



ALBERT VIEILLE

Essentials. It's in our nature!

The Natural Gazette

n°3

2017 - 2nd quarter



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



Cosmetic



Perfumery



Food



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Balsamic
Vanilla like



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Styrax tonkinensis

Benzoin Siam

Resinoid

Laos



Though the benzoin market remains fragile, the year 2017 looks set to be better than 2016 and 2015. The political shifts of recent years, paired with a substantial rural exodus, generated an increased number of actors, leading to a surge in prices and making it difficult for our partner to secure supplies. The situation has since stabilized.

The harvest, although earlier than usual, took place under better conditions. As prices were still high for this raw material, harvesters were prompted to collect the resin before the end of the drying cycle. This gum has a somewhat low yield because, being fresher and not as dry, it crumbles more easily.

Our market position: Our next benzoin resinoid will be available by the end of this year. We invite you to inform your account manager of your needs.



Herbaceous
Fruity



Harvest calendar

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

Anthemis nobilis

Chamomille roman

Essential oil

France



This year's intense heat and minimal rain damaged the flowers, much like the situation last year. To minimize losses, farmers were forced to water the plants, risking the growth of fungi that could further weaken some of the crop.

Our market position: Fortunately, our having contracted with new producers in 2016 helps limit losses in production quantity. We have supplies French Roman chamomile essential oil available for you.



Herbaceous
Fruity



Harvest calendar

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

Anthemis nobilis

Chamomille roman

Essential oil

Italy



In Italy, the weather so far has not been as good as it was in 2016 [see Gazette No. 1]. As in France, drought and severe heat have been problematic for the harvest. Flowering began two weeks early, and the plant material (stem and leaf) did not have time to form completely, decreasing the harvested quantities destined for distillation. Essential oil yields were not impacted quite as much and remain only slightly below the usual levels. Essential oil prices are on the rise.

Our market position: As our partners increased their planted surface areas by 30%, we can supply you with Italian Roman chamomile essential oil.



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*

Cistus - Labdanum

Essential oil - absolute - resinoid

Spain



Though there was more rain than last year [see Gazette No. 1], the early heat slowed the plant's vegetative cycle. The harvest and distillation of cistus branches began in mid-June. The 2017 harvest season looks to be as challenging as that of 2016, as yields of essential oil are low. Prices remain high.

Fortunately, the yields on extract products – cistus absolute, labdanum absolute, labdanum resinoid – seem to be better than we might have hoped and will eventually make it possible to produce sufficient quantities to meet demand.

Our market position: The exceptional location of our Andalusian production site puts us in a superior position for these products. Contact your account manager for cistus and labdanum products.



Herbaceous
Spicy



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Helichrysum italicum subsp. *picardii*

Everlasting picardii

Essential oil & absolute

Spain



The vast carpets of everlasting flower in the Doñana National Park were largely spared from damage by the fire that devastated 8,000 hectares in southern Andalusia late last June. The harvest was therefore only slightly impacted.

Compared to last year, when a lack of rain and late heat during the blooming period affected yield, there is a higher yield of essential oil from the 2017 crop.

Our market position: We process everlasting flower at our production center in Almadén de la Plata, not far from the harvesting areas. We invite you to contact your account manager to communicate your everlasting picardii needs for both essential oil and absolute.



Floral
Spicy



Harvest calendar

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

Frangipani

Absolute

India



The frangipani tree is a hardy, resistant tree, which means it has not been particularly affected by the lack of moisture and intense heat of this year in India. The frangipani flower, equally resilient, has properly flowered, providing a good harvest, which means that 150kg of concrete were produced despite the weather challenges.

Our market position: We have frangipani absolute from the concrete processed at our production center. Another round of production will begin by late summer. We invite you to let us know your needs.



Floral
Rosy



Harvest calendar

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

Geranium

Essential oil

Egypt



The geranium season was good and the quality of the distilled batches is quite satisfactory. The quantities harvested are equivalent to those of 2016, nearly 120 tons, but remain below the years prior to 2015 [see Gazette No. 1]. Prices for geranium essential oil remain high.

Our market position: Our close collaboration with producers at the source means we have supplies of geranium essential oil available at an attractive price.



Floral
Jasmine



Harvest calendar

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

Jasmine sambac

Absolute

India



The jasmine flowering period was hit very hard by weather conditions [see Gazette No. 2], and the flowers were sparse and fragile. The limited quantities were channeled primarily toward traditional ceremonies, leaving very few flowers for processing. The resulting concrete quantities are therefore quite low, almost half last year's supplies. The quality is also not what it could be.

Demand remains brisk, and prices for jasmine Sambac concrete have been rising.

Our market position: The bad weather conditions seen early in the year and their impact on the current harvest have prompted us to position ourselves on concrete batches from 2016. We have just completed our latest production of absolute, so please contact your account manager to discuss your needs.



Herbaceous
Aromatic



Harvest calendar

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

Marjoram

Absolute

Egypt



This year's harvest was good. On the other hand, the increasing demand for the dried herb for culinary use is having a significant impact on the quantities harvested for distillation. There is less essential oil available compared to last year, which is leading to an increase in prices.

Our market position: We planned ahead and positioned ourselves in a timely manner, meaning we have supplies of essential oil to offer you. We invite you to position yourself as soon as possible.



Floral
Powdery



Harvest calendar

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

Neroli

Essential oil

Morocco

Tunisia



In Morocco, the harvest got off to a good start and it appeared that it would be better than last year, but it was then impacted greatly by the rains. Unfortunately, hot winds began blowing in April, drying out the flowers and resulting in substantial petal loss. Further, there was plant growth that harmed new buds. The losses are substantial – a drop of nearly 40% – which is leading to a price increase for the flowers and, subsequently, neroli essential oil.



In Tunisia, the bitter orange trees did not suffer as much as those in Morocco. Rainfall was good and the winter was cool, giving the tree a chance to rest. Despite a few spring temperature drops, which slowed flower development, flowering was more abundant than in the past two years, and 1,300 tons of flowers were harvested.

Nevertheless, this is not enough to satisfy demand, which remains high on the local market, on the distillation front, and for extraction into concrete. The flower price has increased by 30%, a situation further intensified by the challenges faced in Morocco.

Our market position: We are well-positioned and have neroli essential oil supplies at an attractive price.



Herbaceous
Cineolic



Harvest calendar

J

F

M

A

M

J

J

A

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D

Rosmarinus officinalis

Rosemary

Essential oil

Morocco

Tunisia



In Morocco, the demand from the food and cosmetics industries for rosemary – often used as a natural antioxidant – remains high and is limiting the quantities available for distillation [see Gazette No. 2]. This pressure continues to be reflected in the prices.



In Tunisia, the situation here fluctuated throughout the rosemary harvest period. The beginning was more or less satisfactory, before high temperatures began to cause problems, coupled with the arrival of the Ramadan period in the very middle of the harvest. Fortunately, the last rains of June helped regenerate the plants, leading to good yields.

Rosemary in Tunisia is subject to less pressure than in Morocco – prices are fairly stable and supplies are sufficient.

Our market position: By establishing agricultural partnerships, we have ensured that we have supplies available of essential oil. We invite you to let us know your needs.



Floral
Rosy



Harvest calendar

J

F

M

A

M

J

J

A

S

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N

D

Rosa damascena

Rose of Damas

Essential oil

Bulgaria



This year's harvest in Bulgaria was just as complicated as last year's, when it met with more than its share of challenges. The year 2016 was marked by new European directives coming into force concerning labor laws, along with capricious weather and the absence of a carry-over of 2015 stock that could have tempered the situation.

The spring of 2017 saw severe thunderstorms and a very cool April, difficult conditions for the plants and buds. Flowering was sudden, leading the farmers to harvest flowers throughout the day, instead of only in the morning. The distillation times had to be shortened to ensure that all the harvested quantities could be processed before they fermented. This combination of factors led to lower yields of essential oil, but supplies are still quite good, despite these complications.

Our market position: We managed to position ourselves ahead of time on quantities. Contact your account manager for more details.



Floral
Rosy



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Rosa damascena

Rose of Damas

Essential oil

Turkey



This year, the rose plantations enjoyed clement weather that was mild and cool. These conditions allowed for protracted, regular flower development, as is best. The harvest began on May 20 and resulted in good yields in concrete.

Concrete prices are dropping at the moment, but demand, which is still brisk, could quickly cause prices to change.

Our market position: Every year, we produce large amounts of Turkish Damask rose absolute. Let us know your needs.



Floral
Rosy



Harvest calendar

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

Rosa centifolia

Rose Centifolia

Floral water

France



The last harvest of Centifolia roses, single and double, both in the Var and in the Grasse region, went well, continuing last year's success. Some feared that the drought might affect flowering, but that was not the case. The bushes were healthy and generated quality flowering.

Our market position: We have distilled floral water from flowers produced using both conventional farming techniques and organic techniques. We have supplies available, so let us know your needs.



Balsamic
Spicy



Harvest calendar

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



Since partnering with the NRSC, which has helped the Pech tribes reserve their right to harvest liquidambar, the supply and quality of the gum are more consistent. This community, in collaboration with the government, is caring for the 34,000 hectares of the Montaña del Carbón Anthropological and Forest Reserve.

Our market position: We will begin production of styrax essential oil and resinoid in our Spain production center in November 2017. Contact your account manager now.



Gourmand
Almond like



Harvest calendar

J

F

M

A

M

J

J

A

S

O

N

D

Dipteryx odorata

Tonka bean

Absolute

Brasil



This year's harvest is going well, much like last year's. Tonka bean prices remain stable.

Our market position: We have Tonka bean absolute available from the concrete processed at our production center. Another production cycle will be completed by the end of the year. We invite you to let us know your needs.



FLORAL WATER
CONCRETE
RESINOID
EXTRACTS

Our products



Product list





ALBERT VIEILLE

Essentials. It's in our nature!

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