

ALBERT VIEILLE

The Natural Gazette

Your Market Report



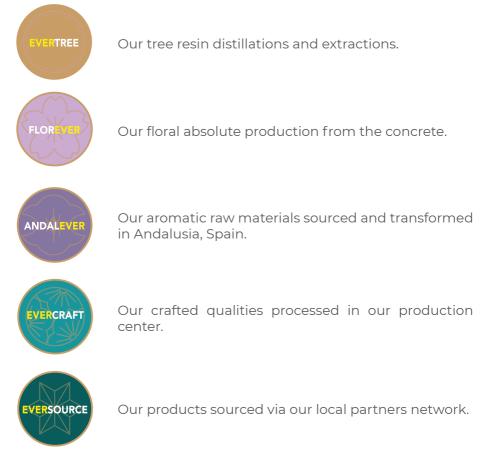
th quarter 2022

The Natural Gazette, your quarterly market report

This Gazette provides you with updates on our natural ingredients, incorporating various factors that impact cultivation and production, to give you a broader understanding of raw material market fluctuations at the source.

Ever, our ranges

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



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EVERTREE

Frankincense

Boswellia carterii



Myrrh

Commiphora myrrha



Somalia



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

The crop was normal, but the quality was not so good, impacting the yield, thus the price has come up.

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: essential oil, organic essential oil & resinoid





Harvest calendar

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

The situation is stable. The crop is normal, but transformation cost increase.

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: essential oil & resinoid

Peru Balsam

Myroxylon pereirae





The new crop will arrive on the market by the end of the year. There is no quantity left at the origin.

Our market position: We ensure fair wages through a community fund that helps providing 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: rectified essential oil & resinoid

▲ Up

Styrax

Liquidambar styraciflua





L

Harvest calendar

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

The crop was normal. The price is stable.

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 product: resinoid





Jasmine

Jasminum grandiflorum







Harvest calendar

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

The 2022 crop was good in terms of quality and quantites. However the inflation affected the processing cost.

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: absolute



The harvest is ongoing. There is a decline in the plantations following a limited demand over the past recent 3 years. There is no carry over. Now the demand is back and the farmers need to be attracted to maintain their activity. Prices are increasing by nearly 20%.

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: absolute

Jasmine Sambac





India



Harvest calendar

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

As the main market is the traditional ceremonies, the demand dropped a lot over the past 2 years during the pandemic, where the ceremonies were very limited. Prices were cheap and farmers did not maintain all their fields. This year the demand is high. With a limited offer, this brings to competition within the buyers to get the flowers. In addition, climatic conditions were very eratic. affecting the crop and the yield. Therefore the prices are skyrocketing about +70%.

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: absolute

Givaudan

ALBERT VIEILLE

🖗 Orange blossom | Tunisia

Citrus aurantium ssp amara Harvest calendar







The weather was unstable and rather cold. The picking season lasted longer than usual as flowers could not be picked every day. This lead to price increase of 20/30%, supporting also farmers to maintain their crops.

Our market position: Neroli and Albert Vieille go back a long way! The flowers from the trees planted by Mr Laborma 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

Rose of May

Rosa centifolia





Harvest calendar

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

The 2022 harvest was better than the previous 2 crops. Eventhough the period was short. The market is still globally short as the demand is high. Prices are increasing due to the processing cost.

Our market position: We work directly with several farmers and oversee all our agricultural partnerships through multi-year contracts that mutually commit us to a volume, quality and a fair price defined by mutual agreement. From cultivation to distillation, our teams offer on-site support to our agricultural partners through training and know-how transfer.

Our products: absolute and floral water

Rose





Harvest calendar



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

The harvest was short and small due to high temperatures, affecting the yield. In addition the price were on the very low side over the past 2 years which discouraged farmers. As the demand is firm, the price is increasing very much.

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

Our product: absolute

Jasminum grandiflorum

ANDALEVER

🖗 Cistus

Cistus ladaniferus var. beta maculata



| Spain



Harvest calendar

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

This year, it is expected that prices will rise sharply. Two main reasons: increasing of the aromatic raw materials price (collect and transportation) and increasing of the processing costs (energy cost: electricity, gaz, fuel).

Our market position: Encouraging the conservation of traditional practices and culture linked to natural endemic resources. We work to improve community life. The sustainable and controlled management of cistus 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 close to the cistus source allowing us to reduce 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

EVERCRAFT

Blackcurrant buds | France





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

It was a good harvest, with good extraction yield, in 2022. The next harvest should start in december.

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 product: absolute.

Galbanum







Harvest calendar



There has been big floods at the end of July and it washed out some areas with Galbanum bushes in the mountains. The prices will go up sharply.

Our market position: the gum is processed in our production facilities in Spain.

Our product: essential oil

Pink Peppercorns

Schinus molle



Peru



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

The crop is a bit lower this year. The producers are more entitled to grow avocados wich are more lucrative than Schinus berries. Also, the logistic cost increased. In fine, the price of the raw material has increased.

Our market position: The pink peppercorns are directly distilled in our production center.

Our product: essential oil.

Pink Peppercorns

Schinus terebenthifolius



Indian Ocean

Harvest calendar

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

Reunion and Madagascar have suffered from cyclones, available volumes are disrupted. Demand is high for this product.

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 product: CO2 extract

Tonka beans

Dipteryx odorata



Brazil

Harvest calendar

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

This year should have been a good crop but finally, heavy and constant rains prevented them from growing. Considering this, the 2022 crop is really poor. As the demand remains important, collectors increased a lot their prices. At this time, almost all the crop is already sold or reserved. Also deforestation in Brazil (especially on the left side of the Amazon rain forest) remains a problem for the Brazilian Tonka bean.

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 product: absolute.



EVERSOURCE

Angelica

Angelica archangelica





Harvest calendar



Roots: 2022 harvest is ongoing. Thanks to the extension of the cultivated area, the output is increasing despite the rather low yields. Price is affected by the energy cost.

Our product: roots essential oil

🕅 Buchu

Barosma betulina



South Africa





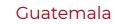
Good harvest this year but prices will increase until next crop, in 2023, as there is no carryover for this product.

Our product: essential oil & organic essential oil

Cardamom

Flettaria cardamomum







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

This year harvest has just started and the oil will be available by the end of the year. Previous crop was very good but this one is projected to be better, luckily the hurricane Julia, that passed through Guatemala in October, didn't cause much damages on the plantations. Prices are not expected to drop much more than the current prices, because the cost structure of the producers would not allow it and at lower prices, they would prefer to stop harvesting and the crop would be lost.

Our product: essential oil





Cupressus sempervirens



Morocco



Harvest calendar

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

The situation is stable

Our product: essential oil & organic essential oil.

🏽 Chamomile Roman 📔 France, Italy

Anthemis nobilis



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

The harvest was lower than usual because of the drought. The small flowers impacted the yield but not the quality.

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.

Our products: essential oil & organic essential oil

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: essential oil & Fair for Life essential oil

Cloves leaves

Eugenia caryophyllata



Madagascar

Harvest calendar

There is an increase of the demand on the Malagasy Market. Also, the price's increased because of fuel and production cost.

Our product: essential oil.

Coriander seeds

Coriandrum sativum



Russia



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

Due to the war in Ukraine, export of goods from Russia via Europe by road has become difficult. Major shipping lines are closing sea routes in and out of several Russian ports. However, we suceeded in importing some quantities lately. But we can't forecast the situation for 2023.

Our product: seeds essential oil.

Cypress

Cupressus sempervirens



Spain



Harvest calendar

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

The demand exceeds the offer. The price has increased and will increase further in a near future.

Our products: essential oil & organic essential oil.



Cyperus scariosus







Harvest calendar

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

It had rained a lot in the key raw material belts during the harvest season, which had seriously impacted the production – less collection and no optimum weather to get rhizomes dry due to lack of sunshine. The low collection has put pressure in market. The price remains stable. Next harvest in 2023.

Our product: essential oil.

Davana

Artemisia pallens





Harvest calendar



The next harvest will be in 2023. Prices will increase until because there is no carryover in the market due to a really bad crop in 2022.

Our product: essential oil.

Fir Siberian

Abies sibirica





Harvest calendar



Due to the war in Ukraine, export of goods from Russia via Europe by road has become difficult. Major shipping lines are closing sea routes in and out of several Russian ports. So at this moment, it is impossible to import Siberian Fir from Russia.

Our product: essential oil



Pelargonium x spp



Juniper berries | Albania

Juniperus communis





Lavandula







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

This year crop is large, availability in the market is very good.

Our product: essential oil



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

The crop is less important this year: the drought in Eastern Countries affected the berries' growth. The yield is poorer. The price will increase by 10%.

Our product: essential oil





Harvest calendar

The 2022 crop is a small crop, it has been largely impacted by the drought/heat waves, as well as the cecidomy (midge). Traditional areas such as Valensole and Albion are the most affected areas. However for the Lavandin Grosso, the stock carry over is so large that global availability is good. Price remains stable.

Our market position: We collaborate with several farmerprocessors 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: Lavender spike EO and organic EO, Lavandin grosso EO & organic EO, Lavender fine EO, Lavender Maillette FO

🖗 Niaouli

Melaleuca quinquenervia







Harvest calendar

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

The availability is still good and the production is stable.

Our products: essential oil & organic essential oil

🕲 Orange blossom

Citrus aurantium ssp amara



Harvest calendar

Egypt, Morocco



EGYPT: The situation is stable with large carry forward stock, exceeding by far the demand.

Our product: Neroli essential oil, Orange blossom absolute

MOROCCO: The weather was unstable and rather cold. The picking season lasted longer than usually as flowers could not be picked every day. This lead to price increase about 10%.

Our products : Neroli EO & organic EO, Orange blossom water absolute

Oregano

Origanum vulgare L.



Moldavia



Harvest calendar



The situation is stable, but the production cost increased.

Our product: essential oil



Peppermint

Mentha piperita L.





Harvest calendar

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

The harvest was good and the quality too, for all our producers in Italy.

Our market position: all our partners in Piedmont are Fair for Life certified. 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 fully traceable.

Our product: Fair for Life essential oil

Ravintsara

Cinnamomum camphora Sieb.



Madagascar

Harvest calendar

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

Prices were high during Covid but now it remains at normal level.

Our product: essential oil & organic essential oil

Rose







Harvest calendar



This year harvest is completed. It is a small crop. The perdiod was short due to high temperatures. In addition the price were on the very low side over the past 2 years which discouraged farmers. As the demand is firm, the price are increasing very much about +50% at least.

Our product: essential oil



Rosemary

Morocco, Tunisia

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

MOROCCO, as in Tunisia, the region suffered from the drought. The producers prefered to sell the leaves for the antioxydant industry than to distill it, as it is more

TUNISIA: The Tunisian harvest was reduced by 30% this year, due to the drought in Automn/Winter. Regarding climate situation, the government reduced the parcels to be croped in order to preserve the plants, and increased its prices. Adjudications' price were 60% higher this year. **Our product:** Rosemary ct cineol essential oil & organic

profitable. So the price is much higher this year. **Our product:** Rosemary ct cineol essential oil

Harvest calendar



Rosmarinus officinalis CT cineole



Sandalwood

Santalum austro-caledonicum



New Caledonia

Harvest calendar

essential oil



The situation is stable.

Our products: essential oil & organic essential oil

🖗 Tagetes

Tagetes glandulifera



South Africa





Tagetes harvest is always a challenge in South Africa and even more for the organic quality. No carryover at this stage, next harvest available in April/June 2023.

Our products : essential oil & organic essential oil



Vetiveria zizanioides







Harvest calendar

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

The price of South African quality may be impacted by the Australian situation. In fact Australia is suffering severe floods and the Tea Tree industry overthere is anticipating a 40% decrease in production.

Our products: essential oil & organic essential oil

Vetiver

Vetiveria zizanioides





Harvest calendar



The harvest season is over, it has been a difficult year. In addition to a lot of rain, that prevent farmers to go on the fields, manpower was difficult to find. Plus the unstable situation across the countries make the logistic complicated. Despite all of this, the demand on the product has remained firm. This explain that the price has already sharply increased.

Our product: essential oil

A century of know-how

1918 Opening of the Laborma factory in Vallauris, France, specializing in local aromatic plants such as orange blossom, centifolia rose and jasmine.

1968 The Laborma factory becomes Albert Vieille, which develops the international distribution of natural aromatic materials.

1991 Albert Vieille strengthens its expertise through the development of quality control, Research & Development and production.

2019 Albert Vieille is acquired by Givaudan. A new step in the company's journey to grow stronger together by leveraging our respective expertise.

Online product catalog

Givaudan

Human by nature



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ALBERT VIEILLE

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