



ALBERT VIEILLE

Essentials. It's in our nature!

The Natural Gazette

n°10

October 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 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.

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ISEO Award

The CIFRE thesis conducted by Aurélien Cuchet in our R & D laboratory, with assistance from our Laboratory Manager Elise Carenini, was awarded “Best Poster” at the 2019 ISEO Congress. The thesis topic is “Authentication of the naturalness of wintergreen (*Gaultheria* genus) essential oils by gas chromatography, isotope ratio mass spectrometry, and radiocarbon assessment.”

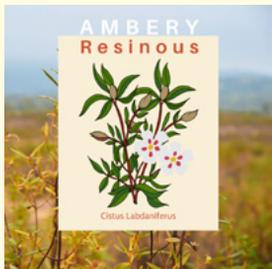
The multi-analytic approach that was applied ultimately provided a great deal of information on the naturalness of the wintergreen essential oil. All these techniques are complementary and make it possible to secure the best diagnosis possible.



News

Instagram

You can now find us on Instagram at @AlbertVieille and #albertvieille! You will enjoy our exclusive content on raw materials – photos, quizzes, olfactory profiles – and corporate news, like interviews and a Profile of the Month.



REACH

We have just submitted our elemi essential oil to be registered as a REACH dossier for quantities of one to 10 tons, on behalf of our production plant, Aromasur. Our Elemi essential oil is made from gum sourced in the Philippines.

Greener Energy

In 2017, while implementing its CSR policy, Albert Vieille began transitioning to a new electricity supplier to be greener in its energy consumption. Today, the switch to a supplier of 100%-renewable electricity is complete: Albert Vieille is choosing to buy from Enercoop. “This choice is in harmony with our determination to respect the environment, while furthering the expansion of renewable energies in France. The unique status of the Enercoop Cooperative, along with its commitment to sourcing – directly and exclusively – from 100%-renewable energy producers, convinced us to make the change,” says Jennifer Riss, who oversees CSR initiatives at Albert Vieille.



Member of the “Action Collective Pesticides” work group

Last December, Albert Vieille joined the second work group formed and led by the Pôle PASS business cluster, this one focused on pesticides. This group initiative involving representatives of the fragrance, flavors, and cosmetics industries worked on implementing viable tools to monitor the presence of pesticides in natural extracts. The group’s efforts include:

- developing an application that brings together a variety of data on pesticides to survey their spatiotemporal evolution;
- tracking the phytosanitary analysis of a supply chain, such as lavender-lavandin, to establish a methodology to identify pesticides that can be applied in other supply chains.

All told, this work has led to the cataloguing of nearly 270 pesticides. The initiative is supported by CRIEPPAM and the ERINI platform and will continue until the end of December. The collective initiative’s outcomes will help us confirm and bolster our skills in interpreting dosage results in the materials, tailor supply-chain audits more effectively, and better support producers in respecting best practices.



A promising outlook for the mycorrhizal fungi agroecological research project

Albert Vieille has been collaborating with Mycophyto, a French start-up based in Sophia-Antipolis, since 2017 on a research project centered on mycorrhizal fungi indigenous to our Correns, France, plot where we organically grow the May (Centifolia) rose.

Objective: to study the mycorrhizal fungi already present in the soil to reinvigorate soil life and boost the fungi's natural synergistic activity with the rosebush roots.

The Phase 2 results are promising: a 15% increase in the soil's mycorrhizal potential; better rose resistance to water scarcity and infestations, such as aphids; and 30% faster development of the rosebushes in the planting year. Next step: larger-scale evaluation of their effects on rose yield and olfactory quality. This project aligns with the precepts of sustainable agriculture, linking improvement of crop production with rehabilitation of agricultural soils.



Product profile: Roman chamomile

Essential oil



Roman chamomile blooms all summer, but is only harvested at the end of the flowering period. To produce the essential oil, the flower heads are harvested in the afternoon, when the sap has risen to the flower head and the sun has dried the morning dew from the petals. Roman chamomile must be distilled as soon as it is picked to prevent any fermentation, thereby ensuring the best quality.

Roman chamomile contains small amounts of matricin which, when in prolonged contact with water (hydrodistillation) or humidity (during transport), becomes chamazulene. This sometimes leads to an essential oil with slightly bluish tint, which becomes light yellow or colorless with time.



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Our market position:

To produce Roman chamomile essential oil, Albert Vieille works with two supply chains – one in France, the other in Italy.

Our position with these supply chains entails supporting producers in developing their production and distillation activities and helping them remain in compliance with the trade's laws and regulations. We support them throughout the process, from the field work to the product shipping: field trials, supplying the mobile distillery, training on labeling, investments. We also hold inter-country gathering to promote sharing knowledge and exchanging savoir-faire between French and Italian producers.

Product profil: Roman chamomile *Essential oil*

Our producer in France, focus on Eure-et-Loir:

We work with growers in three French départements: Drôme for organic, Côte d'Or, and Eure-et-Loir.

In Côte-d'Or, our partner initially produced wheat, but we have been supporting them since 2015 as they diversify in growing aromatic and medicinal plants. Today, this family farm produces not only Roman chamomile, but lavandin.

To distill, we use our mobile distillery at the edge of the fields. This limits the risk of fermentation while the harvest is transported from the fields to the processing plant, as fermentation can impact the essential oil's quality. We are also helping them prepare to set up their own distillation unit, a step further toward independence and production capacity.





Our producers in Italy

This relationship goes back 40 years, when Mr. Albert Vieille initiated a partnership in Piedmont for tarragon, then Roman chamomile. Today, the torch has been passed to a third generation of farmers, from grandfather to son, then son to son-in-law. Over time, the partnership expanded to allow other producer families to join, and they have all benefited from our original partner's readiness to share essential savoir-faire.



Most often, the chamomile is distilled in a truck-box to avoid any risk of fermentation after harvest and to optimize labor time. This technique involves harvesting the plant directly into a truck-box and immediately distilling it after harvest in the truck-box itself. A portion of the harvest continues to be distilled in stills using the traditional process, which better preserves the raw material's olfactory characteristics.



Balsamic
Resinous



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Styrax tonkinensis Pierre

Benzoin Siam

Resinoid

Laos



Our partner continues to work with local communities to ensure that the Benzoin supply chain remains sustainable. Examples of these efforts include establishing a conservation area and conducting a major tree-replanting campaign.

The benzoin gum harvest, which took place six months after the trees were tapped, went well this year. Quantities are good and, as demand has eased recently, prices are down, which has not happened in years.

Our processing: Our benzoin gum is processed in our production center in Spain. We have several qualities of resinoid from different gums.



Ambery
Resinous



Harvest calendar

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

Essential oil, absolute, essence



Having suffered several episodes of drought since 2016, the cistus harvests resulted in very low yields, sometimes even forcing us to cease distillation entirely. This alarming situation has led us to diversify the collection areas and review our distillation process [see Gazette #8].

This year, yields are better and the harvest is more substantial. The weather provided greater moisture than last summer and our efforts in recent years have paid off. Yields have gone back up to over 0.05%. These various improvements have made it possible for us to stabilize prices for the first time in three years.



Spicy
Peppery



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Coriandrum sativum L.

Coriander

Essential oil

Russia



This year, there has been a marked imbalance in coriander production between Russia's southern regions and those that are further north: In northern regions, such as Belgorod or Volgograd, the spring and summer were very dry, which negatively impacted plantations. Further south, however, in the regions of Krasnodar or Stavropol, it was a very good year, with large quantities harvested. Fortunately, the southern harvests made it possible to compensate for the shortages of those in the north.

The overall quantities harvested were greater than in 2018. We have good quantities of essential oil available at a good price that is acceptable to both producers and the market, suggesting that the plantations will be renewed next year.



Floral
Jasminey



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Jasminum grandiflorum L.

Jasmine *Absolute*

Egypt



The year 2019 was excellent for Egyptian jasmine, perhaps even better than 2018. The weather conditions were very auspicious for the crops. More than 6 tons of flowers concrete were produced. Although Egyptian production costs are still on the rise, the price of the concrete has remained stable, as Egypt's currency has again been devalued.

Our processing: We have finalized production of Egyptian jasmine absolute from the concrete at our production center in Spain.



Floral
Jasminey



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Jasminum grandiflorum L.

Jasmine Absolute

India



This year, India – especially southern India – has been suffering from water scarcity that has caused stress for the country’s crops and people.

There was very little rain in the winter season and the monsoon period also did not produce the usual moisture. According to India’s national hydrometeorological observatory, the start of each season had a sharp drop in rainfall: 60% less rain at the beginning of winter, 50% less rain during the pre-monsoon season, and 20% less during the monsoon. Even though rain levels have gradually increased, there is still a lack of water.

Jasmine crops were not left unscathed by this problem, and harvested quantities are already down by 25% compared to usual amounts, with correspondingly lower yields.

Fortunately, because there was more rain overall in 2018, there is significant stock carryover from last year, which makes it possible to maintain stable pricing and ensure there is concrete available.

Our processing: We have finalized production of Indian jasmine absolute from the concrete at our production center in Spain.



Floral
Powdery



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Iris pallida L.

Orris

Essential oil

France



The irises were uprooted in early August 2019 beneath a blazing sun, after years in the ground. The harvest was a good one, resulting in several tons of rhizomes from our agricultural partners in Haute Provence and Hérault.

Our processing: By using the drying technique we developed with our partner, we will be able to process the iris as early as next December to produce Iris essential oil with 8% irones.



Fruity
Animalic



Harvest Calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Osmanthus fragrans (Thunb.) Lour.

Osmanthus

Absolute

China



The Osmanthus flowers harvest has ended up in September, in Est China. It's still ongoing in Guangxi region, in the South. Due to a lack of rainfall this year, the harvest is estimated to be 30% less than last year. The dry weather has damaged the buds.

The flower price has risen up because, firstly, Osmanthus flowers are more and more selected for tea, wine etc. and, then, because picking labor cost has gone up. Subsequently it will increase the Osmanthus concrete price.

Our processing: the new concrete should arrive by the end of the year. Until then, we still have Osmanthus absolute from our 2018 production.



Spicy
Peppery



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Schinus terebinthifolia Radde

Pink Peppercorn

CO₂ Extract

Réunion Island



Despite heavy rains at the start of the harvest season in April, the harvest went well over its six-week duration. Quantities were good, with a harvest of nearly 300 tons of peppercorns, resulting in a good post-drying yield of 150 tons. This amount is substantial compared to last year, which was catastrophic.

Our processing:

To bring out our pink peppercorn's spicy facets, we cryomill the peppercorns before putting them through supercritical CO₂ extraction.



Aromatic
Agrestic



Harvest calendar

J	F	M	A	M	J	J	A	S	O	N	D
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Rosmarinus officinalis L.

Rosemary

Essential oil

Morocco

Tunisia



Morocco

The food and cosmetics industries remain very active on the rosemary market, sometimes even creating tensions with regard to the quantities of plants allocated to distillation. Fortunately, this year's weather resulted in a good crop that can meet these varied demands and substantial quantities of rosemary essential oil were produced.

Tunisia

It has been a very good year for rosemary in Tunisia. Not only was the weather a boon to crops, thanks to generous rains, but the arrival of new agricultural groups to the market, as well as an increase in rosemary cultivation on private farms, have led to strong growth in the quantities harvested.

The most productive regions were Kasserine and Kairouan, which together produced more than 200 tons of essential oil.

Our market position:

We have good quantities of rosemary essential oil and can also offer organic Tunisian rosemary essential oil.



Woody
Sweet



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Santalum austro-caledonicum Vieill.

Sandalwood

Essential oil

New Caledonia



Sandalwood cutting is regulated by a quota established by the local delegated authority. These government entities help stabilize the industry and prohibit the export of raw wood.

Our partner sources wood from tribes who have been educated about the importance of regenerating the resource in the harvest area.

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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Essentials. It's in our nature!

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