

## ESSENTIAL OILS AND OLEORESINS MARKET INSIDER



Field distillery, Madagascar.

November 2014 Report

## Market Insider

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### **Clove prices fall**

Clove prices have weakened on the international market on reduced demand, but this is not expected to affect clove oil prices in the short term, and the medium term view on prices is positive, with global production down and demand likely to increase, pushing prices up for both the spice and the essential oils. The Madagascan crop is just starting to come to the market from the southern production area, with supplies from the northern production area expected to come onto the market later this month. However, overall the Madagascan crop is expected to be significantly down on 2013 levels, in the range 7-8,000 tonnes vs 10-12,000 tonnes for 2013. Both the Brazilian crop and Zanzibar's crop are also reported to be small and significantly down on 2013 levels. Overall a global shortfall in production of around 25,000 tonnes is forecast, and this is certainly likely to push up prices for the essential oils as well as the spice. Interestingly, China is emerging as an important buyer of cloves, for both food and traditional medicinal uses, with an estimated annual demand of around 4,500 to 5,000 tonnes.

Source: Public Ledger

### **Neroli oil production increases**

Biolandes report that there was a good orange blossom harvest in the 3 main North African origins (Morocco, Tunisia, Egypt) with total production estimated at around 2,300 tons of blossom, up around 20% on 2013. Biolande offers certified organic neroli oil from their farms in Morocco. Biolande is expanding its production in Morocco, and offers mimosa, orange blossom, petitgrain, laurel, roman chamomile, geranium and helychryium, as well as a range of wild harvested products (including armoise, myrtle, lentisque, blue tansy and wild german chamomile).

Source: Biolandes

### **Biolandes acquire ylang ylang distillery in the Comores Islands**

Earlier this year Biolandes purchased the company Huilles Essentielles des Comores, HEC, based in Anjouan. The company has a modern distillery, and the acquisition will increase Biolandes ylang ylang production from its existing operations in Madagascar.

Source: Biolandes

### **Spanish production of sage, red thyme and spike lavender oil down**

2014 production volumes for sage, red thyme, and spike lavender oil from Spain are reported to be lower this year, and prices are expected to rise.

Source: Bordas SAS

### **THE sweet smell of lavender is tinged with bitterness this year in the south of France, as farmers who harvest the flower protest European regulations linking the plant to chemical toxins.**

BILLBOARDS proclaiming "Lavender is not a chemical" dot fields that yield what in Provence is known as blue gold - lavender oil, worth over 100 euros a kilogram. The plant is cultivated by around 1,500 producers, representing 30,000 full-time jobs that include catering to the millions of tourists in the south of France who come for the panoramic views of purple fields.

For many, Provence is synonymous with lavender, both fine lavender - used for perfumes, cosmetics and aromatherapy - and hybrid lavender, called lavandin. Lavandin is cheapest and used to scent soaps, detergents and air fresheners. And they fear European Union rules adopted last year and due to come in force by 2018 will threaten that.

According to regulators, lavender oil's potential to produce allergies places it firmly within regulations on chemical toxins. That means lavender products will have to bear bold black and red warning labels with messages such as "CAN BE FATAL IF SWALLOWED OR INHALED." Producers say the rules are too extreme - they note that lavender oil allergies usually produce only rashes - and too expensive for small farmers. Lavender producers are now fighting "to survive," said Francis Vidal, honorary president of APAL, an organisation of lavender essential oil producers.

In addition to the billboards, the group has organised an online petition, signed by over 15,000 people. "The consequence of this ruling, in the very short term, would be the ruin of our plantations and the disappearance of lavender from our Provençal countryside," APAL wrote in a letter sent to President Francois Hollande and other politicians. Advocates point out that lavender oil was used as an antiseptic until the beginning of the 20th century, and even today is prized for its healing and calming properties. "Lavender has been used for thousands of years," Vidal said. "We never heard of any serious problems. Instead, we know that lavender oil helped save tens of thousands human lives."

Even the European Commission acknowledges that any substance whose contents depend on the amount of sun it receives and the kind of soil it springs from is difficult to classify as a chemical product. EU authorities met with lavender producers in April and are now working on ways to help producers to conform to the law. Proposals are to be made this autumn, according to a commission document. But producers claim lavender oil should simply be reclassified under agricultural products.

French producers don't oppose mentioning a potential allergy risk on their product, Vidal said, but they are adamantly against the kinds of dire labels that can be found on chemicals used in industrial processes, such as hydrochloric acid or cleaning products. "There is a risk being linked to a chemical, and can lead to confusion for consumers," said Emilie Zamora, in charge of communication for the PPAM, the union of producers of perfume, aromatic and medicinal plants.

In addition, producers would themselves be responsible for carrying out the chemical analysis. Many are small farmers who couldn't afford the expensive procedure, Vidal said.

Lavender farmers have received support from Raymond Chaillan, a French perfume creator whose nose helped create the scents for Opium, Anas Anas and Parfum d'Hermes. "This new directive will foreshadow the death of the plantations of lavender, of hybrid lavender, and the sage from the southeast of France, this agriculture of the dry mountains," Chaillan wrote in a statement to support lavender producers. "It will further reduce the perfumers' palette, limiting their creativity."

Source: Independent, UK

#### **SIAL Tradeshow runs 19-23 October 2014**

The SIAL tradeshow, held every other year in Paris, France, starts at the end of next week. SIAL alternates with ANUGA, held in Germany. SIAL is primarily focused on food, and provides a good showcase for essential oils and oleoresins used as food flavours.

#### **Major Fragrance and Flavours companies reporting strong sales**

Firmenich ([www.firmenich.com](http://www.firmenich.com)) reported sales of CHF 2.952 billion, up 7% in local currencies and 2% in Swiss Francs for its fiscal year ended June 30, 2014. The company recorded increases in all business segments and in all geographic regions. The company also released its ninth annual independently validated sustainability report and said it made "solid progress" on all tracked environmental indicators compared with its fiscal year 2009 baseline. In fiscal year 2014, Firmenich also improved its safety performance by a further 37%. Firmenich's sustainability report is available on their website at [www.firmenich.com/sustainabilityreport2014](http://www.firmenich.com/sustainabilityreport2014).

In the first nine months of 2014, Givaudan posted sales of CHF 3,313 million, an increase of 4.5% on a like-for-like basis and a decline of 0.2% in Swiss francs compared to the previous year. Midterm, its overall objective is to grow organically between 4.5% and 5.5% per annum, assuming a market growth of 2-3%, and to continue on the path of market share gains. Fragrance division sales were CHF 1,587 million for the first nine months of 2014, an increase of 4.8% on a like-for-like basis and

0.5% in Swiss francs. Total sales of fragrance compounds (fine fragrances and consumer products combined) increased by 4.2% on a like-for-like basis. In Swiss francs, sales of compounds decreased by 0.9% to CHF 1,386 million from CHF 1,399 million in 2013. Fine Fragrance sales grew 3.4% on a like-for-like basis driven by strong growth in developing markets, where new business and volume gains in established business helped performance.

Flavor division sales were CHF 1,726 million during the first nine months of 2014, an increase of 4.2% on a like-for-like basis and a decrease of 0.8% in Swiss francs driven by a continued good performance in the developing markets. There was growth across all major segments, with strength in beverages, dairy and snacks. Health and Wellness sales continued with improved taste solutions involving sweetness, salt and masking capabilities being provided for our customers. In particular, there were strong double-digit gains in Latin America for this segment.

A copy of Givaudan's sustainability report (2013) is available at: [www.givaudan.com/Sustainability](http://www.givaudan.com/Sustainability)

### **Naturex unveils new developments in its sustainability program by disclosing its achievements and reveals the targets set out for the coming years.**

'Pathfinder' reflects Naturex's ability to explore new roads to sustainability without applying a rigid model. Serge Sabrier, President of Naturex's Sustainability Committee, said: "Our paths are not mapped; they're made by listening to local people and understanding the particularities of an environment. It reflects our continuous drive to go one step further. This is what we stand for and how we behave as a company. These values form the basis of our behavior towards employees, suppliers, customers and shareholders."

One year after the publication of its own Sustainability Principles, the group is releasing its first sustainability Pathfinder report, structured around 4 pillars: Sourcing, Operations, People and Innovation which charts the progress the company has made and reveals the objectives set out. Naturex illustrates the Pathfinder philosophy in the way it puts the values of proximity, quality and respect at the heart of its procurement practices for raw materials. For example, Naturex encourages partners to collect only the secondary roots of devil's claw in Namibia in order to preserve the resource.

As part of its operations, the group reconciles the demands of competitiveness while ensuring a safe and healthy workplace for Naturex employees and respecting the environment. As an example, the water treatment station in Avignon is completely underground to ensure its seamless integration into the surrounding landscape.

Innovation is highlighted by ORTESA, a partnership between Naturex and the University of Avignon designed to develop eco-friendly extraction techniques.

From a social perspective, the company's Foundation keeps expanding its actions in communities where Naturex sources and processes its raw materials. Serge Sabrier added: "Naturex's Pathfinder strategy is wide ranging and ambitious, but we are not daunted by the challenge. Sustainable business practices are not optional; they are essential, especially for the botanical ingredients sector to continue to thrive. We are proud to be leading the way in our quest to operate in a manner that respects both the planet and the people." The Pathfinder report is available for download at [www.naturex.com/company/sustainability.html](http://www.naturex.com/company/sustainability.html)

### **About Naturex:**

Naturex is the global leader in specialty plant-based natural ingredients. Through its dedicated business units, the Group addresses the specific needs of 3 strategic markets: Food & Beverage, Nutrition & Health, and Personal Care. The company offers its customers a full array of high quality ingredients, responsibly sourced from nature for food, pharmaceutical, nutraceutical and cosmetic applications. Naturex's head office is Avignon, France. The company employs more than 1,600 people and benefits from 8 sourcing offices around the world and high-performance manufacturing operations across 16 sites in Europe, Morocco, the United States, Brazil, Australia, and India. It also has a global commercial presence through a dedicated network of 25 sales offices. [www.naturex.com](http://www.naturex.com)

Source: Naturex

## **Berjé presents its Farm to Fragrance programme at 2014 World Perfumery Congress**

Berjé introduced its Farm to Fragrance programme, a traceability system for essential oils which allows customers to track ingredients by Batch Number back to the distillery and the cultivation source. The system also allows a more direct connection between perfumers and distillers by providing access to raw material data, farm practice and distillation techniques. The online interface provides a map of the growing region, identities of farms involved in the production, slide shows of the distilleries and information on the raw material. The growing region information includes climate data and botanical descriptions. Farm biographies include photos, location, growing practices and more.

## **Al-Can Exports offers wide range of aluminum packaging for essential oils**

Al-Can Exports, (Mumbai, India) offers a wide range of aluminum bottles for packaging of essential oils. All bottles are UN-certified (X category) for transportation and storage of dangerous goods. Al-Can already exports to more than 37 countries. African countries could source from either India or Dubai. ([www.al-can.com](http://www.al-can.com))

## **Firmenich assembles natural product producers from around the world.**

The livelihoods of 250,000–300,000 families depend on the future of natural aromatic crop production. As a result, Firmenich united natural ingredient producers and perfumers in Paris for its Naturals Together event over the period 12-13 November. The 14 "ambassadors" for the event include producers of more than 40 key ingredients such as rose, jasmine, vanilla, tuberose, orange flower, patchouli, eucalyptus, vetiver, lavender, mint, cardamom, violet leaves, mimosa, clove, chamomile and more. Companies from Africa included: Authentic Products (Madagascar: vanilla); Les Aromes du Maroc (Morocco: orange blossom, rose, grapefruit flower, wild chamomile; Machalico (Egypt: grandiflorum jasmine, violet leaves, orange blossom, blue chamomile); Uvan (Uganda: vanilla).

Led by Dominique Roques, Firmenich's head of natural sourcing, the event aimed to "build stronger bonds with producers, aiming for structured partnerships bringing small farmers closer to perfumers." The event addressed topics such as bridging the divide between perfumery demands and long agricultural cycles, and ensuring long-term sustainability of production. An official Firmenich statement notes, "Only a long-term mutual commitment can protect both parties from shortages and a crisis whose effects are as grievous for farmers as they are for perfumers."

Stable supply will be driven by responsible sourcing, Firmenich explains, while innovations in the field and production facilities will improve quality and yield new olfactory facets. In addition, the company says, "This continuous dialogue is what allows us to establish ambitious improvement plans regarding allergens, pesticides and phthalates."

Master perfumer Olivier Cresp created two scents for the event. *Together Her* comprises rose, tuberose, neroli, jasmine sambac and grandiflorum, orange blossom, violet leaves, vetiver, lavandula, mint, pepper, patchouli, vanilla, eucalyptus and cardamom.

*Together Him* comprises orange, bergamot, neroli, lemon, mandarin, mint, cedar, eucalyptus, violet leaves, galbanum, jasmine sambac, lavandula, patchouli, pepper, rose, vetiver and vanilla.

The full Firmenich Press Release is attached.

## **Hugo Bovill forms Ajowan Consulting (<http://ajowan.biz>)**

Hugo Bovill, formerly CEO of the UK-based flavours and fragrances multinational Treatts plc, has announced the formation of Ajowan Consulting, providing an interesting new source of industry consulting expertise to operations at origin. Ajowan comprises a global network of consultants specializing in advice for the flavor, fragrance and natural cosmetic ingredient industries. The company reports it has already been retained by clientele in the United States, Sub-Saharan Africa, the United Kingdom and Europe for the development of ingredient businesses, particularly essential oils. Hugo Bovill has 30 years of industry experience, and has held the presidency and chairmanship of the International Federation of Essential Oils and Aroma Trades (IFEAT), directorship of the British Essential Oil Association, and executive committee membership in the European Flavour and Fragrance Association.

## PRODUCT & MARKET NOTES

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### Role and position of biotechnology

#### The role and position of biotechnology in the flavours and fragrances sector

Natural products – essential oils, oleoresins, floral concretes and absolutes – have an important place in the flavours and fragrances industry, typically used in the higher quality products where their complexity (of taste, aroma) can justify their higher prices than the synthetic alternatives. However, with the continuing drive to reduce raw material costs, and the increasing sophistication of aroma chemicals available, label legislation - the regulatory environment that determines what can and cannot be stated on the label – has become an important protection for natural ingredients through the control of the use of the word ‘natural’ on product labels.

Up until recently, use of the word ‘natural’ on product labeling was limited to products based on natural ingredients directly from the plant (and animal) world, although definitions began to be blurred with ‘nature identical’ materials. However, the recent emergence of products from fermentation has opened the doors to compounds produced by genetically engineered yeasts that, since they come from yeast, can be labeled natural. There has been a long history of companies trying to develop biotechnology sources for the most expensive natural ingredients, but the costs of production have been too high. However, recent advances in technology have started to overcome these issues, and the first products are now coming on to the market. A major driver for these developments is the prospect of price stability and supply reliability.

A number of products are now in the market, and more can be expected. Current developments include:

- Firmenich recently announced the release of a woody patchouli-like molecule, Clearwood, from the fermentation of sugarcane in Brazil;
- DSM Nutritional Products has formed an exclusive partnership with Isobionics of the Netherlands for valencene (an aroma component of citrus fruit, found naturally in orange) and nootkatone (a natural compound in grapefruit);
- Allylix (USA) has commercialized the production of nootkatone, and more recently (2012) released its Epivone brand terpene for fragrance applications;
- Amyris is working on the production of fragrance materials from farnesene (in Brazil, adjacent to a sugarcane mill) and has a partnership with Takasago (Japan) to commercialise fragrance products derived from farnesene, with expectations that commercial products will come to the market during 2015; Amyris also has a relationship with IFF for the development of renewable flavour and fragrance materials;
- Evolva (Switzerland) recently announced that it is commercially launching its vanillin, having collaborated with IFF on yeast-based fermentation routes in this area; Evolva also has a collaboration with Cargill on fermentation-based steviol glycosides (stevia). Evolva is also working on a saffron product at their site in India, targeting a commercial launch in 2016
- More broadly, Evolva and BiotechCorp (Malaysia) have entered into a collaboration with University Malaysia Penang (UMP) to establish a Malaysian natural product center of excellence, with the objective to apply Evolva’s yeast fermentation production technology to indigenous natural products for the flavour and fragrance sectors. The collaboration will start with the yeast fermentation production of agarwood;
- Symrise (Germany) and P2 Science (USA) report that they have entered into a partnership for the production of a range of renewable ingredients from biomass.

Consolidation in the sector is already beginning. In November this year, Evolva announced it was acquiring Allylix, expanding Evolva’s fermentation-derived ingredient and intellectual property holdings. According to the companies, ‘Evolva will acquire Allylix in return for an overall consideration of 46 million newly-issued Evolva shares. Both Evolva and Allylix are focused entirely on yeast, and its use to make valuable, sustainable, functional ingredients for health, wellness and nutrition. In consequence there are synergies in molecular biology,

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analytical chemistry, production, application development, regulatory, business development, marketing and sales.'

As noted above, one of the key drivers for these developments is the search for stable long term pricing (where prices can be agreed for multi-year periods) where reliability of supply is assured. These drivers address 2 of the critical issues in natural product supply – the interaction of adverse environmental conditions on supply and therefore price, compounded by producers entering and leaving the sector as prices rise and fall, resulting in an endless boom/bust in production and pricing, neither of which is compatible with long term commercial contracting between the compounders and final brand holders in the global markets.

The current view in the industry is that the primary use of these natural compounds derived from biotechnology will be the replacement of synthetics, rather than the replacement of natural products derived directly from plants. This may well be the case initially, and certainly it is not expected that these compounds would replace plant naturals in existing formulations. However, given the increasing sophistication of the flavours and fragrances compounding companies, the concern must be that when developing new products the cost and supply advantages of the products of fermentation with the natural label will provide a strong competitive alternatives to use of the traditional natural product.

One key conclusion from this development is that the industry has to work to develop sustainable supply chains for natural products, from the field to the final formulation. Whilst environmental disturbances that impact production (and quality) cannot be avoided, much can be done to address the issue of stability of fair pricing for producers through partnerships between producers and end users. Supply and pricing boom/bust cycles drive users to industrial production solutions, and these can now also offer a natural label.

## 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	\$33/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
	Madagascan	\$31/kg
	Indonesian	\$46/kg
	Indonesia	\$18/kg container
Cinnamon bark	Sri Lankan 60/65%	n/a
Cinnamon leaf	Sri Lankan	\$18/kg container; \$77/kg
	Madagascar	\$55/kg
Cassia bark	China	\$42/kg
Black pepper	Sri Lankan	\$218/kg 1 kg lots
	Indian	\$150/kg
Nutmeg	Indonesian	\$95/kg
Ginger	Chinese	\$75/kg container; \$100/kg
	Indian	\$168/kg 1 kg lots
	Indonesia	\$55/kg
Pimento leaf	Jamaican	\$140/kg
	Jamaican	\$90 container
Pimento berry	Jamaican	€210/kg
	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	\$120/kg
Coriander seed	Russian	\$80/kg
Coriander herb	Russian	US\$100/kg drum
Cumin seed	Egypt	€150/kg

### Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Brazilian	\$16/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	\$80/kg

Product	Origin/Grade	Prices per KG
Lemon	Italian	\$63/kg 1 kg lots
	Italian (c/pressed)	\$35
	Argentina	\$55-\$58/kg container
Lime (distilled)	Brazil	\$55/kg
	Italian	n/a
	Mexico/Peru	\$70/kg container; \$115/kg
Lime (cold pressed)		\$25/kg
Mandarin (red)	Italy	\$85/kg
Grapefruit (pink)	Argentina	\$42/kg
Grapefruit (white)	France	\$40/kg

## Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Comores	\$125/kg
	Egypt	\$82/kg
Lavender	Bulgaria	\$80/kg
	French	\$250/kg
	English	\$200/kg
	Russia	\$95/kg drum
Lavandin	French Grosso	\$30/kg
Spike Lavender	Spain	\$110/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	\$15/kg
Peppermint	China	\$15/kg

Peppermint dementholised	Indian	\$14/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
	Egypt (blue)	\$1,000/kg
Chamomile (Roman)	UK	\$560/kg
Sage	Croatia	\$105/kg
Rosemary	Portugal/Spain/Tunisia	\$55
	Spain	\$68/kg drum
	France	\$75
Marjoram	Spain (wild)	\$190/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	\$28/kg
	Madagascar	\$25/kg
Litsea cubeba	Spain	\$22/kg
	China	\$18/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 min 32% pa, light	\$70/kg 1 ton lots
	Indonesia min 30% pa, light	\$68/kg
	Indonesia min 28% pa, light	\$66/kg
	Indonesia	\$75/kg drum
Rose	Bulgaria	\$5,750/kg
Geranium	Egypt	\$125/kg
	Egypt	\$120/kg
	China	\$160/kg container
	Egypt	\$110/kg container
	Madagascar	\$310/kg
Rose Geranium	Madagascar/France	\$210/kg
Niaouli (Cineole 1,8) (Malaleuca quinquenervia type I)	Madagascar	\$16/kg
Niaouli Viridiflora (Malaleuca viridiflora type II)	Madagascar	\$20/kg
Petitgrain	Paraguay	\$35/kg drum
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; \$23/kg
	Sri Lanka	\$40/kg container
	China	\$18-20/kg container
Lemongrass	Indian	\$21/kg container; \$35/kg
	Madagascar (C. giganteus)	\$55/kg
Palmarosa	Indian	\$41/kg
Vetiver	Indonesian	\$105/kg container; \$120/kg
	Indonesian	\$140/kg rectified
	China	\$85/kg container
Tea Tree	Australia	\$44/kg;
	Australia, lemon scented	\$140/kg
Guaiacwood	Paraguay	\$25/kg drum
Fennel, bitter	Spain	\$84/kg
Juniperberry	India	\$120/kg
Myrrh	India (extract)	\$133/kg
	India (distilled)	\$270/kg

## PRICE INFORMATION

### Organic essential oils

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### Spice Oils

Product	Origin/Grade	Prices per KG (US\$)
Clove bud	Indian	\$140/kg
Clove leaf	Indian	\$80/kg, container
Cinnamon bark	Sri Lankan	\$240/kg
Cinnamon leaf	Sri Lankan	\$150/kg
Nutmeg	Indonesian	\$165/kg
Ginger		\$315/kg
	India	\$170/kg drum

### 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)	\$42/kg
Orange (bitter)	Italian (c/pressed)	\$135/kg
Bergamot	Italy (c/pressed)	\$208
Lemon	Italian (c/pressed)	\$65/kg
	Italian (c/pressed)	\$71/kg
	Argentina	\$75
Mandarin (red)	Italy	\$210/kg
Mandarin (green)	Italy	\$200/kg
Petitgrain (C. aurantium)	Paraguay	\$65/kg

## Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Egypt	\$150/kg
	India	n/a
Lavender	France	\$225/kg
Lavandin	French Grosso	\$52/kg
Mint, peppermint	USA	\$95/kg
	India	\$65/kg drum
Mint, Cornmint	India, mentha arvensis	\$55/kg
Mint, spearmint, M. spicata	USA	\$120/kg
Chamomile (German)	Nepal	\$705/kg
	India	\$1,250/kg
Chamomile (Roman)	Hungary	\$950/kg
Sage	Croatia	\$120
Rosemary	Spain	\$100
	Tunisia	\$25/kg
Marjoram	Spain	\$225/kg
Thyme	Hungary	\$320/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	\$145/kg
E. smithii	South Africa	\$80/kg
Eucalyptus citriodora	Brazil	\$56/kg
	India	46/kg
Litsea cubeba	Spain	\$35/kg
Ylang ylang	Comores: I	\$240/kg
	Comores : II	\$190/kg
	Comores : III	\$220/kg
	Comores: Complet	\$350/kg
Patchouli	Indonesia	\$165/kg;
Geranium	Egypt	\$295/kg 1 kg lots
Sandalwood	Sri Lanka	\$2,750/kg 1 kg lots
Cedarwood	USA	\$67/kg
Naouli		\$100/kg
Ravinsara	Madagascar	\$120/kg
Frankincense	Somalia/France	\$560/kg 1 kg lots
	India (B. serrata)	\$78/kg drum
Pine (P. silvestris)	Hungary	\$190/kg
Citronella	Sri Lanka	\$100/kg
	India	\$32/kg drum
Lemongrass	Nepal	\$40/kg
Palmarosa		\$80/kg
	India	\$70/kg
Vetiver	Indonesian	\$250/kg 1 kg lots
	Indian	\$350/kg
Tea Tree	Australia	\$85/kg;
	Australia, lemon scented	\$240/kg
Fennel, sweet	Bulgaria	\$160/kg
Juniperberry	India	\$150/kg
Myrrh	Africa	\$1,900/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  
[morasatajosoa@yahoo.fr](mailto:morasatajosoa@yahoo.fr)  
Attn: Josoia Andriamorasata

**SOUTH AFRICA:**

EDESA  
PO Box 123  
Riebeek Kasteel 7306  
Western Cape. South Africa  
Tel: +27 (82) 334 3324  
[info@edesa.co.za](mailto: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](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  
[morasatajosoa@yahoo.fr](mailto: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](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.  
00 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@greif.com](mailto:carl.williams@greif.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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World Food Expo 2014

4-5 December 2014. South Korea

[www.worldfoodexpo.co.kr/English](http://www.worldfoodexpo.co.kr/English)

BevNet Live Winter 2014

8-10 December 2014. Santa Monica, CA. USA

[www.bevnet.com/events](http://www.bevnet.com/events)

Vivaness

11-14 February 2015. Nuremberg, Germany

[www.vivaness.de](http://www.vivaness.de)

Intercharm Professional

16-18 April 2015. Moscow, Russia

[www.intercharm.ru](http://www.intercharm.ru)

International Exhibition of Raw Materials for Perfumery

10-11 June 2015. Paris, France

[www.parfumeurs-createurs.org](http://www.parfumeurs-createurs.org)

Biorefinery for Food, Fuels & Materials 2015 Symposium

15-17 June 2015. Montpellier, France

[www.bffm2015-congress.eu](http://www.bffm2015-congress.eu)

IFT 2015 (Institute of Food Technologists)

11-15 July 2015. Chicago, USA

[www.ift.org](http://www.ift.org)

IFEAT 2015

27 Sept to 1 October 2015. Colombo, Sri Lanka

[www.ifeat.org](http://www.ifeat.org)

Flavorcon 2015

15-15 November 2015. Atlantic City, USA

[www.flavorcon.com](http://www.flavorcon.com)

Fi Europe & Ni 2015

1-3 December 2015. Paris, France

[www.foodingredientsglobal.com/en/europe/home](http://www.foodingredientsglobal.com/en/europe/home)

World Perfumery Congress 2016

13-15 June 2016. Florida, USA

<http://wpc.perfumerflavorist.com>