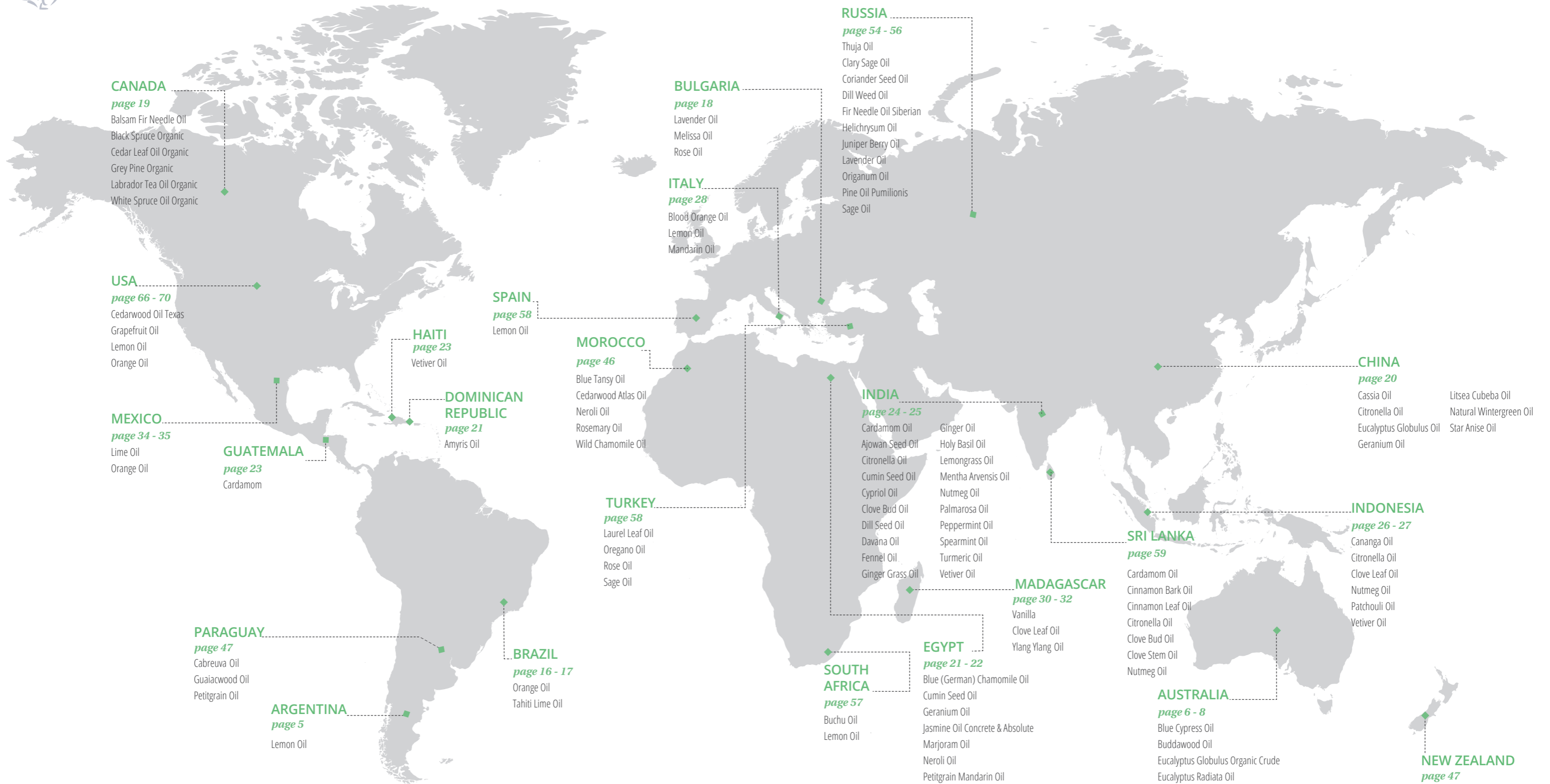


ESSENTIAL OILS
MARKET REPORT
WINTER 2020

WINTER WONDERLAND!



Ultra International B.V.
Essential Oils, Ingredients, F & F



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The leaves have fallen, and the branches lie bare and forlorn, much like the year that was. Crisp mornings and early dusk bring in a nip in the air, and the “new normal” feels normal. Little did we know that most of this time would be spent in the comfortable yet claustrophobic confines of our homes and screens. Thankfully, the wheels seem to be turning with the hope that the worst is over.

2020 is a year of firsts of all sorts. The first time we hesitated before sharing a hug or high-five. The first time we realised that there is no end to learning. The first time in many years that work from home commanded a never-seen-before respect as fulltime on-site roles. The first time after decades, we survived without the frills. Now, as Christmas comes knocking, albeit subdued like all other festivals this year, I find solace in the journey we have traversed together. We have manoeuvre tricky paths and overcome challenges, and pray that Christmas and New Year are the harbingers of hope and good tidings for all.

The mask has become an intrinsic and rather indispensable part of life. Though it is still mandatory to keep the mask on, it is critical that the blindfold from our eyes is removed. The COVID-19 pandemic has come as a clarion call to how much we have taken Mother Nature for granted. Our heightened awareness of eating and living healthy and constant action can do much to ease the burden on the land. Sustainable farming practices and organic living are now more significant than ever. It is imperative to make sweeping changes and I firmly believe that together they are well within our means. With great pleasure I share that Ultra has now taken on the mandate to undertake concerted efforts for organic farming.

The holiday mood is set to warm homes, but how can it be complete without hearty meals? We bring you insights into the use of essential oils in cooking, the benefits and precautions.

Lastly, but not least, we bring you up to date on the latest from the forefront, that is all the action from the fields.

Season’s greetings and Happy New Year. Wishing you all scents-sational celebrations ahead, do maintain prescribed norms, and stay safe.

Priyamvada Sanganeria
Director, Ultra International BV



LEMON OIL

Citrus limon (L.) **Burm. F.** 🇦🇷 Argentina

2018/19 was a milestone year with Argentina producing a record-breaking bumper lemon crop of 1.80 million MT, the highest for over 50 years. The current 2019/20 crop, which started in March, is 10% lower at 1.6 million MT. Initial prediction figures for the 2020/21 crop suggest it could be as low as 1.0 million MT, a level last seen over a decade ago. Fruit earmarked for processing in the current year is estimated to be 1.12 million MT, substantially lower than previous years.

Stocks of lemon oil are limited. Some carryover inventory from last year are available but these do not meet the agricultural residue specifications for chlorpyrifos. Prices tend to be on the higher side depending on the quality of the oil. Considering the crop forecast, prices seem to be firming out and expected to continue for some time. The upward pressure on prices has been limited by the impact of COVID-19 on beverage consumption, as the majority of lemon oil is used in beverages. While beverage supermarket sales have increased this has been counterbalanced by a substantial fall in beverage sales in the food service sector and other distribution outlets. Assuming a degree of normality returns along with the vaccines in 2021 then beverage demand should also show some recovery.

Ground realities have turned out to be different from what was envisaged. The winter months, that is the early part of 2020, saw an unsympathetic frost and above normal temperatures in October and November. Rainfall too was inadequate leading to arid conditions which continue even now. Consequently, the upcoming 2020/21 crop estimate is only 1.0 million MT. The volumes of fruit channelised for processing will also shrink to about 660,000 MT. With the outbreak of the COVID-19 pandemic, transportation lead times have also become longer.

🇺🇸 USD 21.00 /kilo

ARGENTINA: ESTIMATED LEMON PRODUCTION AND PROCESSING 2017/18 TO 2020/21 ('000 MT)

	2017/18	2018/19	2019/20	2020/21
Production	1,770	1,780	1,600	1,000
Exports	273	240	320	
Fresh Domestic Consumption	150	150	160	
For Processing	1,348	1,410	1,120	660
Total Distribution	1,771	1,800	1,600	



BLUE CYPRESS OIL

Callitris intratropica 🌍 Australia

Producers have been distilling lower volumes to cater for the subdued demand for this oil. This is due to the decrease in aromatherapy activities in the wake of the COVID-19 pandemic. Consequently, there are limited quantities of oil available in the market

📈 AUD 485.00 /kilo

BUDDAWOOD OIL

Eremophila mitchellii 🌍 Australia

It is a similar case as sandalwood for buddawood oil. Lack of demand has resulted in marginally more available stock.

📈 AUD 495.00 /kilo

EUCALYPTUS GLOBULUS ORGANIC CRUDE

Eucalyptus globulus 🇦🇺 Australia

Producers are going to produce 5 MT of oil which needs to be produced by the middle of 2021.

🏠 AUD 38.00 /kilo

LEMON MYRTLE OIL

Backhousia citriodora 🇦🇺 Australia

The weather is conducive for lemon myrtle to thrive. However, it is the dried leaf that fetches better returns and so most farmers prefer trading in dried myrtle leaves. This poses an inherent problem for distillers to procure dried leaves for distillation into oil.

🏠 AUD 480.00 /kilo

EUCALYPTUS RADIATA OIL

Eucalyptus radiata 🇦🇺 Australia

The COVID-19 pandemic has proved to be a stimulus for the sector. Globally, the demand for disinfectants, household cleaners, and sanitisers has broken all moulds. This has provided an impetus to the essential oil industry since eucalyptus is a known anti-microbial agent. Production remains stable.

🏠 AUD 82.00 /kilo

SANDALWOOD OIL

Santalum spicatum 🇦🇺 Australia

With travel and the fine fragrances industry hardest hit by COVID-19 the demand for this oil has plunged.

🏠 USD 1175.00 /kilo

TEA TREE OIL

Melaleuca alternifolia 🇦🇺 Australia

Climatic aberrations have impacted the flourishing tea tree oil production this year. Naturally, crop and production have been affected. Harvesting was delayed from June to July-August, and the crop figures are not encouraging. Australia has been facing extreme high temperatures accompanied by drought-like conditions following some bushfires. Winter directly gave way to summer without any spring. As a result, essential oil yields are forecast to be on the lower side.

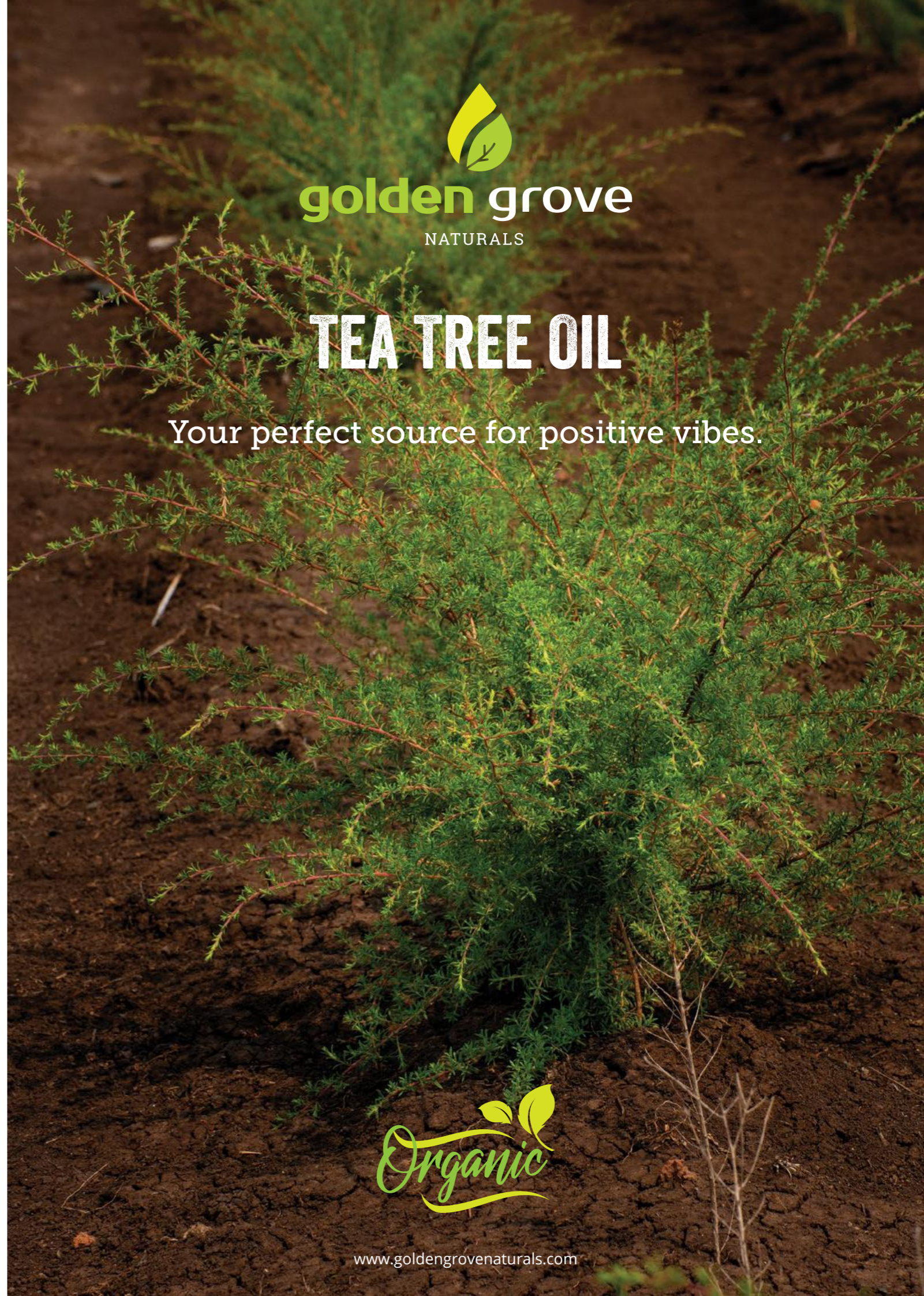
🏠 AUD 54.00 /kilo

TEA TREE ORGANIC

Melaleuca alternifolia 🇦🇺 Australia

There have been conscious efforts to add more acreage to production of this variant. The newest farm is operational and is offering product for upcoming shipments in February 2021.

🏠 AUD 110.00 /kilo




golden grove
 NATURALS

TEA TREE OIL

Your perfect source for positive vibes.

Organic



THE ULTRA GROUP'S UNFLINCHING ORGANIC QUEST IN HARMONY WITH NATURE

Purity and responsibility are the cornerstones on which our organics range is built. Free of any chemical ailments, organic essential oils are safest for consumption. Our production processes are also in harmony with nature. Adopting sustainable practices, we deliver a product that can be consumed guilt-free.

A conscience to protect the environment, keep toxic chemicals at bay, and retain the quality of soil gave birth to the Ultra Organics oils range. With an eye on long-term sustainability, these oils are produced by reducing the usage of synthetic practices. Organically produced herbs and plants, go into the making of these essential oils.

Organic essential oils outscore non-organics on a few valuable parameters – primarily safety, appeal, and therapeutic value. Organics are prepared from plants and herbs, which are cultivated using stringent protocols. The use of harmful pesticides and other chemicals is prohibited at the cultivation stage. This significantly eliminates the chances of chemical residue in the oils produced. They are more likely to be safer and healthier.

Always looking to reinvent and stay ahead of market trends – the Ultra Group already has many organic centres across the globe. Ultra Group companies in Holland, UK, USA and India are certified organic and pledge to procure and distribute safe, organic products. Our Golden Grove Naturals farms in Australia are certified to grow organic products, thus enabling us to learn the latest scientific information covering various topics such as pesticides, yields, benefits of organic farming and nutritional qualities of organic products. World renowned authorities have undertaken extensive testing protocols to certify products at Ultra Group. Our certifications include Australian Certified Organic, Soil Association Organic, Skal Bio Controle, TQ Cert, and Oregon Tilth.



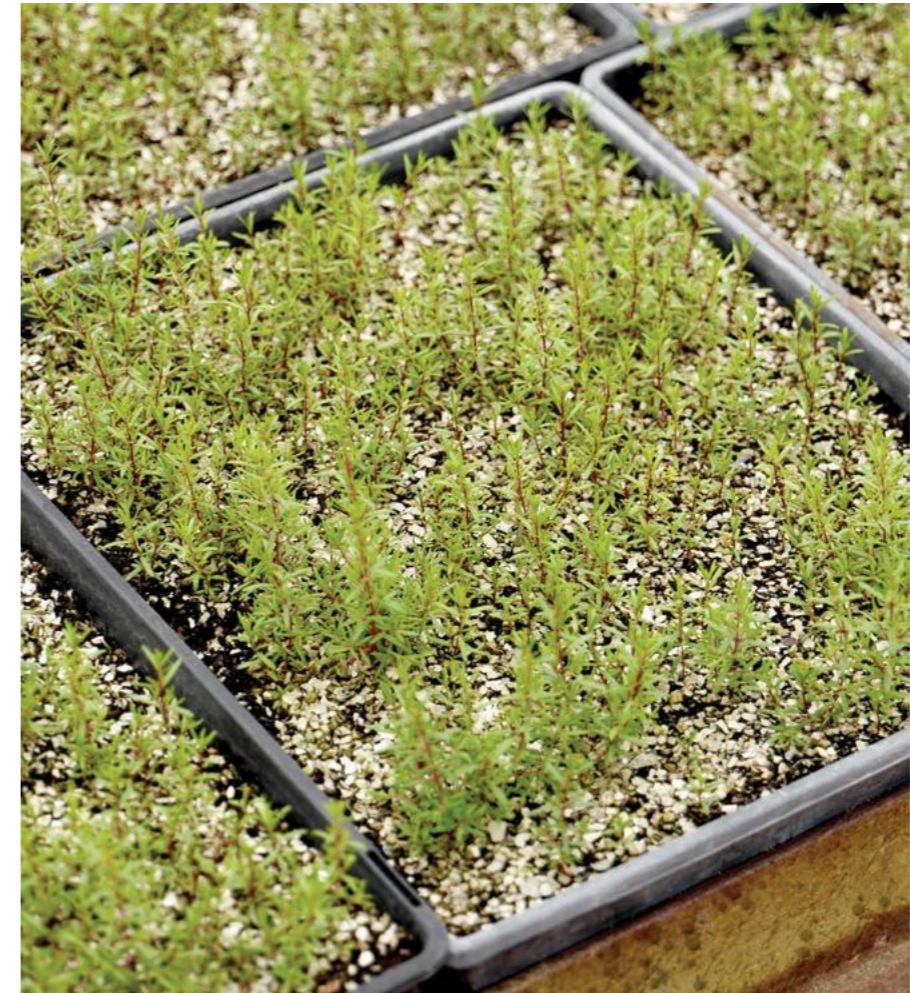
WHY ORGANIC?

Organics are a growing market, and they form a trend that is expected to witness a further upward curve. Various factors add to their appeal:

- Their purity and composition increase therapeutic value. The presence of high volume desirable active constituents gives them better healing properties.
- Their aroma is distinguishable and more potent than non-organic products.
- Increase in customer awareness has also led to a spurt in demand. These oils are used extensively in cosmetics, fragrances, air fresheners and sprays, therapies like aromatherapy, and even as a flavour in food. Demand for concentrated organics to be used in air diffusers is also on the rise.
- Apart from the personal benefits, organic essential oils are compassionate towards nature. That is a big draw in the global climate-change and environmental scenario.

SHIFT IN THE CONSUMER MINDSET

The constantly growing list of benefits associated with organic essential oils has made them a consumer favourite. Buying these products is considered a responsible choice, since they are safer for personal consumption and gracious towards the environment. Organics also pass the litmus test when it comes to stringent regulatory protocols put in place for environment preservation.



HUB OF ORGANIC FARMING

The Ultra Group is prepared to meet the growing demand for organics. These oils are extensively produced in facilities across the globe.

The entire production cycle from organic farming to oil processing in Australia is performed under the watchful eyes of the team at Golden Grove Naturals.

There are only 20 registered organic tea tree farms in Australia currently, and Golden Grove Naturals (GGN) is one of them.

The GGN farms in Australia are a premium farming and production facility. They are certified by Australian Certified Organic in various categories like handler, processor and wholesaler for organics used in food and cosmetics.

Extensively invested in organic farming, GGN's approach is calibrated to not only maintain but also to increase the fertility of soil. The entire process is designed to be harmonious with nature, from foliar sprays being fitted with nutritional and bio stimulants, to organic and renewable materials usage for compost, to the incorporation of predatory insects, control pests, and constant monitoring of soil mineral composition. All the activities are aligned to ensure sustainable practices are followed to produce organic essential oils.



ON THE ROAD TO SUSTAINABILITY

The road to a cleaner, greener, and sustainable tomorrow requires long term commitment and a reimagining of the production and distribution cycle today. The Ultra Group has embarked on the path of sustainability with its investment in organics. The idea is to implement work systems that stimulate local economies, safeguard the health of the environment, and protect jobs. Maintaining the ideal balance between sustainability and growth is the cornerstone of the principles at the Ultra Group. None of the practices compromise on productive growth conditions.

The first part of our drive requires on-ground change, starting with farmers, who are at the foundation of the pyramid. Growth of local economies by hiring local and increasing employment opportunities is another step towards sustainability.

The next order of business is reduction of carbon footprint. Practices like agro-forestry, reducing negative impact on biodiversity, enhancing carbon sequestration, organic certification, and soil and water conservation are all followed for a green and sustainable future. Additionally, it is ensured that all partners source and grow certified organic herbs and plants. The health of the soil is meticulously evaluated. They are taught to adopt crop rotation and nourish the soil with natural fertilisers like compost. This process is beneficial for restoring soil vitality. Since fertilisers and pesticides are excluded from the process, the water streams remain chemical free. This is an extremely crucial factor, since wildlife suffers heavily from the chemical pollution of soil and water. The entire process saves energy and reduces carbon emissions. All these exercises lead to the ethical, consistent, and secure supply of high-quality product. The range of organics under the Ultra banner is chemical free and tested internally, as well as by external certifying agencies, to guarantee the purest and safest product.

There is a delicate balance between sustainability and the future of the essential oils industry. The biggest challenge is to sustainably produce an inherently unsustainable product. Customer awareness coupled with responsible business enterprises have diverted the essential oils industry towards a sustainable path. The Ultra Group is on a cross-country ride on that path, we are in it for the long haul; and our Ultra Organics essential oils range is proof of the same.



ORANGE OIL

Citrus sinensis 🌐 Brazil

The year 2020 is taking a heavy toll on the world and Brazil farmers are a worried lot. The most recent Fundecitrus forecast of Brazil's orange crop covering the Citrus Belt was made in September and predicted a figure of 286.7 million boxes of oranges of 40.8 kg each. This figure includes the key São Paulo and West-Southwest Minas Gerais citrus regions. It represents a drastic drop of 26% from the 2019-2020 crop, and the nadir of the last decade.

This year's total Brazilian orange production is pegged at 382.8 million boxes, compared with 472 million boxes for the previous crop – a fall of 19%. The decrease in crop size took place mainly in the Citrus Belt.

Several factors account for the substantial production decline including the alternate bearing phenomenon, where reduced availability of nutrients after a large crop leads to a reduction in crop size the following year. Climatic factors have been a key influence with drought conditions in March/April 2020 leading to reduced fruit size, while high temperatures in September/October affected setting of young fruit. There is even some concern that the crop starting in July 2021 will be affected by the drought conditions. There has been a significant reduction in the number of fruits per tree.

Rainfall deficit and a late second bloom of the previous orange crop are key factors behind this debacle. São Paulo, Brazil's most important orange region, faced arid, dry weather for several months. The phenomenon of alternate flowering in addition to the drought-like conditions and higher-than-normal temperatures resulted in additional stress on the young trees and hampered the setting of young fruit. There were considerably lower quantities of fruit per tree. Some amount of precipitation did provide relief but was not enough to offset the damage of the long spells of aridity. The result, a distressing effect on flowering. The late bloom in mid-June resulted in delayed harvest. The season began with satisfactory rainfall that was conducive to a healthy average fruit weight. Operations were in full swing by August, but much slower than last year. It is estimated that 97% of harvesting was completed for the early varieties Hamlin, Westin, and Rubi. Valencia Americana, Seleta, and Pineapple were 66% complete. The Pera Rio harvest was 13% complete while Valencia, Valencia Folha Murcha, and Natal had just begun with 3% and 2% respectively.

The delayed harvest and inadequate rains have affected fruit size, which is lighter than the projected weight. May and June were easy months with the rains hitting the growing areas. However, except for Itapetininga, Duartina, and Avaré, the rains have played truant thus affecting the fruit size and weight. The insufficient rains have forced most growers to resort to irrigation to tide over the water crisis. The areas that received copious rainfall could have improved on the weight of the fruit but this was offset by the larger volumes of fruit. Overall rainfall spanning the critical months from May to August was 14% lower than the usual climatological average recorded over the last few years. June witnessed returning rains that came as welcome relief but the accompanying winds caused considerable fruit drop of 17.3%.

The production of orange essential oil has been like all other sectors affected by the pandemic. Supply logistics and operations were impacted but distillation resumed in adherence to protocol. The rainy season is imminent and this will see a lull in production and lower volumes. Fruits allocated to processing are expected to reduce by at least 25% to 262 million boxes. The market is under pressure from the demand-supply aspect. While producers are struggling to meet escalating demand, supplies are rather limited. This has triggered the prices of orange oil, terpenes and d'limonene to rise.

An important factor that impacts the orange oil price is the demand and supply of orange terpenes and d-limonene, which have a variety of end uses e.g. resins, solvents, fracking and perfumes. The relationship is a complex one and the impact of COVID-19 has increased this complexity. COVID has led to an increased demand for detergents and cleaners which has increased the demand for terpenes and d-limonene, which in turn has put upward pressure on cold-pressed orange oil prices. Meanwhile, COVID has substantially reduced petroleum prices and petroleum derivatives which can be used as substitutes for d-limonene. Due to COVID-19 some estimate that overall total demand for orange oil in 2020 could be slightly down on the previous year, but the decline in production and the resultant tighter supplies would lead to upward price pressure. Added to this are concerns that the effects of the drought will stretch out to impact even the imminent July 2021 crop.

📈 USD 8.00 /kilo

BRAZIL: ESTIMATED ORANGE PRODUCTION AND PROCESSING 2017 TO 2022 (MILLION 40.8 KG BOXES)

USA Marketing Year	2017/18	2018/19	2019/20
Brazil Marketing Year	2018/19	2019/20	2020/21
Total Production	391	472	382.8
For Processing	269	349	262

TAHITI LIME OIL

Citrus latifolia 🌐 Brazil

November usually sees low availability of Tahiti limes. Sporadic rains in October are beneficial for the healthy development of the fruit. Availability remains low in early November before gradually increasing again. This year's production is limited, lower than initial forecasts. September and early October witnessed an escalation of prices. Consequently, many growers harvested early. As a result, much of the fruit had not reached the ideal maturation since November would have been the ideal time for harvesting. Most of the crop is expected to cater to the domestic market and stay within its confines.

📈 Price on request



LAVENDER OIL

Lavandula angustifolia 🇧🇬 Bulgaria

In July restrictions in movement due to the COVID-19 crisis had mostly lifted. Thus, the production cycle of lavender oil was not disrupted, but oil production was higher than the quantity required. Due to overproduction of the oil the price has decreased. There is still demand, but the market situation is constantly changing worldwide. Prices seem to have flattened out currently.

🏠 EURO 55.00 /kilo

MELISSA OIL

Melissa officinalis 🇧🇬 Bulgaria

While COVID-19 did not disrupt production of the oil, it has led to a spurt in demand. North America has seen a massive increase in demand over the past six months. The supply is currently sufficient and should be able to meet the annual demand, which hovers around 2,500 kg/year, though rain in April-June 2021 will have a big role to play in the next supply cycle.

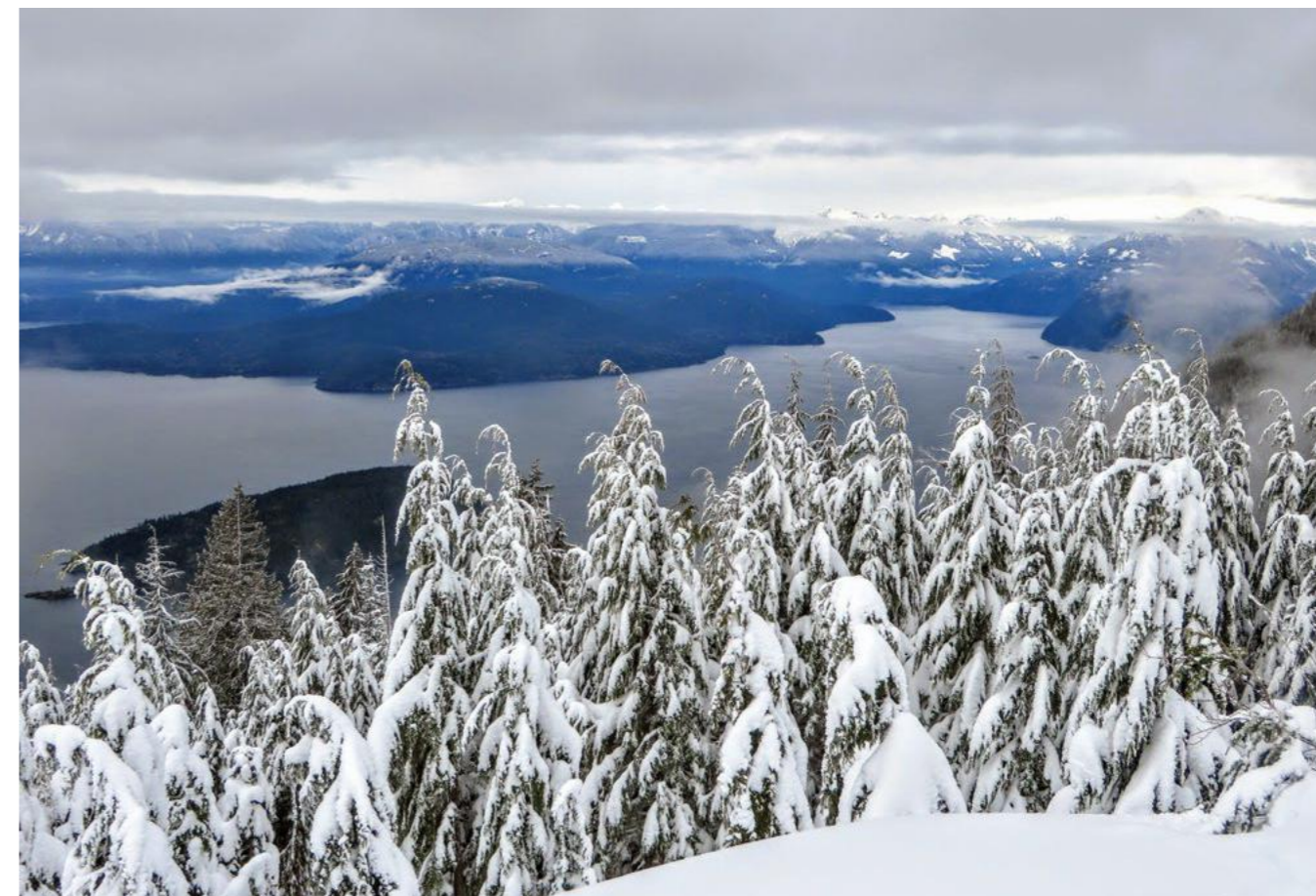
🏠 EURO 1095.00 /kilo

ROSE OIL

Rosa damascena 🇧🇬 Bulgaria

COVID-19 has had a massive impact on the industry. Demand from traditional markets has come down drastically. The low demand had a ripple effect and led to oversupply, reduction in price, and increase in stock. The industry will likely suffer from the repercussions of COVID-19 for a few years. The harvest cycle was scheduled in May, and the production process is labour intensive. Thus, the impact of COVID-19 was felt there too. The export price of the oil was extremely low this year. This was primarily due to the low price of rose petals, which also lowered the production costs.

🏠 EURO 6500.00 /kilo



With the onset of the pandemic and travel restrictions the Canadian essential oil sector was largely disrupted due to the lack of seasonal workforce manpower from the USA and South America. Also, strict implementation of social distancing and minimal contact made it difficult.

BALSAM FIR NEEDLE OIL

Abies balsamea 🇨🇦 Canada

The needles of this evergreen fir yield pure essential oil from steam distillation. However, the existing stocks are almost exhausted.

🏠 USD 89.00 /kilo

GREY PINE ORGANIC

Pinus sabiniana 🇨🇦 Canada

100% pure and natural essential oil from this genus *Pinus banksiana* yields oil that is much in demand in the perfumery and aromatherapy sectors. Needles and twigs are steam distilled to extract this fresh-smelling essential oil.

🏠 Price on request

BLACK SPRUCE ORGANIC

Picea mariana 🇨🇦 Canada

This widespread Canadian conifer *Picea mariana* offers an invigorating oil. Quite common in the boreal forest, black spruce also thrives in acidic wetlands.

🏠 USD 106.00 /kilo

LABRADOR TEA OIL ORGANIC

Ledum groenlandicum 🇨🇦 Canada

A more than robust yield of essential oil this year resulted in healthy quantities of available stock in the market. As a result, there is excess stock leading to around 30% drop in prices.

🏠 Price on request

CEDAR LEAF OIL ORGANIC

Thuja occidentalis 🇨🇦 Canada

Cedar needles and twigs yield pure and 100% natural essential oil. However, prices are on the ascent due to limited stocks available in the market.

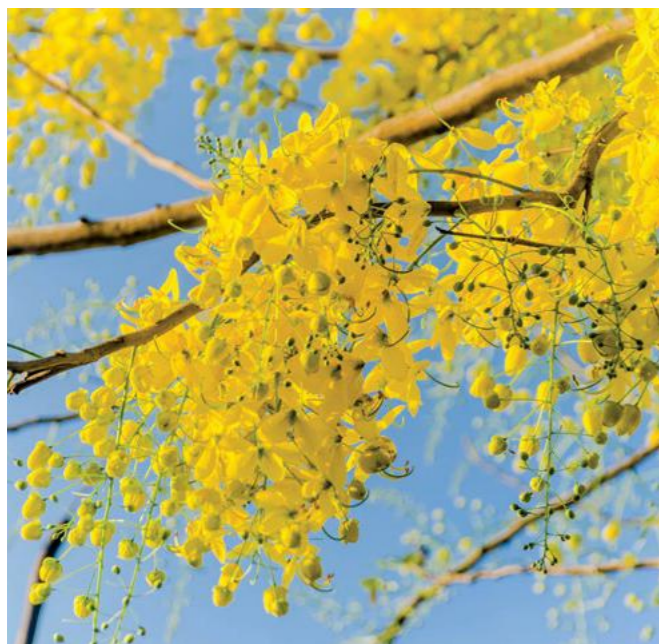
🏠 Price on request

WHITE SPRUCE OIL ORGANIC

Picea glauca (Moench) 🇨🇦 Canada

The *Picea glauca (Moench)* is like the others, steam distilled to obtain a full-bodied fragrant essential oil. It uplifts and is known for its positive effects on chronic fatigue and overwork.

🏠 Price on request



CASSIA OIL

Cinnamomum cassia 🌍 China

The output of cassia oil hasn't directly been affected by COVID-19 restrictions. Instead, the speculation surrounding raw materials related to increased demand of certain products has led to market fluctuations.

📈 USD 40.00 /kilo

EUCALYPTUS GLOBULUS OIL

Eucalyptus globulus 🌍 China

While the new season has begun, small volumes are being traded in the market. This is primarily due to the low price the oil is fetching in the market. Farmers and traders are unwilling to sell at current price levels. The oil being distilled by farmers is also limited due to the market trend. In comparison to previous years there is a vast price gap, though the situation has stabilised slightly in the past week.

📈 USD 18.00 /kilo

LITSEA CUBEBA OIL

Litsea cubeba 🌍 China

There is a massive demand for the oil in the market. This could lead to a price panic similar to last year. The price is already 5% higher compared to last month. It is advisable to stock the oil, since the goods could run out soon. The oil was last produced in August, and quantities weren't high. The new oil produced is with collectors instead of farmers.

📈 USD 32.00 /kilo

NATURAL WINTERGREEN OIL

Gaultheria procumbens 🌍 China

Prices continue to be low compared with previous years. This has discouraged the farmers from distilling and selling the oil. The production season has begun and will continue till December, though limited transactions are taking place in certain areas.

📈 Price on request



CITRONELLA OIL

Cymbopogon winterlanus 🌍 China

There is limited enthusiasm among farmers to distil the oil. This is because of the low, stable price of crude oil. The demand and supply cycle remains slow. The situation has been the same since summer. The new production season is about to commence.

📈 USD 18.00 /kilo

GERANIUM OIL

Pelargonium graveolens 🌍 China

There is a slight increase in the price of the oil even as market transactions shrink. With the crop season over, availability has become an issue.

📈 USD 150.00 /kilo

STAR ANISE OIL

Illicium verum 🌍 China

The oil is priced extremely high this year. The shortage of raw material has led to this spurt in price. The demand-supply gap made farmers sell directly without distilling. The supply chain will be unable to meet future demands once present stock is sold out.

📈 USD 26.00 /kilo



AMYRIS OIL

Amyris balsamifera 🌍 Dominican Republic

In August 2020 a new government took office in the Dominican Republic. It is expected to bring multiple policy changes, which could affect the production of amyris oil. Currently, it is status quo as per March, 2020, when the distillery was shut down by the government. This was due to the decline in wood collection permits by the environmental authorities. None of the distilleries in the Dominican Republic are operational, though a few vetiver distillers in Haiti are intermittently producing amyris oil. Even though the price is low, it hasn't crashed any further.

📈 Price on Request

The Egyptian pound saw some action during the outbreak of the COVID-19 pandemic. It moved up by an impressive 12% against the US dollar causing a general increase in prices. However, going against market calculations which predicted another meteoric 15% hike, the Egyptian currency lost about 3%. It is anticipated to stay stable at these current rates for the coming year 2021/22.

BLUE (GERMAN) CHAMOMILE OIL

(Matricaria recuita syn. Chamomila matricaria) 🌍 Egypt

In 2020 production was very small as carryover stocks were used to satisfy demand. Stocks have now been reduced and prices are predicted to increase.

📈 USD 720.00 /kilo



CUMIN SEED OIL

Cuminum cyminum L. 🌍 Egypt

Production of cumin seed has not been affected by COVID-19. The product is used predominantly in food flavouring and prices are predicted to remain relatively stable.

📈 Price on request





GERANIUM OIL

Pelargonium graveolens 🌍 Egypt

Geranium witnessed a spurt in demand in 2020. Production was almost uninterrupted and unhindered despite the sweeping COVID-19 virus. There were available volumes of oil and prices were steadfast. Industry watchers forecast that these prices will hold till the second quarter of next year with a slight variation between 5 to 10% in Q2 2021.

🏠 USD 91.00 /kilo

MARJORAM OIL

Origanum majorana 🌍 Egypt

2020 witnessed a dizzying high of marjoram prices. The reason behind this was the significantly decreased crop. Over the last 3 to 4 years, farmers have been dissatisfied with the returns on their investments in marjoram compared to other crops. Consequently, this year has seen a marked reluctance and decline in the crop size. This in turn is the cause of the sudden price rise of 40% in marjoram oil rates. The market is hoping that prices will even out over the coming months by May 2021.

🏠 USD 89.00 /kilo

PETITGRAIN MANDARIN OIL

Citrus reticulata 🌍 Egypt

Both demand and supply are in balance at the moment and COVID-19 appears to have had little effect. Previous overproduction had pushed down prices and it is expected that prices will remain low in 2021.

🏠 Price on request



JASMINE OIL CONCRETE & ABSOLUTE

Jasminum grandiflorum L. 🌍 Egypt

Although the demand for concrete and absolute is lower this year, a new demand for jasmine essential oil took place. This helped stabilise prices. If not for that, we would have seen a huge drop in prices. Due to the increase in production, prices went down last season. Expecting it to remain at this level till the new season in 2021.

🏠 USD 2825.00 /kilo

NEROLI OIL

Citrus aurantium 🌍 Egypt

The rich floral scent of neroli oil is used in perfumery and COVID-19 has led to a substantial decline in global demand. Egypt has sizeable plantations of neroli and production costs are lower than competing origins. One source has forecast a surplus of 5 MT in coming years which can only lead to very low prices for the foreseeable future.

🏠 USD 3600.00 /kilo

CARDAMOM

Elettaria cardamomum L. 🌍 Guatemala

Guatemala is the world's largest cardamom producer accounting for approximately 60% of global production. It is followed by India but climatic factors have seen a substantial fall in recent Indian output. It is estimated that Guatemala's annual production fluctuates around 30,000 MT and it is produced as a cash crop by 350,000 smallholder families on 63,000 hectares of land. Unlike India, domestic consumption is negligible and all cardamom production is exported predominantly as a dried spice. The Middle East dominates exports, where it is consumed mainly as an essential ingredient of *gahwa* coffee. Less than 5% of production is steam distilled to produce an essential oil. For several years until late 2018 the oil price remained relatively stable at around USD 200/kg. During late 2018 until recently, supply issues, particularly in India, led to three-fold increase in oil prices. The 2020/21 harvest began in October and thanks to favourable weather and higher yields a good crop is anticipated leading to a price decrease. However, the impact of COVID-19 and climatic factors could limit this downward price pressure.

🏠 Price on request

VETIVER OIL

Vetiveria zizanoides 🌍 Haiti

The demand for vetiver in the European market has fallen, and prices have plunged to half of what they used to be a few years ago. There has been a steady decline in demand leading dealers and distributors to tread cautiously. Many are buying and holding in order to get higher prices at a later stage. With the pandemic raging and distilleries halting operations, production is at a standstill. The industry has been reeling under the effects of a volatile political climate for the last year. The COVID-19 situation has added to the difficulties faced by the industry. An arbitrary currency manipulation by one of the leading banks of the country led to currency volatility. Exporters of vetiver oil, hitherto earning in dollars, found that they were in deficit. Consequently, many defaulted on debt repayments.

🏠 USD 250.00 /kilo





CARDAMOM OIL

Elettaria cardamomum L. 🇮🇳 India

In comparison to last year the prices have come down drastically. This makes it ideal to stock up in case of short or medium-term requirements. The last two years have witnessed a fall in cardamom production due to climate fluctuations. First the fields were affected by floods, and then long dry spells. This year the ongoing production cycle has been impacted by COVID-19. The restrictions imposed by government have affected the availability of migrant workers, as well as other logistical requirements. Marketing opportunities were also impacted due to the lockdown. With the easing of restrictions, production is slowly picking up.

📈 USD 335.00 /kilo

AJOWAN SEED OIL

Trachyspermum ammi L. 🇮🇳 India

Any fluctuations in demand can lead to an increase in the price of raw materials. Currently the price is stable in the market.

📈 USD 14.00 /kilo

CUMIN SEED OIL

Cuminum cyminum L. 🇮🇳 India

The last few weeks have witnessed low demand from domestic and foreign markets. The current volumes being traded are the lowest for the last few years. The price is expected to remain stable. As far as the new crop is concerned, the majority of the cultivation zones are experiencing normal to excess rainfall.

📈 USD 29.00 /kilo

CLOVE BUD OIL

Eugenia caryophyllata 🇮🇳 India

With low price prevailing in the market right now, it is advisable to stock up for the year. A good crop has resulted in sufficient supplies and a lowering of the price.

📈 USD 54.00 /kilo

DAVANA OIL

Artemisia pallens 🇮🇳 India

Davana is extremely sensitive to climate change. The next crop cycle is in February and predicting the output is not possible at this time. Currently, there is a shortage of high quality davanone material. Carryover stock was also limited, which has led to an increase in price. It is advisable to stock quantities required till next year. Crop sowing commenced in November. Presently the price continues to be stable.

📈 USD 545.00 /kilo

CITRONELLA OIL

Cymbopogon winterianus 🇮🇳 India

Until recently oil prices were at an all-time low. Slowly the demand is picking up and so is the price, though India isn't a major player in the market and produces small quantities of the oil.

📈 USD 18.00 /kilo

CYPRIOIL OIL

Cyperus scariosus 🇮🇳 India

Considering the small volumes of the crop, a slight increase in demand has led to a price surge. With the next crop cycle three months away, price is expected to stay at the prevailing level. Early monsoon and the lockdown both had a role to play in the poor availability last month. The market is witnessing an upward trend now.

📈 USD 365.00 /kilo

DILL SEED OIL

Anethum graveolens L. 🇮🇳 India

The price is stable currently. There is limited demand for raw materials in the market. With the new crop ready the next batch of raw materials are available in the market.

📈 Price on request

FENNEL OIL

Foeniculum vulgare 🇮🇳 India

The price of raw materials has stabilised. The crop is also good. A further surge in price is not expected, unless there is a significant fluctuation in demand.

📈 USD 54.00 /kilo

HOLY BASIL OIL

Ocimum sanctum 🇮🇳 India

Considering the low quantities of carryover stock, increase in demand has pushed the price upward. The new crop season commenced in November.

📈 USD 187.00 /kilo

NUTMEG OIL

Myristica fragrans 🇮🇳 India

The demand for Indian nutmeg oil has far exceeded the supply. There isn't much hope of bolstering the supply as the crop season is ending. This has led to a severe shortage of premium quality raw materials. The shortage is expected to continue till the next cycle in April 2021. Nutmeg is primarily cultivated in household farms. The pandemic had an adverse effect in South India, as the supply chain from farms to collection centres was affected.

📈 USD 48.00 /kilo

SPEARMINT OIL

Mentha spicata 🇮🇳 India

There is a shortage of supply and the price continues to be firm.

📈 USD 37.00 /kilo

GINGER GRASS OIL

Zingiber officinale 🇮🇳 India

The current high demand for the oil has pushed the price upward. Since the quantity of crop produced is low, slight fluctuations in demand lead to an increase in price.

📈 Price on request

LEMONGRASS OIL

Cymbopogon citratus 🇮🇳 India

Adequate rainfall has helped pick up production in major cultivation areas. The distillation process has been hampered by rain. There has been an increase in demand for the oil. This has resulted in a price surge in the past few months. Production is expected to pick up to meet this increased demand.

📈 USD 21.00 /kilo

PALMAROSA OIL

Cymbopogon martini 🇮🇳 India

The carryover stock for the oil is low. Production was to pick up post monsoon. Low demand has kept the market stable and prevented the price from fluctuating, though slowly the trend is reversing with an increase in demand for the oil.

📈 USD 33.00 /kilo

TURMERIC OIL

Curcuma longa 🇮🇳 India

The second half of August witnessed a 3%-4% price surge, but owing to low sales at high prices, there has been a correction of around 2%. The turmeric sowing season is almost complete. Adequate rainfall in major cultivation zones has been a positive for the crop.

📈 USD 25.00 /kilo

GINGER OIL

Zingiber officinale 🇮🇳 India

The availability of extraction quality ginger is low. With raw material accessibility becoming an issue there is a sudden surge in demand for the oil. The price has stabilised at a high level. There is a favourable climate for the upcoming crop.

📈 USD 82.00 /kilo

MENTHA ARVENSIS OIL

Mentha arvensis 🇮🇳 India

There was a bumper crop this season. This led to a massive fall in price to levels prevailing in 2010. This is the ideal opportunity to stock up for the long haul.

📈 USD 23.00 /kilo

PEPPERMINT OIL

Mentha piperita 🇮🇳 India

Depleting stocks and growing demand have resulted in an increase in the oil price. The new crop cycle is far away. Thus, it is advised to stock up.

📈 USD 34.00 /kilo

VETIVER OIL

Vetiveria zizanioides 🇮🇳 India

The unique aroma of this oil has made it a favourite among perfumers. This has resulted in an increased interest in Indian vetiver oil. The current market price is low and customers are advised to stock up on required quantities.

📈 USD 280.00 /kilo

CANANGA OIL*Cananga odorata* 🌍 Indonesia

Cananga oil has increasingly been preferred in aromatherapy. This has led to almost a 30% surge in demand for the oil. The price has also gone up accordingly. Several new plantations of cananga have come up across Indonesia in Java and Sumatra.

📈 USD 135.00 /kilo

CITRONELLA OIL*Cymbopogon winterianus* 🌍 Indonesia

La Niña has already brought heavy rainfall to Indonesia. With the rainy season approaching stocks are expected to be hit. Producers are expecting low yields, which will lead to an increase in price. At present, the market for the oil is stable.

📈 USD 17.00 /kilo

CLOVE LEAF OIL*Eugenia caryophyllata* 🌍 Indonesia

Clove leaves are harvested in the dry season. Unfortunately this year there has been excessive rainfall due to La Niña. This has affected the availability of raw materials. The price remained constant due to COVID-19, but with La Niña, the product quantity has reduced, but demand is on the rise. This will result in a price rise, which could last till July 2021.

📈 USD 15.00 - 17.00 /kilo

NUTMEG OIL*Myristica fragrans Houtt.* 🌍 Indonesia

Currently the demand and price for the oil are stable. There has been a good yield and the output is expected to increase. The global demand for this oil has started to pick up. Hence, the graph could change position in the coming months due to large demand and shortage of good quality material.

📈 USD 65.00 /kilo

PATCHOULI OIL*Pogostemon cablin* 🌍 Indonesia

The demand for the oil is greater than the supply. Heavy and constant rains, floods and the inability to procure dry leaves have led to a supply shortfall. Prices are expected to rise in future so customers are advised to take strong current positions.

📈 USD 60.00 - 70.00 /kilo

VETIVER OIL*Vetiveria zizanioides* 🌍 Indonesia

Oils with high acid content are flooding the market. While they are priced lower, these oils don't meet regulatory specifications. The superior-quality vetiver oil market is stable at the moment. Demand, supply, and price are all firm.

📈 USD 170.00 - 250.00 /kilo





BLOOD ORANGE OIL

Citrus sinensis 🇮🇹 Italy

Market reports point towards a robust crop though weather plays a critical role in determining the size and weight of the fruit. There are no more carryover stocks from last season since the 2020 crop is lower than last year by a significant 30%. The price for blood orange is stable, albeit on the higher side, but it has lent stability to the market. If the upcoming crop falls short of expectations, it may lead to price upheavals. The industry is optimistic and looking forward to a robust crop.

🏠 EURO 10.00 /kilo



LEMON OIL

Citrus limon (L.) Burm. F. 🇮🇹 Italy

The COVID-19 pandemic has thrust lemon and all other citrus fruit into the limelight. Consequently, demand has also soared. There are no carryover stocks but early indications are good and market forecasts paint a favourable picture of the lemon crop. Last season's crop was 30 to 40% lower and prices high but stable. The market is looking at a robust lemon crop, provided weather continues to remain favourable and conducive to a healthy crop. Harvesting has just begun with smaller volumes but all eyes are on the weather. If all goes well, the peak of the season is yet to come with better volumes. There is some trepidation that the new lockdown may hamper harvesting operations and that much of the harvest will be channelised into the fresh fruit market following increased demand. If this happens, prices will skyrocket and disrupt the equilibrium.

🏠 EURO 22.00 /kilo



MANDARIN OIL

Citrus reticulata (Citrus deliciosa) 🇮🇹 Italy

Processing of green and yellow mandarin oil began in September followed in December and January by red mandarin oil. Mandarin production in 2020 is estimated to be down by approximately 20% to 26,000 MT of which approximately 70% (18,000 MT) is processed. Despite the reduced supply COVID-19 has reduced demand and as a result the availability of yellow, green and red oils should improve.

🏠 EURO 77.00 /kilo

May this year's learning nurture our minds
and help enrich our planet.
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VANILLA

Vanilla planifolia 🌍 Madagascar

Vanilla is one of the most widely used flavouring ingredients in the food industry and the COVID-19 pandemic has impacted natural vanilla demand, particularly in the food service and tourist sectors. These sectors were the dominant consumers of black and gourmet vanilla, which is thought to account for approximately 20% of natural vanilla consumption. While retail and on-line sales have grown, these have failed to compensate for the decline in other end-uses. Early in the year, at the start of the pandemic, the downward trend in prices was arrested as demand for industrial vanilla grew but this has not continued. Nevertheless, the downward trend in prices combined with the continuing consumer preference for natural flavours should lead to increased demand but this can take some time. However, the high prices of recent years have led to blending of vanilla along with mislabelling and fraud. Thus there are concerns in the market that not all "natural vanilla" is a natural product leading to various lawsuits against food manufacturers in the USA.

The downward pressure on vanilla prices continues as production in major origins increases and supply outstrips demand. The very high prices of recent years encouraged many origins (e.g. Comoros, India, Indonesia, Papua New Guinea and Uganda) to try to expand output. Since Madagascar usually accounts for 70% - 80% of global natural vanilla output the economic impact of falling prices will be considerable. Not only is vanilla Madagascar's second largest export but the sector accounts for approximately 5% of GDP and creates employment for an estimated 80,000 smallholder farmers and their families concentrated mostly in the northeast region of Sava where the plantations are located - Sambava, Andapa, Vohémar and Antalaha. The relatively new Madagascan government is taking a more interventionist role. It has tried to fix a minimum export price (Avis) of USD 250/kg for the 2020 crop, irrespective of grade or quality. While this is below the USD 350/kg price it set in early 2020, it is still above the prevailing market price and is unlikely to hold. The price is not legally binding, but this, in combination with the need for licensed exporters to remit foreign currency earnings from their vanilla exports, has led to some confusion and disruption in the market leading to delays in export volumes. This creates export market opportunities for alternative suppliers including Indonesia, PNG and Uganda. Moreover, the local Madagascan currency (ariary) has been trading at an all-time low, putting further downward pressure on prices.

For decades now, particularly in periods of high prices such as in recent years, many end-users and traders have welcomed alternative supply sources as a potential means of stabilising prices and the market. While new producers have been attracted into the market, Madagascar has continued to be the dominant supplier and this will continue. At lower prices the much more price sensitive non-traditional suppliers with free and open markets have reduced output in response to lower prices. Despite recent falling prices, their production is still trending upwards. Counter-intuitively the lower prices have led to quality improvements since pressure to harvest immature beans has diminished. With better quality vanilla from non-traditional suppliers on the market this has intensified competition for Madagascar's production.

Estimates suggest that Madagascar vanilla production in 2020 will be about 1,800 MT, higher than the 2019 crop and of a better quality. Moreover, flowering for the 2021 crop suggests another bumper crop next year. The combination of stock carryover and a large production in 2021 will create further downward price pressure. As yet, there are no factors such as hurricanes, disease, political turmoil or demand surges that could create a price floor or put upward pressure on prices. Therefore, some are forecasting prices in the USD 150 - 180/kg price range by the end of the first quarter of 2021, substantially below the USD 600/kg level reached in 2018. How the government will react and how effective this will be remains to be seen, but it is highly unlikely to be able to hold its current minimum export price. Past experience suggests that the market will continue to remain both volatile and unpredictable.

🏠 Price on request



CLOVE LEAF OIL

Eugenia caryophyllata 🌍 Madagascar

Clove exports from Madagascar have continued on track with not too much disruption. It was possible to continue production despite the hurdles posed by the COVID-19 pandemic. Indonesian clove leaf oil has fallen short so consignments from Madagascar have been exported to India, China, and Indonesia to make up for the lack of oil.

🏠 Price on request

YLANG YLANG OIL

Cananga odorata 🌍 Madagascar

Travel restrictions, closure of airports and duty-free shops have impacted the global ylang ylang market. Production has stopped because there is sufficient stock available at source. However, demand has taken a free fall. There is zero demand except for the high-end superior variety. Prices have been slashed by a whopping 50%.

🏠 Price on request



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LIME OIL

Citrus aurantifolia – Key lime, Citrus latifolia – Persian lime 🇲🇽 Mexico

Key limes are mainly grown in the state of Michoacán, with about 75% of total volume, and Colima, representing about 20-25% of the total of Key lime volume in Mexico. Key limes are more commonly distilled for oil and are used to produce both lime oil distilled and cold pressed oil, but the latter in much smaller volumes. Persian limes are mainly grown in the state of Veracruz. The primary products of Persian lime are cold pressed oil and juice.

The last five years have seen reduced levels of lime available for processing, in part because of the impact of HLB (citrus greening disease) as well as increased consumption of fresh fruit. 2020 has seen the additional impact of COVID-19 both on demand as well as supply through both harvesting and transport constraints. In addition the drought substantially reduced Persian lime production. The proportion of lime production consumed as fresh fruit has risen from approximately 60% to 85%. As a result the price of limes for processing has increased, the volumes of juice, peel and oil processed have fallen and product prices have risen, including the cost of distilled lime oil. One estimate suggests that the volume of Mexican lime oil produced in 2020 fell by 35%, which was too great a volume to be filled by Peruvian lime oil. As a result lime oil distilled prices have risen by approximately 20%, and it would have been even greater but for the depreciation of the Mexican peso against the USD. Despite the fall in Persian lime production, the reduced output of cold pressed oil seems to have been sufficient to meet demand.

December to January marks a crucial time in the Key lime cycle in Michoacán, Mexico. It is the season for harvesting. Last year, the main growing region was reeling under a severe water shortage and the trees were also impacted. As a result, the crop for 2019/20 is anticipated to be around 2,199,000 MT. It is hoped that the upcoming harvesting season brings better news. Exports are projected to be at 755,000 MT and fresh fruit consumption has gone up to 1,140,000 MT. The processors are expecting around 307,000 MT of fruit to come their way. The lower crop size and consequent processing volumes have exerted an upwards pressure on prices. Rates for the lime oil Persian and distilled are both on the ascent.

📈 USD 42.00 /kilo

MEXICO: ESTIMATED LIME PRODUCTION AND PROCESSING 2017/18 TO 2019/20 ('000 MT)

	2017/18	2018/19	2019/20
Production	2,311	2,401	2,199
Imports	4	4	3
Total Supply	2,315	2,405	2,202
Exports	729	751	755
Fresh Domestic Consumption	1,190	1,257	1,140
For Processing	396	397	307

ORANGE OIL

Citrus sinensis 🇲🇽 Mexico

2020 saw a serious drought in Mexico leading to a substantial fall in orange production, alongside a reduction in orange processing and orange oil production - by an estimated 40%. Fortunately normal rains have returned to Mexico and we can anticipate a rise in orange oil production in 2021.

📈 USD 9.00 /kilo

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ESSENTIAL OILS IN THE KITCHEN

MANDY AFTEL ON FLAVOUR AND FRAGRANCE CROSSOVERS



Mandy Aftel is a revered California-based perfumer who only uses naturals in her work – a choice she made early on in her career that not only influences the end olfactory results of her products but also encourages innovative approaches and contexts for using essential oils. She was one of the first in the industry to format and package natural essences traditional in perfumery specifically for use in fine dining kitchens and mixology stations, anticipating today's multisensory trend by almost two decades – her “Chef's Essences” are all-natural oils that she describes as “concentrated flavours [that] have the upper hand on spices and herbs; they outlive their traditional pantry counterparts and deliver a cleaner flavour”.

This interview delves into Mandy's cross-industrial mind, exploring her love of naturals and reviewing the benefits and surprises inherent to applying essential oils in gastronomic settings.





“They (essential oils) are, for me, beautiful ingredients to work with, even the stinky, funky ones. I sit and wonder at the complexity of nature – they fire me up and they make me happy.”

Eddie Bulliqi [EB]: What initially drew you to this industry and at what point did you choose to work with naturals only?

Mandy Aftel [MA]: I had no intention of becoming a perfumer – I was a psychologist specialised in artists, writers and creative people. I first began researching perfume when I decided to make the main character of a novel I was working on a perfumer. Starting in old bookstores delving through catalogues on aromatherapy and botanicals, I took an aromatherapy class and was hooked on the value of naturals. I loved their history, how it was intertwined with us, with human beings as a species, and was fascinated that you could get your hands on things that carried so much reverence so far back in time. To me, these natural materials were near-universal and incredibly complex. It sparked inspiration in my mind that you could do amazing things with them in the perfumery world in the same way as in the food world, celebrating them just how a perfect tomato or truffle oil deserves to be celebrated. I just love the complexity of natural aromas and I have never felt limited by them. I’m not against synthetics, I just love naturals.

EB: What do you enjoy the most about working with essential oils?

MA: Because they’re so complicated, with so many aroma facets inside them, they smell very intricate to me. I have really enjoyed the process of figuring out how to work with them through what I believe is both a very cerebral art practice and a genuinely sensual experience. They are, for me, beautiful ingredients to work with, even the stinky, funky ones. I sit and wonder at the complexity of nature – they fire me up and they make me happy.

EB: Do you use essential oils in any functional contexts in your life – for example, to ease stress or aid sleep?

MA: I do it in a personal and intuitive way, in terms of using them in cooking, for example. I find that they change everything I cook. But I use the materials mostly for their beauty to create something beautiful; although, anecdotally, working with them completely changes my mood. At times in my life when I’ve been sad or troubled, by the end of my work session I feel a lot better.

EB: What about your customers – are you increasingly or less frequently being asked about the functional properties of the oils you select?

MA: I have found, since COVID-19 began, a huge increase in the number of notes on orders saying how much my oils have helped my customers through this time by engaging with them in a therapeutic context.



EB: It was rare to hear of chefs implementing essential oils into their cooking when you yourself began developing your Chef's Essences. What factors led you to think of applying perfumery principles to gastronomic frameworks?

MA: In essence, it was because I realised that I wanted to speak to and work with people who were concerned about the integrity of ingredients and natural ingredients in particular. I live near the restaurant Chez Panisse and asked a friend of founder-chef Alice Waters to recommend someone to me who would be interested in an essential oil project. I ended up bringing some oils for the two-Michelin-star chef Daniel Patterson to smell and he was blown away – particularly by the black pepper essential oil which has many facets of aroma and taste that are not evident in peppercorns themselves when included in a recipe, often dusty and hot in their original form.

The heat you experience when eating peppercorns doesn't travel to the essential oil, giving it an entirely new flavour. I see the use of saffron absolute in cooking in the same way – the raw spice is classically added at the beginning of the cook to impart its flavour but a few drops of absolute at the end of cooking retains much greater vibrancy from the ingredient.

EB: Do you see specific trends in this realm – certain oils that have become particularly popular in mixologist circles or within fine dining, for example?

MA: One thing I notice is that people tend to start in one place and then they branch out with a spirit of experimentation, looking for unusual combinations. I've also noticed a lot of dessert chefs buying pine needle absolute, whilst savoury chefs have been very interested in my mushroom spray.



EB: How do you think your Chef's Essences stimulate new approaches to flavour that aren't as obvious when using raw food ingredients?

MA: I use my basil essential oil in tomato sauce as I don't have basil growing and if I buy a whole head I usually waste a lot of it. One way it changes your interaction with food is that it allows you to access flavour you may not have to hand in an easy and thrilling way – with one or two drops balancing a recipe. One or two drops change everything about the taste, adding extra excitement to the cooking experience.

Also, some people still own spices passed down from their grandmother! With old spices, most of their oil is not there or not active. With essential oils in the kitchen, you can get the beauty of fresh ingredients when you don't have them or when accessing their flavour is difficult – for example, dried mint is not nearly as interesting as a drop of spearmint oil. The flavour vibrancy of naturals is fully retained in the oil and you can add it to a dish without affecting its texture nor liquidity. I also think of ginger here – dried ginger can taste stale, but ginger oil, distilled from fresh ginger, is citrusy and buoyant.

EB: How do you advise customers to avoid overdosing in recipes and avoiding unforeseen negative consequences when ingesting natural essences?

MA: We are very careful about what we do offer and are stringent about asking people to put the drops onto a spoon and count them, never advising more than two or so drops at first. It's about starting small and going from there. With my sprays, which are pre-diluted and more for finishing food or cocktails, it's almost impossible to mess up.

EB: Finally, what's your current favourite recipe that you feel is transformed through the use of essential oils?

Here's one I love from my 2004 book with Daniel Patterson: *Aroma: The Magic of Essential Oils in Food and Fragrance*.



FEATURE

ROSE AND GINGER SOUFFLÉ: SERVES 8

This soufflé is based on yoghurt instead of the traditional pastry cream, which gives the soufflé incredible lightness and a subtle tanginess. It is easy to make, and the aroma of the rose intermingled with the ginger is unforgettable.

Ingredients:

- Unsalted butter, for buttering baking dishes
- Sugar, for dusting baking dishes
- 1 cup plain whole-milk yoghurt
- 2 large egg yolks
- 1 tablespoon fresh blood orange juice
- 10 drops rose absolute
- 13 drops fresh ginger essential oil
- 1 cup large egg whites
- $\frac{3}{4}$ cup confectioners' sugar
- Salt

Butter and sugar eight 4-ounce soufflé moulds or ovenproof ceramic cups. In a mixing bowl, combine the yoghurt, egg yolks, blood orange juice and essences.

Preheat the oven to 325F/165C. In a mixer fitted with a whisk attachment, beat the whites on low speed with half of the sugar and a pinch of salt until they form soft peaks. Add the rest of the sugar and continue beating until the whites form stiff peaks.

Carefully fold 1/3 of the whites into the yoghurt base. Do not overmix. Fold in the rest of the whites until just combined and ladle into the soufflé moulds. Fill the moulds completely and then run your thumb around the top edge of the rim to create a slight indentation in the soufflé mixture. Bake until set but still moist inside, about 10 minutes. Serve hot in the soufflé moulds.

Enjoy!



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GERANIUM

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BLUE TANSY OIL

Tanacetum annuum 🌍 Morocco

Small quantities of the organic variety are available in the market. Owing to little demand, and the low carryover price, there has been no production in 2020.

🏠 EURO 330.00 /kilo

CEDARWOOD ATLAS OIL

Cedrus atlantica 🌍 Morocco

Demand has remained stable, though there is a shortage of the crop due to the lockdown.

🏠 EURO 21.00 /kilo

NEROLI OIL

Citrus aurantium 🌍 Morocco

A fall in demand has lowered the oil price. The lockdown impacted the crop quantity. The next cycle of production is April 2021.

🏠 EURO 5900.00 /kilo

ROSEMARY OIL

Rosmarinus officinalis 🌍 Morocco

Demand and price of the oil are currently stable. This year the harvest was impacted by the lockdown. A late start resulted in low volumes. The next cycle of production is in June 2021.

🏠 EURO 67.00 /kilo

WILD CHAMOMILE OIL

Matricaria chamomilla (L.) 🌍 Morocco

With the collectors unable to travel for the harvest season, there is no stock for the current year.

🏠 Price on request



MANUKA OIL

Leptospermum scoparium 🌍 New Zealand

New Zealand was among the first to implement early lockdown. Since essential oils are categorised as essential services, production was not hampered. Distillers and producers were able to resume operations without an adverse effect on plantations. Global demand for manuka oil continues to remain reasonably strong. Summer and autumn have been good months in terms of weather, leading to a healthy manuka harvest. The plantations in the East Cape region are now established and have joined the inventory leading to significantly good yield of oil. Distillation and production continued, albeit a tad slowly during the onset of winter. This is a usual pattern with work picking up again with the warmer weather of spring. The producer carried out in-vitro testing on the MBTK 20+ grade to test the efficacy of 20% triketone oil. It has proved to be equally effective on acne as the manuka variety containing 25% triketone oil. There are sufficient volumes of 20% triketone manuka oil available in the market.

🏠 AUD 995.00 /kilo



CABREUVA OIL

Myrcarpus frondosus 🌍 Paraguay

The month of April witnessed interruption in the distillation of cabreuva since production came to a standstill due to COVID-19. Since then production has resumed and continues to be steady.

🏠 USD 45.00 /kilo

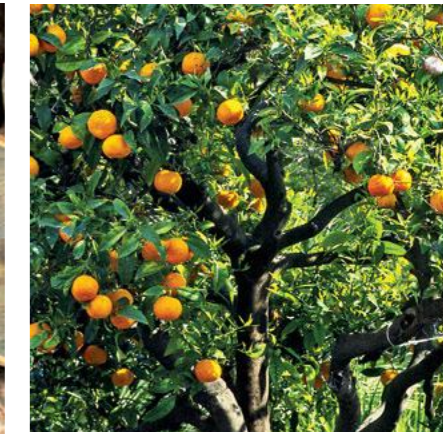


GUAIAWOOD OIL

Bulnesia sarmientoi 🌍 Paraguay

Production of guaiacwood oil remains steady and there are sufficient stocks available to cater for the demand. Under the 2020 CITES Export quota Paraguayan producers are barred from exporting the oil to the EU and UK. The sector is hoping that a favourable decision will be reached and the embargo lifted at the next meeting of the EU SRG (Scientific Review Group) in December.

🏠 Price on request



PETITGRAIN OIL

Citrus aurantium ssp. 🌍 Paraguay

It is not the repercussions of the COVID-19 pandemic but the impact of a severe drought that the petitgrain producers are reeling under. Production was underway, largely unhindered by the corona situation. However, with the aridity, the yield is affected. There is no stock on offer and the first batches are expected to come in only by end of November or early December.

🏠 USD 62.00 /kilo

THE UNTAPPED POTENTIAL BRITISH ESSENTIAL OILS

Marianne Martin is a commercial perfumer, who has been working with essential oils for over four decades. We had an opportunity to have her inputs on the British essential oils landscape.

Please tell us about yourself with regard to your experience in the essential oils industry and what inspires you to use them?

I joined the industry in 1974. The day of my interview, I was seduced by the smells of spices around me. I had no idea that this industry existed, but it has been part of my life ever since. I started to train as a perfumer in 1976, and am still working as a (semi-retired) commercial perfumer. My passion is working with naturals; choosing to add a drop of jasmine absolute into a ton of an inexpensive fragrance for a shampoo is thrilling. For me, this drop gives a life and a lift which no synthetic could provide.



Since 2010 I have taught the perfumery unit for the MSc in Cosmetic Science at the London College of Fashion. Introducing essential oils to a younger generation is a privilege. They write an odour recognition journal, and reading their responses to the aromas is fascinating. They come to London from across the globe and their childhood memories live in their descriptions. I have also been teaching various courses for my local council in Northampton in their nationally recognised programme Learn2be. This is a part of their adult education delivery, aimed at supporting mental health and wellbeing. I have taught many sessions involving fragrance and essential oils.

I am in the process of becoming a qualified mindfulness teacher, and am starting a pilot programme to teach mindfulness with essential oils. I believe the sense of smell is a powerful tool that connects us to our feelings.

I feel lucky to have taught creative perfumery in other contexts, such as the fragrance workshop for IFEAT (International Federation of Essential Oils and Aroma Trades) at Cartagena and Bali. Also for the Design with Scent short courses for University Arts London.

When did the essential oil bug bite Britain? How did the industry evolve thereon?

I believe the love of aromatic plants is in the human DNA. Essential oils have long been used in the UK by the trades making pharmaceuticals, flavours, and fragrances. If you ask about the essential oil bug, I think you mean the use of oils by aromatherapists and by individual consumers.

I remember my mother gave us eucalyptus oil as a decongestant, and clove oil as a relief for tooth ache. But, before aromatherapy, home use of essential oils was very limited. I would say that aromatherapy hit the UK in the 1980s. The Aromatherapy Organisations Council was set up in 1990, as the number of therapists blossomed, there was a need to create recognised professional standards.



What are the milestone changes over the past decade?

From the point of view of a perfumer and a mentor for trainee perfumers, the Internet has made training about the origin of oils and their production more accessible. Before, we relied on books such as Gunther and Arctander. They were our bibles.

There is nothing to substitute smelling the oils and memorising them. This has not changed over the centuries. We understand more about the neuroscience of olfaction, which has only developed in the 21st century and informs our experience of the sense of smell.

There has been continuing development of extraction techniques and refinement techniques with a variety of drivers, broadly:

- Hedonism
- Regulatory restrictions
- Sustainability

Which essential oils are produced locally in the UK?

The one British oil that I have enjoyed my whole career is the English Chamomile oil, grown and distilled by the Starke family in Suffolk since 1925.

One ton of oil is produced each year making it a product that perfumers can safely add to their formulations in the knowledge that there is a consistent supply.

Another famous producer in the UK is Norfolk Lavender. This business is based in a beautiful garden, where the public can visit the lavender fields. The essential oil is produced there and a number of toiletries are sold containing the English lavender oil.



Back in 1995, Sir Michael Colman (of the mustard empire) set his sights on America to track down Black Mitcham peppermint. This variety was established and grown extensively in Mitcham Surrey, along with lavender, through until the early 20th century. Because of Sir Michael's efforts, Black Mitcham mint was reintroduced to the UK and has been grown in Hampshire since 1995 at Summerdown Farm. Currently, they have a hundred acres under production.

Is there a regulatory authority for essential oils in the UK?

All essential oils need to meet GHS (Globally Harmonised System) legal requirements for manufacture, handling, and transportation. IFRA ((International Fragrance Association) is the body that gives standards for the use of many essential oils in fragranced products.

What could be the future of essential oils in the UK?

There are lots of possibilities for essential oils as a number of aromatic plants could be grown in the UK. Naturally, the character of these essential oils will likely be different from those grown in other locations. Climate change has given rise to vineyards creeping further north in recent decades, I am sure there would be scope for growing aromatic crops not previously suited to the UK climate.

There are some wild plants that have aromas that have not been exploited so far for essential oils, but might be suitable especially if modern extraction techniques were employed:

- The unexplored *mugwort* or *Artemisia vulgaris*
- *Hogweed seeds* with their amazing citrus flavour
- The surprising grapefruit qualities of *herb-robert* (*Geranium robertianum*) stems
- Elderflower and blackcurrant buds could be used to make absolutes, as they are currently in France

The UK holds much possibility and potential for this industry, it is just waiting to be explored. Exciting times lie ahead.



GETTING TO THE ROOT OF ALL FRAGRANCES

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THUJA OIL*Thuja occidentalis* 🇷🇺 Russia

There is no stock available at the moment. Producers expect to offer quantities in the first quarter of 2021.

📈 USD - 49.00 /kilo

CLARY SAGE OIL*Salvia sclarea L.* 🇷🇺 Russia

Demand as well as price for the oil is stable. This has been prompted by a normal crop.

📈 USD 125.00 /kilo

CORIANDER SEED OIL*Coriandrum sativum L.* 🇷🇺 Russia

The oil is moderately priced at the moment. There is no guarantee that the situation will prevail as demand is rising. It is advisable to secure contracts and purchase orders at the current rate before the market fluctuates. Production costs are already on the rise in Russia due to COVID-19. The crop was also not good this year and some distillers are unable to buy seeds at competitive prices.

📈 USD 85.00 /kilo

DILL WEED OIL*Anethum graveolens L.* 🇷🇺 Russia

The market for dill weed oil is stable. There is sufficient raw material in the market. The crop was basically average.

📈 USD 47.00 /kilo

FIR NEEDLE OIL SIBERIAN*Abies sibirica Ledeb.* 🇷🇺 Russia

Demand for the oil is extremely high due to its usage in disinfectants. Compared with previous years, the production was also low this year. This was due to the dual effect of the coronavirus and increasing production costs. All this is expected to increase the price in coming months. It is advisable to stock up on the oil now. As per trends, September-October generally witnesses the lowest oil price.

📈 USD 49.00 /kilo

HELICHRYSUM OIL*Helichrysum italicum* 🇷🇺 Russia

Buyers are enjoying the current market scenario, as there is excess supply compared with demand. The price is currently low. The crop was also good this year.

📈 USD 1245.00 /kilo





JUNIPER BERRY OIL

Juniperus communis 🇷🇺 Russia

A significant increase in the price of the oil can be expected. Demand is high and current stock is sold out. For the second consecutive year the crop was highly unsatisfactory. This has made it extremely difficult to procure berries with a good quantity of essential oil. The last period of the crop cycle is going on and producers are trying their best to meet demand.

🏠 EURO 245.00 /kilo



LAVENDER OIL

Lavandula angustifolia 🇷🇺 Russia

Similar to lavender oil in Bulgaria, there is immense price pressure on small and mid-size producers. It is turning out to be economically unviable for some of them.

🏠 USD 72.00 /kilo



ORIGANUM OIL

Origanum vulgare 🇷🇺 Russia

While there is a surge in demand for the oil, high price fluctuations have been successfully avoided for the time being. The crop was average this year.

🏠 USD 66.00 /kilo

PINE OIL PUMILIONIS

Pinus Sylvestris 🇷🇺 Russia

The oil is priced high. This is due to two factors. The storm last year meant farmers or forest owners had to get rid of fallen trees before commencing production. This process was made harder due to COVID-19 restrictions. As a result, the actual production period was reduced.

🏠 USD 135.00 /kilo

SAGE OIL

Salvia sclarea L. 🇷🇺 Russia

There is a massive demand for sage oil in the market. The crop was also average, though, supply and price are expected to remain relatively stable.

🏠 USD 66.00 /kilo



BUCHU OIL

Agathosma betulina 🇿🇦 South Africa

It has been a good season for the buchu crop. With copious rainfall in the winter months and dams at full capacity, the crop has been a good one. Fortunately, there has not been much disruption due to the COVID-19 pandemic. However, lockdown-affected freight and transportation logistics are unable to function properly. This has posed a scarcity of stocks at ground level. Consequently, prices are expected to hold their peak position for some time.

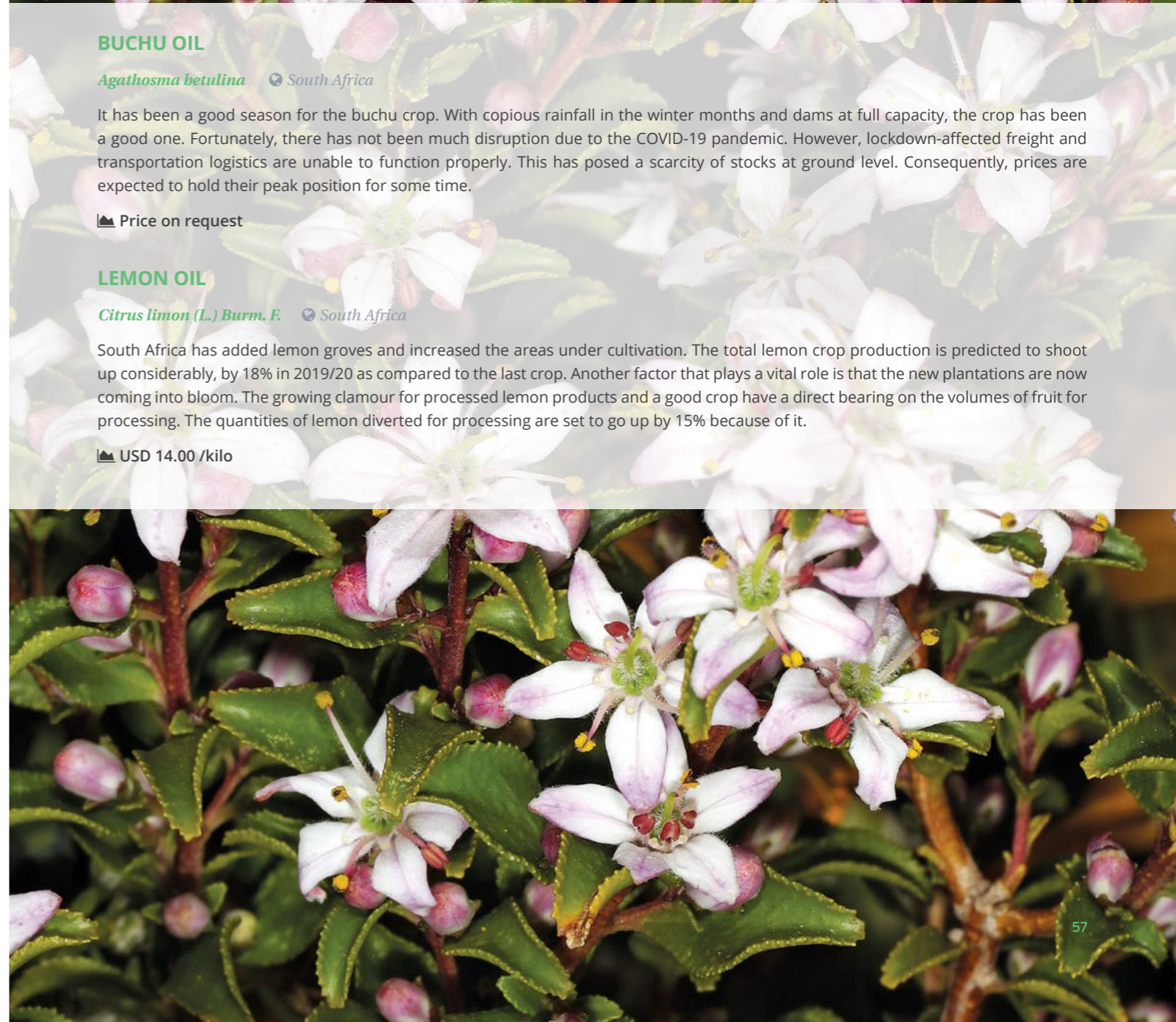
🏠 Price on request

LEMON OIL

Citrus limon (L.) Burm. F. 🇿🇦 South Africa

South Africa has added lemon groves and increased the areas under cultivation. The total lemon crop production is predicted to shoot up considerably, by 18% in 2019/20 as compared to the last crop. Another factor that plays a vital role is that the new plantations are now coming into bloom. The growing clamour for processed lemon products and a good crop have a direct bearing on the volumes of fruit for processing. The quantities of lemon diverted for processing are set to go up by 15% because of it.

🏠 USD 14.00 /kilo



LEMON OIL

Citrus limon L. Burm. F. 🇪🇸 Spain

The harvesting of Spain's lemon has commenced. Crop forecasts for 2020/21 are optimistic with an estimated increase of 8% compared to last season. Industry reports peg the crop at 1,290,740 MT. There is an embargo on Argentinian exports of fresh lemons to the EU. This, combined with a lower Turkish lemon crop, will enable Spanish lemon farmers to bridge the gap in supply and this is the primary reason that harvesting has begun two weeks earlier than usual. It would however, not be correct to assume that there will be a proportionate increase in the volume of fruit earmarked for processing. Most of the additional volumes will be directed to the fresh fruit market. There is, however, a projected increase in the quantities for processing from 221,000 MT in 2019/20 to 271,000 MT in 2020/21. Traders are anticipating a mounting increase in prices as transportation costs have inched up due to COVID-19.

🏠 EURO 18.00 /kilo

SPAIN: ESTIMATED LEMON PRODUCTION AND UTILISATION 2017/18 TO 2020/21 (MT)

	2017/18	2018/19	2019/20	2020-21
Production	928,000	1,149,000	923,000	1,290,740
For Processing	232,000	278,000	221,000	271,000

Turkey's key oils oregano, laurel leaf, and sage oil are coveted in the flavours & fragrances sector. Most of the production and distillation facilities are situated in rural areas away from dense urban clusters. This has stood the sector in good stead since operations were able to continue with not much disruption due to the COVID-19 outbreak. Demand for the oils is high, mostly because of their usage in the flavouring industry. Certain oils are witnessing an upward price curve because of demand being more than supply.

LAUREL LEAF OIL

Laurus nobilis 🇹🇷 Turkey

This is another key component used extensively in the flavouring industry, coveted for its distinctive flavour. The leaves have been harvested and distilled for oil without disruption. However, limited volumes of oil have resulted in an increase in market prices.

🏠 USD 68.00 /kilo

ROSE OIL

Rosa damascena 🇹🇷 Turkey

A favourite of perfumers, rose oil has seen some upheavals due to the pandemic. While the crop size was good, demand from the perfumery sector has reduced putting downward pressure on prices.

🏠 USD 6900.00 /kilo

OREGANO OIL

Origanum vulgare 🇹🇷 Turkey

A key ingredient in the food business and manufacturing of flavours, oregano continues to enjoy all-year-round healthy demand from this sector. Despite normalcy in operations, crop size is less and this has led to an escalation in prices.

🏠 USD 72.00 /kilo

SAGE OIL

Salvia sclarea L. 🇹🇷 Turkey

Harvesting and processing of sage is continuing as usual due to considerable distance from the urban COVID-19 hotspots. Sage commands a robust demand in the food and flavouring industry that has not been dented by the pandemic. However, this year's smaller crop size has pushed up the prices of sage oil in the last quarter.

🏠 USD 62.00 /kilo

CARDAMOM OIL

Elettaria cardamomum L. 🇸🇰 Sri Lanka

With a limited quantity of raw material, producers are debating between spice production and oil distillation. The price for Sri Lankan origin cardamom has shot up massively with a huge surge in demand.

🏠 USD 550.00 /kilo

CITRONELLA OIL

Cymbopogon nardus 🇸🇰 Sri Lanka

The market scenario is stable. Both production and demand for the oil are low.

🏠 USD 25.00 /kilo

CINNAMON BARK OIL

Cinnamomum zeylanicum 🇸🇰 Sri Lanka

The market has managed to remain stable, even with a supply shortage. If the situation remains the same, the price of the oil will shoot up. It is advised to secure quantities for the coming 4-5 months. The anti-viral properties of cinnamon powder have led to a massive surge in demand for raw materials.

🏠 USD 325.00 /kilo

CLOVE BUD OIL

Eugenia caryophyllata 🇸🇰 Sri Lanka

The upcoming harvest season is crucial for Sri Lankan clove bud oil. With competitive pricing, the Sri Lankan variety may take over some of the Indonesian oil market. Indonesian clove bud oil continues to be the market leader. But a global surge in demand is likely to increase the volumes traded of the Sri Lankan variety.

🏠 USD 55.00 /kilo

CINNAMON LEAF OIL

Cinnamomum zeylanicum 🇸🇰 Sri Lanka

With the second wave of COVID-19 in Sri Lanka, the country has re-imposed a curfew and lockdown. This is expected to lead to a shortage of oil supply in the coming three months. Demand for the oil is high and is constantly pushing the price upward. Current production levels are also low. Farmers are currently holding back stock, or it is already booked by regular customers.

🏠 USD 32.00 /kilo

CLOVE STEM OIL

Eugenia caryophyllata 🇸🇰 Sri Lanka

Globally the demand for clove oil and its derivatives has increased. With the harvest cycle about to commence and continue till January, the Sri Lankan variety can be priced competitively in comparison to the Indonesian one.

🏠 USD 34.00 /kilo

NUTMEG OIL

Myristica fragrans 🇸🇰 Sri Lanka

September witnessed the highest raw material prices. The competitive price of the Indonesian variety prevented the price of the oil from shooting up. The current raw material stock is from the previous harvest. The new harvest season will commence soon. The price is stable, but higher than the previous quarter.

🏠 USD 54.00 /kilo



ROSEMARY REMEMBRANCES

From food to Pharaohs, rosemary has captured imaginations and spread its enlivening essence throughout the ages. Join us as we trace the nostalgic nuances of rosemary through the winding lanes of civilisation.

Ophelia, Hamlet's lady love swore by it. The Egyptian Pharaohs took it with them on their journey into the afterlife. Hungary's Queen Isabella, used it as a treatment for gout. Ask any young bride and they would refuse to walk down the aisle without a few sprigs of this fragrant herb in their wedding nosegays. Early ballads celebrated it as an undying symbol of love and remembrance. Greek scholars of yore took the help of this bud to help them study better by wearing it in their hair. The Romans and Greeks put it on a pedestal and considered it sacred. Centuries later, Michelin chefs hoard it in their cupboards and gourmands savour its subtle flavouring in continental cuisine. Today, it is also the go-to essential oil for herbalists and aromatherapists for stimulating tired brains and pepping up emotional quotient. If you have not guessed it already, we are referring to the 'dew of the sea,' **Rosemary**.



Rosmarinus officinalis derives its name from the Latin words 'ros' meaning 'dew' and 'marinus' meaning 'sea'. The moniker is indicative of the plant's affinity to coastlines, especially the dry rocky one of the Mediterranean. It is native to the cliffs of the Mediterranean and, in common parlance, the plant is also referred to as compass plant, polar plant or compass weed. A bushy evergreen shrub, rosemary is quite distinctive with its stiff, needle-like foliage and small blue flowers. Graceful as they look, the flowers are rather small and two-lipped, blossoming in clusters on the spiky stalks of the plant. Late spring and early summer are when rosemary comes into its full blooming glory. Its dark green leaves are simple, sessile and storehouse of the potent, much-loved essential oil.

'Sovereign balm' was what Nicholas Culpeper, noted botanist of the 17th century, called rosemary essential oil. Not without reason. As history has proved, the herb and its volatile, aromatic oil has enjoyed a place of reverence throughout western civilisation. Rosemary belongs to the same family as mint, myrtle, and sage, and the genus *Rosmarinus* includes several species of botanicals. However, it is *Rosmarinus officinalis* that is used for distillation and yields the essential oil that the world loves.

Fresh or dried leaves from the top portion of the plant and flowers are hand-harvested. These yield the best quality of essential oil. The other parts of the plant like the stem and lower leaves are sometimes also used in distillation, but the oil extracted from these is of an inferior quality. Rosemary essential oil chemical constituents include bitters, borneol, linalool, camphene, camphor, cineole, pinene, resin, tannins, and it holds a firm place in the medicinal world for its anti-bacterial, anti-inflammatory, carminative, decongestant, and antiseptic properties.

Bewilderment sets in when there is a cornucopia of vials proudly proclaiming rosemary essential oil from France, Spain, Dalmatia, Tunisia or Corsica. Rosemary loves the temperate climes and so quite happily adapts to the growing conditions in all these countries. As a result, these nations are notable producers of the oil but the grades of oil differ with their counterparts in terms of chemotypes.

- Rosemary from Morocco and Tunisia is quite robust with a cineole chemotype that is 1,8-cineole chemotype, it is the most frequently offered variety.
- Its French cousin is stronger, veering more towards the camphor chemotype.
- In Spain, rosemary chooses to be gentler with clear leanings towards the alpha-pinene chemotype.
- In Corsica rosemary of the verbenone chemotype chooses to be gentler with 1,8-cineole and also less camphor.



“Sovereign balm’ was what Nicholas Culpeper, noted botanist of the 17th century, called rosemary essential oil. Not without reason.



In the ubiquitous dark amber or blue bottle, rosemary essential oil is beguiling. It is not easy to make out the pale yellowness of the oil and has all the appearance of water due to its low viscosity. But uncork the stopper and at once you will be taken in by the irresistibly warm, herbaceous aroma with woody and balsamic undertones. The camphor chemotype naturally displays a more penetrating camphorous fragrance.

From odorous to cosmetic to medicinal, rosemary has a plethora of uses. Rosemary verbenone variety, due to its milder characteristics, is favoured by the cosmetic and skin care industry. Rosemary is a soothing anti-microbial, antiseptic, astringent antioxidant. Its regenerative properties lend it well as a common ingredient in skin care products to treat aging skin, dry or oily skin, eczema, inflammation, acne, burns, and sun damage. In haircare, rosemary is an age-old remedy for preventing greying, hair fall, and dandruff. As a massage oil, it helps reduce pain, soothe inflammation and eliminate headaches. Its strong antioxidant properties make it an ideal catalyst for aiding digestion, relieving flatulence and constipation. The more full-flavoured and robust rosemary cineole with the distinctive camphorous aroma works wonders to clear respiratory passages and reduce coughing.

If there was a competition for quick, zesty lift-me-ups, rosemary would give the citrus eucalyptus and tea tree a stiff run for their money. Used extensively throughout generations as enhancing mental prowess, ongoing research has revealed the stimulatory effect of 1,8-cineole on the temporal portion of the brain. This would sound like a science journal, only for the fact that it has a direct bearing on a person's emotional quotient and happiness factor. Inhalation of rosemary oil has been shown to augment memory and incite renewed mental vigour. The oil acts as a definite mood-booster, eases stress and heightens the capacity to retain information. Science has only reiterated what the forefathers of continental civilisations knew all along, that this potent essential oil is a powerful fatigue-relieving psycho-stimulant, an elixir that held the power to incite cheerfulness and sharpen minds. In this perspective, the presence of rosemary in almost all festivals and religious ceremonies, including weddings, is symbolic of the cycle of life and death. This was the talisman that was commonly strewn on floors and in doorways to keep the dreaded bubonic plague at bay. In fact, recent developments are promising and indicate positive results in cancer-inhibiting effects of rosemary.

So, next time you are preparing for an important presentation, remember the Greek scholars who tucked a bud in their hair, and remember rosemary. While you might not wear the flower, it would not be a bad idea to plug in that diffuser and remember rosemary.

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The USA citrus growing region this year faced the heat on several fronts. Literally, the weather was warmer in the initial stages of 2020 just before the blooming period. With temperatures higher than usual, most of the key citrus regions also faced aridity due to shortfall of rain. Throughout the month of May the critical growing areas reported drought-like conditions. It was only in June, with the advent of the rains, there was some relief for trees and growers. The groves yielded good fruit size though the fruit set was not up to par compared with earlier seasons. The Florida coast was buffeted by two storms Hurricane Isaias and Hurricane Sally. There was an imminent threat to the orange groves but fortunately the damage was minimal. By the end of September fruit had matured and growers were prepped for harvesting early oranges and tangerines, but as the pandemic swept across geographies, the lockdown and shelter-in-place protocols kicked in. Naturally, there was a direct ripple

effect in terms of operations and demand-supply. US citrus growers estimate the immediate impact to be to the tune of USD 200 million. The shutdown of the food and restaurant business has dealt a severe blow to the country's lemon and orange growers. In addition, there is the grapefruit sector which was derailed due to a nationwide shutdown of schools, colleges and retail outlets which downed shutters. The sector has appealed to the authorities for adequate measures to get back on track.

On a positive note, US researchers continue to make advancements in the fight against HLB (citrus greening). This includes a significant advancement in citrus genome sequencing, which will provide a new tool to control the deadly HLB (citrus greening disease). The new genome will help citrus breeders develop trees that will survive under the current challenging production conditions, including invasive pests, viruses and climate change.



CEDARWOOD OIL TEXAS

Juniperus mexicana 🌍 USA

Its popularity as an organic pesticide and disinfectant has made cedarwood oil a preferred ingredient in household and agricultural products. This is one of the primary reasons why, despite the strict COVID-19 protocol, distillation of cedarwood oil was allowed to continue as an essential service. In the wake of the pandemic, demand for the oil has soared. Distillers are unable to bridge the gap between demand and supply and available stocks are woefully short. To compound the problem, one of the large production plants witnessed a devastating fire leading to an almost complete shutdown of the unit.

📈 USD 25.00 /kilo

GRAPEFRUIT OIL

Citrus paradisi 🌍 USA

Total US production of grapefruit in 2020/21 is forecast by the USDA at 13.2 million boxes, slightly up on 2019/20. As the table illustrates, production is dominated by Florida, Texas and California with almost equal shares. Citrus greening continues to be a major problem and unless some solution is found supply is unlikely to increase substantially. Approximately 30% is processed into juice, peel and oil, but increased demand for fresh grapefruit, in part because of COVID-19, has reduced the availability of grapefruit for processing. The limited availability of grapefruit oil is impacting prices, especially for white grapefruit oil. Prices are also affected by the oil's nootkatone content and agricultural residue issues. The typical 0.2% nootkatone content oil is more difficult to find. Prices for some grapefruit oils are significantly lower than two years ago. If demand and supply remain at current low levels then prices are unlikely to return to the high levels seen over the past five years.

October saw the harvesting of the red grapefruit primarily for the fresh fruit market. White grapefruit supplies are tight and availability is limited, which will affect white grapefruit oils supplies. The USA's total grapefruit crop is predicted to touch 13.20 million boxes with Florida contributing 4.50 million boxes (of which some 2.6 million boxes will be processed). The figure comprises 3.80 million boxes of red grapefruit and 0.7 million boxes of white grapefruit. While the total has recorded a plunge of 7% from last season, red grapefruit forecast is 6% less than last year's final crop. The white grapefruit forecast is an 11% drop from last year's figures. The average fruit per tree is also at an historic low since the 1968/69 season. In view of the inclement weather and hurricanes, fruit droppage is anticipated to be above average but it is hoped that this will be compensated by the fruit sizes which are expected to be above average. Prices of the oil hinge upon the presence of nootkatone content and the typical 0.2% nootkatone material is difficult to find.

📈 USD (Pink) 27.00 (White) 55.00 /kilo

USA: ESTIMATED GRAPEFRUIT PRODUCTION 2015/16 TO 2020/21 ('000 BOXES)

X 1,000 Boxes	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Total Florida Production	10,800	7,760	3,880	4,510	4,850	4,500
White	2,490	1,480	700	770	790	700
Red/Pink	8,310	6,280	3,180	3,740	4,060	3,800
California			3,800	4,200	3,800	3,800
Texas			4,800	6,100	4,400	4,900
Total USA			12,480	14,810	13,050	13,200

LEMON OIL

Citrus limon (L.) Burm. F. 🌍 USA

Lemon production in 2020/21 is forecast to fall to 23.3 million boxes, a reduction of 2.4 million over the previous year. California continues to dominate production. A lower output of approximately 25% may not necessarily lead to a reduction in processing since one impact of the COVID-19 pandemic is reduced consumption of fresh lemons.

📈 USD 19.00 /kilo

USA: ESTIMATED LEMON PRODUCTION 2015/16 TO 2020/21 ('000 BOXES)

	2017/18	2018/19	2019/20	2020/21
Arizona	1,000	1,350	1,800	1,300
California	21,200	23,700	25,700	22,000
USA	22,200	25,050	27,500	23,300



ORANGE OIL

Citrus sinensis 🌍 USA

The first 2020/21 forecast puts total USA orange production at 109 million boxes. This includes the country's largest contributor, Florida's 57 million boxes, of which an estimated 96% is processed. California comes in second with 50.5 million boxes, of which approximately 80% is sold as fresh fruit, with Texas bringing up the rear with 1.5 million boxes. This includes Valencia oranges of 42.7 million boxes and non-Valencia varieties of 66.3 million boxes. Approximately 60% of US orange production is processed.

Florida's 57 million is a significant reduction of 15% compared to last season's crop. The breakdown of the varieties includes 23 million boxes of early, midseason and navel oranges with 34 million boxes of Valencia oranges.

The Valencia orange crop is a 10% decline from last season's crop despite an increase in the number of trees which has gone up 2% from the previous season. Fruit per tree has gone down by a whopping 18%. This is an all-time low since the 2006/07 season. While fruit size is expected to be below average, fruit droppage has shot up.

Dipping below the bar set by last year's crop, the non-Valencia forecast of 23 million boxes is 22% lower than last year. Estimated fruit per tree has also declined by 24% to the lowest figure recorded since the mid 1960s. However, fruit size is hoped to be above average while fruit droppage is also high at 27%.

📈 USD 9.00 /kilo

USA: ESTIMATED ORANGE PRODUCTION 2017/18 TO 2020/21 ('000 BOXES)

USA Orange Production x 1,000 Boxes	2017/18	2018/19	2019/20	2020/21
Florida	45,050	71,850	67,650	57,000
California	44,200	52,200	53,300	50,500
Texas	1,880	2,500	1,340	1,500
Total	91,130	126,550	121,940	109,000

TANGERINE AND TANGELO OIL

Citrus reticulata & Citrus reticulata x C. paradisi 🌍 USA

The total production of tangerine and tangelo stand at 1.1 million boxes. This is an 8% jump from last season's 1.02 million boxes.

📈 USD 33 /kilo



ORANGE OIL

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