang ylang	Comores: Extra S	n/a
	Comores : Première	$168/kg
	Comores : Deuxième	$150/kg
	Comores : Troisième	$110/kg
	Comores: Complet	$215/kg 1 kg lots
	Madagascar (grade II)	$80/kg
Ylang (cananga)	Indonesia	$57/kg 1 ton lots
Patchouli	Indonesia min 32% pa, light	$88/kg 1 ton lots
	Indonesia min 30% pa, light	$86/kg
	Indonesia min 28% pa, light	$84/kg
Geranium	Egypt	$150/kg
	China	$155/kg container
	Egypt	$110/kg container
	Madagascar	$310/kg
Rose Geranium	Madagascar/France	$280/kg
Niaouli (Cineole 1,8) (Malaleuca quinquenervia type I)	Madagascar	$8/kg
Niaouli Viridiflora (Malaleuca viridiflora type II)	Madagascar	$11/kg
Sandalwood	India	$2,900/kg
	East Indies	$2,500/kg
	Australian	$1,680/kg
Cedarwood	USA	$52/kg
	China	$13/kg container; $32/kg
Frankincense	Somalia/France	$250/kg
	India	$120/kg
Citronella	Indonesian	$18/kg container; $36/kg
	Sri Lanka	$20/kg container
	China	$17.50-18/kg container
Lemongrass	Indian	$18/kg container; $42/kg
	Madagascar (C. giganteus)	$55/kg
Palmarosa	Indian	$53/kg
Vetiver	Indonesian	$105/kg container; $200/kg
	Indonesian	$130/kg spot
	China	$85/kg container
Tea Tree	Australia	$58/kg;
	Australia, lemon scented	$140/kg
Fennel, bitter	Spain	$84/kg
Juniperberry	India	$120/kg
Myrrh	India (extract)	$133/kg
	India (distilled)	$450/kg

Price Information

Organic essential oils

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Spice Oils

Product	Origin/Grade	Prices per KG (US$)
Clove bud	Indian	$120/kg
Clove leaf	Indian	$80/kg, container
Cinnamon bark	Sri Lankan	$450/kg
Cinnamon leaf	Sri Lankan	$120/kg
Nutmeg	Indonesian	$185/kg
Ginger		$290/kg

Spice Seed Oils

Product	Origin/Grade	Prices per KG
Star Anise	China	$190/kg
Cumin seed	Egypt	$96/kg

Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Italian (c/pressed)	$38/kg
Orange (bitter)	Italian (c/pressed)	$135/kg
Bergamot	Italy (c/pressed)	$208
Lemon	Italian (c/pressed)	$65/kg
	Italian (c/pressed)	$35
Mandarin (red)	Italy	$210/kg
Mandarin (green)	Italy	$200/kg
Petitgrain (C. aurantium)	Paraguay	$120/kg

Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Egypt	$200/kg
Lavender	France	$225/kg
Lavendin	French Grosso	$60/kg
Mint, peppermint	USA	$95/kg
Mint, Cornmint	India, mentha arvensis	$55/kg
Mint, spearmint, M. spicata	USA	$120/kg
Chamomile (German)	Nepal	$705/kg
Chamomile (Roman)	Italy	$560/kg
Sage	Croatia	$255

Rosemary	Spain	$100
Marjoram	Spain	$225/kg
Thyme	Hungary	$320/kg

Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus radiata & other high cineole types	China	$64/kg
E. polybractea	Australian	$145/kg
E. smithii	South Africa	$80/kg
Eucalyptus citriodora	Brazil	$56/kg
Litsea cubeba	Spain	$65/kg
Ylang ylang	Comores: I	$240/kg
	Comores : II	$190/kg
	Comores : III	$220/kg
	Comores: Complet	$350/kg
Patchouli	Indonesia	$255/kg;
Geranium	Egypt	$400/kg 1 kg lots
Sandalwood	Australian	$1,750/kg 1 kg lots
Cedarwood	USA	$67/kg
Naouli		$100/kg
Ravinsara	Madagascar	$120/kg
Frankincense	Somalia/France	$560/kg 1 kg lots
Pine (P. silvestris)	Hungary	$190/kg
Citronella		$67/kg
Lemongrass	Nepal	$80/kg
Palmarosa		$80/kg
Vetiver	Indonesian	$125-155/kg
Tea Tree	Australia	$95/kg;
	Australia, lemon scented	$240/kg
Fennel, sweet	Bulgaria	$160/kg
Juniperberry	India	$240/kg
Myrrh	Africa	$1,900/kg

Suppliers of Equipment

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

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
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
Attn: Samantha Moray, General Manager
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
Attn: Mr James Davidson

ATICOM
Lot IT 91A Itaosy
102 Antananarivo – Atsimondrano. Madagascar
Tel: +261 32 07 744 34
morasatajosoa@yahoo.fr
Attn: Josoa Andriamorasata

SOUTH AFRICA:

EDESA
PO Box 123
Riebeek Kasteel 7306
Western Cape. South Africa
Tel: +27 (82) 334 3324
info@edesa.co.za
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
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; sales@komar.co.za
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
morasatajosoa@yahoo.fr
Attn: Josoa 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
peter.fernandes@industrialboilerproducts.co.ke
Peter Fernandes
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
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

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
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
Tel: +43 3142 22544-0
Fax: +43 3142 22544-16
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

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
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
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
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
Attn: Pascal Wanyonyi

Greif Nigeria Ltd
Apapa, Nigeria
Phone +234 (01) 587 0866
Fax +234 (01) 587 3084
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
Attn: Carl Williams
Website: www.greif.co.za

Greif Mozambique
Maputo. Mozambique

Phone +258 21 720153
Fax +258 21 720724
vanleer@vironn.com

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

Greif Algeria
Arzew, Algeria
Phone + 213 41473723 / + 213 41473724
Fax + 213 41473730
Mohamed.Gherbi@Greif.com
Attn: Mohamed Gherbi

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; paul_chew@163.com
SKYPE: xpyllj74

(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
Website: 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
Website: 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

IFEAT 2014 Study Tour: Yunnan and Guandong, China
31 Aug-8 September 2014. Yunnan and Guangdong, China
www.ifeat.org/study/book-study-tour/

Sustainable Cosmetics Summit
10-12 September. Sao Paulo, Brazil
www.sustainablecosmeticssummit.com

WorldFood Moscow
15-18 September 2014. Moscow, Russia
www.world-food.ru/en-GB

Biofach America
18-20 September 2014. Baltimore, USA
www.biofach-america.com

IFEAT 2014
21-25 September 2014. Rome, Italy
www.ifeat.org

Naturally Australia Wellness Expo
21 September 2014. Melbourne, Australia
www.naturallymag.com.au

Food Technology Summit and Expo
1-2 October 2014. Mexico City, Mexico
www.flsexpo.com

SupplySide West
8-9 October 2014. Las Vegas, USA
www.west.supplysideshow.com

Cosme Tokyo
20-22 October 2014. Tokyo, Japan
www.cosmetokyo.jp

World Congress Nutrition & Health
24-26 October 2014. Taiyuan, China
www.bitlifesciences.com/wcnh2014

2014 Global Food Security Conference
28-29 October 2014. Montreal, Canada
www.mcgill.ca/globalfoodsecurity/conference/2014/registration

RIFM Annual Meeting
5 November 2014. River Vale NJ, USA
www.rifm.org

BSP Fine Fragrance Demonstration Meeting
12 November 2014. Manchester, UK
www.bsp.org.uk

Biofach India
13-15 November 2014. Bangalore, India
www.biofach-india.com

Organic Expo Japan (includes Biofach Japan)
20-22 November 2014. Tokyo, Japan.
www.biofach-japan.com

Fi Europe & Ni
1-3 December 2014. Paris, France
www.foodingredientsglobal.com/en/europe/home

Vivaness
11-14 February 2015. Nuremberg, Germany
www.vivaness.de

Intercharm Professional
16-18 April 2015. Moscow, Russia
www.intercharm.ru

International Exhibition of Raw Materials for Perfumery
10-11 June 2015. Paris, France
www.parfumeurs-createurs.org

IFT 2015 (Institute of Food Technologists)
11-15 July 2015. Chicago, USA
www.ift.org

Flavorcon 2015
15-15 November 2015. Atlantic City, USA
www.flavorcon.com

Fi Europe & Ni 2015
1-3 December 2015. Paris, France
www.foodingredientsglobal.com/en/europe/home

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[i] Incorporating material from a paper (US trends in the aromatherapy essential oil sector 2013-2014) presented at IFEAT 2013, by Dorene Petersen, President American College of Healthcare Sciences