



ALBERT VIEILLE

*Essentials. It's in our nature!*

# The Natural Gazette n°2

2017 - 1<sup>st</sup> quarter





ALBERT . VIEILLE

*Essentials. It's in our nature!*

## Your Market Report

*The Natural Gazette* is the quarterly market report from Albert Vieille. The Gazette provides you with updates on specific aromatic raw materials from our 2017 catalogue. These raw materials include both those we produce ourselves and those for which we have established partnerships with reputable growers.

This quarterly report incorporates the various factors that impact production and pricing – economic, geopolitical, climatic – to give you a broader view of price fluctuations and the quantities of raw materials available at the source.

For each raw material, we will also share our current market position, to help you best tailor your needs and ordering plans based on reported conditions. Your Albert Vieille sales representative is also at your complete disposal to advise you further.



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## Our savoir-faire

For nearly a century, Albert Vieille has crafted exceptional savoir-faire in the realm of aromatic raw materials, acting as your partner in the formulation of your creations by offering more than 200 exceptional products that are exclusively 100% pure and natural.

Over the years, we have developed a network of producers in over 40 countries and built reliable, long-lasting relationships with our agricultural partners. Doing so means we can offer raw materials on a consistent basis in terms of quality, availability, and pricing. At our production center in Spain, we have the ability to expertly process fresh and dried aromatic raw materials, gum-resins, and floral concretes using a variety of techniques.

# Key



Our integrated farming subsidiaries



Our own production



Market supply trends



Market price fluctuation



Supplies up



Price down



Supplies stable



Price stable



Supplies down



Price up

## Product applications



Aromatherapy



Cosmetic



Perfumery



Food



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Fruity  
Animalic



## Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Ribes nigrum

# Blackcurrant buds

## *Absolute*

France



In Burgundy, this year's winter weather conditions were cold and dry, favoring bud growth, unlike last year. The yield per hectare remains below that of 2016, but the harvested quantities remain acceptable thanks to a 15% increase in planted surface area. While today's harvested quantities are insufficient to meet the ever-increasing demand for blackcurrant buds, we expect to achieve an improved balance between supply and demand in the next three years as a result of the crop surface area that is expanding annually.

**Our market position:** Carefully selected buds gave us a good yield in concrete, positioning us well on blackcurrant bud absolute and guaranteeing a competitive price.



Herbaceous  
Dry



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

*Chamomilla recutita*

# Blue chamomile

## Essential oil

# Egypt



The harvest began a month ago, somewhat earlier than usual, to meet the ever-increasing demand, especially for the herb trade and essential-oil production. As is always the case at the start of the harvest, essential-oil yields are lower and the available quantities are costlier than average. But there was a 20% increase in harvested flowers and a 40% increase in essential-oil production. Prices should drop slightly over the course of the harvest, to increase again at the end, when there is a clearer overall picture of the quantities available. The market is very speculative.

**Our market position:** Demand for the product is still very active. As a major supplier of this product, we have reserved large quantities. We recommend contacting your account manager as soon as possible to secure your volumes and take advantage of the best prices.



Woody  
Sweet



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

*Cedrus atlantica*

# Cedarwood Atlas

## Essential oil

Morocco



Our producer's cedar essential oil is made from the by-products of sawmill wood, particularly sawdust, as cedar wood is commonly used in making furniture. This year, available quantities are stable. However, one must remain cautious, because the tree is highly prized for its wood, which can lead to fraud, complicating the supply of this material.

**Our market position:** We have supplies available and recommend you contact your account manager.



Herbaceous  
Aldehydic



### Harvest calendar

J	F	M	A	M	J	<b>J</b>	A	S	O	N	D
---	---	---	---	---	---	----------	---	---	---	---	---

Coriandrum sativum

# Coriander

## Essential oil

Russia



The 2016 crop for coriander seeds was good [see Gazette No. 1]. Russia is now the leading exporter of coriander, surpassing India. Nevertheless, though more seeds were harvested, the majority of the harvest was destined for the spice market and little was reserved for distillation. In fact, there is still a good deal of essential-oil stock left over from last year and demand is calm.

Though the situation is advantageous today, it may not last, as prices for the essential oil have come down to a level that might discourage producers.

**Our market position:** We have stock available and prices are very attractive. Inform your account manager of your needs now, especially since forecasts suggest that lesser quantities will be produced at higher prices.



Woody  
Spicy



### Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
---	---	---	---	---	---	---	---	---	---	---	---

*Cyperus scariosus*



The 2016 harvest was good and the coming harvest of cypriol roots, which starts next April, looks just as promising. Administrative challenges have complicated essential-oil supply in recent months, but the situation is returning to normal.

**Our market position:** We positioned ourselves well and have quantities available at an attractive price.



Floral  
Rosy



### Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
---	---	---	---	---	---	---	---	---	---	---	---

Pelargonium spp

# Geranium

## Essential oil

# Egypt



Though prices are now more stable, they remain higher than in previous years and we can expect a more challenging year in 2017 as planting is reduced. As prices for the essential oil fell sharply in 2015, producers have gradually been focusing on other crops, despite continued active demand. One hundred and twenty tons of essential oil were produced in 2016, compared with 230 tons in 2010, and 100 tons are expected for 2017.

The lack of availability from the source has strongly influenced price volatility in the past year, and the challenges being faced in Egypt [see Gazette No. 1] have not helped the situation's stability at all.

**Our market position:** Our sourcing partnership means we have quantities of geranium essential oil available at attractive prices.



Floral  
Jasmine



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
---	---	---	---	---	---	---	---	---	---	---	---

Jasminum sambac

# Jasmine Sambac

## Absolute

India



At present, both the population's daily existence and the nation's agriculture are being powerfully impacted by the drought gripping the country – the monsoons have not been forthcoming and water reserves are very low. As a result, bud flowering was delayed and yielded very few blossoms. Moreover, the few flowers that were harvested have been used primarily for ornaments or traditional events, such as weddings, and not reserved for processing.

Thanks to the little rain those past days, the harvest has started to supply production centers. The production of Sambac jasmine concrete is eventually starting, but slowly.

**Our market position:** The bad weather conditions seen early in the year and their impact on the current harvest prompted us to act on batches of concrete from 2016. We just finalized our new absolute production; please contact your account manager for pricing information and reservations.



Woody  
Humic



### Harvest calendar

J F M A M J J **A** **S** O N D

*Commiphora myrrha*

# Myrrh Essential oil

## Somalia



As with frankincense, Somalia's myrrh-producing regions have been affected by the severe lack of moisture [see Gazette No. 1]. This drought has weakened the trees and reduced the exudation of gum-resin. Future periods are expected to be difficult.

**Our market position:** We have established a partnership at the source to offer you essential oil and resinoid from gums harvested during the trees' natural exudation, a highly prized gum. We invite you to act now for your supplies.



Woody  
Resinous



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

*Boswellia carterii*

# Olibanum

## Essential oil

## Somalia



The severe drought in the Somaliland region [see Gazette No. 1] continues to weaken the trees, which are secreting decreasing quantities of gum. The ever-growing demand for gum-resin is compelling the collectors to cut the trees more regularly, resulting in reduced-quantity harvests. Consequently, the availability of gum-resin from the source tends to be limited. Prices are rising.

**Our market position:** The special partnership we have with our Somali gum-resin supplier ensures stable quantities and prices. This means we can continue to produce frankincense essential oil and resinoid at our factory. As with all gum-resins, variations in yield during processing may justify changes in the sales price of the essential oil and resinoid.



Fruity  
Floral



## Harvest calendar

J F M A M J J A S O N D

Osmanthus fragrans



In December 2016, the harvest of osmanthus flowers for making concrete was strongly impacted by meteorological conditions [see Gazette n° 1], giving rise to minimal concrete production. Fortunately, the deferral of December 2015 concrete stocks has made it possible to stabilize the situation and, consequently, the prices. Demand remains very active.

**Our market position:** Following our March 2017 production of osmanthus absolute, we have supplies available. Additional absolute production is planned for later this year.



Herbaceous  
Cineolic



Harvest calendar

J	F	M	A	M	<b>J</b>	<b>J</b>	A	S	O	N	D
---	---	---	---	---	----------	----------	---	---	---	---	---

# Rosemary

## Essential oil

Morocco



The quantities of rosemary leaves harvested to date are already insufficient to satisfy the ever-increasing demand for the herb trade and distillation for essential oil. These plants are affected by water shortages, a situation common in the region, which greatly impacts the quality, quantity, and price of harvested leaves. This past winter, rainfall was ample.

Recent interest on the part of the food and cosmetics industries in rosemary's antioxidant properties has created a monopoly on a major portion of the crops, reducing the quantities available for distillation. This situation is generating a sharp rise in prices and creating challenges in essential-oil supply.

**Our market position:** Having established agricultural partnerships, we have supplies available of this essential oil. We invite you to plan ahead to ensure your needs are met.



Woody  
Smoky



Harvest calendar

J F M A M J J A S O N D

Vetiveria zizanioides

# Vetiver

## Essential oil

# Haiti



The powerful hurricane that tore through Haiti last September had a major impact on the entire country and, consequently, the supply chain [see Gazette No. 1]. The cooperatives are still being rebuilt and fuel for the distilleries remains expensive and hard to come by.

The few roots being distilled at this time, in an attempt to meet the unchanged demand, were gathered too early and have poor yield. The price of this raw material remains high and available quantities have decreased.

**Our market position:** Our longstanding involvement with the sector through the NRSC means we have high-quality essential oil available for you.

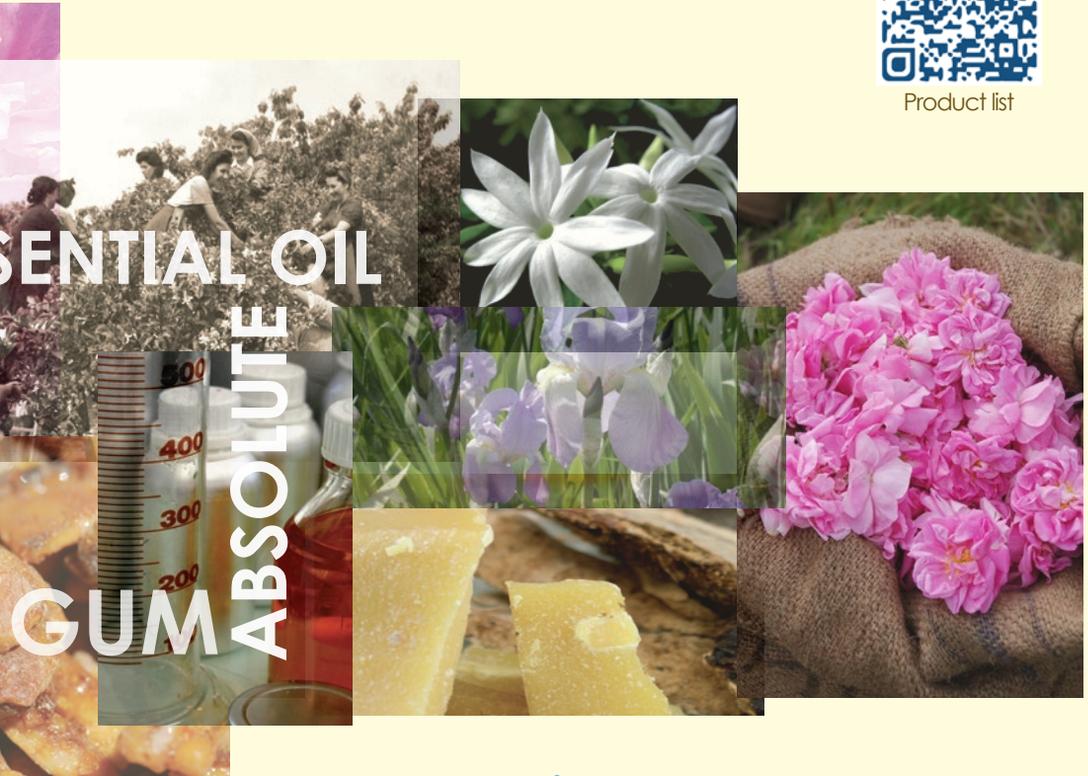


FLORAL WATER  
CONCRETE  
RESINOID  
EXTRACT

# Our products



Product list





ALBERT . VIEILLE

*Essentials. It's in our nature!*

629 route de Grasse - BP 217  
06227 Vallauris Cedex  
FRANCE

+33 (0)4 93 64 16 72  
[www.albertvieille.com](http://www.albertvieille.com)  
[info@albertvieille.com](mailto:info@albertvieille.com)