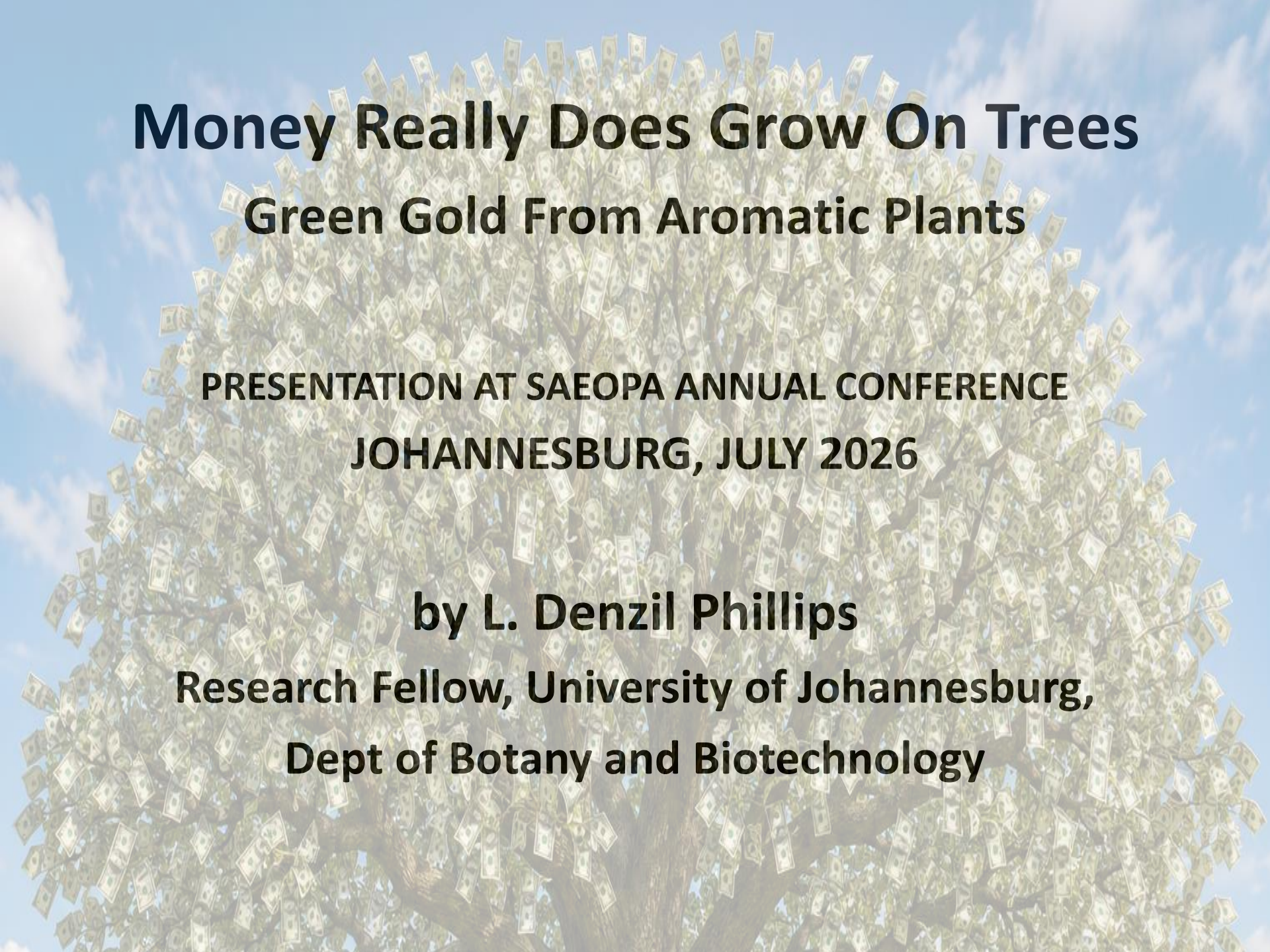




# **Money Really Does Grow On Trees**

## **Green Gold From Aromatic Plants**

**PRESENTATION AT SAEOPA ANNUAL CONFERENCE**

**JOHANNESBURG, JULY 2026**

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# Oudh: Money really does grow on trees



# Miss Nutmeg : Grenada Nutmeg Festival



# Explosion in Fragrance launches

Source: Michael Edwards /Google Gemini

- 1989 – 85
- 2010 – 1313
- 2024 – 7000
- 2030 – ??????
- How can natural essential oils match that annual growth path?

# Some Essential Oil History

- 1900- 300 t of Parma violets picked in Grasse
- 1912 - 9500 hectares of roses planted in Bulgaria
- 1925 - 8,000 hectares of Algerian geranium
- 1927 - 2021 t. Indian sandalwood distilled
- 1927- 1500 t. of jasmine flowers picked S. France
- 1929 -50 stills making 95 t of Guyanese rosewood
- 1938 - 132 t of Reunion geranium exported
- 1949 - 1600 t of Florence orris root picked
- 1956 - 2400 hectares of Bergamot in Calabria

# Aromatherapy Giants

- doTERRA (Utah, USA) Est Turnover: \$1.8 - \$2.0+ billion p.a
- Young Living (Utah, USA) Est Turnover: \$1.5 - \$1.8 billion p.a
- NOW Health Group (Illinois, USA) Est Turnover: \$500 - \$700+ million p.a
- Plant Therapy (Idaho, USA) Est Turnover: \$100 - \$150 million p.a
- Edens Garden Est Turnover: (California, USA) \$50 - \$80 million p.a
- Mountain Rose Herbs Oregon, USA Est Turnover: \$40 - \$60 million p.a

# Fragrance and flavors giants

- 
1. DSM-Firmenich (Switz/Netherlands)  
Annual ~€9.03 billion
  2. International Flavors & Fragrances - IFF (US)  
Annual ~€9.5 billion
  3. Givaudan (Switzerland)  
Annual ~€7.7 billion
  4. Symrise AG (Germany)  
Annual ~€4.93 billion
  5. Kerry Group plc (Ireland) Annual  
~€8.8 billion
  6. Takasago International Corporation (Japan) Revenue:  
~€1.5 billion

# Key Constraints

- Climate Change and Environmental Damage
- Labelling overload: organic, fair trade, natural
- Lack of Transparency /Supply chain management
- Ethical/Fair Trading – is it real
- Multinational Take-overs
- IFRA Regulations, particularly, on Allergens
- Convention on Biodiversity - ABS
- Convention on Endangered Species (CITES)

# Growing environmental farming problems

- Conflict between food and non food crops
- Lack of water, High cost of water
- Deforestation /Desertification
- Water pollution/shared irrigation
- Pesticide spray drift
- GMO costs
- Disappearing pollinators
- Cost of natural pesticides

# Labelling confusion

based on Judi Beerling Organic Monitor 2014

- Natrue – Belgium ( mainly BDIH on a global scale)
- BDIH –Germany
- Ecocert –Greenlife – France ( now incl IMO Switzerland )
- Cosmobio France
- Soil Association – UK
- ICEA – Italy
- USDA/National Organic Program
- Natural Products Association USA
- And many many more !!!!

*COSMOS – is trying to harmonise European standards but the consumer continues to be confused?*

# Allegen headaches – The list is getting longer

***Cinnamaldehyde*** - occurring in cinnamon

***Cinnamyl alcohol*** - in cinnamon, balsam of Peru

***Citral*** - in lemongrass, citrus, cardamom, petitgrain, ginger

***Coumarin***- in tonka bean, sweet clover, stone fruit, strawberries

***Eugenol*** - in clove, nutmeg, cinnamon, rose, basil and bay

***Farnesol*** -in neroli, rose, palmarosa and ylang ylang

***Geraniol*** - in rose, citronella, palmarosa, and geranium

***Hydroxycitronellal*** - in citrus fruits, ylang ylang and sandalwood

***Isoeugenol*** - in clove, nutmeg, ylang ylang

***Limonene*** - (oxidised) (in citrus)

***Linalool*** - (oxidised) citrus, rose, coriander, chamomile, ylang+

# Gary Young, Founder of Young Living

- The essential oil and aromatic raw materials industry is failing to self-police itself with respect to conserving threatened plant and animal species.
- Commodity shortages and higher unit prices for certain items signal ever-increasing supply problems.
- Green policies and any semblance of ecological awareness with respect to these commodities often seem to originate more from the attitudes of consumers than via the raw materials producer and reseller

# Ethical questions

- What is a fair price for an essential oil
- The concept was designed for commodities
- Adding value at source is what creates wealth
- Branded and G.I products are often fairer?
- What makes one farmer/village fair trade certifiable and not the other?
- Is Green Washing Ethical ?
- Is Child Labour inevitable?

# ESSENTIAL OILS FOUND IN FLAVORS NOT FRAGRANCE

| NATURAL     | FLAVORS | NATURAL            | FRAGRANCE |
|-------------|---------|--------------------|-----------|
| Orange      | 51000   | Lavandin           | 1300      |
| Cornmint    | 32000   | Patchouli          | 1200      |
| Lemon       | 9200    | Eucalyptus Citriod | 1000      |
| Eucalyptus  | 4000    | China Cedarwood    | 800       |
| Peppermint  | 3300    | Litsea Cubeba      | 760       |
| Citronella  | 1800    | Atlas Cedarwood    | 550       |
| Clove       | 1800    | Virginia Cedarwood | 300       |
| Lime        | 1800    |                    |           |
| Scotch Mint | 1000    |                    |           |

The future market for essential oils may not be in F&F anymore? ( after Jim Gobert IFEAT 2011)

- 1) Animal feed – e.g oregano, sage
- 2) In mosquito repellents
- 3) In pesticides
- 4) In herbicides
- 5) In fungicide
- 6) Anti-oxidants in foods

# NATURALS PYRAMID



# Tree bark oils are generally a NO NO

- Rosewood
- Agarwood
- Styrax
- Cedarwood
- Sandalwood
- Cascara Bark
- Lignum Vitae
- Cinnamon Bark
- Mexican Linaloe

# Natural Florals require lots of labour

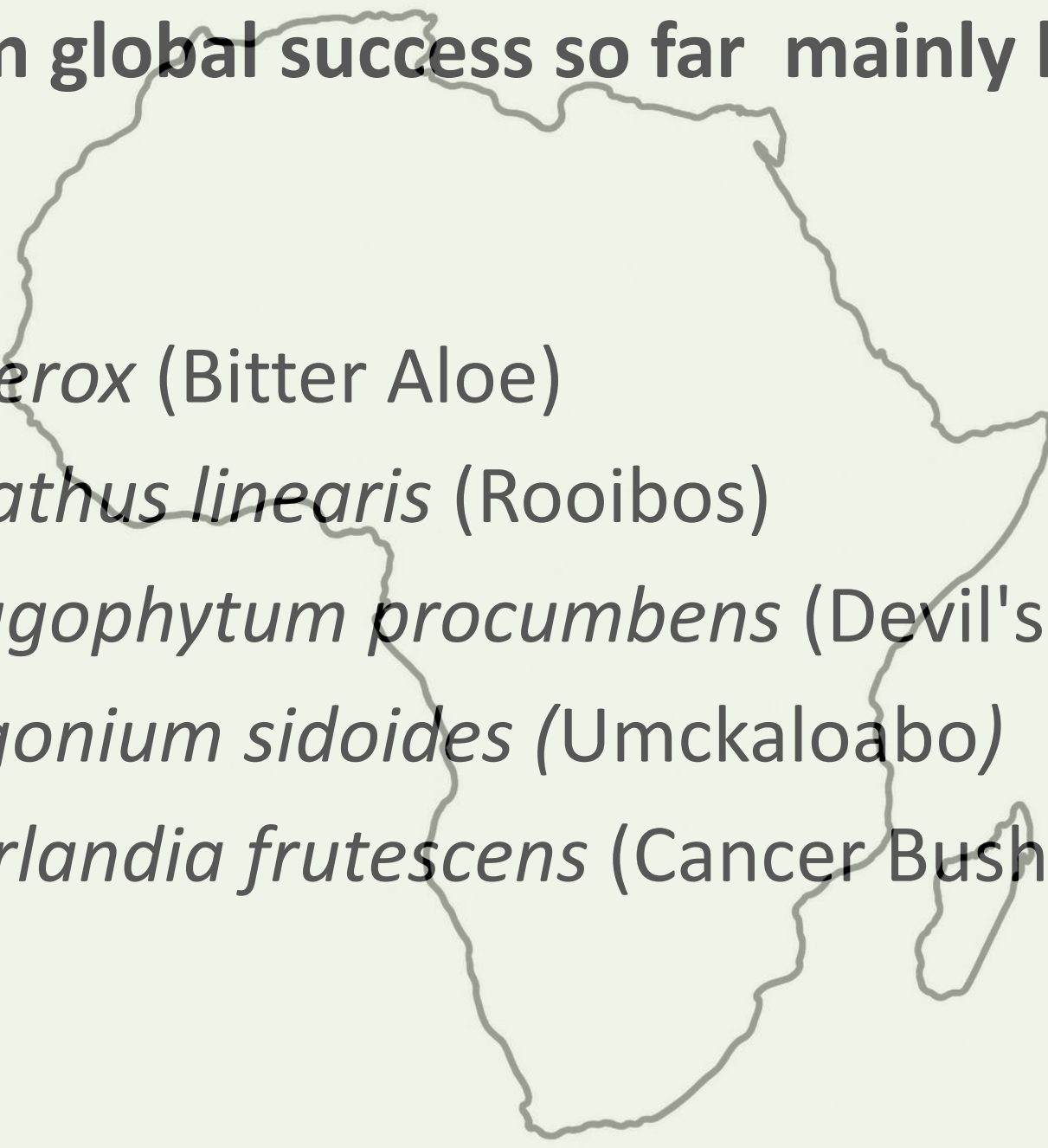
- Tuberose
- Jasmine
- Rose
- Ylang Ylang
- Violet
- Orris Root
- Carnation

# Herbs - AI aromatic crops?

- Basil
- Parsley
- Mint
- Oregano
- Rosemary
- Thyme
- Sage
- Tarragon

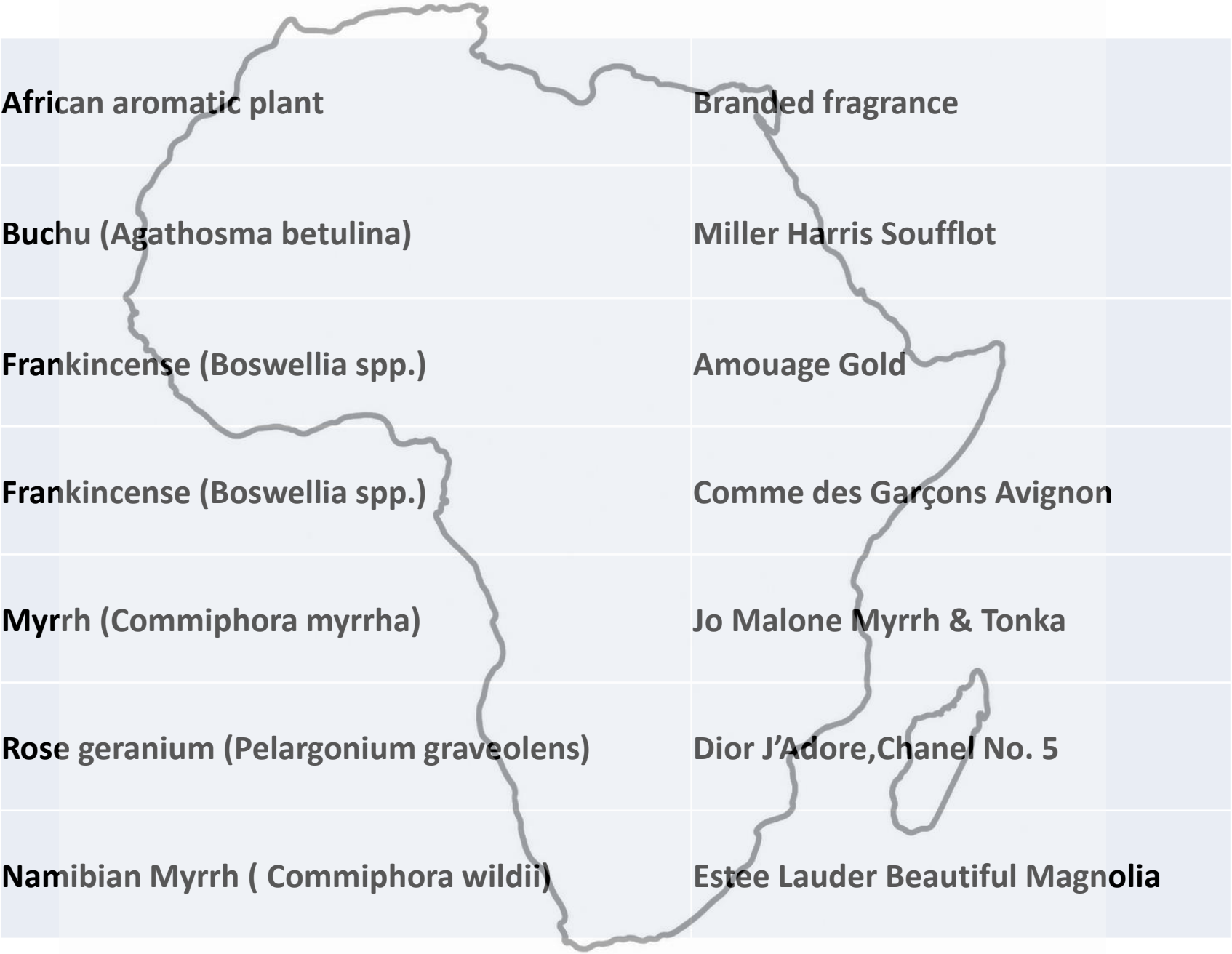


# African global success so far mainly herbals

- 
- *Aloe ferox* (Bitter Aloe)
  - *Aspalathus linearis* (Rooibos)
  - *Harpagophytum procumbens* (Devil's Claw)
  - *Pelargonium sidoides* (Umckaloabo)
  - *Sutherlandia frutescens* (Cancer Bush)

# African aromatics in global brands

- **Miller Harris – Soufflot (Buchu)** few internationally recognised fine fragrances showcase South African **buchu** (*Agathosma betulina*)
- **Amouage – Gold (Frankincense)** an outstanding example of how a traditional regional aromatic resin can be the defining ingredient of modern luxury perfumery.
- **Comme des Garçons – Avignon (Frankincense)** is widely regarded as one of the world's finest incense fragrances. Frankincense is the dominant aromatic theme throughout this composition
- **Jo Malone – Myrrh & Tonka (Myrrh)** This fragrance is one of the best modern commercial examples of myrrh as a featured ingredient.
- **Estée Lauder – Beautiful Magnolia (Namibian Myrrh)** use of sustainably harvested **Namibian myrrh** (*Commiphora wildii*) is an excellent example of African biodiversity creating value in prestige perfumery. A partnership between international fragrance houses and community-based wild harvesters in Namibia.
- **Chanel No. 5 (Rose Geranium)** one of the world's most famous perfumes uses **rose geranium** (*Pelargonium graveolens*) so does **Dior J'Adore** – Geranium oil remains one of the most valuable natural floral modifiers and aromatherapy items



**African aromatic plant**

**Buchu (*Agathosma betulina*)**

**Frankincense (*Boswellia* spp.)**

**Frankincense (*Boswellia* spp.)**

**Myrrh (*Commiphora myrrha*)**

**Rose geranium (*Pelargonium graveolens*)**

**Namibian Myrrh ( *Commiphora wildii*)**

**Branded fragrance**

**Miller Harris Soufflot**

**Amouage Gold**

**Comme des Garçons Avignon**

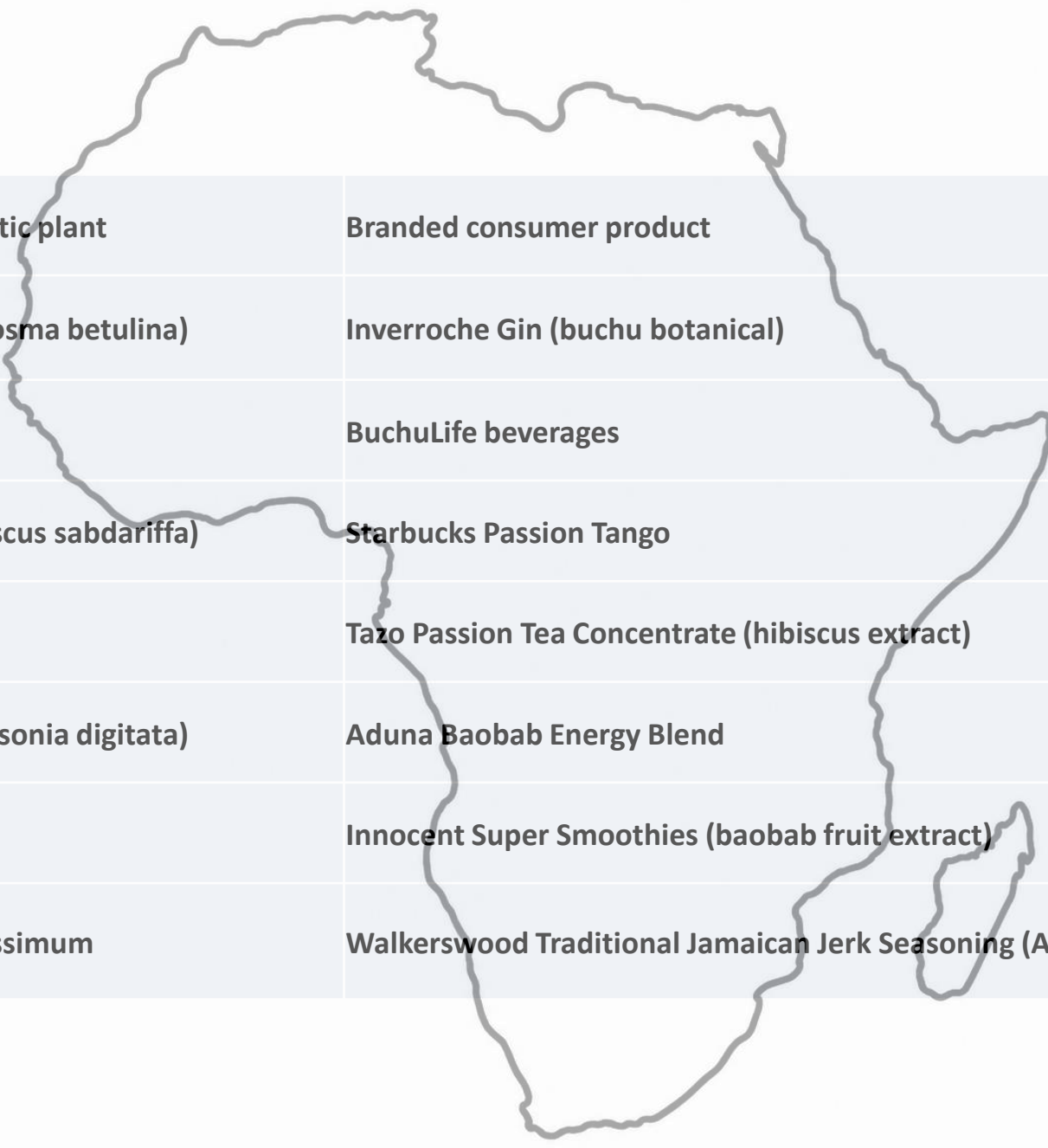
**Jo Malone Myrrh & Tonka**

**Dior J'Adore, Chanel No. 5**

**Estee Lauder Beautiful Magnolia**

# African ingredients in Flavors

- **Inverroche Gin (Buchu)** has become an international ambassador for South African botanicals. Buchu is used as a signature flavour ingredients, transforming this indigenous plant into a premium export
- **BuchuLife Beverages (Buchu)** represents one of the most successful attempts to commercialise an indigenous African aromatic plant as a modern consumer beverage.
- **Starbucks' Passion Tango** beverages illustrate the global commercial potential of **hibiscus (*Hibiscus sabdariffa*)** It provides both colour and a distinctive fruity-acidic
- **Aduna – Baobab Energy Blend** a successful international brand combining sustainability, community development and premium positioning.
- **Walkerswood Traditional Jamaican Jerk Seasoning (*Ocimum gratissimum*)** demonstrates how African basil, introduced historically through the African diaspora, I

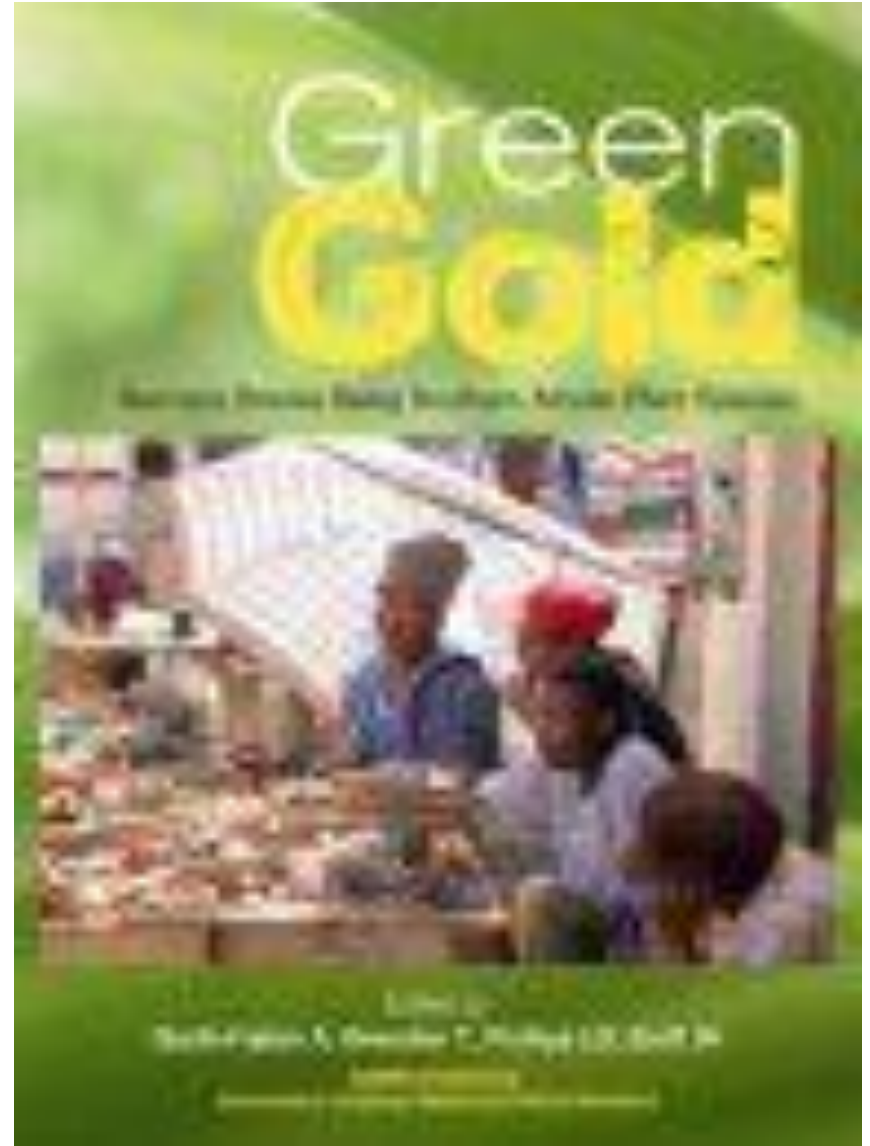


| <b>African aromatic plant</b>         | <b>Branded consumer product</b>                                         |
|---------------------------------------|-------------------------------------------------------------------------|
| <b>Buchu (Agathosma betulina)</b>     | <b>Inverroche Gin (buchu botanical)</b>                                 |
| <b>Buchu</b>                          | <b>BuchuLife beverages</b>                                              |
| <b>Hibiscus (Hibiscus sabdariffa)</b> | <b>Starbucks Passion Tango</b>                                          |
| <b>Hibiscus</b>                       | <b>Tazo Passion Tea Concentrate (hibiscus extract)</b>                  |
| <b>Baobab (Adansonia digitata)</b>    | <b>Aduna Baobab Energy Blend</b>                                        |
| <b>Baobab</b>                         | <b>Innocent Super Smoothies (baobab fruit extract)</b>                  |
| <b>Ocimum gratissimum</b>             | <b>Walkerswood Traditional Jamaican Jerk Seasoning (African basil )</b> |

“The challenge for Africa is not discovering new aromatics.

It is developing more African-owned brands that capture this value closer to source.”

# Andrew Rugasira 2025



Thanks SAEOPA especially Karen Swanepoel

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