

# HEAT WORLD

INTERNATIONAL FEDERATION OF  
ESSENTIAL OILS  
& AROMA TRADES

APRIL 2018

ROSE  
BY DOMINIQUE ROQUES

DR JONATHAN M BONELLO  
JOINS THE TEAM

ROSE  
SOCIO-ECONOMIC IMPACT  
STUDY OF THE NATURALS

NEW  
CARTAGENA  
Las Américas  
9-13 September 2018



FROM THE CONFERENCE CHAIRMAN

# RAÚL AMIGO



"I look forward to welcoming you all to our **2018 IFEAT Conference** taking place in **Cartagena, Colombia, from 9th to 13th September**. After 17 years, the IFEAT Conference is finally returning to South America!

Cartagena, overlooking the Caribbean Sea, is the top tourist destination in Colombia, with a charming historic walled city that provides a fascinating insight into the city's past, and due to its historical heritage, UNESCO declared the city a "World Heritage Site" in 1984. This is all within a five minute taxi journey from the Conference hotels.

The Conference will be held at the **Estelar Cartagena de Indias Hotel & Convention Center** and the **Hyatt Regency Hotel**, adjacent properties in the Bocagrande area of Cartagena and located just 10 minutes by taxi from the airport.

**The theme for the 2018 Conference is "Las Américas"** and it will focus on essential oils and F&F markets in Central and South America, the Caribbean, Mexico and the Amazon. It will also cover legislative and scientific issues. We have an interesting and varied speaker programme and there is more information on speakers who have already confirmed in this edition of IFEATWORLD. As more speakers confirm, information will be updated on the website.

The Conference programme will be similar to the past two years, running for two full days of plenary sessions on Monday and Tuesday whilst on Wednesday and Thursday, we will have the IFEAT Trade Exhibition, where delegates will have the opportunity to meet international companies from within the industry. I encourage companies to make their Exhibition Booth bookings as early as possible to avoid disappointment!

Short courses and a workshop on distillation processes are being organised for the Wednesday and Thursday and more information about these will be available on the website when they are finalised.

Registration for the Cartagena conference opened on 19th April for members and opens on 1st May for non-members. Book early to take advantage of the "early bird" rates.

I would like to thank my colleagues on the IFEAT Cartagena Committee for their great support assisting me to organise this exciting Conference, as well as the Local Organising Committee; Aldemar Castaño, Germán Ronderos and Andres Tolosa. A big thanks also to the Events & Co team and to our IFEAT team: Louise, Ronit, Sarah & Tina.

Bienvenidos a Cartagena!"

**Raúl Amigo**  
**Chairman, IFEAT 2018 Cartagena**  
**Conference Committee.**

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# MY FAVOURITE ROSE BY DOMINIQUE ROQUES

There is no clear reason why Rosa damascena, the Queen of flowers in Perfumery, bears the origin of Damascus in its name but it likely traces back to the Crusades era with fighters and merchants smelling and trading rose seedlings and primitive oils in the largest city of the Middle East, before they carried it on the east and westward bound roads.

*“Until the 18th century, rose was used and praised in the form of “rose-water.”*

This journey takes us to the plateau of Taëf in Saudi Arabia, an amazing site almost 2,000 m above sea level where the Royal family claims to be distilling the most precious rose oil in the world.

And it's a long way, reaching almost the Atlantic Ocean in southern Morocco, in the valleys of the rivers Dadès and M'Goun where, out of nowhere, kilometres of rose hedges circle small fields of wheat or vegetables in the

majestic beauty of the decaying ksars, those clay castles slowly melting down with time.

But it is around the 17th century that Rosa damascena found a home for good in what was then the Edirne province, in the location the Sultan's gardeners recommended as the most favourable for growing the fragrant rose. This was to become what is today the Valley of Roses in Bulgaria, centred on the town of Kazanlak.

What we do know is that Rosa damascena originates from Persia and more precisely from the province of Shiraz where, still today, there are hills where roses grow wild and form amazing scenery when they start blooming in April or May.

Of Persian origin like so many familiar trees - like cypress or apricot - our rose has travelled. To far and strange places...

Travelling east along the silk roads, it has reached China where it is established today in Yunnan and central China, but the delicate pink fragrant flower is also largely spread in Iran and has left traces in Kyrgyzstan and Pakistan.

And of course, it has settled long ago in India where it became as important as sandalwood for the Attars of the city of Kannauj, meeting point of three empires in current Uttar Pradesh.

Probably much later on, Rosa damascena moved south and west where it was to meet fame and glory with the Ottoman empire gardeners.



ROSE PICKERS Shipka, Bulgaria

Until the 18th century, rose was used and praised in the form of “rose-water”, widely used in all Islamic cultures, as it is today still strikingly used in Iran, Turkey or Morocco.

Then the Bulgarians really “invented” the distillation of the flower and the recovery of the oil and organised its trade. Rose oil became a symbol and a most important ingredient of modern perfumery was born. Bulgarians are still very proud today of this three century glorious journey, even if they now have to share with Turkey what used to be a monopoly.

It is simply wonderful to walk the rose fields of the valley in the early morning from Karlovo to Tarnichene or Zimnitsa. The fields are fragrant with the breeze, flowers starting to “distillate” in the sun, about to be picked. The smell is both delicate and enrapturing.

Follow the horse carts loaded with 15 kg pink bags into the distilleries where the smell of distillation goes straight to your brain.

One million hand-picked flowers for a litre of precious oil. Watch the distillate coming out of the copper or steel vessels and the decanting oil floating on top of the water with its deep golden colour with shades of green.

And take the time to visit the church of Shipka at the heart of the Valley of Roses. A celebration of the 1878 victory over the Ottomans, the church with its golden domes rising from the surrounding forest overlooks the country where the last battle for independence took place.

In the valley below, rose fields were planted 20 years ago and I remember walking there one morning and listening to

the enchanting song of the birds getting stronger as the sun was rising.

Asking the man who planted the field about the birds, he said to me: “This is not birds singing, this is the soul of the fallen soldiers singing for their brides.”

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## DR JONATHAN M BONELLO JOINS THE IFEAT TEAM

Jonathan joined the IFEAT team as a Consultant in January 2018 in the role of Scientific Coordinator. He is an accomplished professional with over 15 years' experience in the flavour and fragrance industry having held various senior management roles in strategic sourcing of raw materials (synthetic and natural aroma chemicals, intermediates and essential oils), supply chain and the implementation of modern procurement systems and processes at both Firmenich and Givaudan. Within these roles he actively contributed to projects linked to sustainability, ethical sourcing, REACH and other evolving regulatory standards. More recently Jonathan held the position of Head of Global Innovation Procurement at Givaudan, driving cross-functional strategies and initiatives to build best-in-class manufacturing and supply solutions for natural and synthetic flavour and fragrance ingredients, integrating technology platforms, open innovation programmes and strategic alliances and partnerships. In September 2017, he founded a freelance consultancy company based in Geneva, Switzerland that specialises in the area of natural products and ingredients as well as novel technologies like bio-transformations.

Jonathan has received several awards in recognition of his academic merit and achievements, completing his education with a PhD in physical chemistry from Cambridge University in 2001. He is the author of several publications in peer reviewed journals and a Member of the Royal Society of Chemistry and the American Chemical Society.

As Scientific Coordinator, Jonathan will report to, and work closely with, the Chair and Members of the IFEAT Scientific Committee, in discerning and managing the best approach to issues and opportunities affecting the production and use of essential oils and related materials. Other responsibilities will include the set-up and management of specific scientific projects, information as well as education letters and other activities such as addressing concerns related to new regulatory and socio-economic challenges facing the industry. Finally, Jonathan will support IFEAT in enhancing its strong relationships with sister organisations under the direction of the Scientific and Executive Committees.

A Maltese and Swiss dual national fluent in several languages, Jonathan enjoys reading, theatre, music and historical and cultural travel. He is also keen on running, swimming and hiking.

# CARTAGENA

## CONFERENCE PROGRAMME

The full conference programme is being finalised and will soon be updated on the Cartagena website. This year we have papers covering citrus, including economic changes in the lemon industry in Argentina, as well as the challenges within the industry with a focus on citrus greening.

There will be an overview of the F&F and essential oils industry in Colombia and the broader Latin American region. Juan Elizalde will take us on a journey through the culinary senses of South America whilst Luis Alberto Asturias will look at production of natural essential oils in Guatemala, El Salvador and Honduras.

Further sessions will look at the opportunities that exist in Colombia and Latin America for essential oil production. Robin Van Loon will discuss the opportunities that aromatic essential

oils provide as a driver for rainforest conservation and regeneration and Iguatemi Costa will show how Natura is seizing the opportunities to produce new essential oils from the forest. Patricia Shimojo will look at the fragrance market in Brazil.

Regulatory landscapes will also be examined with Richard Pisano Jr showing the history of flavour safety evaluation. His lecture will be an introduction to the 90-minute workshop which he will run later in the programme. The workshop will begin with an understanding of the global process for flavour ingredient safety evaluation, including a very entertaining history lesson going back to 1958. Participants will see how the GRAS process in the US morphed into the JECFA process and samples will be looked at as well as slides of essential oil production. At the conclusion, each

attendee will be able to present the same lecture and it is hoped they will return to their companies and train associates to do just that.

There will be the usual business session with the AGM, a round-up of the education programmes at Plymouth and Reading Universities, presentations on next year's Conference and Study Tour destinations as well as best student medal presentations.

A number of panel discussions are being organised and, once finalised, information about these will be added to the programme on the Cartagena website.

**We encourage you to keep some space in your busy diaries to attend some of these very interesting plenary sessions.**

## NEW WEBSITE

### FOR THE CARTAGENA CONFERENCE

This year, we have built a new website specifically for the IFEAT 2018 Cartagena Conference, making registration even easier. A link to the new website is provided on [www.ifeat.org](http://www.ifeat.org) which takes you to an online shop where you can buy everything available at the Conference. As well as being able to

register as a delegate, you can book an exhibition booth or meeting room and buy sponsorship or advertising from the large number of packages on offer this year. You can also book your hotel room direct via links on the website. Members who log in can take advantage of special discounted rates.



### CALL FOR PAPERS

We had a very good response to the Call for Papers this year and, as a result, the speaker programme for Cartagena is almost finalised. A big thank you to all who submitted a paper for consideration. We had some very interesting submissions!

Due to this success, we will be issuing a Call for Papers again for next year's conference and this will be announced at the Cartagena Conference. If you would like to be considered to present a paper at any of our forthcoming conferences, please email an abstract (approx. 200 words) a head and shoulders photograph (in high resolution) along with a brief biography to Tina Carne, (IFEAT'S Conference Programme Coordinator and IFEATWORLD Editor) to [tina.carne@ifeat.org](mailto:tina.carne@ifeat.org)

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• Rose geranium oil	• Rose Geranium Floral water
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• Roman Chamomile oil	• Roman chamomile Floral water
• Milfoil oil	• Milfoil Floral water
• St. John's worth oil	• St. John's Floral water
• Helichrysum oil	• Helichrysum Floral water
• Lovage oil	• Lovage Floral water
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### CONFIRMED SPEAKERS TO DATE:



**RICHARD C PISANO JR**  
President, Citrus and Allied Essences Ltd



**DR JUAN ELIZALDE**  
R&D Manager, Cramer



**ROBIN VAN LOON**  
Founder & Executive Director, Camino Verde



**PATRICIA SHIMOJO**  
Marketing Professional, Vollmens Fragrances Ltda



**IGUATEMI COSTA**  
Senior Scientific Manager, Natura



**LUIS ASTURIAS**  
Founder partner of Aromas Naturales, S.A.

## SOCIO-ECONOMIC IMPACT STUDY OF THE NATURALS

# ROSE

THIS REPORT IS PART OF A SERIES OF REPORTS BEING PRODUCED BY THE IFEAT SOCIO-ECONOMIC SUB-COMMITTEE ON THE IMPORTANCE OF SPECIFIC NATURALS TO THE LIVELIHOODS OF THOSE INVOLVED IN THEIR PRODUCTION.



### INTRODUCTION

There are four major species of rose plants which are cultivated for industrial applications:

*Rosa Damascena* Miller • *Rosa Centifolia* •  
the lesser white coloured *Rosa Alba* • *Rose Rugosa*.

Today, we can locate production in Iran, Afghanistan, China, Bulgaria, Turkey, Morocco and India. In Morocco, *Centifolia* is the variety that is mainly cultivated, while in China the *Rugosa* variety yields a very different quality than the more significant *damascena* oil upon which this report will focus.

In essence, this report will impart no new knowledge about the various productions around the world but will compile and summarise the excellent work by Peter Greenhalgh, Hasan Ali Kinaci, Liat Murad Barbut, F. H. Giryel, M. C. Omerci Kartin, Juliana Ognyanova and Primrose Wilson. Others will also be noted in the bibliography.

The figures on each of these regions are at best tenuous approximations. The two most significant regions for *Rosa damascena* continue in their historical centres: Turkey, primarily in the region surrounding the city of Isparta in the southwest part of the country, and the Valley of Roses centred around the Stara Zagora and the Plovdiv areas of Bulgaria. In both regions we have the Ottomans (who controlled these regions until Bulgaria's independence in March of 1878) to thank for the impetus for planting and production.

### TURKEY

Although roses, per se, and rose oil have for centuries figured prominently in Anatolian culture, the first commercial rose oil distillery plant was commissioned only in 1934/1935. "Rose oil production is a really tough and labour-intensive activity

carried out by family farms without high-income expectation. Although because of all these challenges, rose oil production still exists because it is a traditional local product and a part of cultural heritage, and provides a certain income to its producers," Givag and Kant clearly state in their 2010 report<sup>1</sup>. At that time, there were some 10,000 families involved in the production of ca. 1,400 kg of oil. Most rose flower production comes from smallish family plots of less than a hectare which supply numerous distillation facilities<sup>2</sup>. One would say that in the past eight years the production has increased in conjunction with demand and significantly higher prices.

The six major distillers who produce +/- 65% of Turkey's oil are Sebat United, Gulbirluk, Robertet, IFF, Ercetin and Biolandes. Between eight and ten other companies comprise the balance. Each year some 7,000-8,000 MT of roses are converted to oil (1,400 kg) and rose concrete, and subsequently absolute (6,000 kg and 1,000 kg respectively in 2013)<sup>3</sup>. Based on 2017 numbers one can extrapolate the value of this business to be approximately:

1,400 kg oil @ \$11,000.00 kg	=	\$15,400,000
10,000 kg concrete @ \$1,364.00 kg	=	\$13,640,000
5,000 kg absolute @ \$322.00 kg	=	\$16,125,000
		Total: \$45,165,000

This is supporting 10,000 families, that is, +/- 45,000-50,000 people plus more than 15 factories and countless exporters<sup>4</sup>.

### BULGARIA

Similarly to Turkey, rose growing dates back to the Ottomans who built upon an existing culture of over 350 years; it can be assumed that the rose plants were brought to Europe by returning Crusaders from Persia. With the collapse of the

communist system in +/- 1992 the government centralised *Bulgarska Rosa* organisation splintered into numerous privately held companies. There is some concern that the quality/yields may have deteriorated since this time; the state-run organisations closely controlled the nursery feed-stock and all aspects of production which resulted in a consistent quality from all of the growing regions. There is adequate evidence suggesting that this consistency has been compromised. That there has been the recent introduction of *Rose Centifolia* into Bulgaria, corroborates this disturbing fact.

Although there is a trend to larger rose plantations by several of the more significant distillers, more than 7,000 families in the mountainous and semi-mountainous areas - most of them coming from minority population groups - earn their income from essential oil plant cultivation. However, there has been an ever-increasing shortage of labour during the harvesting period, in part due to migration. Estimates are that there are more than 12,000 people who work in the rose industry year-round, while during harvest time in May to mid-June, weather depending, these numbers swell to some 40,000 pickers, harvesting around 3,500 to 4,000 hectares of rose plantations<sup>5</sup>. Since Bulgaria's entrance into the EU in 2007, new wage structures have put considerable stress on production costs. The availability of low-cost Romany labour cannot be overstated in mitigating more dramatic future price increases.

Using very loose approximations for 2017, we would guesstimate production to have been based upon a harvest of 11,000/12,000 MT of flowers:

+/- 2,400 kg oil @ \$11,000 kg	=	\$26,400,000
+/- 2,000 kg concrete @ \$1,600 kg	=	\$3,200,000
200 kg absolute @ \$3,000 kg	=	\$600,000
		Total: \$30,200,000

### PRODUCTION IN OTHER COUNTRIES

Historically, Iran may be one of the first producers of rose oil, though rose water is their signature product. This precious rose water, so culturally important to this country, was first produced by the Persian physician, Avicenna, in the 10th century. Damask Rose is commonly called the Flower of the Prophet Mohammed figuring prominently in holy as well as medicinal contexts.

It is reported that some 13,000-15,000 hectares are tended by some 500 farmers (this number seems too few perhaps); the numbers are not available as to how many people are involved with the actual harvest and production. As in Bulgaria and Turkey, these farms are generally small land holdings centred around the major producing areas of Kashan, Keman, Shirz and Kerminshah. The production of oil may be only 200 kg annually but the production of rose water is massive, +/- 75/85 m litres<sup>6</sup>. Significant inflation resulting from economic sanctions has already affected price and production, though most of their crop is consumed internally rather than exported.

Morocco is an important producer of predominantly *Rose Centifolia*. Annual production is approximately 2,000 MT of flowers employing 6,000 small farmers. In 2017 rose petal prices were +/- US\$ 1.80 kg with the women pickers being paid \$0.40 per kg for their labour<sup>7</sup>. Their major production is of concrete, rather than oil.

Rose cultivation in China dates to the 13th century with Mongolians of the Yuan Dynasty and then French missionaries in the 18th century. Production today is primarily in the higher altitudes of Yunnan Province. It is perhaps, in the past 12-15 years that commercialisation of their production has been organised. Rose oil and important quantities of rose water are produced for the cosmetic industry. Production in 2017 has been estimated at +/- 700-800 kg of *Centifolia* oil<sup>8</sup>.

The IFEAT Study Tour in 2014 visited the Yunnan Heng Feng Rose Perfumery Company which has been mainly working with the Rugosa variety; however, in the past five years there have been plantings of Rosa Rugosa with promises of increases to come. The oil which we have seen from China does not yet compare favourably with Bulgarian or Turkish oil. Give them time. Figures on people involved and costs are not available.

India also produces rose products. It has been suggested that rose production dates to the 16th century during the Mughal Empire. Today ca 2,500-3,000 hectares of Rosa damascena are under cultivation from which +/- 200 kg of oil and larger quantities of rose water are produced. The oil compares favourably in composition to Bulgarian oil<sup>9</sup>.



The most interesting new production is happening in Afghanistan since about 2010 when German economic and a German NGO, German Agro Action interests, and U.S. aid programmes began funding the project. The aim was to employ similar farming techniques on plants to replace the production of poppies/heroin.

There are perhaps as much as 3,000 hectares planted; some certainly with materials supplied from Bulgaria. The equipment is alleged to have been supplied by Turkish producers for two or three distillation facilities. As much as 100-120 kg of oil is likely finding its way to Europe<sup>10</sup>. Dated information suggests that more than 400 farmers are involved in the dangerous area of eastern Afghanistan.

Rose oil, rose concrete/absolute and rose water are used in a wide variety of consumer products. Cosmetics, perfumes, food flavouring, religious incantations and aromatherapy are a few using this "Queen of Oils". Many thousands are involved in its manufacture while millions enjoy its splendour. And, it is of significant economic importance to these producing areas and their populations.

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- <sup>3</sup> Barbut, Liat Murat. (2014, September). *An Overview of the Essential Oils Industry in Turkey*. Paper presented at the IFEAT International Conference, Rome, Italy. *Conference Proceedings*, pp. 147-155.
- <sup>4</sup> Ibrahim Isidan (personal communication, May 10, 2017)
- <sup>5</sup> Peter Greenhalgh (personal communication, August 30, 2017)
- <sup>6</sup> Primrose Wilson (personal communication, April 28, 2017)
- <sup>7</sup> Jalal Charaf (personal communication, April 27, 2017)
- <sup>8</sup> Peter Greenhalgh (personal communication, June 26, 2017)
- <sup>9</sup> Shawl, A.S. and Robert Adams (2009, July) *Rose Oil in Kashmiri India*. *Perfumer & Flavorist*, 34, 22-25.
- <sup>10</sup> Dominique Roques (personal communication, May 8, 2017)

Country	Rose Variety	Area Devoted to Production	Essential Oil Produced (Metric Tons)	Work Force	2017 Petal Price / Oil Price per kg	Concrete Produced (Metric Tons)	Rose Water Produced (Metric Tons)
Bulgaria	Damascena	4000 ha	1.5-2.4 MT	35000 Pickers	2.20Лв <sup>3</sup> / \$11000	c. 2 MT	300 MT
Turkey	Damascena	2000 ha	1.4 MT <sup>1</sup>	10000 Families	7.50Kr /	10 MT @ \$1364	> 80 MT
Morocco	Centifolia	-	2000 MT Petals	6000 Farmers	1.80 MAD <sup>4</sup> /	6-6.5 MT	-
Iran	Damascena	13000-15000 ha	.2 MT <sup>2</sup>	500 Farmers	-	.075-.085 MT	-
China	Rugosa	-	.7-.8 MT	-	/ \$8750	-	-
China	Damascena	-	-	-	/ \$10000	-	-
Afghanistan	Damascena	3000 ha	.1-.15 MT	400 Farmers	-	-	-
India	-	2500-3000 ha	.2 MT	-	-	-	Significant

1 - Based on 7000-8000 metric tons of petals

2 - Based on 40-45 metric tons of petals

3 - Bulgarian Lev

4 - Moroccan Dirham

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## NEW IFEAT MEMBERS

Below is a list of new IFEAT members who had joined by 1st March 2018

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