

# FEAT WORLD

INTERNATIONAL FEDERATION OF  
ESSENTIAL OILS  
& AROMA TRADES

JULY 2017

EDUCATION AND  
STUDY TOURS

FRANKINCENSE  
AND MYRRH  
BUCHU OIL

STUDY TOUR  
TO BULGARIA



ATHENS GREECE  
24-28 SEPTEMBER 2017

4-PAGE PROGRAMME FOR ATHENS INSIDE

# BERJÉ

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67  
YEARS  
3  
GENERATIONS  
1  
AMBITION

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## ATHENS GREECE

24-28 SEPTEMBER 2017

FROM THE CONFERENCE CHAIRMAN

# DOMINIQUE ROQUES



"I am delighted to report that within just one month of opening registration, we saw record bookings for the 2017 IFEAT Athens conference and by 1st July we had over 1,000 registered delegates.

We would like this year's conference to be somewhat special as we will celebrate 40 years since IFEAT's inception in Kyoto in 1977 in the beautiful and historic city of Athens in Greece.

Not only will we celebrate the history of IFEAT but we will take a few glimpses into the ongoing journey of 40 centuries of perfumery. We are fortunate to have gathered together an impressive range of talent to deliver some very interesting and fascinating presentations.

Celebration will open the conference on Monday morning 25th September with a special presentation by **Dr Wladyslaw S. Brud** and **Mr Richard C. Pisano Snr.**, who have been with IFEAT since the beginning. They will present **40 Years of IFEAT – The History**; the first of two half-hour sessions looking back over the past 40 years of IFEAT. Their second session will take place on Tuesday morning 26th

and will be a photographic review of all Congresses with IFEAT participation and IFEAT Conferences from 1979-2016.

To follow up on Monday, **Jacques Cavallier**, Master Perfumer for Louis Vuitton and **Michael Carlos**, President of IFRA will offer their highly experienced view on the past and future of perfumery and creation, while **Professor Jean-Pierre Brun**, from the Collège de France, will take us through a fascinating journey in our knowledge and discoveries of what Perfumery in Antiquity really was. You cannot be at the Athens conference and miss this!

Our Monday afternoon session will deal with **Challenges & Opportunities in Essential Oils from Africa to Greece** with a focus on the future of East African gums, to be followed by a panel discussion which grows more animated every year...

On Tuesday morning, IFEAT President **Raúl Amigo** will reveal the destination for the 2018 IFEAT conference and we will have news of the 2018 Study Tour. IFEAT Study Tours are becoming increasingly popular and are usually fully booked within hours of registration opening.

The Scientific session on Tuesday afternoon will look at hot topics like Pesticides and REACH and cover much in the fast-moving area of Regulation. Again, this will be followed by a panel discussion.

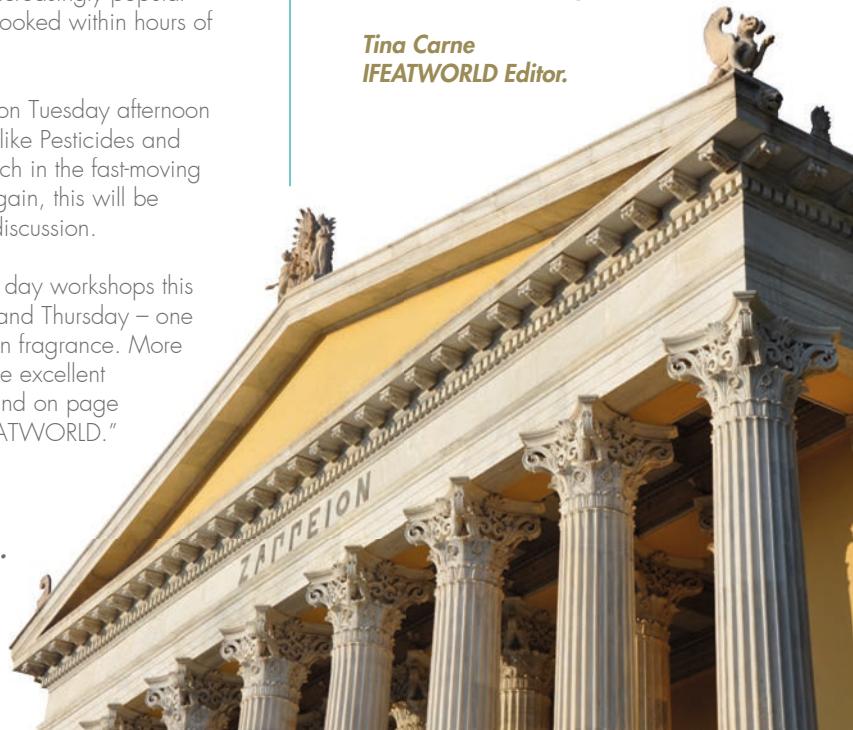
There will be two one day workshops this year on Wednesday and Thursday – one on flavours and one on fragrance. More information about these excellent workshops can be found on page 13 of this issue of IFEATWORLD."

**Dominique Roques**  
**Athens Conference Committee Chairman.**



"I hope you enjoy reading the newly designed IFEATWORLD. In this issue, "My Favourite" is buchu oil by Stephen Pisano, the socio-economic report looks at frankincense and myrrh and Peter Greenhalgh continues his fascinating "History of IFEAT" series with part three, "Education & Study Tours". There's also a pull out programme for the Athens conference. If you would like to discuss editorial or advertising, please contact me, Tina Carne, by email at [ifeatworld@ifeat.org](mailto:ifeatworld@ifeat.org)"

**Tina Carne**  
**IFEATWORLD Editor.**



# IFEAT: EDUCATION AND STUDY TOURS



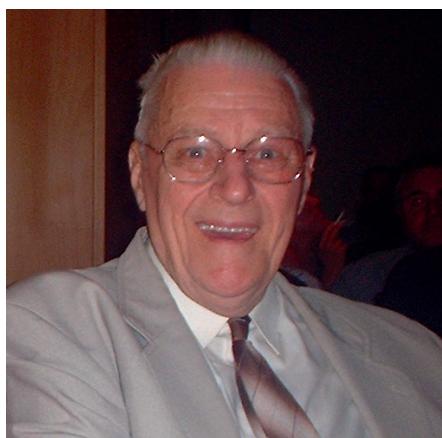
In this third instalment of the "History of IFEAT" series and following on from his "Early Years" article in the April 2017 issue of IFEATWORLD, Peter Greenhalgh takes a look at how Education and Study Tours have played important roles in IFEAT's activities.

"Education" was not included as one of the initial aims of IFEAT but, led by Murray-Pearce, the first Chair of IFEAT's Education Committee, and later by Michael Boudjouk, the promotion of various aspects of education very soon played an important role in IFEAT's activities. "Education" took a variety of forms, including supporting and helping to organise perfumery and flavour courses; organising lectures, workshops and discussion panels at IFEAT Conferences; circulating relevant information on F&F industry issues to members; and study tours, as well as sponsoring student attendance on various courses and conference attendance. For the past four decades, IFEAT has offered substantial support in terms of financial and technical resources, promotion and help in all these various educational areas.

## PERFUMERY EDUCATION

The support of perfumery education was the first success story for IFEAT. Murray-Pearce worked closely with David Williams to launch the IFEAT supported Perfumery Education Centre (PEC) during the second IFEAT World Council meeting at the Cannes Congress in 1980. Williams, Director of the PEC, had since 1970 pioneered a comprehensive open entry approach to perfumery education based on evening lectures at South East London College. However, the College was unable to obtain approval to offer a correspondence course in perfumery, which led to the setting up of the PEC in 1980 offering the IFEAT diploma duly certified. The course provided a thorough introduction to perfumery and was particularly suitable

to newcomers. IFEAT was very pleased to be associated with the PEC and strongly believed that education opens new avenues of personal achievement and would be the key to the industry's future development and success.



— DAVID WILLIAMS

In the 1980s, with the encouragement of IFEAT and other industry supporters, Williams completed the monumental task of writing a complete distance-learning package. It was designed to provide students with a recognised qualification and a firm grounding in the perfume industry enabling them to develop their careers. The duration of the course was normally one academic year during which students received detailed study notes and guidance. A programme of sensory work formed an integral part of the course and for this purpose students were supplied

with aromatic materials and smelling strips. IFEAT's role included assessing the special studies submitted by each student and awarding diplomas if the special study and coursework reached the required standard.

Williams, along with IFEAT, set in motion a perfumery education programme that encompassed the world. The course was not only of interest to trainee perfumers but also attracted some of the big compounding companies who placed their newly recruited sales and marketing staff on the course. Some of the sons and daughters of owners of essential oil businesses also took the course. By 1984 some 196 students from 48 countries had registered for the course and already some 40 diplomas had been awarded, 26 at ordinary level and 14 with distinction. Now, well in excess of 1,000 people from many countries have participated in IFEAT sponsored perfumery and later flavour training programmes.

While IFEAT provided financial support for the running of the perfumery and later flavour courses, IFEAT member companies also provided financial and material support and offered company visits.

Following David Williams's retirement in 1993 the next phase began, involving an expansion in the number of perfumery courses. This initially involved a five-day residential workshop at Plymouth University Business School supported by IFEAT and The British Society of Perfumers (BSP). This led to the four-year BA degree in the Business of Perfumery at Plymouth Business School. Course management was now



## --- STAFF AND STUDENTS

Diploma in Perfumery Course 2003 - 04

under the direction of Dr Tony Curtis, who had previously worked at Bush Boake Allen. With the support and advice of IFEAT and the BSP the new degree was validated and the first students graduated in 1998. IFEAT financial support was vital in supporting students. The degree course was re-structured and transferred to the Science Department to become a four-year B.Sc in Aroma and Formulation Science.

IFEAT made substantial annual donations to Plymouth to help support the course as well as fund library texts on perfumery and flavourings. The first BA graduates entered the industry in 1998. This course ran alongside the Diploma in Perfumery correspondence course. Plymouth also developed a flavouring module for the course, with Mike Boudjouk closely involved as IFEAT Education Coordinator. The courses were also supported by the BSP and the UK Society of Cosmetic Chemists.

In 2009 Plymouth, with IFEAT support, started a new distance-learning programme and also, beginning in 2008 at the IFEAT Montreal Conference, Plymouth gave a one-day Perfumery Workshop, which continued at later conferences. Another IFEAT initiative made possible with IFEAT support was a Medical Elective at the Plymouth Peninsular Medical School on 'Odours in Medicine'

and Health Care'. IFEAT financial support also allowed Plymouth student attendance at the BSP New Materials for the Perfumer Symposium. Another key development was the introduction of CPD (Continuing Professional Development) where students could take selected modules to fit their career development plans.

## FLAVOURIST TRAINING PROGRAMME

2002 saw the start of a six-week Flavourist Training Programme at the University of Reading, supported by IFEAT. Following initial teething troubles leading to a shortening and re-formatting of the course in 2003, the course has continued to run until

today and provides potential flavourists with the foundation to build a career.

While the large international companies had their own flavourist training programmes, there are many smaller companies where flavourists receive little formal training. Hence, with a few notable exceptions, course participants have been from small to medium size companies. Over the first 15 years there have been 156 participants from 44 countries. IFEAT's publicity has helped significantly to make the course known throughout the world. Jack Knights of the British Society of Flavourists (BSF), supported by Prof Don Mottram from Reading, are the driving force behind the course.



## --- FLAVOURISTS COURSE GROUP



-- **NECATI GULER, EC CHAIR PRESENTING  
CYNTHIA STEWART-STOKES (USA)  
BEST STUDENT PERFUMERY MEDAL AWARD**

EC visit to Plymouth 1995

## STUDENT EXCELLENCE MEDAL AWARDS

In 1986 Mr Michael Boudjouk of Medallion International (long time Chairman of IFEAT's Education Committee) proposed the IFEAT Students Excellence Award and Medal to be presented annually to the best students selected from groups supported by IFEAT. The first medal was awarded to Mrs A.P. Kallianpur from India at the Taormina, Sicily Conference in 1987 while the first flavourist student award was presented in Warsaw in 2002.

## OTHER IFEAT EDUCATIONAL ACTIVITIES

Another important function of IFEAT was to circulate information and data to members. The IFEAT Newsletter, started in May 1980, was the major publication for dissemination, and in 2007 was replaced by IFEATWORLD. Also, in the late 1990s, IFEAT started its own website which has slowly evolved; IFEAT joined REACH-Ready as a means of disseminating REACH data; in 1994 IFEAT bought a complete set of the nine-volume F&F ingredient data sheet set compiled by FEMA, RIFM and the FMA, which contained safety information on over 1,500 raw materials used in the F&F industries and the data made available to members. In 1989 IFEAT published a "Guide Line for the classification and labelling of Essential Oils for transport and handling" (ed. by Klaus Dieter Protzen and sponsored by Paul Kaders GmbH).

The organisation of full day courses/ workshops at IFEAT Conferences is another educational initiative. Alongside the perfumery workshops, there have been workshops on essential oils (led by Brian Lawrence), REACH, flavour workshops (led by John Wright), international transportation of hazardous materials, short chiral course and medicinal plants.

## STUDY TOURS

Another very successful feature of IFEAT educational activities has been the organisation of study tours for members. Over the past decade, IFEAT study tours have gone from strength to strength. They are proving to be a great learning experience – in the company of other industry specialists, who might be competitors but become good friends. This facilitates the growth of the international IFEAT family. While each study tour follows a similar format they remain very different, predominantly because of the country and companies visited as well as different participants.

The study tours have a number of objectives. First, to gain a clearer understanding of the various processes, capabilities and set-up of different facilities producing and processing essential oils, aroma chemicals and F&F ingredients in the country being visited. Second, the tours provide opportunities for participants to meet up with key producers, processors, importers and exporters in the F&F sector in the country. Third, the tours

enable participants to meet up with other knowledgeable F&F industry people from a variety of countries and continents. Each tour has been an incredibly international and multi-generational group. Travelling together over 6 to 12 days, the wide range of expertise and knowledge on hand make them remarkably useful and informative.

Two study tours to China took place in 1982 and 1987. However, the first was restricted to IFEAT Executive Committee members, although the initial plan for the 1982 tour was for a greater number of participants but the Chinese authorities refused this. Even so, the 1982 three-week fact-finding tour was accorded diplomatic status and covered eight cities, including Beijing, Jiangsu, Guanxi, Yunnan and Guangdong.

From Beijing, the IFEAT group went to Yunnan Province to visit plantations, distilleries and factories and then finished the tour at the Shanghai Research Centre to meet Dr Ding Desheng, Medal Lecturer at the Beijing Conference in 1988.

The first IFEAT Study Tour, which was open to all IFEAT member companies, as well as non-members was to Sri Lanka in 2005, since when nine further study tours have taken place. Initially, each study tour was approximately one week in duration every two years, but following the success of the Italian and Indonesian tours, they became annual events ranging from six to twelve days and in recent years waiting lists have been established shortly after registration opened due to the high interest. The number of participants attending has varied; 2005: Sri Lanka (11 participants from 7 countries); 2007: Egypt (13 from 9 countries); 2009: Southern Italy (30 from 13 countries); 2011 Indonesia (40 from 19 countries); 2012 Brazil (40 from 17 countries) and Paraguay (20 participants from 10 countries); 2013: India (33 participants from 17 countries); 2014: China (36 participants from 15 countries); 2015 France (44 participants from 21 countries); 2016: USA (48 participants from 20 countries) and 2017: Bulgaria (45 participants from 20 countries). Since 2011 a book, usually in excess of 100 pages, has been published on each of the study tours, and on page 14 there is an article on the recent Bulgaria Study Tour.

*To read the history article in full,  
please visit [www.ifeat.org](http://www.ifeat.org)*

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For Essential Oils & Aromatic Products



# MY FAVOURITE BUCHU OIL

BY STEPHEN PISANO

Executive Vice President Citrus and Allied Essences Ltd.

Over the past 30 years I have smelled many essential oils, absolutes and aroma chemicals. Each note sparks a memory and is connected to an experience.

With all the amazing essential oils, why choose buchu oil? In one word, GROWTH! I relate this oil to my early years of inexperience. The first time I smelled buchu oil, to my untrained nose it was not very pleasing. I could not imagine where it could be used or why anyone would use it, especially

in flavour and fragrance applications! I loved to show it to junior perfumers and flavourists who were not familiar with it, just to see their reactions. I have heard many descriptors of buchu oil - some of which are not fit to print!

Over the years, I learned to smell deeper and to recognise and appreciate the nuances in the oil; now when I smell buchu oil, I imagine the flavours and fragrances where it is used and could be used. I find myself looking for it in tropicals and exotics when evaluating flavours and fragrances with customers. Buchu oil is extremely powerful; a little goes a long way. It is typically added in solutions of less than 10ppm in blackcurrant, passion fruit, grapefruit, mango, and other tropical and berry flavours.

Although buchu oil imparts a very sulphury offensive off-note at higher levels, it is an essential ingredient for our industry thanks to the increased demand primarily in natural flavours. Organic buchu oil is also available and is mainly used in natural fragrance for personal care products.

Buchu was traditionally used for ceremonial and cosmetic purposes in ancient times. It was first introduced to the Dutch settlers in South Africa in the 17th and 18th centuries as a herbal remedy and quickly spread to Europe. Dried buchu leaves, not oil, were exported to Europe in the early 1800s and

used to make natural health tonics to cure many ailments including rheumatism. It is still used today locally for numerous health related claims and can also be found in tea blends.

The 2006 IFEAT Cape Town Conference gave me my first introduction to the plant itself when I visited a buchu farm.

Connecting the oil to the actual plant and soil, to be able to pick a leaf, pinch it and smell the oil, put a face on it for me! It was a great experience to

stand in the field and witness the leaves being harvested by hand.

Buchu is a perennial shrub that is indigenous only to South Africa where it is growing wild and is cultivated both conventionally and organically in the Western Cape region. Buchu grows on slopes that are west and south facing at a minimum of 500 metres above sea level. The leaves are typically harvested from October through to May. Buchu likes a Mediterranean climate with an average rainfall of 770mm per year. For optimal oil yield, the leaves should be immediately steam distilled for 135 minutes after they are picked. It is important to note, Buchu - both betulina and crenulata - are part of the Fynbos (fine-leaved

plants), the unique floral kingdom that occurs only in the Western Cape

of South Africa. As a result, buchu is a protected species and permits are required to propagate, cultivate, harvest, transport and deal in it.

Agathosma betulina, known as round leaf, and Agathosma crenulata, known as long or oval leaf, are the two main species of buchu that have been commercialised. In fact, there are as many as 150 species of buchu. Agathosma is derived from the Greek word "Agathos" meaning pleasant and "osme", meaning fragrance. The preferred species is A. betulina because of its lower, naturally occurring pulegone

level, which conforms to the EU regulatory restrictions on pulegone. However, in recent years, the demand for A. crenulata has significantly increased, along with the increased price level.

Thirty years ago, buchu oil was considered to be a boutique oil. Ten years ago, the over commercialisation of the plant caused the price of the oil to drop. As a result, farmers began pulling up the plants and replacing them with more profitable crops. To date, the selling price is around 40% of the price of buchu when it was in its prime. Today, the demand for buchu oil remains strong; however, most recently, historic severe drought conditions and wildfires have led to shortages and higher prices!

Welcome to the world of naturals, there's always something! This may all seem boring to the average person but to all of you reading this, the next time you smell buchu oil, I hope you will have a newfound love for this very special oil.



For further and technical information about buchu oil, may I refer you all to Dr. Matthias W. Esterhuysen's paper; **"Buchu Oil in South Africa"** which was presented at the Cape Town Conference in 2006. It is available in the Conference Proceedings on the IFEAT website. A Big Thank You to my dear friends Michelle Starke from Moutons Valley Pty Ltd whose information on organic buchu oil and pictures were a huge help to me and to Catherine Crowley from Eucaforest (Pty) Ltd for her market insights.



ATHENS GREECE  
24-28 SEPTEMBER 2017



## PROGRAMME

[www.ifeat.org](http://www.ifeat.org)  
conference@ifeat.org

# PROGRAMME

## SATURDAY 23RD SEPTEMBER

13.00 - 17.00 **Registration of Delegates**

## SUNDAY 24TH SEPTEMBER

09.00 - 17.00 **Registration of Delegates**

18.00 - 20.00 **Welcome Cocktail Reception**  
InterContinental Hotel

## MONDAY 25TH SEPTEMBER

09.00 **Conference Opening Ceremony**  
Introduction by **Dominique Roques**, IFEAT Executive Committee and Chairman of the Athens Conference Committee

09.15 – 09.45 (approx) **Session One:**  
**40 Years of IFEAT – The History**  
Part 1 of a joint presentation from **Dr Wladyslaw S Brud** and **Richard C Pisano**

10.00 – 10.30 **Naturals: the New Deal in Perfumery**  
**Jacques Cavallier-Belletrud**, Perfumer at Louis Vuitton

10.30 – 11.00 **Coffee Break**  
Sponsored by: **The Lebermuth Company**



11.00 – 11.30 **Session Two:**  
**Flavours & Fragrances – Today and Tomorrow**  
**Michael Carlos** (Chairman of RIFM & IFRA)

11.30 – 12.15 **Perfume in Antiquity**  
**Professor Jean-Pierre Brun**, Collège de France

12.15 – 14.00 **Lunch**  
Sponsored by: **Lansdowne Aromatics**



14.00 **Session Three: Essential Oil Sources: Challenges & Opportunities**

14.00 – 14.45 **Greece: Essential Oils, a Promising Business Opportunity in a Crisis Period**  
**Mr George Bouas**

14.50 – 15.15 **Africa Rising: Naturals as a Challenge & Game Changer**  
**Catherine Crowley & Jalal Charaf**

15.20 – 15.45 **Somalis' Historical Frankincense Trade: Valuing Sustainability**  
**Anjanette Decarlo**

15.45 – 16.30 **Discussion Panel**

16.30 **Close for the Day**

**Evening free**

# PROGRAMME

## TUESDAY 26TH SEPTEMBER

09.00

### Session Four: IFEAT Business Meeting

Chairman: *Raúl Amigo*, President of IFEAT

Part 1      The IFEAT Annual General Meeting

Part 2      Business Reports

#### Annual Review:

*Antonella Corleone*, Chair of IFEAT Executive Committee

#### Reports on the IFEAT Education Programme

##### ICATS/University of Plymouth Aroma Trades Course

Dr Alison Green

##### The University of Reading Flavour Course

##### Report on IFEAT 2017 Bulgaria Study Tour

##### IFEAT 2018 Conference

*Raúl Amigo*

##### IFEAT 2018 Study Tour

09.45 – 10.15

### 40 Years of IFEAT – Congresses and Conferences

Part 2 of a joint presentation from *Dr Wladyslaw S Brud* and *Richard C Pisano*

10.15

### Presentation of medals to the Best Students

10.30

### End of morning sessions

Coffee Break. Sponsored by: **The Lebermuth Company**



12.00

### Lunch

Sponsored by: **Lansdowne Aromatics**



14.00

### Session Five: Regulatory and Legislative Developments (title to be confirmed)

#### Pesticides in Naturals

*Michel Meneuvrier*, SAPAD

#### REACH, 10 years of defending the EU market access for our naturals

*Julie Cena*

#### Safety Assessment

*Jim Romine*, President of RIFM

#### Limonene: Form a Calculated to a Data Based Hazard Classification for the Environment

– The Impact on Essential Oils

*Hans Van Bergen*

#### Discussion Panel

*Jim Romine, Michel Meneuvrier, Kim Bleimann, Jens-Achim Protzen, Martina Bianchini* (president IFRA).

Moderator: *Sven Ballschmiede* (Executive Director IOFI)

16.30

### Dominique Roques to close programme

Time tbc

### The IFEAT Annual Dinner at The Zappeion Hall

# PROGRAMME

## WEDNESDAY 27TH SEPTEMBER

09.00 – 17.00

**Trade Exhibition**

09.00 – 16.30

**Workshop on Flavours & Flavourings (ticket only)**

*Michael Zviely*

Course Sponsored by **Ultra International Ltd**



**Evening Free**

## THURSDAY 28TH SEPTEMBER

09.00 – 17.00

**Trade Exhibition**

09.30 – 16.00

**ICATS Intermediate Perfumery Workshop (ticket only)**

*Joanna Norman*

Course Sponsored by **P.T. Van Aroma**



18.15 Coaches commence  
for Closing Banquet

**Closing Banquet at Balux Prive**

Sponsored by **Les Arômes du Maroc**



All timings are subject to change, for the most up to date agenda please visit: [www.ifeat.org](http://www.ifeat.org)

## IFEAT/IFRA SOCIO-ECONOMIC IMPACT STUDY OF THE "NATURALS"

# FRANKINCENSE AND MYRRH

Both frankincense and myrrh (F & M) grow as small trees or shrubs; they are of the botanical family Burseraceae. Frankincense (also called olibanum) is classified as belonging to the *Boswellia* genus, while myrrh is obtained from trees of the *Commiphora* species. The nomenclature of these products is both complex and confusing. Thus, there are numerous species and varieties of F & M trees, each producing a slightly different type of resin. Differences in soil and climate create even more diversity of the resin, even within the same species. The primary species relied upon today are *Boswellia carterii* (Somalia) and *Boswellia papyrifera* (Ethiopia) for frankincense and *Commiphora myrrhae* for myrrh. Pappas (2016) argues that frankincense should also be classified by chemotype as well as species, and discusses the five main chemotypes that encompass the five main species.

### IMPACT CATEGORY:

**High impact, many people involved.** Political instability, combined with geographic isolation and the nomadic nature of much of the collection area, makes it almost impossible to get accurate data. According to Farah (1994), officials of the Frankincense and Gums Development and Sales Agency reasonably estimated that the number of families in northern Somalia alone that primarily depend upon incense gathering is around 10,000 and the occurrence of commercial frankincense, "is absolutely crucial to the subsistence of a large number of the regional population".

More recently, in 2013, Zahra Osman of Neo Botanika (Somaliland) stated that, "For many villagers, the collection of gum often represents their only opportunity to earn cash and this is particularly important for

the financing of significant events such as weddings, funerals or for the purchase of food stocks."

### RELEVANT SITE LOCATION:

F & M are tree resins produced in East Africa, particularly Ethiopia, Somalia, Somaliland and Puntland, the southern Arabian Peninsula, particularly Yemen and Oman, and the Sahelian region of Africa. Other producing countries include Sudan, Kenya, Chad, Central African Republic, Cameroon and Uganda. The trees are found in very exposed and arid or semi-arid regions with poor organic soil composition.

### FARMED OR FORAGED:

**Foraged.** Most resin (whether F or M) is obtained either by collecting the exudate or more commonly by the tapping of wild growing trees. Tapping

involves making deliberate incisions into the bark of the tree. The resin is left to exude from the tree and harden for a few days. The collector then returns to collect the hardened gum and re-mark the tree for more gum to start exuding. Resins are usually collected every 10 to 15 days.

F & M is predominantly a traditional trade undertaken by nomadic communities and networks that has been in existence for thousands of years. Tapping is done by traditional means by indigenous communities, including local farmers and villagers, with nomadic traditions and is often undertaken alongside other activities, including herding. Collection is, at times, carried out by pastoralist peasants who include poor members of the community, women and/or children, as they collect water and wood fuel or tend small stock, or by organised tappers/collectors. It is not an organised or agricultural type of harvesting, but rather a wild craft method.





## **--BOSWELLIA SACRA TREE - FRANKINCENSE RESIN**

(Ceroni, 2005; Chikamai and Casadei eds. 2005; Farah, 1994; Lemenih et al 2007, Chaudhry, 2016, Guelleh 2016 and Harris 2016).

### **HARVEST TIMING:**

The collection of the resin occurs at a particular time and season, varying between regions. The gum activity is concentrated during the very low vegetative activity period when the trees have no leaves. Tapping occurs during the dry season from trunks and branches. The particular details of the tapping, such as the time of year it is undertaken, its duration, and the interval between individual tapping, varies according to the species and the customs in the area of production. For example, in Somalia there are usually two periods when *Boswellia* is tapped, each lasting three to four months, involving successive tapping at approximately 15-day intervals, with the timing of the tapping periods dependent upon the onset and extent of the rains.

### **LOCATION OF PROCESSING:**

After the gum has been tapped and collected into bags and packaging, the villagers or farmers collect the gum and store it in an excavation, cave or some kind of camp, to accumulate for some time while they are harvesting in a certain region. This probably contributes to the stabilisation of the gum resin. Finally, after sufficient quantities have been collected, they are brought to the village or town, where the material is classified, graded and traded. All this is done manually. The resin is stored for about 12 weeks to harden. The only processing undertaken after collection is the sorting and grading of the resin globules. This is usually done by the local merchant to whom it is sold rather than by the collector.

The cleaning process is undertaken in the collection centres where the primary material ranges from being as white as milk to a deep dark red. Following cleaning, sieving, sorting and picking, the material finally ends up graded by colour or size. After the material is cleaned, the trader comes to negotiate the purchase and export of the product. Most of the product is exported in this form, although there is a local market for chewing frankincense.

Further processing is predominantly undertaken in the importer's country and depends on usage. The resins are used in unprocessed form for both fragrance and flavour purposes, distilled to yield volatile oils with characteristic and balsamic odours used in perfumery. Solvent extracts are also prepared as resinoids and absolutes used as fixatives in perfumes. Although the bulk of processing was undertaken outside the gum-producing countries, processing plants have been set up in Somaliland, Kenya and Oman. This indicates a clear evolution in the F & M supply chain.

Typically, frankincense is produced by water distillation and not usually by steam injection, with diesel thought to be the major energy source. Oil yields from processing appear to vary considerably and Pappas (2016) quotes the following oil yields. *Boswellia serrata*, primarily of Indian origin, is often very rich in oil content with oil yields of around 10% or more. High oil yields and low odour quality result in low prices. *Boswellia sacra*, which is typically from Oman and is an oil-rich resin, yields around 9-10%. *Boswellia carterii* and *Boswellia frereana*, usually from Somaliland, typically has oil yields of 5-6% and around 2% range respectively. *Boswellia papyrifera* from Ethiopia has approximately a 2% oil yield.

### **DISTINGUISHING CHARACTERISTICS:**

The markets and end-uses for the resins fall into three main sectors: fragrance (chiefly for incense use – either in religious ceremonies or around the home but with some fine fragrance applications); flavour (principally 'maidi type' for chewing but with some minor uses of the oils as flavouring agents such as mouthwashes); and pharmaceutical applications. Both F & M were known for centuries in folk medicine and are used now in some medical products and in aromatherapy in the form of resins (incenses), oleoresins and essential oils. All of the products show antimicrobial properties and for that purpose were and are widely used in Chinese and Ayurveda medicine. Frankincense is also used to relieve depression and anxiety and myrrh has analgesic properties and is used in the treatment of rheumatic pain and arthritis. Both are present as additives to mouth care products and toothpastes and are also used in a variety of skin care products. Incense was commonly used to disinfect air in churches and homes and this tradition has remained until recently in different religious liturgies. Incense is, without question, its greatest use, and in addition to Eritrean-type frankincense being used by the Orthodox and Roman Catholic Churches, China is believed to be using an increasing proportion of its imports for the manufacture of incense sticks rather than, as previously, for traditional medicines.

The F & M markets operate under various constraints and challenges. Some of the production constraints include: inconsistent quality, tapping or cleaning processes leading to variable grades; regulatory measures and forest management programmes and practices are often poor or lacking, reflecting the poverty of the regions; land degradation, clearance and use of wood for fuel can, in the long term, threaten supplies, if unabated; climatic changes, which can affect the timing and length of the dry season when harvesting is undertaken; deforestation, livestock over-grazing and changes in land use, will affect production levels; political instability, military and border conflicts, particularly in Somalia and between Ethiopia and Eritrea; lack of tree tenure in some countries to guarantee incentives to farmers and pastoralists in order to conserve and manage the woodlands. In addition, Sadqa Haq recently argued that NGO provision of food to nomads in the Horn of Africa during the last drought five years ago was reducing the incentive to collect resins. She now reports that the situation on the ground has changed and the pastoralists have formed collectors' groups, especially in north eastern Kenya, and are more

focused on obtaining high quality resins for the markets. This change in attitude is very promising for the conservation of the indigenous resin producing trees.

There are also various marketing constraints, which include changes in market demand, little marketing or trade registration (including very limited export or import statistics) and the threat from synthetic products. However, the use of F & M depends on their characteristic fragrance properties rather than functional properties and this makes it much more difficult for them to be substituted.

### VOLUMES:

Frankincense is traded in the greatest volumes and is available in the largest number of different grades. It ranges in appearance from pale pieces or tears up to several centimeters in size, to smaller pieces, and from powder and siftings to large, reddish-brown or dark agglomerated masses. Myrrh is traded in smaller volumes and has fewer clean, pale grades to choose from. All the resins have a fragrant aroma due to the presence of essential oil and this accounts for their commercial importance.

It is difficult to trace the exact volume of trade in F & M. In very recent years, France, the UK and the USA have been reported as sizeable importers of frankincense resins for further processing. Delauney (2010) estimated that at least 400 MT per year (and probably more) of the carterii or sacra type goes into the fragrance industry. This can be differentiated from the Ethiopian type, which is exported in much larger volumes and thus the Eritrean or church type of frankincense accounts for the majority of incense traded around the world.

Delauney estimates that average annual exports over the two decades (1987 to 2006) of *B. carterii* and *B. sacra* from Somalia, Somaliland and Puntland have averaged 460MT, while exports of *B. frereana* have been between 50 and 70 MT. Yemen and Oman are estimated to export approximately 120MT each year of *B. carterii* and *B. sacra* and 60MT of *B. frereana*, including an unknown quantity of gum resins that originate from Somalia/ Somaliland and transit through these countries. Exports of frankincense from Ethiopia and Eritrea are much larger, with annual exports of *B. papyrifera* estimated at 2,300MT with a further 700 to 800MT from other sub-Saharan producers. More recently, Guelleh (2016) has estimated current annual Somaliland harvesting levels and potential as follows: *B. carterii* gum resin production 200 MT to potentially around 1,000 MT; *B. frereana* gum production 150 MT to potentially 400 MT; myrrh production 90 MT to potentially 400 MT; and opopanax current production 6 MT to potentially 40 MT. Harris (2016), while recognising the inadequate data, discusses the substantial fall in Omani frankincense annual production to around 30 MT, with harvesting totally dependent upon immigrant Somali labour.

Coppin in Chikamai and Casadei eds. (2005) stated "Total world demand is estimated at around 2,500 tonnes/year but this figure is subject to some qualification and much uncertainty. China and Europe are the largest markets but the Middle East, North Africa and (to a lesser degree) the US also import significant amounts directly from source."

Today, with no official statistics with regard to export destinations, one can safely argue

that China and the Middle East (and to a lesser extent Europe) have definitely become the largest importers. Although a significant proportion of imports in the Middle East are re-exported, China purchases for medicinal applications and also for burning incense sticks, whereas Europe and America use a similar type of incense (the Eritrean type) in the Orthodox and Roman Catholic Churches. The Northern African and Middle East destinations import the "Maidi" and the "Luban Maidi" for chewing gum and there are sizeable sales in local markets for chewing uses. France is certainly the leading importer of the *B. carterii* or *B. sacra* for perfumery and fragrance use, including essential oils and resinoids. In recent years, the popularity of aromatherapy and self-medication with essential oils has contributed significantly to a rise in the international demand for frankincense and myrrh. Similarly *Boswellia* resins are used for their antiseptic, anti-arthritis and anti-inflammatory effects, while recent German, Indian and US research has indicated their use as a possible treatment for cancer.



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- \*Guelleh, Osman Guelleh 2016, *The Incense Trail: A Supply Chain in Flux*
- Haq, S., Managing Director of Lubanchem Ltd., Nairobi, Kenya [www.lubanchem.com](http://www.lubanchem.com) (Email Sadqa Haq [sadqahaq@me.com](mailto:sadqahaq@me.com)). She is responsible for the production, quality assurance and overall running of the company. She has extensive experience in the distillation of essential oils from gums and resins, especially those from the genus *Boswellia* and *Commiphora*. She has been attending IFEAT conferences for the last eight years and has participated in the four study tours.
- \*Harris, Trygve, 2016, *The Mother of Society and the Umbrella of our Lives: Frankincense in the Sultanate of Oman*.
- Lemenih, M, Feleke, S. and Tadesse, W., 2007. Constraints to smallholders production of frankincense in Metema district, North-western Ethiopia. *Journal of Arid Environments*, 71 (4), Dec 2007, pp. 393 – 403.
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- Ms. Zahra Osman Guelleh, Neo Botanika, Hargeisa, Somaliland – Traders in aromatic gums and resins and their essential oils. Email – [zahra.osman@ogfgroup.com](mailto:zahra.osman@ogfgroup.com), UK phone number +44 78 764 4161. See interview on [www.ifra.org](http://www.ifra.org) where she discusses aromatic gums in Somaliland. She has worked for UN agencies – and is familiar with "sustainable livelihoods" concepts. She attends IFEAT conferences every year.
- Dr Robert S Pappas 2016, "Frankincense – A classification by chemotypes rather than just species" Ultra International BV [www.ultraln.com/frankincense-essential-oil-chemotypes](http://www.ultraln.com/frankincense-essential-oil-chemotypes)
- Starlight Products ([www.starlightproducts.com](http://www.starlightproducts.com)) a specialised international trading company in botanicals, natural raw materials and ingredients and is part of the Iranex Group and based in Rouen, France.

\*Papers presented at IFEAT Dubai Conference 25th to 29th September 2016, "The Middle East: Challenges at the Historical Crossroads of the F&F Trade"



# TWO WORKSHOPS IN ATHENS

## PLACES STILL AVAILABLE

There are still places left on the workshops we have in Athens this year and there is still time to book your place.

Two workshops will be run this year – one on flavours and the other on perfumery.



On Wednesday 27th September

### DR MICHAEL ZVIELY'S WORKSHOP ON FLAVOURS & FLAVOURINGS:

- Flavours, Flavourings and Sweet Taste Modifiers.
- Flavour Creation – main principles.
- Flavours Stability and Changes During Shelf Life.
- Flavourings and Interactions with Food and Beverage Matrices.
- Gas Chromatography Mass Spectrometry (GCMS) as a Tool for Development of Flavourings.



On Thursday 28th September,

### JOANNA NORMAN'S INTERMEDIATE PERFUMERY WORKSHOP:

- **Odour Language and Fragrance Ingredients:** An interactive multi-sensory exploration of communicating and classifying key natural and synthetic fragrance ingredients.
- **Fragrance Accords:** Introduction of modern fragrance families, following an olfactory journey of over a hundred years of fragrance developments.
- **Creative Drivers and Key Trends:** Smelling the creative triggers in recent fragrance launches and how they influence fragrance development from niche perfumery to household products.
- **Fragrance Creation Exercise:** A practical session of fragrance creation developing a take home perfume composition.

Both workshops will run from 09.30 until approx 16.00 and are by ticket only.

Members: 200 EUR per workshop.

Non-Members: 300 EUR per workshop.

Plus VAT at the Greek rate of 24%

For more information on the workshop leaders and to book your place, please visit [www.ifeat.org/project/courses-workshops](http://www.ifeat.org/project/courses-workshops)



### NEW TO IFEAT CONFERENCES

On Wednesday 27th September from 17.30 to 19.30, a discussion workshop will be organised around "What Future for Olibanum and Myrrh in Somaliland?", to allow an in depth follow up to Dr Anjanette Decarlo's presentation on Monday 25th September. Open to a limited number of Delegates upon registration, more news about this will be available on our website in the coming weeks and we will send information by email soon. Please visit our website at [www.ifeat.org](http://www.ifeat.org) for more information.

## IFEAT STUDY TOUR TO

## BULGARIA

28th MAY - 2nd JUNE 2017

IFEAT STUDY TOUR TO BULGARIA • 28th MAY - 2nd JUNE 2017

On the last weekend in May, 45 delegates from 20 countries gathered in rain-soaked Sofia for the start of IFEAT's 10th Study Tour to Bulgaria. With them, the delegates brought the sunshine; the rains from the previous week disappeared and there followed five days of almost perfect weather – making the precautionary Wellington boots ordered for each delegate for the rose field visits unnecessary. Sadly, the originally planned onward trip to Turkey had to be cancelled due to security concerns. As a result, this study tour was the shortest to date. Although the programme was packed, the range of oils and extracts covered was limited. Nevertheless, as the comments from participants illustrate, this was one of the best study tours to date.

Here are just a few of the comments from the Bulgaria Study Tour (BST)

"Thank you all for the beautiful journey to the Valley of Roses. We enjoyed the tour and thank you all for making this yet another memorable tour."

"Thanks for organising the Tour, which was a really wonderful journey of rose!"  
"The BST went like clockwork, largely due to the meticulous organization."

"Thank you all for wonderful experiences these five days. Thanks to Filip and Andrey for their hospitality. I have never seen anybody so open in sharing process details and other technical information. It's been a wonderful journey."

"Thank you ALL for this successful and rewarding experience, the camaraderie amongst us was off the charts. In terms of rose and lavender oil knowledge, my first study tour was stellar."

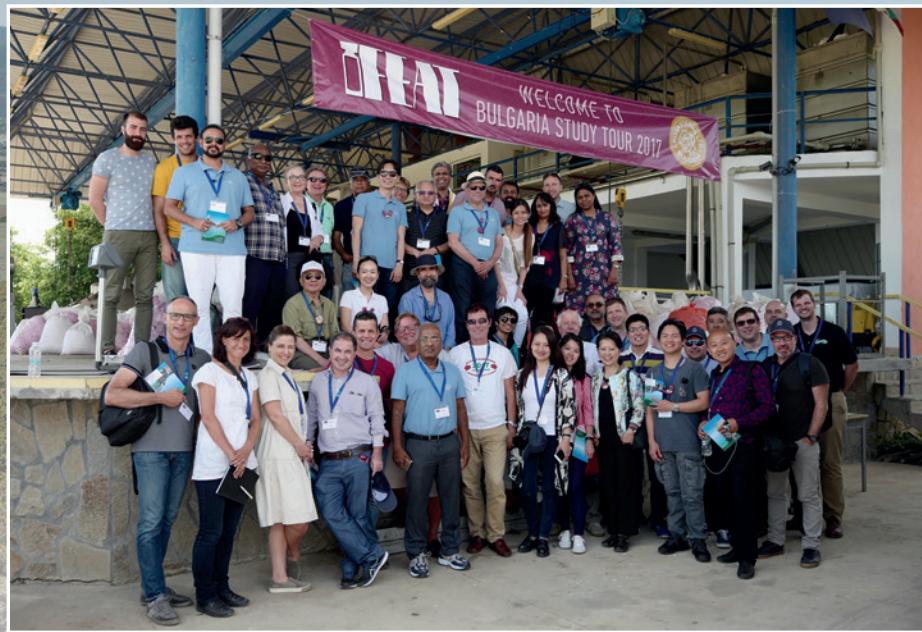
The tour concentrated on rose and lavender oils, in which Bulgaria is the world's leading producer. During the five days, participants were able to gain an intimate knowledge of their production and processing, alongside some smaller oils. The tour provided an excellent opportunity for the participants to meet Bulgarian producers, processors and exporters as well as discuss a whole range of F&F topics with other delegates from a diversity of countries and backgrounds. Everyone was there to learn and to have a hands-on experience!

The timing of the tour was perfect, with early morning visits to the rose fields enabling delegates to experience and participate in the picking of the flowers during the season's peak! Unfortunately it was too early in the season to witness the harvest and distillation of lavender, which takes place a month later. Nevertheless, the participants enjoyed visiting the lavender fields, which had just started to bloom.

Touring the Rose Valley, participants were able to see Bulgaria's beautiful physical landscape and culture during their travels, in part thanks to the sponsorship of the Bulgarian companies we visited. IFEAT would like to thank Berje Trakia Ltd., Bulattars Ltd., Enio Bonchev Production Ltd., Galen-N Ltd., Rosa Eterna Ltd. and Vigalex Ltd. for their sponsorship, as well

as BalkaNova Ltd., the tour agent who provided excellent support and logistics. However, particular thanks must go to two Local Organising Committee members, Filip Lissicharov (Enio Bonchev) and Andrey Mitov (Vigalex), who accompanied the tour throughout the week, for their dedication and hospitality. As one delegate said of them; "I have never seen anybody so open in sharing process details and other technical information." This, combined with company visits, the "coach lectures" and the professionalism and warmth of the welcome, meant that delegates gained an intimate knowledge of Bulgarian essential oil production, processing, marketing and end uses. One innovation introduced on the first day of the tour in Plovdiv was a series of five lectures on topics covering various aspects of Bulgaria's essential oil industry. A visit to Rosa Impex, a major producer and exporter of a wide range of cosmetics, followed this.

On Tuesday, delegates visited rose growing fields and then the operation of Galen-N and Kateko, where another Local Organising Committee member, Mornitchil Mihov, provided a detailed guide to the company's growing, distillation, concrete and absolute extraction operations. This tour included a visit to new pharmaceutical ingredient production facilities as well as a lunchtime lecture on dry rose flower extract. In the afternoon, a visit was made to Rosa Eterna's essential oil processing facilities. Wednesday began with a very early morning visit to Enio Bonchev's rose picking operation with stunning views overlooking the Rose Valley. Delegates were shown the

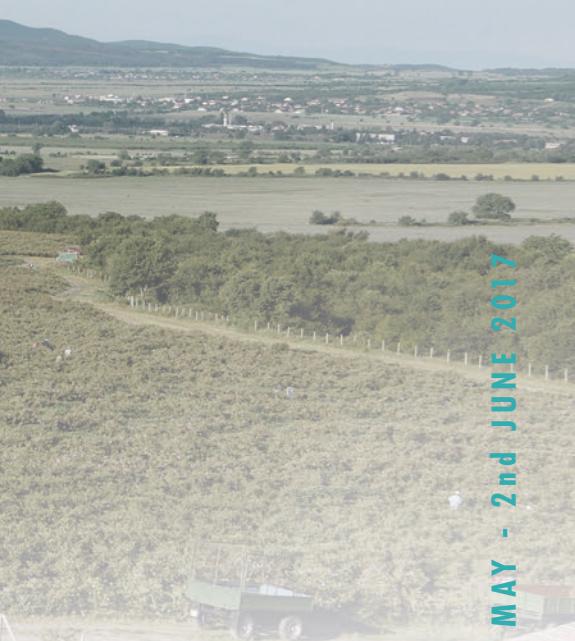


## IFEAT BULGARIA STUDY TOUR DELEGATES 2017

new high tech software facilities monitoring rose harvesting and then competed in a rose picking competition. At both Enio Bonchev and Bulattars, (which was visited in the afternoon), delegates were given in-depth tours of each company's new and old distillation facilities, as well as their impressive rose museums. The detailed description of the uncommon cohabitation technique, used to distil rose oil, was very interesting. Delegates also saw rose oil being very carefully decanted from the still, not surprising when the current price is approximately €12,000 per kg! The final day saw visits to Vigalex's rose and lavender fields and its modern processing

and extraction facilities. This was followed by a plant visit to Panteley Toshev Ltd. – an innovative and technological leader in the production of beverage, food and natural flavour ingredients. Throughout the tour, delegates received generous gifts from the companies they visited.

Cultural activities were not overlooked. The tour began with a tour of Sofia riding on a traditional tram. Other events included walking tours of historic Sofia and Plovdiv; an evening reception and dinner at the superb Kazanlak Rose Museum with the Mayor; visits to the Thracian tombs (a UNESCO Heritage Site); several folk



dancing and singing displays in traditional costumes and a dinner accompanied by a superb male voice choir. Throughout the tour, delegates sampled the magnificent Bulgarian hospitality, wine and cuisine beginning with a welcome dinner on a roof-top restaurant with stunning views over Sofia as the sun set, and concluding with a rose themed closing banquet with fine Bulgarian wines – a spectacular end to another successful IFEAT study tour.

*Peter Greenhalgh is currently preparing a book on the Bulgaria Study Tour, which will be available later this year.*

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andres.gonzalez@vicentetrapani.com

## NEW IFEAT MEMBERS

Below is a list of new IFEAT members who had joined by 1st June 2017:

### Colgate-Palmolive

909 Rover Road, Piscataway, New Jersey 08855  
USA

Contact: Ms Tracy Bariexca  
Email: tracy\_bariexca@colpal.com  
Web: www.colgate.com



### Jayshree Aromatics Pvt. Ltd.

Plot No: 4703, 4704, 4705/1/2, 3, 4,  
G.I.D.C. Estate, Ankleshwar, Gujarat 393002  
India

Contact: Mr Neel Patel  
Email: neel@jayshreeind.com  
Web: www.jayshreeind.com



### Tianmen Deyuan Chemical Tech Co., Ltd.

No.58 Chuangye Road, Economic Development Zone,  
Tianmen, Hubei 431700  
China

Contact: Mr Li Jijian  
Email: lijijian@deyuanchem.cn  
Web: www.deyuanchem.cn/template/company.htm



### DCP Ltd

29 Abercromby Place, Edinburgh, Midlothian EH3 6QE  
UK

Contact: Mr David Crosthwaite  
Email: david.crosthwaite@dcpdirect.com  
Web: www.dcpdirect.com/Home.html



### Florame

ZA de la Gare, 8 Allée de la Garance,  
Saint Remy de Provence 13210  
France

Contact: Ms Charlotte Decours  
Email: cdecours@florame.fr  
Web: www.fr.florame.com



### SunWest Ingredients

9980 Evans Road, Wapato, Washington 98951  
USA

Contact: Mr Dan Brown  
Email: dan@sunwestingredients.com  
Web: www.sunwestingredients.com



### Life Solutions Sp z.o.o.

18E, Sasiedzka Street, 03-168 Warszawa  
Poland

Contact: Mr Robert Piorunski  
Email: robert.piorunski@lsessence.pl  
Web: www.lsessence.pl



### Pacific Provender Limited

Malo, Sanma Province  
Republic of Vanuatu

Contact: Mr Jeff Allen  
Email: bearoma22@gmail.com



### Destilla

Eninger Strasse 2, Noerdlingen 86720  
Germany

Contact: Mr Michael Feil / Mr Armin Thienel  
Email: m.feil@destilla.com  
Web: www.destilla.com/en/home



### EssenceDirect GmbH

Läittenstrasse 2, Winkel, Zurich 8185  
Switzerland

Contact: Dr Thomas Meier  
Email: tmeier@essencedirect.ch  
Web: www.essencedirect.ch



### HYTECK Aroma-Zone

25 Rue de l'Ecole de Médecine, Paris 75006  
France

Contact: Ms Heike Graetz  
Email: heike.graetz@aroma-zone.com  
Web: www.aroma-zone.com



### S. H. Kelkar & Company Ltd

LBS Marg, Mulund (W), Mumbai, Maharashtra 400 080  
India

Contact: Mr Shyam Prabhu  
Email: sprabhu.aromatics@keva.co.in  
Web: www.keva.co.in



### Oleos

1/3/11 office, 15 Borodinskiy boulevard,  
Moscow region, Podolsk, 142108  
Russia

Contact: Ms Anastacia Stepanova  
Email: A.Stepanova@oleos-info.ru  
Web: www.oleos-info.ru



### Malinis Nikolaos

3rd Septembriou 22, Kozani 50132, West Macedonia  
Greece



### Golden Grove Naturals Pty Ltd

Munro Wharf Road, Tucki Tucki, New South Wales 2480  
Australia



Contact: Mr Aaron Pollack  
Email: aaronpollack@goldengrovenaturals.com  
Web: www.goldengroveglobal.com

### Dhriya Essential Oils

Gundala Ratadiya Road, Gundala, Mundra Kutch,  
Gujarat, 370410  
India



Contact: Mr Urmil Gala  
Email: dhriyaessentialoil@gmail.com  
Web: Under construction

### Luxaroma

62 Blackshaw Avenue, Mortdale, New South Wales 2223  
Australia



Contact: Mr Ravi Demello  
Email: sales@luxaroma.com.au  
Web: www.luxaroma.com.au

### Venus Enterprises Ltd

The Chandlery, 50 Westminster Bridge Road,  
City of London SE1 7QY  
UK



Contact: Mr Peter Norris  
Email: eo@venusenterprises.co.uk  
Web: www.venusenterprises.co.uk

### BoreA Canada

3177 Beausejour Boisbriand, Quebec, Quebec, J7H 1A4  
Canada



Contact: Mr Jean-Claude Villeneuve  
Email: jc@boreacanada.com  
Web: www.boreacanada.com

### Ennolys

Rue de Mancamp, Soustons 40140  
France



Contact: Mr Thomas Rager  
Email: tr@ennolys.fr  
Web: www.ennolys.fr/en/home-page

### Sangam Aromatics

C/12-16 & 18 Ajitpur Industrial Estate, Shahbad Road,  
Rampur UP 244901  
India

Contact: Mr Vineet Gupta  
Email: contact@sangamaroma.com  
Web: www.sangamaroma.com



### Factores y Mercadeo S.A

Cra 116 No. 14B – 95, Zona Industrial El Recodo  
Fontibón, Bogota D.C.  
Colombia

Contact: Ms Carol A Cortes  
Email: marketing@factoresymercadeo.com  
Web: www.factoresymercadeo.com



### DSM Nutritional Products Ltd

Wurmisweg 576, Kaiseraugst, AG CH-4303  
Switzerland

Contact: Ms Sonia Balboni  
Email: sonia.balboni@dsm.com  
Web: www.dsm.com/corporate/home.html



### Maydi Frankincense Natural Oil

Al Qasais Industrial Area 3, Unit 11, Dubai 235330  
United Arab Emirates

Contact: Mr Hassan Saleh  
Email: hassan@maydifrankincense.com  
Web: www.maydifrankincense.com



### Kundaly Naturals

Kanan Devan Hills Plantations Company Pvt Ltd,  
KDHP House, Munnar, Idukki, KL 685612  
India

Contact: Ms Roshini Korath  
Email: roshini.korath@kdhpte.co.in  
Web: www.kdhpte.co.in



### Jiangxi Spice Chemical Industrial Co.,Ltd.

Area C, Industrial Zone, Fuzhou City 36,  
Jiangxi Province  
China

Contact: Mr Leo Lee  
Email: jxspicemarkets@gmail.com  
Web: www.jxspice.com



### Vessel Essential Oils

Farmakeika, Neo Risio, Thessaloniki  
Greece

Contact: Mr Vasilis Varsamis  
Email: info@vessel.gr  
Web: www.vessel.gr



### Scatters Oils

147 Malibongwe Drive, Strijdom Park, Randburg, 2194  
South Africa

Contact: Mr Ian Lutge  
Email: ian@scattersoils.com  
Web: www.scattersoils.com



### Mehk Chemical Pvt Ltd

W 6 TTC Industrial Area, Pawane,  
Navi Mumbai 400703  
India

Contact: Mr Rohit G Kamath  
Email: rohit@mehk.in  
Web: www.mehk.in



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