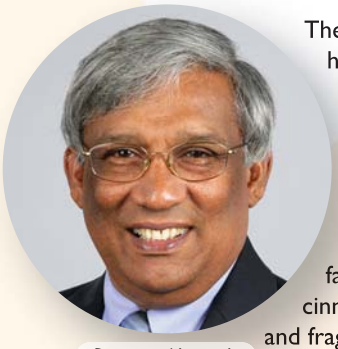
IFEAT WORLD
INTERNATIONAL FEDERATION OF ESSENTIAL OILS & AROMA TRADES
NEWS FROM AROUND THE GLOBE • APRIL 2015

2015 IFEAT Conference

27th September – 1st October, Colombo, Sri Lanka

IFEAT SRI LANKA
27 SEP – 1 OCT 2015
CINNAMON GRAND COLOMBO



Devapriya Nugawela

The 2015 IFEAT Conference will be held in Colombo, the capital city of the beautiful island nation of Sri Lanka. Renowned for its stunning and diverse landscape and varied climate, this tropical island located in southern Asia produces a wide variety of crops including its famous prime quality tea and cinnamon as well as many other spices and fragrant and medicinal plants.

Hotel Cinnamon Grand, Colombo

Named after the country's most famous spice, the **Hotel Cinnamon Grand** has been chosen as this year's conference hotel. In the heart of Colombo's business, shopping and entertainment centre it is ideally situated just 35km from the airport. Delegates will have all the facilities they require during the conference week, including a fully equipped business centre and a wide range of meeting rooms. Well known for its warm hospitality, the Cinnamon Grand offers the ideal environment for the perfect mix of business and pleasure, a mix for which the IFEAT Conference has now become famous.

The theme of this year's conference will be **"Asia: Source of essential oils and medicinal plants"**. Lectures over three days will look at production of and demand for the main essential oils and aroma chemicals in Asia along with market trends and the wider, global picture for trade in these products. Updates on the latest legislative issues that affect our markets will also be covered, as well as various reports on social achievements in the flavour and fragrance industry. There will also be the opportunity to discuss the issue of medicinal plants in healthcare, food and cosmetics. For the Wednesday of the Conference some field trips are being organised. These will be an ideal opportunity for delegates to see local production of Sri Lanka's spices and essences and to experience the rich culture and heritage of which we are so proud.

Members will be notified when registration is open for the IFEAT Conference. A registration booklet will be made available on the IFEAT website at this time with full details of all activities and the booking process. This year, members will have the exclusive opportunity to register before it is opened to non-member companies. For any questions with regard to registration, please contact **Michaela Schier** of the IFEAT secretariat (michaela.schier@ifeat.org).

I should like to thank my colleagues on the Local Organising Committee for their help in preparing for this prestigious event; **Mr D A Perera** of EOAS Organics (Pvt) Ltd, **Mr H D De Silva** of HDDES Extracts (Pvt) Ltd and **Mr Karunaratne** of LB Spices Trading. There is much work ahead for all of us, but I could not wish for a better team, and I am so grateful for their time and commitment towards the 2015 IFEAT Conference. We all look forward to seeing you in Sri Lanka in September. A warm welcome and a fascinating stay await you!

Devapriya Nugawela
Chairman, Sri Lanka Conference Committee

Mr D A Perera

Mr H D De Silva

Mr Kurunaratne

Local Organising Committee members

Call for papers for the 2015 IFEAT Conference

If you are interested in presenting a paper at this year's IFEAT Conference on a topical theme relating to the international trade in essential oils and aroma chemicals, we would welcome your input. Please contact the Conference Programme Coordinator, Romina Garay (romina.garay@ifeat.org) with your suggestion and an outline or abstract of the presentation that you propose.

Sri Lanka – the spice island

The diverse landscape of Sri Lanka suits a variety of agricultural crops and spices. Evidence of trade in spices on this island dates back as far as the Roman period, and the rich culture and heritage of the country is entwined with its spice trading history since the fourteenth century. The country's most famous spice is true cinnamon or *cinnamomum zeylanicum,* which is an indigenous plant. Sri Lanka continues to account for over 90% of the world market for true cinnamon. The tables show production volumes of some of the main crops and export quantities of the principal essential oils. Other important crops include betel, ginger, lemongrass, vanilla and cardamom.

Production of export agriculture crops

Crop	*2013 (MT)*
Pepper	28,000
Nutmeg	2,545
Cinnamon	17,500
Clove	6,190

Essential oil exports from Sri Lanka (tonnes)

Essential Oils	2010	2011	2012	2013
Nutmeg Oil	25	30	32	38
Clove Oil	10.7	13	12	10
Black Pepper Oil	9	10	12.3	16
Cinnamon Leaf Oil	155	231	318.2	265
Cinnamon Bark Oil	7.0	8.0	8.9	10
Cardamom Oil	0.4	1.5	0.8	2

Source: Government of Sri Lanka and Link Natural Products

Sorting white pepper at EOAS Organics (Pvt) Ltd

Essential oil distillation at Link Natural Products

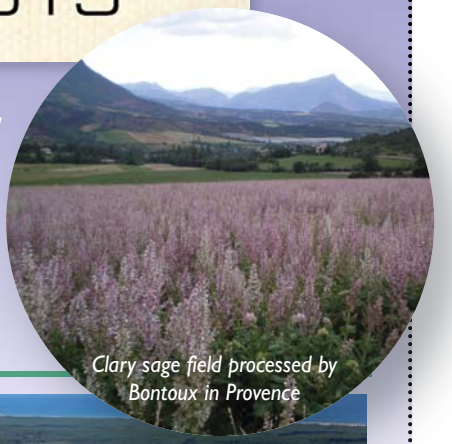
France Study Tour 2015

Provence and Aquitaine Regions of southern France

5 to 15 July, 2015

The Lavender Road, Fragrances and the Pine Industry

The 2015 IFEAT Study Tour is now fully booked and registration is closed. Participants are due to visit two fascinating regions of southern France; the Provence, Alpes and Côte d'Azur (PACA) region in the south-east and Aquitaine in the south-west of the country. They will see the production and processing of essential oils and aroma chemicals in these two important regions of France, including lavender, clary sage and pine derivatives.



Clary sage field processed by Bontoux in Provence

DRT – Pine derivatives specialist

The 2015 Study Tour will visit DRT, based in Les Landes in the south-west of France. This company, with 80 years' experience in pine chemistry, specialises in the value-added products of rosin and turpentine extracted from pine resin. DRT is the story of a local group of entrepreneurs which over several decades has acquired considerable experience in pine chemistry, bringing international recognition to the company. Today, DRT is the only specialist of pine derivatives in France. It plays a major role in the fragrance industry worldwide and in 2013 it became the largest fractionator of turpentine in the world. An important characteristic of the company is its involvement in a responsible chemistry with 85% of its raw materials derived from plant-based origin.

DRT's main plant : raw materials fractionation and processing of terpene and rosin derivatives

Presentation at the 2014 IFEAT Conference introduces the French lavender industry

Michel Krausz, Managing Director of SCA3P (Société Agricole Coopérative des Plantes à Parfum de Provence), the largest French cooperative for the production of lavandin and lavender, gave an interesting paper at the 2014 IFEAT Conference. Around 16,000 ha of lavandin and 4,000 ha of lavender are cultivated in the south-east of France. While production quantities are affected by climate, world prices also significantly affect production decisions. Current prices currently cover the cost of production, said Mr Krausz, but if they drop below about 60 euros per kg, production will drop very fast.

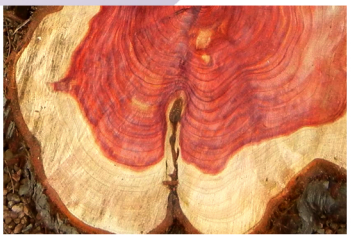
Estimation of World Production of Lavender
(excluding China) (tonnes)

Country	2008	2009	2010	2011	2012	2013	2014
France	40	38	35	30	45	50	55
Bulgaria	30	26	22	45	78	95	80
Ukraine	15	7	12	15	7	5	2
Moldovia	5	2.5	3	3	5	3	5
Total	**95**	**82.5**	**78**	**105**	**140**	**223**	**142**
Average price (for clones) €/kg	50-55	55-63	62-100	95-120	75-100	65-90	70-90

Source: Presentation by Michael Krausz (SCA3P) at the Rome Conference "World Production of Lavandin and Lavender - Strengths and Weaknesses"

WHERE THE WORLD COMES TO ITS SENSES

Sixty Years. Three Generations. One Ambition.





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With that foundation Berjé is breaking new ground on improving the industry's standard of service. Coupled with **Berjé Trakia**, a European rose and lavender production facility, our global network of partners gives us the reach to sell in over sixty countries on six continents. As we further our commitment to promoting environmentally stable solutions, Berjé guarantees the quality of the past and the good sustainable business practices of the future.

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JASMINE

(*Jasminum grandiflorum* and *Jasminum sambac*)

INTRODUCTION

Jasmine absolute is widely used in perfumery and fragrances for cosmetics and toiletries to impart unique floral scents. In traditional holistic medicine and in aromatherapy jasmine is considered one of the most effective products to relieve stress, anxiety, nervous tension, depression and exhaustion. It can be used also as an antiseptic (and anti-viral) and as an anti-inflammatory agent. Many classic French fragrances owe much of their existence to jasmine (eg Chanel No. 5, Opium, Coco, Mitsuoko, Miss Dior, Samsara, "L'Air du Temps", Fidji, Shalimar, Caleche....).

Jasmine does not yield an oil by steam distillation. The most common extraction method (covering 98% of jasmine production) involves a two stepped method where hexane is first used to extract "jasmine concrete" (a solid, waxy-buttery product made of oil and wax) from the blossoms while recovering the hexane for further extraction cycles. The concrete is ultimately either commercialised as is (for further processing by the buyer) or converted by the jasmine concrete producer into "jasmine absolute", a liquid oil freed of waxes. This is performed by numerous washings of the concrete with ethanol (at negative temperatures) to allow the soluble fraction on the concrete to dissolve. The flaking wax can then be easily removed by filtration. The ethanol-absolute solution is then distilled to separate one from the other.

A good quality extract can also be obtained by supercritical carbon dioxide extraction, but this is performed after a hexane extraction in place of the ethanol step described above. Jasmine extract solutions in eg di-propylene glycol or isopropyl mirystate are incorrectly called "jasmine oil". Also remarkable is the existence of jasmine extracts which are 100% certified organic, therefore not produced with the use of a petroleum/synthetic/mineral solvent (hexane or other). These extracts are mainly intended to be used in aromatherapy applications, but also offer different organoleptic facets of great interest in fine fragrance or flavour applications.

According to Kerala Agriculture University, more than 80 species of the *Jasminum* genus are found in India, however there are four species mainly used in perfumery and fragrances: *Jasminum grandiflorum*, *Jasminum sambac* and to a much lesser extent, *Jasminum asteroides* and *Jasminum auriculatum*. Due to their importance and volumes, only the *grandiflorum* and *sambac* species are the subject of this report.

JASMINUM GRANDIFLORUM

The two main producers of *Jasminum grandiflorum* concrete are India and Egypt. Together they account for about 95% of the market share. In India the estimated production of concrete in 2014 was about 5.5 to 6 tonnes, and in Egypt it was around 4.5 tonnes, which is significantly lower than the 11 tonnes/year produced in the mid-1970s.

In India, the extracts are produced predominantly in the Coimbatore district of Tamil Nadu state where the flowers are grown under contract, primarily for extraction purposes. 90% of grandiflorum flowers of the Coimbatore district are used for extraction purposes but only 10-15% of the total grandiflorum cultivation in the state of Tamil Nadu is estimated to be used for extraction and almost none in other producing states. Government estimates of total grandiflorum acreage under cultivation in Tamil Nadu alone is about 7,000 acres.

In Egypt, 99% of jasmine plantations are located in the Nile delta, around the village of Shoubra Beloula El-Sakhaweya (province of Gharbeya). The remaining plantations occur in the Fayoum area. Jasmine plantations have covered an area between 105 and 150 hectares in recent years, and are supporting approximately 5,000 flower pickers. The network of dependent family members and businesses (family workers, transporters, cooperatives, middlemen, etc) probably accounts for some 30,000 people.

Production and Processing Characteristics

In India, the season lasts from June to December and the flower harvest volumes are parabolic with a peak in August/September. The plant has a productive life from the 3rd to the 10th year and can yield about 5-6 tonnes of flowers per hectare per year. The concrete yield from flowers ranges from 0.27% to 0.3%.

In Egypt, the period of production is typically from June to October, but may be extended from end-May to early-December if production is considered short for the projected market demand. The plant has a productive life of over 25 years, but well groomed farms generally replace a plantation every 12-15 years, mostly because of drop-out bushes which impact the acreage productivity. One ha produces between 9.5 and 14.2 tonnes of blossoms per year. Each tonne of blossom gives 2.6 kg of concrete (0.26% yield) as an average over a season. Dry blossoms (not wetted by dew or intentionally by the picker) yield as much as 3.1 kg/tonne concrete. Egyptian concrete yields between 55% and 61% of jasmine absolute. The by-product of jasmine absolute (jasmine wax) has a market in the cosmetics, candles and wood polish industries.

The processing of jasmine grandiflorum takes place mainly at farm/district level.

Social and Economic Characteristics

In India, picking of the flowers is done manually. On average 3 to 4 kg of flowers for extraction are picked a day in 5 hours. Usually all family members work in this activity. Jasmine (both grandiflorum and sambac) are important commercial crops in their areas of cultivation. Being hardy and drought resistant crops, they are typically grown in the drier regions (irrigation is mostly limited to critical periods in the cultivation cycle). The average size of a jasmine farm is less than half an acre and it is grown primarily by small and marginal farmers. Very few inputs of either fertiliser


Jasminum grandiflorum


Jasminum sambac

Photos reproduced by kind permission of Jasmine CE Pvt Ltd

or pesticides are used, with any application being limited to traditional practices. Jasmine is preferred by these farmers as it provides income (even if variable) over an extended period of time. Also, the established demand and corresponding trade in these flowers reduces risks that are otherwise inherent to such a perishable product.

In Egypt, picking of the flowers is also done manually, every day of the season, between 3.00 and 10.00 a.m. On average 3 to 4 kg of flowers are picked a day, in 5-6 hours, though some individuals are capable of collecting up to 12 kg. Usually all family members work in this activity with an emphasis on women for whom the revenue from this activity is important, for example for their future dowry (if unwedded), children's education or other expenses. This revenue goes untaxed as per Egyptian law. The steady income over a 7 month period is much appreciated by farmers as it is unique when compared with traditional crops that procure revenue only upon a single harvest. Moreover, jasmine contracts involve in most cases different degrees of pre-financing for the farmers from the factories, helping to strengthen a sustainable economic substrate. Cost of cultivation/ha/year is around US$6,500 (including harvesting costs).

In winter, farmers intercrop lettuce, peas or clover with jasmine plantations, thus adding to their revenue.

JASMINUM SAMBAC

Despite being relatively new to the international market, the demand for this product has grown rapidly to reach a stable and reasonable market size. The estimated production in 2014 was about 3 to 3.5 tonnes of concrete. The current annual demand for jasmine sambac concrete is believed to be around 3 tonnes. While India is the primary origin, China is, to a much lesser extent, another source for this product.

Jasmine sambac is cultivated throughout peninsular India and to a smaller extent in the Gangetic plains. However most of the cultivation and all the extraction is undertaken in the state of Tamil Nadu. Government estimates of total sambac acreage under cultivation in Tamil Nadu alone is almost 16,000 acres. Some districts have been granted a Geographical Indication Mark for the jasmine sambac flowers grown there.

Egypt, though not a producer today of jasmine sambac, used to be an important producer in the 1970s. As the botanical is still present in the country, Egypt could well reactivate its production at any time.

Production and Processing Characteristics

In India, the season lasts from March to October, or longer in the case of a mild winter. In practice, the plant has a productive life from the 3rd to the 8th year and can yield about 4-5 tonnes of flowers per hectare per year. The concrete yield from flowers is between 0.12% to 0.13%. About 5% of Tamil Nadu's total flower harvest used to go to the perfumery industry when the demand was mostly domestic, but with increasingly global demand this share is now closer to 10%.

As with jasmine grandiflorum, the processing of jasmine sambac takes place mainly at farm/district level.

Social and Economic Characteristics

With an area of 16,000 acres, production involves around 20,000 to 25,000 farmers, who have an average of 0.5-1.0 acres each. Usually the whole family works on the farm with an average of 4 to 5 people in the family. There are around 80,000 to 100,000 people involved in the picking activity. Harvest times could extend to more than

(Continued on page 8)

How is IFEAT supporting our industry?

IFEAT members are well aware of some of our activities, notably the annual conference and the Study Tours to producing regions around the world. They may not be aware however of other activities in which IFEAT is investing finances and time on behalf of the global trade in essential oils and aroma chemicals. There are three main areas in which IFEAT has chosen to invest funds for 2015 ... and beyond:

1 Product safety

Two projects are currently underway, as described below.

RIFM – Safety evaluation of natural complex substances
The Research Institute for Fragrance Materials (RIFM), an independent organisation whose function is the evaluation of fragrance materials, has been working on the assessment of natural complex substances (NCS's) per se. Insufficient evaluations of our products as single substances have been performed in lieu of their individual components. With this fresh look at the NCS's we expect that a new perspective of their safety will be affirmed. An initial group of five essential oils, jointly chosen by IFEAT and RIFM, is nearly finished. These results will be made available to the IFEAT membership in the coming months. The objective of this project is to build a recognised database on the safety of NCS's, accessible to our members.

Natural complex substances as flavouring ingredients
The FEMA GRAS (Generally Regarded as Safe) list is the global standard for flavour materials. In conjunction with the Flavor Extracts Manufacturers Association (FEMA) and the International Organization of the Flavors Industry (IOFI) a systematic updated re-evaluation of the NCS products on this list is now beginning. IFEAT will fund a portion of this five year project taking a leading role in the project's implementation.

The evaluation of the NCS's will be performed by the Expert Panel of FEMA. The aim of this affirmation of the safety of the NCS's is to provide the flavour and fragrance industries with a comprehensive framework with which to argue for the safe use of our products. Although FEMA is a US based organisation it speaks in tandem with industries in Europe, Japan and the global arena.

2 Socio-economic reports on specific naturals

The IFEAT Socio-Economic sub-committee has commissioned 12 reports on the socio-economic impact of the production of specific naturals in certain parts of the world. This is an important project as it is aimed to give an idea of the numbers of people, families and communities involved in local production, processing and trade in these products. The reports are being published in IFEATWORLD as they are completed. In this edition we cover the production of jasmine in Egypt and India (pages 4, 5 and 8).

3 Educational support

Sponsored education courses
A long-running commitment by IFEAT has been to support the industry through the provision of educational programmes on the many aspects of the essential oils and aroma trades. IFEAT sponsors

Students and lecturers at the 2014 Flavourist Course; over 120 young food scientists from 38 different countries have attended this course since its inception in 2002

two educational courses run separately through the UK universities of Reading and Plymouth. Following the successful completion of the programmes, delegates are awarded the IFEAT Flavourist and Perfumery Diplomas.

Sponsorship for ISEO
Following on from its contribution last year, the IFEAT Executive Committee has agreed to give financial support for the participation of 20 students in the 46th International Symposium on Essential Oils (ISEO) to be held in Lublin, Poland on 13-16 September 2015. ISEO has acknowledged the benefits of IFEAT funding, and working cooperation between the two organisations will continue to benefit the industry as a whole.

Members will be kept informed of progress on these important projects.

NEW IFEAT MEMBERS

Below is a list of new IFEAT members who had joined by 18th February 2015:

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Contact: Mr. Travis McIntosh

Sponsorship opportunities at IFEAT Conference

There are several sponsorship opportunities available at the 2015 IFEAT Conference in Sri Lanka. Please see the sponsorship brochure on the IFEAT website, or contact the IFEAT secretariat to discuss these further (**secretariat@ifeat.org**).

(Continued from page 5)

8 hours a day, and harvesting ability can vary from 0.25-1.25 kg per hour depending on flowering density and individual experience. One hectare produces around 6 tonnes of flowers per year. Average cost of cultivation is around $ 4,000 per hectare per year.

CONCLUSIONS

Jasmine (both grandiflorum and sambac) are important commercial crops in their areas of cultivation. Over 20,000 farmers in India cultivate jasmine as it provides income (even if variable) over an extended period of time. There are around 80,000 to 100,000 people involved in the picking activity of jasmine sambac alone. Jasmine plantations in Egypt support approximately 5,000 flower pickers. Some other 30,000 people are also participating in the jasmine business. Jasmine provides the highest consistent return of all crops in Egypt and is the second revenue entry of Egypt's national aromatic raw materials turnover with some US$6.5 million in value. 100% of the production is exported providing a hard currency source to the country.

This article is an edited version of the IFEAT Socio-Economic sub-committee's report on jasmine. The full version is available to members on the IFEAT website.

Jasmine field at dawn at A Fakhry & Co. Today A Fakhry & Co processes about 1.5 tonnes of jasmine concrete out of the 4 to 4.5 tonnes produced annually in Egypt. In the 1970s it used to process 6 out of the 11 tonnes produced in Egypt: capacities remain, markets change... (www.afakhry.com)

Tending jasmine sambac in India Photos reproduced by kind permission of Jasmine CE Pvt Ltd

Farewell to...

We are sad to announce the passing away of three well known members of IFEAT.

We extend our deepest sympathies to their families and loved ones.

Julius (Jules) Soltesz
International Flavors and Fragrances, USA

Irvin N. Brown
The Lebermuth Company, USA

Pedro A. Muñoz
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