



ALBERT VIEILLE

Essentials. It's in our nature!

The Natural Gazette

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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.



ALBERT VIEILLE

Essentials. It's in our nature!

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, wellness





















Perfumery



Food

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Herbaceous
Fruity



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Chamomilla recutita (L.) Rauscherf

Chamomile German

Essential oil

Egypt



The weather conditions were satisfactory for the new 2018 crop. What's more, planting activity increased over 2017, initially leading to a fall in the price of the flower. However, since demand for this raw material remains brisk, the flower price ultimately saw an increase at the end of harvest and, of the 4.5 tons of essential oil produced, supplies are almost completely diminished.

Our market position : We have stock because we have already secured our supply from our partner until the next harvest in 2019.



Ambery
Resinous



Harvest Calendar

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

Cistus ladaniferus var *beta-maculatus* Dun.

Cistus

Essential oil

Spain



The Andalusian spring was quite chilly and damp due to the persistent rains between February and May. The twigs suffered from the lack of warmth and have been slow to exude gum, even as of this writing. We began distilling the first twigs in early June to determine when we could start harvesting, but yields are still low. The harvest should begin in July. Although warm weather has come at last to Andalusia, we are bracing ourselves for another difficult season ahead, with low yields and higher prices.

Our market position : This is the third consecutive year that we have seen these low yields. Our long-standing presence in Spain makes it possible for us to directly adapt to these climat changes and find solutions.



Floral
Rosy



Harvest Calendar

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

Pelargonium spp.

Geranium

Essential oil

Egypt



In December 2017 and January 2018, geranium was planted extensively, a good omen for this year's crops (see Gazette 5). In addition to the increase in geranium planting, the weather has been very good, making it possible to start the harvest two weeks early, in early May. Taken together, these conditions led to the production of more than 200 tons of geranium essential oil, nearly double last year's quantities. On the other hand, the price of essential oil is higher than expected, though still lower than last year, for various reasons: first, oil and fuel subsidies have been discontinued, increasing production costs; second, as the price of geranium China is increasing, there is greater demand for Egyptian geranium; lastly, the carryover of Egyptian geranium essential oil stock from last year is very limited.

Our market position : Our close collaboration with producers at the source means we do have quantities of geranium essential oil for you, at an attractive price.



Floral
Jasmine



Harvest Calendar

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

Jasminum sambac (L.) Aiton

Jasmine Sambac

Absolute

India



Rain was scarce in early 2018 in the Tamil Nadu region of southern India, causing severe drought. As a result, the jasmine plants flowered later and produced very few blooms. The harvest began six weeks late, in mid-April. This challenging situation has led to an increase in the price of the flower. With the start of the summer monsoon, it is hoped that the situation will improve in the months to come, as the first rains have been particularly abundant. As of this writing, flower prices are on the rise.

Our market position : The unfavorable climatic conditions have increased in frequency in recent years, leading us to position ourselves on supplies of 2017 concrete so as to be able to produce jasmine Sambac absolute and have the wherewithal to supply our clients throughout the year. Our next production cycle of jasmine Sambac absolute will be in September.



Floral
Jasmine



Harvest Calendar

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

Jasminum grandiflorum L.

Jasmine *Absolute*

Egypt



Weather conditions in 2018 were good for jasmine crops. The harvest opened on the first day of June and holds great promise, especially since the plants put in the ground after 2012 are reaching maturity. Since cultivating jasmine is a lucrative business, farmers have been motivated to plant more. As a result, we expect there will be at least 5% more flowers harvested compared to last year, when six tons of jasmine blossoms were collected. However, as subsidies for oil and fuel have been discontinued, production costs are increasing, which is expected to increase the price of jasmine concrete.

Our market position : The Egyptian jasmine absolute we have available is now made in our production center from concrete supplied by our Egyptian partner. Our last production cycle was in May.



Herbaceous
Aromatic



Harvest Calendar

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

Origanum majorana L.

Marjoram

Essential oil

Egypt



Weather conditions have been favorable for marjoram plantations. At present, the harvested quantities are sufficient to meet demand, even if the planted surface areas are down compared to last year. Prices are stable for now. However, prices for marjoram essential oil are likely to increase in the coming months.

Our market position : We planned ahead and positioned ourselves for supplies in good time, meaning we have essential oil available for you.



Floral
Powdery



Harvest Calendar

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

Citrus aurantium var. *amara* L.

Neroli

Essential oil

Egypt



Before even being produced, batches of neroli essential oil are being reserved in advance. Furthermore, as weather conditions have varied widely, the orange blossom harvest is 30% less than last year, meaning the supplies available on the market today are very limited. For next year, though, more flowers are expected, as plants put in the ground in 2016 are reaching maturity.

Our market position : We took action before the harvest and reserved substantial quantities of Egyptian neroli essential oil, meaning we have supplies available.



Floral
Powdery



Harvest Calendar

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

Citrus aurantium var. *amara* L.

Neroli

Essential oil

Morocco



The lack of rain in late 2017 delayed the flowering phase for the orange trees, which in turn delayed the start of flower-picking, which began in April, rather than March. Even then, the harvest was regularly interrupted by rain, wind, and cold in April, causing the flowers to drop and disrupting the gatherer's work rhythm. The harvest was spread over more than 40 days in an attempt to compensate for losses and harvest as many flowers as possible. Expansion of orange-tree parcels was not enough to offset losses. The neroli essential oil quantities produced are equivalent to those of last year (see Gazette 3). In addition to the timing challenges, farmers are facing a lack of manpower, which has increased production costs, thereby triggering a price increase on the raw material.



Floral
Powdery



Harvest Calendar

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

Citrus aurantium var. *amara* L.

Neroli

Essential oil

Tunisia



In Tunisia, the regions that produce orange blossom enjoyed very mild weather, as they did last year (see Gazette 3), which encouraged flowering, resulting in substantial quantities of blooms. The orange blossom harvest went well, though the buds were slow to open in March. Ultimately, the harvest was 5% greater than last year. As demand remains quite brisk for this material, and because Morocco saw a poor orange-blossom season, the price of the flower has increased.

Our market position : We planned well and have stock of neroli essential oil at a good price.



Woody
Resinous



Harvest Calendar

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

Boswellia carterii Birdw.

Olibanum

Essential oil - resinoid

Somalia



The frankincense-producing regions have lately received some rain, precipitation that has been far too scarce in recent years (see previous Gazettes). This rain will at last moisten the Somali soil, reenergizing the trees. However as the rain is washing the exuded resin, it will impact the gum's harvest. The country is still facing challenges in food and water supplies, particularly after Tropical Cyclone Sagar blew through last May.

Our market position : The partner from whom we source frankincense gum provides training and medical support for his collectors and ensures their families have the basic necessities. We are in a position to continue supplying you with essential oil and resinoid, as we have gum in stock that we process at our production center in Spain.



Woody
Earthy



Harvest Calendar

J

F

M

A

M

J

J

A

S

O

N

D

Pogostemon cablin (Blanco) Benth.

Patchouli

Heart essential oil

Indonesia



The start of the year in Sulawesi was very rainy, leading to flooding and landslides. These occurred during the period when patchouli leaves are dried and distilled, affecting production of essential oil. The situation is also reflected in the price of essential oil.

Patchouli from Sumatra remains in demand. It is priced slightly higher than Sulawesi patchouli, as it the crop has a long history in that region (see Gazette 4) and is of better quality. On the other hand, as demand fluctuates, farmers in Sumatra tend to abandon their patchouli crops for more stable crops, such as lemongrass.

Our market position : Using essential oil made with Sumatran patchouli, we manufacture a “patchouli heart” essential oil through rectification, enriching the extract’s patchoulol content, the molecule responsible for the characteristic patchouli odor. Patchouli heart production will begin in July.



Balsamic
Vanilla like



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Myroxylon pereirae Klotzsch

Peru Balsam

Essential oil - resinoid

El Salvador



The beginning of the harvest, which should have taken place last December and January, was delayed due to frequent winds. This prevented the balsameros, the gatherers, from climbing the trees to burn the bark, to stimulate the trees to exude the balm. The combination of wind and fire might have harmed both the trees – through the risk of forest fire – and the gatherers. The harvesting process could not get underway until February, delaying collection of the resin. This harvest period was soon interrupted by the start of the rainy season in May, with precipitation far too heavy to continue even a minor harvest. This means that there is less Balsam of Peru available this year, causing a rise in prices.

Our market position : Being a member of the NRSC, we work with their partner producers who collect, produce, and clean the balm. By virtue of this partnership, we have stock of Balsam of Peru currently being processed in our production center in Spain. At the time of this writing, we have Balsam of Peru essential oil available and another round of production is scheduled for July.



Spicy
Peppery



Harvest Calendar

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

Essential oil

Peru



Peru's harvest of pink peppercorn, from the *Schinus molle* tree, is good this year, an improvement over last year, when a portion of the flowers were lost due to cold temperatures. The 2018 harvest began a bit earlier in the Huanta Province than in years past. The peppercorns have a lovely color and a delicate fragrance. Prices for this raw material are stable.

Our market position : We produce pink peppercorn essential oil at our production center in Spain. We have substantial quantities.



Floral
Rosy



Harvest Calendar

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

Ros. 'Damascena Mill.

Rose of Damas

Absolute

Morocco



This year's harvest in Morocco was not a good one. Low temperatures and overcast conditions at the start of the harvest in the Kasbah, M'Goun, and Dades regions unfavorably impacted blooming of the Damask rosebushes. In the Dades region, a lack of moisture made things worse. Furthermore, once the harvest started, rain and frost weakened the flowers.

About 550 tons were harvested, quantities below last year's, which were already worse than usual. The price of flowers has increased by 40%, leading to an increase in production costs.

Our market position : Despite the challenges faced this year, our close collaboration with a producer at the source means we have very satisfactory quantities of Damask rose concrete at an attractive price. We manufacture Morocco Damask rose absolute at our production center in Spain. The next production cycle is scheduled for August.



Floral
Rosy



Harvest Calendar

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

Rosa 'Flamenco' Mill.

Rose of Damas

Absolute

Turkey



In Turkey, the weather turned warm earlier than usual. The flowers bloomed ahead of schedule, causing the harvest to begin mid-April. In the lowlands, the harvest volume was 20% greater than last year. Still, as temperatures were hotter, similar to a month of July, the essential oil yield was not ideal. In the high-altitude areas, somewhat fewer flowers were harvested, but the yield of essential oil was better. In total, more than 7500 tons of petals were harvested in Turkey and nearly 8.5 tons of concrete were produced.

With the devaluation of the Turkish currency, the price of concrete is down, which is unfortunate for the farmers, who received a crop advance last October, when the exchange rate was better.

Our market position : We manufacture our Turkish Damask rose absolute at our production center in Spain. The next production cycle is scheduled for August, so let us know your needs as soon as possible.



Floral
Rosy



Harvest Calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Ros. 'Damascena Mill.

Rose of Damas

Essential oil

Bulgaria



It will be another good year for the Kazanlak rose harvest in Bulgaria's Rose Valley. Too good, in fact. As a result of an increase in planted plots and favorable weather conditions, nearly 16,000 tons of flowers have been harvested, more than 25% over the 2017 crop. So much more that distilleries cannot handle it all. This overproduction has led to a sharp drop in the kilo price of these flowers, which is bad news for farmers. To address this situation, the Bulgarian Ministry of Agriculture decided to buy from farmers the surplus that could not be processed and had to be discarded. The government is also considering enacting a law to protect the Bulgarian producers of rose products, to limit the mixing of Turkish and Iranian essences.

Our market position : We have Bulgarian essential oil available.



Floral
Rosy



Harvest Calendar

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

Rosa centifolia L.

Rose of may

Floral water

France



The weather in May was cool and very wet, with a long succession of rain and thunderstorms, leading to the loss of nearly 25% of the flowers on some farms. However, having signed contracts with new farmers, and because additional rosebushes were planted in recent years, we and our partners have been able to produce substantial quantities of May rose floral water.

Our market position : We have two qualities of floral water for you: conventional and organic. Our organic rose fields are farmed naturally, without the use of chemical fertilizers or pesticides. Organic Centifolia rose blooms are distilled using our mobile distillation unit.



Woody
Smoky



Harvest Calendar

J

F

M

A

M

J

J

A

S

O

N

D

Vetiveria zizanioides (L.) Nash.

Vetiver

Essential oil

Haiti



Vetiver harvests started in January, in the rain, which is rather unusual and affected yield. Then the weather became drier, allowing the harvests to continue under more normal conditions. Essential oil is now being produced again, so stocks are being replenished. While this situation may seem ideal, relations are strained between farmers and distilleries. Moreover, not having been able to take advantage of Venezuelan oil at a good price because of the US embargo, production costs remain high. Stock is available only on a just-in-time basis, because demand remains very high for this material, which is particularly sought-after by the USA.

Our market position : Our long-standing involvement with the supply chain through the work of the NRSC means we have vetiver essential oil available for you.



FLORAL WATER
CONCRETE
RESINOID
EXTRACT

Our products



Product list



ESSENTIAL OIL

ABSOLUTE
GUM



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