



ALBERT . VIEILLE

Essentials. It's in our nature!

The Natural Gazette

Your market report

N°11

3rd Quarter_ 2020

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. 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.

Ever, our ranges

Ever, to last in time, Ever to capture the scents, Ever for everywhere on earth, Ever for ever.



Our tree resin distillations and extractions.



Our floral absolute production from the concrete.



Our aromatic raw materials sourced and transformed in Andalusia, Spain.



Our crafted qualities processed in our production center.



Our products sourced via our local partners network.



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Key



Market price fluctuation



Price down > -5%



Price stable -5 to 5%



Price up > +5%



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EVERTREE

Benzoin

Styrax tonkinensis



| Laos



Harvest calendar



The crop is good this year. There has been some carryover from last year. The price has decreased from 10 % since last year.

Our market position: we ensure legal compliance at every stage of the supply chain, from harvest to export of the plant raw material, and work on supply chain sustainability. We process the gum ourselves at our production center in Seville

Our product: resinoid benzoin n°3 & 5 available on DPG

Elemi

Canarium luzonicum



| Philippines



Harvest calendar



The new crop has arrived on the market. The quality is good. The gum price is stable.

Our market position: we distil the essential oil of Elemi (*Canarium luzonicum*) in our Spanish production plant. We are able to produce large quantities of essential oil all the year long, thanks to our REACH registration.

Our product : elemi essential oil

Frankincense

Boswellia carterii



| Somalia



Harvest calendar



The harvest is still going on, and everything looks fine at the moment. The market is bearish, the prices are decreasing for the gum.

Our market position: we ensure legal compliance at every stage of the supply chain, from collection to export of plant raw material. Training in good harvesting practices is provided to collectors by our partner. We process the gum ourselves at our production center in Seville. We are often producing essential oil and resinoid, thus we have good stock.

Our products: frankincense essential oil, frankincense resinoid

Peru Balsam

Myroxylon pereirae



| El Salvador



Harvest calendar



The crop is good this year but the government implemented some drastic transport restrictions because of Covid-19 and finally, the availability is lower than forecasted, but the price is steady. The next crop will be in January.

Our market position: Albert Vieille has been working for 10 years on develop a structured, sustainable supply chain with local actors. We're still pursuing awareness-raising actions with our historical partners, in particular by promoting the improvement of balsameros' safety. We process the balsam ourselves at our production center in Seville, and we have just finished our production .

Our products: Peru balsam essential oil rectified, Peru balsam resinoid

Styrax

Liquidambar styraciflua



| Honduras



The 2020 crop is over and was good. The market is stable at that time.

Our market position: Albert Vieille has been deeply involved in the Styrax supply chain for years, we are closely working with the APARFSS (association of styrax producers). We process the gum ourselves at our production center in Seville.

Our products: Styrax essential oil, Styrax resinoid





Myroxylon pereirae



FLOREVER

Jasmine

Jasminum grandiflorum



| Egypt



Harvest calendar

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

The crop is good this year. At the moment the price has decreased.

Our market position: under a multi-year contract, our partner is committed to the preservation of biodiversity and the education of children. We directly transform the concrete in our production center to produce the jasmine absolute 100% pure and natural.

Our products: Jasmine absolute

| India



Harvest calendar

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

The harvesting season has started well and the crop is quite good this year. There are overstocks and prices will decrease for Grandiflorum.

Our market position: for more than 10 years we have been collaborating with our partner committed in the field to improve the situation of the harvesters and in favour of the environment we directly transform the concrete in our production center to produce the jasmine absolute 100% pure and natural.

Our products: Jasmine absolute

Jasmine Sambac

Jasminum sambac



| India



Harvest calendar

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

The crop was good this year. The price has been decreasing since the beginning of the crop.

Our market position: we directly transform the concrete in our production center to produce the jasmine sambac absolute 100% pure and natural.

Our products: Jasmine sambac absolute

Osmanthus

Osmanthus fragrans



China



Harvest calendar

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

Last year crop was good. There is some carry over, the prices were lower. The new crop will begin in November.

Our market position: we directly transform the concrete in our production center to produce the osmanthus absolute 100% pure and natural. Last April we have also produced Osmanthus Gold absolute

Our products: Osmanthus absolute, Osmanthus gold absolute

Rose Damascena

Rosa damascena



Turkey



Harvest calendar

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

The harvest has been good this year, from 10 to 15% more and the yield was also 10% better. But as there is some carry over from last year, the concrete market is bearish. The demands are calm and the stock are high. Turkey produced 11 tons of Rose concrete per year.

Our market position: we have been working with our farmer-processor partners for several years. We directly transform the concrete into Rose absolute 100% pure and natural. Our new production is available at a competitive price.

Our products: rose absolute



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Q3_2020



Jasminum grandiflorum



ANDALEVER

Cistus

Cistus ladaniferus var.
beta maculata



| Spain

Harvest calendar

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

The harvest has started later this year. For the essential oil production the yield is lower versus last year due to warm spring in the bush. As there is medium availability and high demand the market is slightly bullish. Although the weather was not favourable for Cistus this year this does not influence the yields for the transformation into concrete.

Our market position: we harvest cistus from areas that are mainly located close to our facilities. From the branches or the resin we offer different products, each with its own character. We act to ensure the sustainability of the resource: respect for forest management defined by local authorities, implementation, training and application of good harvesting practices by our collectors.

Our products:

Cistus essential oil, cistus essence

Cistus absolute, cistus absolute SEV

Labdanum resinoid, labdanum absolute





EVERCRAFT

Blackcurrant buds

Ribes nigrum



| France



Harvest calendar



The harvest has been good this year. The new crop is expected to begin early in December 2020. It seems that it will be a good year.

Our market position: we obtain our supplies from a cooperative structure that guarantee buds without any quantifiable pesticide residue. We process this raw material into concrete, then into absolute, at our production plant in Spain. Our last production has been done this summer, new extraction will be done by the end of the year.

Our products: blackcurrant buds absolute.

Orris

Iris pallida



| France



Harvest calendar



The harvest of the rhizomes took place in August and has been good.

Our market position: Albert Vieille has developed its own organic Iris pallida plantations. We guide each farmer in the cultivation, the removal of rhizomes from the ground and support them financially. After having being sent to dry the rhizomes are grinded, and distilled in our production center.

Our products: Orris essential oil 8%.

Patchouli heart

Pogostemon cablin



| Indonesia



Harvest calendar



Regarding the harvest of the patchouli leaves, the inclement weather, with heavy rains, has delayed the start of the patchouli season and as a result raw material supplies are very low and prices remain firm.

Our market position: the essential oil is rectified in our facilities to obtain a 50% patchoulol essential oil.

Our products: patchouli heart essential oil

Pink Peppercorns

Schinus molle



| Peru



Harvest calendar

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

Due to the Covid situation, the 2020 collect has been delayed to September. At that time most of the pink peppercorns have dried on the trees, so less crop are expected this year. Also as the healthcare system in the rural areas is very poor our farmers have suffered a lot. 2021 will be a difficult year too. The prices are on the upper trend.

Our market position: we are working with the collectors to raise the price of the berries to support this traditional activity and ensure its sustainability. The peppercorn are directly distilled in our production center.

Our products: pink peppercorns essential oil.

Pink Peppercorns

Schinus terebenthifolius



| Indian ocean



Harvest calendar

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

No storm or hurricane happened this year and destroyed the crop. So, crop is really good this year for all the origins.

Our products : we produce a 100% Indian ocean quality, from La reunion, Madagascar, and Mauritius berries.

Our products : pink peppercorns CO2 extract

Tonka beans

Dipteryx odorata



| Brazil



Harvest calendar

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

The harvest has been good so far. It's a good year for Brazilian crop.

Our market position: we collaborate with a company that coordinates nearly 500 bean collectors and is committed to ensuring fair remuneration for their activity. We directly transformed the beans in our production center: solvent extraction of the beans, and washing the concrete several times with alcohol. We produced 100kg of absolute in June.

Our products: Tonka beans absolute.



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Ribes nigrum



EVERSOURCE

Angelica

Angelica archangelica



| Belgium



Harvest calendar

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

Roots: April crop was reduced because of a lack of rain. As usual the main crop is in October. It seems good so far.

Seeds: The crop has been ok.

Our market position: we have been collaborating with our partner farmer-processor for more than 10 years.

Our product: roots essential oil, seeds essential oil

Buchu

Barosma betulina



| South Africa



Harvest calendar

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

The last year crop has been low due to fire and drought. The new harvest will start in December and will be available in March. The winter rains are in full swing, the market is looking forward to a good crop.

Our product: essential oil

Cardamom

Elettaria cardamomum



| Guatemala



Harvest calendar

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

The new harvest has begun in early October. The rainy season is promising and the blossoming is good. We really hope that this season won't be as so chaotic as the last one. Prices have begun to ease yet.

Our product: essential oil

Coriander seeds

Coriandrum sativum



| Russia



Harvest calendar

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

This year the crop has not been as good as usual. Coriander seeds prices are higher this year, last year price has been really low. So oil prices are increasing.

Our market position: good availability at a very competitive price.

Our products: seeds essential oil.

Cypress

Cupressus sempervirens



| Spain



Harvest calendar

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

The availability is good, we expect the market to be stable all along the year.

Our products: essential oil.

Cyprip

Cyperus scariosus



| India



Harvest calendar

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

The February crop was very low, creating scarcity in the market.

Our products: essential oil.



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Davana

Artemisia pallens



India



Harvest calendar

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

The March crop was very low. Quantities have decreased a lot at the origin since the beginning of the crop and prices are increasing.

Our products: essential oil.

Gaiacwood

Bulnesia sarmientoi



Paraguay



Harvest calendar

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

The availability is good in Paraguay but, due to CITES quota restrictions, it has been difficult to import this product since January 2020. European SRG (Scientists Review Group) meeting took place in September to analyze it. Their decision has been negative. They will meet again in December to review it.

Our products: essential oil.

Geranium

Pelargonium x spp



Egypt



Harvest calendar

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

Market is steady, there has been good harvest this year. Prices have not moved up for the moment.

Our market position: we have been working with our partner farmer-processor for more than 15 years.

Our products: essential oil.

Grapefruit

Citrus paradisi



| United States



Harvest calendar

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

There is good availability for regular material and prices (after a long downward trend) are stable now.

Our products: essential oil

Juniper berries

Juniperus communis



| Macedonia



Harvest calendar

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

2019 crop was a disaster because of drought and 2020 is not a good year too. The berries quantity is limited and the yield is very bad. The prices will increase in the next months.

Our products: essential oil

Lavandin Grosso

Lavandula x intermedia 'Grosso'



| France



Harvest calendar

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

The crop is good this year. Prices have decreased a lot, since last year prices were too high and created a market bubble. There are still some available stocks.

Our market position: we collaborate with several farmer-processors and cooperatives in Provence. We also act directly on the sector by supporting trials carried out by the ITEIPMAI, on how plant cover impacts resistance to water scarcity in lavender and lavandin.

Our products: essential oil



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Lime

Citrus aurantifolia



Mexico



Harvest calendar

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

As Peru crop was under pressure, with some suppliers struggle to fulfil existing contracts, Mexico has taken up some of the slack. But the usual competition from fresh fruit has caused prices to spike.

Our products: lime distilled essential oil

Niaouli

Melaleuca quinquenervia



Madagascar



Harvest calendar

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

The supply is lower than the demand. The Niaouli is harvested when farmers do not harvest other more profitable products (like rice or litchi for example). The market has been stable for 2 years and the price will remain the same for the next few months.

Our products: essential oil

Nutmeg

Myristica fragrans



Indonesia



Harvest calendar

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

Nutmeg production and its pricing has been stable for the past couple of years with only currency fluctuations really impacting export prices. The main quality for oil production comes from Java and Sumatra as the Sulawesi quality is high in Methyl Eugenol. In Sumatra there has been some heavy planting of nutmeg trees 3-4 years ago which will bring additional volumes by 2025.

Our products: essential oil

Orange blossom

Citrus aurantium ssp amara



| Egypt Tunisia



Harvest calendar

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

EGYPT: Prices have slightly decreased as there are large quantities at the origin.

Our product: Neroli essential oil

TUNISIA: Market is bearish. There are some overstocks this year of all origins due to over plantation 2 years ago. There are good crops everywhere.

Our market position: the flowers from the trees planted by Mr Laborma decades ago are still harvested and our privileged relationship with our production partner lives on.

Our products : Orange blossom absolute, Neroli essential oil, Organic Orange blossom floral water

Oregano vulgare

Origanum vulgare



| Moldavia



Harvest calendar

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

This year's harvest was less good than previous years due to the lack of rain, but the quantities available are good and the price is the same.

Our products : essential oil

Roman chamomile

Anthemis nobilis



| France, Italy



Harvest calendar

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

The harvest took place last July, the yields were good, as expected. As the offer is increasing there are some stocks at producers farm gate on both origin France and Italy.

Our market position: Albert Vieille has set up partnerships with farmer-processors. These partnerships include support of producers in the development of their activity, from field cultivation to distillation.

Our products: essential oil & organic essential oil



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Rose Damascena

Rosa damascena

Bulgaria



Harvest calendar

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

It was finally a good crop. 2.5 tonnes of essential oil were produced.

Our products: rose essential oil

Rosemary

Rosmarinus officinalis CT
cineole

Morocco



Harvest calendar

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

The crop has been good and the price is stable.

Our market position: Our teams regularly visit our partner's site to improve our understanding of the supply chain and its impact on people and environment.

Our product : Rosemary cineol essential oil

Tunisia



The crop has been good and the price is decreasing.

Our product : Rosemary cineol essential oil

Sage officinalis

Salvia officinalis

Albania



Harvest calendar

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

The new crop is of normal size. The prices are quite stable.

Our products: essential oil

Scotch pine

Pinus sylvestris



| Austria



Harvest calendar

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

The situation on the market is rather stabil, although due to the Corona Crises the demand for this oil is increasing.

The essential oil is used as a natural disinfection substance and therefore used in many natural medicine products.

Our products : essential oil

Siberian pine

Abies sibirica



| Russia



Harvest calendar

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

The crop is not very good this year compared to last year and coronavirus has not helped. Demand is high, this product is used in disinfectants and price has increased and will increase in the future. It is the right time to buy.

Our products : essential oil

Vetiver

Vetiveria zizanioides



| Haiti



Harvest calendar

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

Production remains slow, and in some cases producers have stopped production. The qualities can vary from producer to producer, depending on root/wood quality, distillation time, processing, etc.. Modest stocks of oil are available. Global demand remains weaker than usual. The local Haitian currency continues to weaken, which is contributing to higher costs for production (i.e. roots, fuel, etc.). Price could go up in case of increasing demand.

Our products: essential oil



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Lavandula x intermedia 'Grosso'



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