International Trade Centre

Market Insider

ESSENTIAL OILS AND OLEORESINS

MARKET INSIDER

Ylang ylang distillery, Comoros Islands.

August 2015 Report

Market Insider

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Building awareness and assisting developing countries with access to trade and market information has been at the heart of the International Trade Centre (ITC) work. The Market Insider is a newly branded global public goods service built on a "blog" interface to provide just-in-time content on market prices and industry developments focusing on forward-looking intelligence in anticipation of market opportunities, market dynamics, quality issues, trade events and sector-specific intelligence on commodities of interest to developing countries.

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Isobionics expands to launch Sandalwood and Patchouli products

The production of natural flavours and fragrances from fermentation (based on yeasts etc) continues its growth with Isobionics announcing that it is opening a new laboratory equipped with new generation fermenters on the Brightlands Chemelot Campus in Sittard-Geleen, in the Netherlands. Biostream (who specialise in fermentation equipment) is supplying the fermenters for the laboratory which is preparing to launch two new fragrance materials – sandalwood and patchouli.

"This new laboratory enables us to scale up new products to production more quickly", explains Toine Janssen, CEO of Isobionics. The new laboratory is equipped with new generation fermenters, giving Isobionics a unique facility. Janssen explains: "Before a product is ready to be put on the market, the production process needs to be tested on an increasingly larger scale. We have created sufficient capacity in our new laboratory in order to be able to do this."

Isobionics was founded in 2008 and produces natural fragrances and flavorings based on fermentation. The company has developed rapidly and expansion is projected to continue. It current employs 25 people and expects to expand to 50 in the new future. The company has already brought three products onto the market, namely Valencene, Nootkatone and beta-Elemene. Valencene is orange fragrance, Nootkatone is grapefruit fragrance and beta-Elemene is ginger fragrance. These products are used in soft drinks and perfumes. The market launch of two new fragrances, Sandalwood and Patchouli, is currently in the preparation stage. Janssen explains: "With our new laboratory we are able to scale up from production on a laboratory scale to large-scale production more quickly, so that we can shorten the time-to-market for these two products." The new fermenters for the laboratory are supplied by an innovative Dutch company, Biostream from Doetinchem, which specializes in fermentation equipment for the biotechnology industry. The new facility at Isobionics was opened by Twan Beurskens, Minister of Economic Affairs for the Province of Limburg: "Isobionics has strong roots on the Brightlands campus and we are proud that this innovative company is investing in the expansion of its laboratory here during its growth phase. It proves that the campus can also offer added value to biotechnology companies."

Isobionics B.V. is a global company, developing, producing and selling a range of natural products for the Flavor & Fragrance (F&F) and Agrochemical market. Isobionics was the first company in the world that introduced BioValenceneTM, which uses a proprietary fermentation technology (similar to brewing beer). Many natural compounds today are seasonally harvested. Therefore product availability, quality and price are varying and unpredictable. Isobionics' products distinguish themselves by unlimited and guaranteed availability, constant quality, high purity, and a low cost price. Moreover, the products are sustainable and environmentally friendly. For more information visit: www.isobionics.com

Source: Isobionics

Fi Europe – an important trade show for essential oil & extract producers

With ever-changing and more complex consumer trends, say the organisers of Fi Europe, greater need for safer and healthier food and beverages and higher demands to use purely natural ingredients, today's food and beverage professionals need greater access to innovative reformulation solutions, new, tastier and better quality ingredients and greater industry thought-leadership. For more than 25 years Fi Europe & Ni has provided the world with the leading food and beverage ingredients sourcing platform, the organisers note, and in 2015 it will take place in Paris from 1-3 December 2015. In fact, they say, over 25% of all annual ingredient procurement budgets for food and beverage manufactures are influenced by a visit to Fi Europe & Ni making Fi Europe & Ni one of the most influential and important three day event for the industry.

Fi Europe & Ni is returning to Paris for a number of reasons. France has the second-largest economy in Europe, in nominal figures, and is the third-largest food market on the continent, behind Germany and the United Kingdom. In addition, France is home to 13,500 food and beverage businesses, which generate more than €147 billion in annual revenue and Paris' strategic geographic positioning only enhances global food and beverage trade. It is therefore the perfect location to bring the food and beverage industry together. Over 1,400 ingredient suppliers have already been confirmed to exhibit at Fi Europe & Ni, including Roquette, Cargill, Brenntag, ADM, Friesland Campina, DSM, Naturex, and many more. Leading European food and beverage manufacturers have also already confirmed their attendance including Lactalis and Barry Callebaut.

"Fi Europe is a truly global meeting place for professionals – in 2015 we expect over 27,000 attendees, all of who will be looking to make connections with new business partners and suppliers, as well as learn about the latest innovations shaping their industry. Fi Europe has proven to be the most successful platform for companies who want to successfully position themselves in the vibrant and ever-growing food and beverage market," said Brand Director, Richard Joyce, who is anticipating the best and biggest show to date.

Along with ingredient suppliers, Fi Europe 2015 will also offer thought-leadership and new ingredient innovations showcases. This year will see the return of the New Product Zone which displays the latest products and innovations and gives an opportunity to find out what is predicted in the future. The Innovation Tours will provide insight on clean labelling, sugar and salt reduction solution providers. The Global Market Forum will provide workshops and educational seminars surrounding key industry topics, conducted by companies like EAS, Euromonitor, NVC, Leatherhead and Innova Market Insights. The Innovation and Ingredients Hub will allow exhibitors to present the latest innovations, cutting edge technology and product opportunities. The Food ingredients Excellence Awards are presented, recognising the leading ingredient manufacturers and their latest innovations. The event is co-located with the Food ingredients Europe Conference, which covers issues currently faced by the food ingredients industry and will, say the organisers, provide crucial insights into leading scientific innovations, winning marketing strategies and explore the hottest ingredients trends driving new product development and consumer spending in the F&B industry.

Registration online to secure free entry to Fi Global's biennial flagship and for more information about Fi Europe & Ni 2015, visit: www.figlobal.com/fieurope/home

Source: Food Ingredients Europe (Fi Europe)

FAO price indexes show weak market prices for food and vegetable oils

The FAO Food Price Index averaged 164.6 points in July 2015, down 1.7 points (1.0%) from June and almost 40 points (19.4%) less than in July 2014. At its current level, the Index has reached its lowest monthly value since September 2009. Last month's decline reflected sharp drops in the prices of dairy products and vegetable oils, which more than offset some increases in the prices of sugar and cereals. Meat prices held steady.

The FAO Cereal Price Index averaged 166.5 points in July, up 3.3 points (2.0%) from June, but still 18.7 points (10.1%) below July last year. For the second consecutive month, strong wheat and maize quotations kept the cereal index rising, while rice prices fell. Unfavourable weather in North America and Europe caused a surge in international prices of wheat and major coarse grains during the first half of July, much of which was eroded in the second half as weather prospects improved. Rice prices remained on a falling trend, reflecting intense exporter competition for markets amid weak import demand.

The FAO Vegetable Oil Price Index averaged 147.6 points in July, nearly 9 points (5.5%) below June and its lowest value since July 2009. The recent slide was primarily driven by developments in the palm and soy oil markets. International palm oil quotations eased on increased production in Southeast Asia, combined with slower exports, especially from Malaysia. Soy oil prices weakened further, on ample export availabilities in South America and a favourable outlook for global supply in 2015/16. Continued weakness in crude oil prices also weighed on the vegetable oil complex.

The FAO Dairy Price Index averaged 149.1 points in July, down 11.5 points (7.2%) from June. Prices for dairy commodities declined across the board, with milk powders being most affected, followed by cheese and butter. Subdued import demand from China, the Middle East and North Africa caused prices to fall. Additionally, some manufacturers in New Zealand reduced prices in an attempt to trim inventories prior to the closure of the financial year, at the end of July. EU milk production is currently running above its level of a year ago, resulting in good availability of products for export.

The FAO Meat Price Index averaged 174.1 points in July, nearly unchanged from June. International prices of bovine meat moved up, offsetting a decline for pigmeat and ovine meat, while poultry quotations remained stable. Prices of beef from Australia, in particular, rose, supported by stronger import demand from the United States, Japan and the Republic of Korea, amongst others. Muted domestic demand for pigmeat in some EU member states caused quotations to fall, with export prices following suit.

The FAO Sugar Price Index averaged 181.2 points in July, up 4.4 points (2.5%) from June 2015. The increase was largely due to reports of less than ideal harvesting conditions in the main sugar producing region of Brazil. Also, so far into the season, a large share of the Brazilian sugarcane harvest is reportedly being diverted for the production of ethanol instead of sugar. The recent gain in sugar prices was contained by a slide in the Brazilian currency against the US dollar, together with expectations of ample supplies in the main sugar producing and exporting regions.

Source: FAO

Flavours market growth supported by strong growth of snacks market

Snacks are an important driver for the flavours market, and an important user of essential oils and oleoresins. P&S Market Research has released a new report analysing the development and projected demand of the savoury snacks market. The global savoury snacks market was valued at US$111.1 billion in 2014. The market is expected to grow at a CAGR of 7.1% during 2015 to 2020, to reach US$166.6 billion by 2020. The global savoury snacks market is being driven by the rising urbanisation, increasing per capita income (especially in developing countries), and changing food culture. The high growth of the savoury snacks market in Asia-Pacific region is mainly coming from the increasing demand from China and India, as they constitute a large part of the global and regional population. The healthier alternatives to savoury snacks, such as bakery products, fresh fruits, and juices, are hindering the savoury snacks market growth; which is compelling companies to offer healthier snacking options. The demand for small pack sizes has been increasing considerably in certain countries, such as India and Mexico, due to increasing consumption from lower income groups and demographic changes.

People are demanding variety in snacks, the report says, which is encouraging companies to launch new products. Several companies have announced the launch of products with new tastes, flavours, and shapes to maintain their competitiveness in the market. Moreover, customers' increasing inclination towards organic foods is compelling the savoury snack companies to innovate their products for customer retention.

The report segments the global savoury snacks market into potato chips, processed snacks, popcorn, nuts and others. Processed snacks accounted for the largest share, with a market size of US$41,572.3 million in 2014 and it is expected to grow at a CAGR of 6.5% during 2015 – 2020. Previously, notes the report, snacks were considered as a break time light food. However, in recent times people have been increasingly eating them between meals. Snacks are being considered as a fourth meal of the day. In the U.S., Americans are forerunners amongst the snack eaters between meals as they love to snack everywhere from theatre, to workplace, to car, and even on the subway, the report claims.

Globally, the Indian savoury snacks market is expected to witness the highest growth – 16.6% during the period 2015 – 2020, The United Kingdom of Great Britain and Northern Ireland is the forerunner in snack consumption within Europe. According to a food research company, people in the United Kingdom. snack 825 times a year as compared to the 807 times of the European consumers' average. People in the age group 6 years to 24 years are the largest savoury snack consumers in the United Kingdom. The United Kingdom leads the savoury snacks market in Europe; however, it is not the largest consumer in terms of per capita consumption. Countries such as Netherlands, Norway and Spain have a greater per capita consumption of savoury snacks as compared to their British counterparts. According to the European Snacks Association (ESA), the average annual per capita savoury snacks consumption in Europe is about 3.6 kilograms.

The increasing numbers of supermarkets and hypermarkets coupled with growing per capita income is encouraging people into bulk buying of savoury snacks, the report claims, which is mostly offered by large scale retail. Convenience stores are another format which is growing at a global level due to peoples' growing demand for convenience.

Range of vanilla extracts on markets continues to grow

Synergy Flavors, has enhanced its range of vanilla flavors with a new variant of its core Madagascan vanilla extract. The new addition to the vanilla extract range possesses a sweet and creamy taste profile whilst also retaining an authentic beany flavor. Part of a wide range of extracts, flavorings and pastes, the new addition opens up broader application and taste opportunities for Synergy Flavors' customers in the dairy, bakery and beverage sectors.

Synergy Flavors' entire vanilla range is based on Madagascan vanilla which is a global benchmark for quality and is renowned for its rich, luxurious flavor and aromatic qualities. The new extract, which is ideally suited to dairy desserts, such as trifles, and baked goods, such as cupcakes offers creamy top-notes with sweet, beany tones. Offering an extract label declaration, the product has been developed using Synergy Flavors' 100 years of vanilla expertise, which combines technology with artistry to create the most authentic vanilla solutions using the finest pods and beans. Using sensory analysis, Synergy Flavors provides customisable solutions for a multitude of applications from cheesecakes and muffins to ice cream and yoghurts. As well as delivering innovative vanilla profiles including creamy, smokey and caramellic varieties, Synergy Flavors' high impact vanilla range comprises clean label, natural and organic options. The range includes vanilla pastes that offer a luscious, buttery profile and mouthfeel, ideal for bakery applications and frosting, as well as liquid top-notes which enable bespoke profiles for specific customer requirements.

Hugh Evans, marketing manager Europe and Asia at Synergy Flavors, commented: "We have fused our analytical and sensory capabilities with modern extraction techniques to produce an unrivalled range of smooth, rich vanilla flavors. This latest addition to our portfolio ensures that we have the profile and format needed for the widest range of applications. Our technical experts assist customers in selecting the right vanilla or combination of profiles to develop winning recipes. With provenance and clean label key considerations for many target applications, our Madagascan vanilla range includes natural liquid top-notes that permit a natural vanilla flavoring declaration."

Source: Synergy Flavours

IFEAT conference registration closes

Registration for the annual IFEAT conference, to be held in Colombo, Sri Lanka, over the 27th September to 1st October, has closed.

Source: IFEAT

Ylang Ylang Oil – a review of production from Comoros

Ylang ylang oil is one of the major traditional export products of the Comoros (together with vanilla and cloves) and an important ingredient in many fine fragrances. The crop is grown by small farmers, and the flowers are distilled by a large number of small distillers. Production is centered on 2 islands – Anjouan and Mohéli. In the past, Comoros produced a diversity of other essential oils, but production is now almost exclusively limited to ylang ylang.

Ylang ylang oil is an essential oil distilled from the fully open flowers of the ylang ylang tree, *Cananga odorata*. The oil is used in high quality (haute gamme) perfumery. In Comoros, ylang ylang oil was traditionally produced in 5 qualities (fractions): Extra-S, Extra, Première, Deuxième, and Troisième (ES, E, P, D, T). However most production in Comoros is now only of 2 grades: a higher (E+P+D) and lower quality (T).

1 Export supply

Ylang oil is only produced in Comoros, Mayotte and Madagascar[1]. Comoros is the major producer, followed by Madagascar. Production in Mayotte has almost stopped (due to uncompetitively high labour costs). Full trade data for ylang ylang is not available for the EU market as ylang is combined with niaouli and clove oils in the Harmonised Codes[2]. Comoros and Mayotte do not produce any significant quantities of these other oils, so all imports to the EU can be taken as ylang oil. However Madagascar produces both niaouli and large volumes of clove oils and it is not possible to separate out ylang oil volumes. In the US trade data, however, ylang is only combined with cananga oil, so the oils can be separated by production origin.

Production of ylang ylang oil has been in long term decline, with production in both Comoros and Mayotte having fallen significantly over the past 30 years. From past production levels of around 90 tonnes, recent production in Comoros has been in the range 30 to 40 tonnes, down from levels in the range 40-50 tonnes over the period 2005-2010. Production in Mayotte has declined from around 20 tonnes to 1 tonne or less over the last 5 years. Current production levels in Madagascar are not known but are estimated to have been maintained in the range 15 tonnes.

France dominates the trade in ylang ylang oil from origin and almost all production from Comoros and Mayotte is exported to France. EU imports of ylang oil from Comoros and Mayotte over the period 2005-2014 is shown in Table 1.

Table 1 Ylang ylang imports to EU from Comoros & Mayotte, 2005-2014, tons

Origin	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Comoros	50.1	64.2	53.8	54.8	39.8	54.9	39.3	31.9	41.1	24.7
Mayotte	10.5	7.8	8.0	7.9	4.4	3.7	0.9	1.2	1.1	0.0
Total	**60.6**	**72.0**	**61.8**	**62.7**	**44.2**	**58.6**	**40.2**	**33.1**	**42.2**	**24.7**

Source: EuroStats

[1] Cananga oil is produced from the same species in Indonesia and Philippines, but this is of a different and lower quality and does not compete directly with ylang ylang oil (depending on prices, it can substitute for the troisième grade).

[2] 33012911: terpenic oils of ylang ylang, niaouli and clove; 33012931 terpeneless oils of ylang ylang, niaouli and clove. Almost all oil is exported as the unmodified terpenic oil. Data is given for the 2 codes combined.

Imports of ylang ylang and cananga oils into the USA are shown in Table 2. Supply is dominated by France, with almost no direct imports from the Comoros, although direct imports from Madagascar have started to increase over the last 5 years

Table 2 USA imports of ylang ylang and cananga oil, by major origin, 2005-2014, tonnes

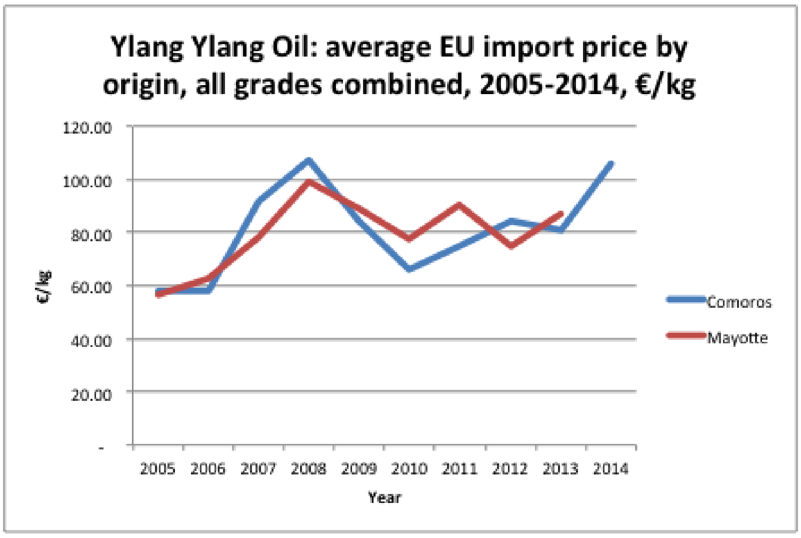
Origin	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
France	22.8	30.7	29.2	28.8	20.5	27.7	12.7	12.0	13.9	20.6
Madagascar	0.8	0.3	0.8	1.2	0.7	1.1	7.3	7.2	7.7	3.9
Comoros	0.0	0.1	0.8	0.4	0.1	0.3	0.0	0.1	0.2	0.1
Indonesia	1.5	1.8	3.2	1.0	1.5	1.9	1.2	1.0	1.0	0.4
Other[3]	5.4	13.4	3.0	2.4	2.0	3.0	2.4	1.0	06	7.4
TOTAL	**30.5**	**46.3**	**37.0**	**33.8**	**24.8**	**34.0**	**23.6**	**21.3**	**23.4**	**32.4**

Source: US FAS

2 Ylang ylang export prices

A long term price series (€/kg) for ylang ylang imports to the EU from Comoros and Mayotte is shown in Figure 1. Ylang oil is priced by grade, and import prices therefore only show an average of all grades. However, the graph shows clearly that prices have been highly variable (varying in the range €60 to €120/kg over the past 10 years), and that there has been a consistent increase in prices over the past 5 years since earlier lows. Increases in market prices have reflected increases in prices for both flowers and oil at the distillery in Comoros. Over the past 10 years, prices for flowers have risen from KMF 75-150/kg to KMF 350-400/kg in 2012, to current prices of KMF 500/kg. Over the same period prices for oil at the distillery have risen from KMF 375/degree/kg to KMF 1,000/degree/kg in 2012, to current prices of KMF 1,450/degree/kg.

Figure 1 EU: average import price for ylang oil, 2005-2014, €/kg



Source: EuroStats

Ylang grades are determined by the specific density of the oil, with the different fractions separated on the basis of density. A generally accepted division of the factions is shown below, but a range of cut-offs are used depending on buyer preference.

[3] Primarily re-exports from other European countries.

Table 3 Ylang ylang oil grades

	Specific density[4]	**% in Comoros oils**	**% in Madagascar oils**
Extra & Extra S	950^{o} to 970^{o}	24%	3%
Première	934^{o} to 945^{o}	10%	20%
Deuxième	920^{o} to 932^{o}	8%	17%
Troisième	900^{o} to 916^{o}	58%	60%

Source: Olivier de Bontin, IFEAT 2006

Prices for the high quality grades (ES, E, P, D) are calculated on the basis of actual measured degrees of density; troisième is priced on a fixed per kg price. Current buying prices at the distillery are:

- Higher grades: KMF 1,450 per degree above 900
- Troisième: KMF 14,500/kg

On the basis of an average of 55^{o} (955^{o}) for the higher grade, the price at the distillery would be KMF 79,750 (€162 / US$ 178 per kg). With an average ratio of production of 1kg higher grade for each 2 kgs lower grade, the overall average price at the distillery for all production will be in the range €74 / US$82 per kg.

If only the higher grades are produced (the distillation stopped after around 4 hours before the production of troisième begins), volumes will be lower, but average prices much higher.

[4] Where water is 1000^{o}

Price Information

Conventional 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	Indonesian	$23/kg 200kg lots
	Indian	$84/kg 1 kg lots
	Madagascan	$75/kg 1 kg lots
Clove stem	Indonesian	$17/kg container
	India	$50/kg
	Madagascar	$36/kg 200 kg lots
Clove leaf	Indonesian min. 73%	$12.00/kg, container
	Indonesian min. 80%	$13.50/kg
	Indonesian min. 82%	$14/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
	Madagascar	$55/kg
Cassia bark	China	$35/kg; $70 1 kg lots
Black pepper	Sri Lankan	$218/kg 1 kg lots
	Indian	$150/kg; $195 1 kg lots
Nutmeg	Indonesian (myristicin 7%)	$38/kg
	Indonesian	$88/kg
	Indonesian (safrole free)	$65/kg
Ginger	Chinese	$105/kg
	Indonesia	$100/kg
	Indian	$183/kg 1 kg lots
	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 US$210/kg spot

Spice Seed Oils

Product	Origin/Grade	Prices per KG
Aniseed	China	$13-16 CIF NW Europe; $75/kg 1 kg lots
Star Anise	India	$120/kg
Coriander seed	Russian	$200/kg
Coriander herb	Russian	$100/kg drum
Cumin seed	Egypt	$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)	$7/kg container
Orange (bitter)	Italian (c/pressed)	$45/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	$55-$58/kg container
	Brazil	$55/kg
Lime (distilled)	Italian	n/a
	Mexico/Peru	$46/kg container; $62/kg
Lime (cold pressed)		$25/kg
Mandarin (red)	Italy	$80/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	$96/kg
	French	$250/kg
	English	$200/kg
	Russia	$95/kg drum
Lavendin	French Grosso	$30/kg
Spike Lavender	Spain	$110/kg
Mints	Indian piperita	$63/kg
	India, mentha arvensis crude, L-menthol 72%	$13/kg
Menthol	Indian, bold crystals	$19/kg
	Indian, medium crystals	$15/kg
	China	$18/kg
Peppermint menthofuran 3%	China	$23.50/kg
Peppermint	China	$15/kg container
Peppermint dementholised	Indian	$13/kg
Menthone 80/20	Indian	$16/kg
Menthone 90/10	Indian	$19/kg
Spearmint 60% carvone	China	$23/kg
Chamomile (German)	German blue	$670/kg
	Morocco (wild)	$450/kg
	Egypt (blue)	$1,000/kg
Chamomile (Roman)	UK	$550/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	$13/kg container; $35/kg 1 kg lots
	Australian	$44/kg
	China	$38/kg 1kg lots
	Madagascar	$31/kg
Eucalyptus citriadora	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	$57/kg 1 ton lots
Patchouli - Indonesia	Sulawesi min 26% pa	$47/kg
	Sulawesi min 30% pa	$54/kg
	Sulawesi min 30% pa, light	$56/kg
	Sumatra min 30% pa	$66/kg
	Sumatra min 32% pa	$69/kg
	Sumatra min 34% pa	$74/kg
	Sumatra min 30% pa, light	$68/kg
Rose	Bulgaria	$5,750/kg
Geranium	Egypt	$125/kg
	Egypt	$120/kg
	China	$155/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	$2,025/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	$16/kg container; $37/kg 1 kg lots
	Madagascar (C. giganteus)	$55/kg
Palmarosa	Indian	$41/kg; $130/kg 1 kg lots
Vetiver	Indonesian	$235/kg; $380/kg 1 kg lots
	Indonesian	N/a rectified
	China	$85/kg container
Tea Tree	Australia	$44/kg; $90/kg 1 kg lots
	Australia, lemon scented	$140/kg
Guaiacwood	Paraguay	$25/kg drum

Product	Origin/Grade	Prices per KG
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

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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
Lavendin	French Grosso	$55/kg
Mint, peppermint	USA	$90/kg
	India	$65/kg drum

Product	Origin/Grade	Prices per KG
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

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

Kohlbach Group
Grazer StraBe 23
A-9400 Wolfsberg
Austria
Email: office@kohlbach.at
Tel: +43 4352 2157-0
Fax: +43 4352 2157-290
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
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 41473724Fax + 213 41473730
E-mail: 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; paul_chew@163.com
SKYPE: xpyllj74

India:

Al-Can Exports Pvt Ltd
Sheetal Industrial Estate, Kashimira Road,
Bhayander East District,
Thane 401 105
India.
Tel: +91 22 2819 3122
Fax: +91 22 2814 2477
Email: 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
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
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

International Conference and Exhibition on Food Processing and Technology
10-12 August 2015. London, UK
http://foodtechnology.conferenceseries.com/

Personal Care India Expo
19-21 August 2015. New Delhi, India
www.ubmindia.in/personalcareindiaexpo

Fi South America
25-27 August 2015. Sao Paulo. Brazil
www.figlobal.com/southamerica

Fi Asia-Thailand
9-11 September 2015. Bangkok, Thailand
www.figlobal.com/asia-thailand

Bioflavor 2015
9-11 September 2015. Frankfurt, Germany
http://bioflavour-conference.com

International Citrus & Beverage Conference
15-18 September 2015. Clearwater Beach, FL, USA
www.conference.ifas.ufl.edu/citrus

34th International Day Essential Oils & Extracts
23-24 September, Digne-les-Bains, France
www.appam.fr/

IFEAT 2015
27 Sept to 1 October 2015. Colombo, Sri Lanka
www.ifeat.org

Hi Japan
7-9 October 2015. Tokyo, Japan
www.figlobal.com/japan

Anuga 2015
10-14 October 2015. Cologne. Germany
www.anuga.com

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

Cosme Tokyo 2016
20-22 January 2016. Tokyo, Japan
www.cosmetokyo.jp/en/ex

Cosme Tech 2016
20-22 January 2016. Tokyo, Japan
www.cosme-i.jp/en

International Spice Conference

21-24 January 2016. Goa, India
www.internationalspiceconference.com

American Spice Trade Association Annual Meeting
10-13 April 2016. Scottsdale, AZ, USA
www.astaspice.org

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

BiobasedWorld Tradeshow
15-16 February 2017. Cologne, Germany
www.boiobasedworld.de/en/home.html