



ALBERT VIEILLE

*Essentials. It's in our nature!*

# The natural Gazette n°9

June 2019

# 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 2019 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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## Acquisition by Givaudan

Givaudan, the global leader in flavours and fragrances, announced on 6th May 2019, the acquisition completion of Albert Vieille renowned for its natural raw material expertise.

« Joining Givaudan, the leader in the market is a unique opportunity for Albert Vieille to further develop its activities in natural ingredients. I have every confidence that our common objective of crafting the most beautiful naturals will result in future successes with the major fragrance and aromatherapy brands.»

Georges Ferrando, CEO of Albert Vieille



## Albert Vieille at SIMPPAR 2019

Albert Vieille was present once again for the latest edition of the International Exhibition of Raw Materials for Perfumery, held on 5 and 6 June in Paris. On this occasion, the company has displayed new imagery. During these two days, perfume professionals have evaluated several essential oils of frankincense in development. It is about 3 qualities whose olfactory profile varies (zested, woody, and warm) which were obtained according to different processes and sourcing.



## The Nouvel Air Foundation improves air quality

The Nouvel Air foundation, created as our initiative, aims to offer local solutions for the improvement of indoor air quality, through its purification and olfactory information. In March 2019, in the scientific journal International Journal of Clinical Aromatherapy, Nouvel Air published the results of its 1<sup>st</sup> study conducted in collaboration with the general hospital in Grasse. Its staff has chosen to offer aromatherapy care to cancer patients to help them handle tough treatments and improve their everyday lives.



# Product Profile : Jasmine Sambac *Jasminum sambac* (L.) Aiton



Native to the valleys of the Himalayas, jasmine Sambac is also present in China. The word jasmine comes from the Arabic “Yâsamîn” borrowed from Persian and which means “white flower”. Also known as Mogra in India, it has many uses going beyond perfumery: religious (flower of the Gods), medicinal and in food. Its precious flowers give off their perfume in the middle of the night before closing in the early morning. Sambac jasmine differs from *Jasminum grandiflorum* in that it has more petals, smaller, fleshier flowers, and a fruity, green scent with orange blossom notes.

The jasmine sambac harvest starts early in the morning, around 6 am, and finishes around noon. The flowers are hand picked, one at a time. Very fragile, they have to be processed very quickly. In India, the first crop is kept as an offering, the second to make necklaces, adorn the hair or decorate homes, and only the third is used to make jasmine absolute.

In contrast to *Jasminum grandiflorum*, historically used in perfumery, Sambac jasmine only came to perfumers’ attention in the 1980s. Its heady, animal and sensual scent is particularly easy to recognise. Sambac jasmine absolute is present in the heart of floral bouquets and in floral reconstitutions. It is also used alone, with accessory fruity, woody or marine notes. It is mostly used for perfumery.

**Our market position :** Albert Vieille’s 2019 production is expected to be higher than the previous year despite a considerably lower yield than in previous years due to drought in the Tamil Nadu region. Additional supply was crucial to reaching this level of production. Since December, the price of the flowers has increased by about 60% due to a shortage of raw material. Demand has been so high that this has led to fierce competition between manufacturers, causing an unstoppable rise in price until mid-spring. However, June corresponds to the peak of production, which has eased price levels.

## Harvest calendar





Spicy  
Peppery



# Pink Peppercorn

## Essential Oil

Peru



The harvest zone for our sector is located in the Huanta region, subject to stormy rains. It has good fertility and yields fleshy and well-formed fruit. Collectors follow different steps in order to harvest in the best conditions.

The harvest is currently in progress with about 30% of the total expected volume at the end of harvest, it remains a low level at this date. Picking of pink peppercorns has been delayed as the maize and tara harvests take priority. We need to support this sector, because the harvest of Schinus molle fruit is in competition with Tara spinosa (more profitable for farmers).

Harvest calendar

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

Schinus molle L.



Balsamic  
Vanilla like



# Peru Balsam

Essential oil - Resinoid

Salvador



The balsameros are fewer and fewer and they suffer from threats and theft of resin by gangs. . Balsam stocks are at their lowest at the end of the dry season. Yields are exceptionally low for reasons that are still unexplained, possibly linked to climate change. The price of the raw material has doubled as a result.

**Our market position :** We work with producer partners in the NRSC, of which we are members, and they ensure the collection, production and purification of the balsam. But even if production continues, availability remains low (with reduced production in the wet season).

Harvest calendar

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

Myroxylon pereirae Klotzsch



# Chamomile German Egypt

## Essential oil



The season has been favorable for chamomile german thanks to temperatures conducive to its cultivation. The chamomile german flower crop, however, has lost 30% of its volume compared to last year. This drastic drop is explained by the Egyptian farmers' abandonment of the chamomile's cultivation for the benefit of other more profitable crops.

**Our market position :** The essential oil is of better quality this year, thanks to a decrease in the use of pesticides. The amount of essential oil was severely affected, with a 70% drop in production compared with 2018, explained by the combination of a smaller harvest and lower yields. A price increase has been observed in 2019 in parallel with a drop in demand. The price has nevertheless remained at a lower level than expected.

Harvest calendar

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

Chamomilla recutita (L.) Rauschert



Ambery  
Resinous



# Cistus Absolute - Essential Oil

Spain



Andalusia and the province of Seville in particular offer us excellent harvesting areas, with very good quality and yield levels.

The cistus season began in May, during a spring that was particularly sunny and mild, especially in Almadén de la Plata where our production site is located. It is interesting to note that 2019 started much drier and hotter than 2018.

**Our market position :** The quantity of cistus branches will not be lacking, exceeding last year's. Yields should also be higher, and the harvesting areas are larger. Nevertheless, it should be noted that the farmers have pointed out that the absence of rain along with the ambient heat could lead to water stress.

Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Cistus ladaniferus var. beta maculatus Dun.



Woody  
Smoky



# Cypriol

## India

Essential oil



Cypriol grows wild, in particular in riverbeds in the Madhya Pradesh region of India. After a terrible monsoon in 2018 (causing many casualties and major damage to infrastructure), a serious shortage has hit cypriol this season due to low rainfall since the start of this year. This drought continues today, and some areas are facing severe water shortages.

At the same time, demand for the essential oil is not weakening in the various markets of Europe, the Gulf and the domestic market. The price is therefore on the rise.

Harvest calendar

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

Cyperus scariosus R.Br.



Floral  
Rosy



# Geranium Bourbon

## Essential oil

Mada-  
gascar



The situation for the geranium is not good. Pressure from the American aromatherapy market, constantly increasing, has led to an increase in the area of geranium planted.

This increase in the area planted has led to gradual deforestation of the region. The local microclimate has been impacted, as the forest allowed the presence of an early morning mist that is now almost absent in the region. This mist has to a great extent contributed to the blossoming of the geranium. In the end, this has led to lower yields and the amount of essential oil produced has therefore decreased despite additional planting. The direct consequence is greater pressure on the market because of reduced supply.



Pelargonium spp

Harvest calendar

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



Aromatic  
Agrestic



# Marjoram Egypt

## Essential oil



This season, the farmers preferred to grow thyme and rosemary rather than marjoram, because of a more attractive return on investment. As was to be expected, the lack of plots cultivated this year affected the quantities of marjoram available. The fall is significant but should not affect the market price of the material.

**Our market position :** Availability will be reduced this year, as the product from Fayoum, which we use, is only available in very limited quantity, while the dry product from Menia is destined for herbalists because of its higher price.

Harvest calendar

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

Origanum majorana L.



Floral  
Powdery



# Neroli Essential oil

## Egypt



The harvest, which began in mid March, turned out well. It is even bigger than last season. However, the cool weather in Egypt until the end of the harvest has affected overall quality, which is not as good this year. At the same time, competition in the market for flowers is less fierce than in 2018, and prices should return to levels closer to those of Morocco rather than Tunisia.

**Our market position :** Availability is guaranteed thanks to the additional quantity. It should be noted that some qualities, not selected by Albert Vieille with its 100% Pure & Natural commitment, have been blended with sweet orange with the aim of ensuring a good harvest.

Harvest calendar

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

Citrus aurantium var. amara L.



Floral  
Powdery



# Neroli

## Essential oil

# Morocco



The dry weather at the start of the year favoured development of the flower. Harvest started at the end of March. Nevertheless, bad weather (rain accompanied by hail and a drop in temperatures in early April) slowed down the harvest and caused a loss of raw material of around 20%. This confirmed a slight decrease in production compared with the previous year. Disturbance from the weather resulted in staggered picking, thus increasing its cost.

**Our market position :** Our historic collaboration with local producers should allow us to cover your needs, despite the production losses observed. We remind you that we offer a conventional variety and an organic variety.

Harvest calendar

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

Citrus aurantium var. amara L.



Floral  
Powdery



# Neroli Tunisia

## Essential oil



Climatic conditions in Cape Bon were very favourable for flower buds thanks to a particularly rainy autumn and a relatively cold winter. Picking started in early April and continued for 5 weeks. The start of harvest was characterised by cold weather delaying blossoming of the flowers. Despite heavy rains in the first days of April, the flowers held up well and reached maturity in sheltered and coastal areas. In addition, the weather was better for the last 10 days of the season and allowed an increase in the volume of flowers picked.

**Our market position :** The final weather conditions were conducive to blooming, favouring the yield and optimal quality of the material. There is no lack of it this year, but demand still remains high. Cultural practices are reasoned and ways to improve environmental impact are being studied, especially in terms of water management, which remains a key issue in a country such as Tunisia.

Harvest calendar

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

Citrus aurantium var. amara L.



Floral  
Rosy



# Rose of Damas

## Floral Water - Essential Oil

Bulgaria



The rose bushes initially grew well at the start of spring. The weather conditions were mostly favourable in the harvest areas, with no snow and little rain. As with other parts of Europe, however, spring was generally very cool, with the direct effect of delaying the start of harvest. In addition, the weather then deteriorated with gusty winds and rain, causing the first buds, of which there were many, to fall to the ground. The absence of rain during the harvest period compared to other years was also felt. And last but not least, there was a shortage of Bulgarian labour, despite the attractive remuneration.

**Our market position :** These special conditions caused yields to fall below expectations, and it took 1/3 extra flowers to produce the normal quantity of essential oil. The quantity of essential oil produced this year will therefore be lower, but availability remains good thanks to carryover from the previous year.

Harvest calendar

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

Rose of Damas, Elena Mill.



Floral  
Powdery



# Rose of Damas Absolute

Morocco



This year's harvest was expected after a complicated 2018 season due to drought and spring frost. Finally, the weather conditions were clement in Morocco this year. The winter season of 2019 was cold, which was good for the rose.

The expected warmth was not present at the beginning of the campaign but triggered thereafter, and it has lasted above all. At the end of the season, we can say that the quantities harvested were satisfactory. Prices remain similar to those of last year for the time being.

**Our market position :** Our Rose of Damas Absolute Morocco is manufactured in our production center in Spain.

Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Rose of Damas - cene Mill.



Floral  
Rosy



# Rose of Damas Turkey

## Absolute



The latest news on cultivation of the rose in Turkey is very encouraging. The weather conditions were generally favourable until the end of April (despite some frosts at altitude, which did not have a negative impact during this crucial period). Flowers were there in sufficient quantity to ensure a satisfactory harvest. In addition to this, stocks from the previous season are relatively large and contribute to the reduction in price of the rose concrete.

**Our market position :** We believe that Bulgarian farmers will stop planting roses after the 2019 crop. The same will happen in Turkey after the 2020 crop. Consequently, 2019 and 2020 will be the best years to obtain supplies of roses at the best prices.

Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Rose of Damask from Mill.



Floral  
Rosy



# Rose of May

## Floral Water

France



After a particularly mild winter, the centifolia rose campaign began on April 29th. Each morning, the collectors harvest by hand the open flowers of the day with dew and then the roses are distilled in rose of May water.

The weather of early May having recorded very cool nights, the opening of the flowers has been slowed causing a spread of the crop until the month of June. The campaign ran for a total of 8 weeks, an exceptional long time for the rose of May. These unfavourable weather conditions led to a decrease in rose water volumes of around 25%.

**Our market position :** We distill the fresh flowers of organic rose centifolia produced at our organic producers of Grasse and in Var on our mobile distillery that enables us to be closer to the field.

Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Rosa centifolia L.



Woody  
Smoky



# Vetiver Essential Oil

## Haiti



Local production of Vetiver slowed somewhat in the first half of spring (a slowdown or even halt in production by the usual producers). However, some newer, smaller distillers have started production. The usual spring rains occurred, with a negative effect on root collection and yields of essential oil during distillation.

The quality of the essential oil varies with the producer; some qualities are therefore better than others. In addition, there are some scarce stocks of Vetiver essential oil (unsold stocks in particular). At the end of the period, the weather proved to be much more favourable, leading to better availability. In parallel, global demand remains relatively calm.

Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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*Vetiveria zizanioides* (L.) Nash.

## 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 150 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

## Domaines d'application des produits



Aromatherapy, wellness



Perfumery



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