



ALBERT . VIEILLE

Essentials. It's in our nature!

The Natural Gazette

Your market report

N°13

2nd Quarter_ 2021

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%



Benzoin

Styrax tonkinensis



| Laos



Harvest calendar

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

The crop is good this year. There is some carryover of last year.

Our market position: Our partner ensures the sustainability of the resource by training his collectors in good harvesting practices. We ensure compliance with legislation at every stage of the supply chain, from harvesting to the export of the plant raw material and process the gum in our Spanish facilities.

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

Elemi

Canarium luzonicum



| Philippines



Harvest calendar

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

Situation is unchanged. The new crop is in one month and the price will remain unchanged.

Our market position: We work directly with a local family business. The harvesting practices ensure the regeneration of the resource and promote good working conditions and safety for the harvesters. We work on the identification and selection of canarium species, ensure the traceability from harvest to export, distill ourselves in our Spanish facilities.

Our product : elemi essential oil

Frankincense

Boswellia carterii



| Somalia



Harvest calendar

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

The new crop is in 2 months. There is availability problem at the origin, due to a lot of rain last fall, affecting gum quality.

Our market position: Collaboration with a local partner through a multi-year contract. Training in good harvesting practices is provided. We ensure compliance with legislation at every stage of the supply chain, from collection to export, and the gum is processed in our production facilities in Spain.

Our products: frankincense essential oil & resinoid

Myrrh

Commiphora myrrha



Somalia



Harvest calendar

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

Despite the poor 2020 crop, there are still quantities at the origin as demand is weak.

Our market position: Collaboration with a local partner through a multi-year contract. Training in good harvesting practices is provided. We ensure compliance with legislation at every stage of the supply chain, from collection to export, and the gum is processed in our production facilities in Spain.

Our products: Myrrh essential oil & resinoid

Peru Balsam

Myroxylon perei



El Salvador



Harvest calendar

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

The new crop is in progress and is normal.

Our market position: We ensure fair remuneration through a community fund that helps provide safety equipment for workers. To protect the trees, training in good harvesting practices is provided to collectors by a local forest ranger. This supply chain is fully traceable and the gum is processed in our facilities.

Our products: Peru balsam rectified essential oil & resinoid

Styrax

Liquidambar styraciflua



Honduras



Harvest calendar

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

The yield is lower this year than usual and qualities are not as good as usual. Price should be stable for the new crop.

Our market position: We have been a key element to develop a fair & sustainable sector. In early 2018, Albert Vieille financed a photovoltaic solar system in the APARFSS (association of styrax producers) building. We process the gum ourselves at our production center.

Our products: Styrax essential oil & resinoid





Jasmine

Jasminum grandiflorum



| Egypt



Harvest calendar

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

The new crop will begin in 1 months and will be available in October. At this time, there are still quantities at the origin. That explains why the price has decreased a little.

Our market position: We have been working with our partner farmer-processor for more than 15 years. Under a multi-year contract, our partner is committed to the preservation of biodiversity and the education of children. We support the development of crops diversification. We purchase concrete which is then transformed into absolute in our facilities.

Our products: Jasmine absolute

| India



Harvest calendar

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

New crop is in 1 months but there are still quantities at the origin.

Our market position: For more than 10 years we have been collaborating with our partner. We purchase concrete which is then transformed into absolute in our facilities.

Our products: Jasmine absolute

Jasmine Sambac

Jasminum sambac



| India



Harvest calendar

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

The Jasmine Sambac season has begun mid-March only. Small volumes of flowers are collected. The season will pick up in another one or two weeks. It will end in June. It is too early to predict this season quantity.

Our market position: For more than 10 years, we have been working with several local partners. The concrete, produced locally, is transformed into absolute in our Spanish factory.

Our products: Jasmine sambac absolute

Osmanthus

Osmanthus fragrans



Rose

Rosa damascena



China



Harvest calendar

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

The market is bearish. There is an increasing demand in China for osmanthus tea. In parallel the demand is low on extraction.

Our market position: Partner with long standing local farmers, we buy the concrete and then it into absolute in our facilities in Spain. Our historical quality of osmanthus comes from Anhui, Guangxi and Hubei provinces in China.

Our products: Osmanthus absolute, Osmanthus gold absolute

Turkey



Harvest calendar

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

The price remains unchanged and there are still some quantities at the origin. We don't know the new price of the new crop yet.

Our market position: We have been working with our farmer-processor partners for several years. We directly transform the concrete into Rose absolute.

Our products: rose absolute

▲
Up



Rosa Damascena

ANDALEVER

Cistus

Cistus ladaniferus var. *beta maculata*



Spain

Harvest calendar

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

The harvest will start in June and we expect the price to be similar to 2019. The winter and autumn have been rainy, which is good for the yield of this wild plant, although we will not be able to verify it until the beginning of the season. Last year's stock is low due to the very low performance, the lowest in history.

Our market position: Encouraging the conservation of traditional practices and culture linked to natural endemic resources. We work to improve community life. Cistus sustainable and controlled management is crucial for the forest structure, preventing fire and helping the plant to restart: cistus is harvested by hand, and plough strips are created. Our facility is closed to the cistus source allowing us to reduced our carbon footprint. We work closely with the local environmental agency and meet all their requirements. Cistus growing areas are certified organic. Our cistus products are fully traceable.

Our products:

Cistus essential oil, organic essential oil, essence
Cistus absolute & SEV absolute
Labdanum resinoid & absolute

Orange blossom

Citrus aurantium ssp *amara*



Spain



Harvest calendar

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

The campaign started mid-March. We have harvested 3 tons of flowers per day. The quality of the flowers is good.

Our market position: Our new Orange blossom Absolute sustains Seville's historical orchards of bitter orange trees, through an exclusive partnership with traditional and local farmers. Fully traceable and cultivated without pesticides, the blossoms are transformed into absolute in our own extraction unit located near the collection area.

Our products: Orange blossom absolute



Blackcurrant buds

Ribes nigrum



| France



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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2021 harvest occurred in January and lasted a month and half. It was a good year, despite the blackcurrant bushes' appearance, due to the drought, there were still a lot of buds. However the blackcurrant market is still in a context of overproduction.

Our market position: Since 2006, we collaborate with a cooperative structure imposing strict rules regarding phytosanitary treatments allowing us to guarantee buds without any quantifiable pesticide residue. The entire transformation process is carried out in our facilities in Spain: from the buds to the concrete, then from the concrete to the absolute.

Our products: blackcurrant buds absolute.

Orris

Iris pallida



| France



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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The next harvest will occur in August. The plantation has been extended.

Our market position: Albert Vieille has developed its *Iris pallida* plantations with producers on the Plateau de Valensole and in Hérault, in France. This project is part of a process of setting up traced and sustainable supply chains, from planting to processing. We guide each farmer in the organic cultivation of irises, the removal of rhizomes from the ground. We process the ground rhizomes at our production center in Spain.

Our products: Orris essential oil 8%.

Patchouli heart

Pogostemon cablin



| Indonesia



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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There has been a temporary price fall at the beginning of March. The total output is still relatively low. Thus, it is estimated that the price might rise again to its Jan/Feb'21 level.

Our market position: We rectify the essential oil in our facilities, to obtain a 50% patchouli 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

As 2020 crop was poor (due to collection problems because of Covid-19), there is no quantity left at the origin. New crop will begin in June and will be available in July/August.

Our market position: The pink peppercorns 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

The crop is expected to be good this year so far. The harvest might be delayed because of the coming rains, hopefully without postponing and impacting the harvest too much.

Our market position : We work directly at the origin through multi-year contracts with local collectors to guarantee availability and a fair price. We control the process of transformation of pink berries into CO2 extract.

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 2 last crops were good ones. Every 3-4 years, the crop is lower than usual. Let's hope that the 2021 crop will be OK. At this moment, there are little quantities at the origin. The new crop will begin in July.

Our market position: We collaborate with a company that coordinates nearly 500 bean collectors and is committed to ensuring fair remuneration for their activity. This makes it possible to maintain the harvesting activity and, as a result, to fight against deforestation. We process tonka beans ourselves at our production plant.

Our products: Tonka beans absolute.





Angelica

Angelica archangelica



| Belgium



Harvest calendar

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

Roots: The quantities are limited. Price will remain stable this year.

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

New crop is in progress and is better compare to the last years, but the demand is still higher compared to offer.

Our product: essential oil

Cardamom

Elettaria cardamomum



| Guatemala



Harvest calendar

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

After a volatile crop, hit by climatic events, the market is finally stabilizing. The rains continued, even during the dry season, the rainy season normally begins in May, it should be good. So prices can be expected to decrease for the new crop in October.

Our product: essential oil

Coriander seeds

Coriandrum sativum



Russia



Harvest calendar

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

There is nearly no quantity left at the origin (except small quantities which have been produced in January at a very high price). We'll only see a price release in September at the new crop.

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

Market is stable. Availability is good.

Our products: essential oil.

Cyprip

Cyperus scariosus



India



Harvest calendar

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

The new crop began in February. The demand is important and the price is kept at a high level for a 100% pure and natural quality (a lot of adulterated goods on the market).

Our products: essential oil.

Davana

Artemisia pallens



India



Harvest calendar

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

The harvest and distillation of Davana have been delayed to March due to unfavorable weather conditions, and the yield is expected to be 35% lower than last year.

Davana seed prices had doubled last year, due to the high demand, further the quality of the seeds was not very good, which reduced cropping. The main growing areas experienced heavy rainfalls in September and November 2020, during the growing season, reducing the overall availability herbage. Also, there is almost no carry-over production from last year. All these factors will put the prices on the higher side in the current season.

Our products: essential oil.

Gaiacwood

Bulnesia sarmientoi



Paraguay



Harvest calendar

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

The situation is unchanged regarding the importation restriction. Everybody is waiting the update decision from the European SRG (Scientists Review Group) meeting.

Our products: essential oil.

Geranium

Pelargonium x spp



Egypt



Harvest calendar

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

The quantities remaining from 2020 crop are small at the origin and the price could increase until new crop in June. The new crop is forecasted to be stable.

Our products: essential oil

Grapefruit

Citrus paradisi



United States



Harvest calendar

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

Despite Texas bad weather conditions (frost and snow), there is no availability issue as the supply is global. The price is 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

The situation is unchanged, 2020 had not been a good year too. The berries quantity was limited and the yield was very bad. After having increasing, the prices are stable for the moment.

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 production was very good in 2020: + 40 %. Unfortunately, demand has been decreasing since summer 2019. So there are large quantities of stock left and prices are very low at this time.

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

Niaouli

Melaleuca quinquenervia



Madagascar



Harvest calendar

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

The situation is unchanged. Supply is good. 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

The price of nutmeg oil has slightly increased recently following the increasing demand. On the other side, the output has declined slightly during rainy season as farmers faced difficulties to dry Nutmeg seeds.

Our products: essential oil

Orange blossom

Citrus aurantium ssp amara



Morocco, Tunisia



Harvest calendar

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

MOROCCO The harvest has been lower than in 2020, because of cold temperature at the beginning and heat at the end.

Our product: Neroli essential oil, Orange blossom floral water absolute

TUNISIA The harvest has been ok, but shorten because of cool temperatures at night, impacting the flower growth.

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

Roman chamomile

Anthemis nobilis



France, Italy



▲
Up

Harvest calendar

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

2020 harvest took place in July, the yields were good. As the offer is increasing there are some stocks at producers farm gate.

FRANCE - Our market position: Albert Vieille has set up partnerships with French farmers-processors. These partnerships include supporting the producers in the development of their activity, from the farming of the fields to the distillation.

We encourage the sharing of knowledge and the transmission of know-how through the organization of inter-producer meetings.

This supply chain is fully traceable.

ITALY - Our market position: Our partnerships in the Piedmont region began 40 years ago when Mr.Vieille started working with a tarragon producer. Gradually, the producer moved towards cultivating Roman chamomile. Our agreements include the support of producers in the development of their activity, from field cultivation to distillation.

Our partners respect human rights and fair working conditions. Furthermore, they also work on their environmental impact, first by reducing the use of chemicals, second, by working on energy savings. This supply chain is also fully traceable.

Our products: From France, essential oil & organic essential oil. From Italy, essential oil & Fair For Life essential oil.

Rose

Rosa damascena



Bulgaria



Harvest calendar

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

There is still some quantities at the origin from 2020 stock. So the price is slightly declining. At this level, the price does not cover the rose culture price and we already know that some cultivators will abandon this plantation as it is not lucrative anymore.

Our products: rose essential oil

Rosemary

Rosmarinus officinalis CT
cineole



Morocco, Tunisia



▲
Up

Harvest calendar

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

MOROCCO : The prices should be lower than last year as a lot of farmers planted Rosemary.

Our product : Rosemary ct cineol essential oil

TUNISIA : The crop seems good. Also, as for Moroccan origin, the prices should be lower than last year as a lot of farmers planted Rosemary.

Our product : Rosemary ct cineol essential oil

Tarragon

Artemisia dracunculus



Hungary



Harvest calendar

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

Availability is low at this moment but the price remains unchanged.

Our products: essential oil

Scotch pine

Pinus sylvestris



Bulgaria



Harvest calendar

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

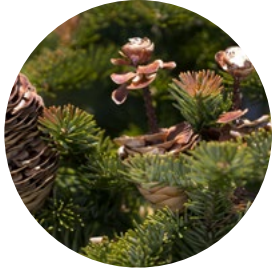
The situation is unchanged. The market is stable, despite the increasing demand for this oil, because of the Corona crisis, the availability is good.

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

Due to poor 2020 crop, there is no quantity left on the market at the origin. The new crop will be ready in June, perhaps before depending on when snow will melt. The price will remain high as demand is important.

Our products : essential oil

Vetiver

Vetiveria zizanioides



| Haiti



Harvest calendar

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

The demand is low and the price is very, very, low. At this level, it is not lucrative anymore. The price cannot go further down.

Our products: essential oil



Salvia officinalis

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