



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Aromatherapy in Europe

Introduction

Aromatherapy is an interesting market segment if you supply low volume and high value essential and vegetable oils and hydrolates, for use as natural ingredients. Consumers are increasingly using aromatherapy for specific health issues, especially in France and Germany, where aromatherapy is used as a medical treatment in the context of phytotherapy.

Product description

Aromatherapy is defined as using genuine and authentic essential oils for their healing properties; the term “essential oil therapy” is also increasingly used. In aromatherapy, essential oils can be inhaled, used topically or used internally.

Box 1: How to use this Factsheet

- Learn how European consumers use aromatherapy and for which indication areas.
- Learn about the developing country species that are most commonplace and of greatest interest.
- Learn about requirements you need to meet for aromatherapy species.

There are various forms of aromatherapy (Fundamentals of Complementary and Alternative Medicine, Micozzi, 2015). This factsheet focuses on the following:

- **Holistic aromatherapy** is the most common form of aromatherapy. Here, massage is an important form of application; for that purpose several essential oils can be blended with vegetable oils and lotions. The efficacy and safety of the overall combination is the main consideration. Holistic aromatherapy has a holistic approach, focusing on the balance of body and mind.
- **Medical aromatherapy** is the second largest form of aromatherapy, which originates in herbal medicine. This is mostly practised in Germany and France, although it is growing in countries such as the UK. In this form, essential oils are applied for their pharmacological activities, rather than for their aroma or psychophysiological effects. Moreover, dosages are generally higher or more intensive than in holistic aromatherapy. Internal use is more common in medical aromatherapy, along with topical application. Compliance with pharmaceutical legislation might be required. This is needed when the essential oil is marketed as a medical product or ingredient (herbal or conventional medicinal product) by a manufacturer, or when pharmacists use it in their preparations. However, when consumers themselves apply essential oils as aromatherapy products medicinally based on literature, it is not needed (e.g. essential oils can still be marketed as natural ingredients according to chemical legislation, including as cosmetic ingredients and consumer products).

Other forms of aromatherapy include clinical aromatherapy (a combination of holistic and medical aromatherapy) and aesthetic aromatherapy (for wellbeing and cosmetic benefits).

Essential oils can be produced from various plant sources (wild collection and/or cultivated), as well as from different plant parts, including resins (plant exudates), leaves, flowers, fruits (the peel), bark and wood. The [International Organization for Standardization](#) (ISO) defines essential oils as products “made by distillation with either water or steam, or by mechanical processing of citrus rinds [expression], or by dry distillation of natural materials”. Extraction methods mainly depend on the raw material that is being extracted.

Essential oils include flower oils (e.g. rose, geranium absolute), resin oils (e.g. frankincense), fruit oils (e.g. citrus oils), leaf oils (e.g. patchouli or cajepout oil), roots (e.g. vetiver or valerian oil) herb oils (e.g. peppermint oil) and bark/wood oils (e.g. sandalwood and cedarwood oils).

Essential oil quality

Product identity of essential oils for aromatherapy is key and needs to be specific (species, sub-species, varieties and chemotypes). Chemical compositions vary among species and varieties thereof. This chemical composition forms the basis of its therapeutic benefits in aromatherapy. Next to the species used, an oil's chemical composition also depends on: the environment of production; time and method of harvesting and processing; and storage conditions.

Quality of the oils is key for their use in aromatherapy, especially in medical aromatherapy. Optimum quality of essential oils implies that they are 100% natural (i.e. not adulterated through the addition of chemicals) and 100% pure (i.e. not mixed with, or infused in, any other oils that have similar characteristics). Such essential oils are called "genuine and authentic".

Tips:

- Provide analyses of the chemical profile of your essential oil as "type" and "lot" samples. All your lots need to be tested with gas chromatography (GC) and mass spectrometry (MS) in order to describe the oil's composition. Include this information in your Product Factsheet and specifications, as it is important to buyers. Work together with a local university department or laboratory to determine the composition of your essential oil.
- Get in contact with your national aromatherapy sector to supply genuine and authentic essential oils to your national market.
- Have a look at [WHO herbal monographs](#) (volumes 1-4) and the [WHO Traditional Medicine homepage](#) for more information on product identity requirements and aromatherapy in your own country/region.
- For more information on essential oils used in cosmetics, refer to CBI's Market Intelligence on [Natural Ingredients for Cosmetics](#) regarding several essential oils and the [cosmetics market for aromatherapy](#). Also, refer to relevant European and International literature available from, for example, [Forum Essenzia](#).

Essential oils from developing countries

Aromatherapy is an important market for small and medium-sized essential oil producers at origin, when they can guarantee the quality needed for use in aromatherapy. This market works with low volumes at high value.

Essential oils are used in a wide range of indication areas, although aromatherapy treatment is more common for some health issues than others. Major indication areas are fungal, bacterial and/or viral infections, stress & anxiety (including mood and sleep disorders), cough & cold and pain relief. These and other indication areas are included in [Annex I](#). This table also includes some exemplary essential oil species. Developing country producers have good potential to produce several of these oils.

Tips:

- Refer to CBI's Market Intelligence on [Natural Ingredients for Health Products](#) for more information on other health products for the above-mentioned indication areas.
- For more information on essential oils used in aromatherapy, please refer to the literature available under [Forum Essenzia](#). For information on properties of essential oils in aromatherapy, have a look at sources such as [WHO Herbal Monographs](#); books by [Dr. Kurt Schnaubelt](#), [Pierre Franchomme](#) and [Robert Tisserant](#); the [National Association for Holistic Aromatherapy](#) (NAHA); or the [Aromatherapy Bible](#).
- Check community herbal monographs for essential oils as provided by the [European Medicines Agency](#) to assess product standards and possible claims. This is important in medical aromatherapy.
- Check databases such as [Herbmed](#) to identify research on traditional use, clinical trials (safety and efficacy evaluation of herbal formulations on people) and patents. In Europe, you can contact relevant universities such as the [University of Vienna](#), the [University of Veterinary Medicine Vienna](#) and the [University of Graz](#). Access scientific resources, for example through [Elsevier Science Direct](#) (not for free). Also consider becoming a member of the [Society for Medicinal Plant and Natural Product Research \(GA\)](#) to access their research.

What is the demand for aromatherapy in Europe?

- Data on European market demand for aromatherapy are limited. The majority of European essential oil imports are destined for the flavour and fragrance industry. Some 20% of these imports are used in aromatherapy and cosmetics,

according to industry sources. In 2014, European imports of essential oils amounted to 86 thousand tonnes at €1.2 billion. The aromatherapy market in Europe is stable, according to industry sources.

- There is a particularly strong market for aromatherapy in France, Germany, the UK, Austria and Switzerland, where aromatherapy is commonly practised as medicine. Although this is still uncommon in the UK, the country's licensed practitioners are growing in number. In most other West European countries mostly holistic or aesthetic aromatherapy is used, with products being marketed as cosmetics.
- In **France**, aromatherapy is a popular form of alternative medicine and used to treat various conditions. In French aromatherapy practices, essential oils are mainly used internally. Practitioners with a focus on phytotherapy require a separate licence to administer aromatherapy. According to industry sources, the country offers good opportunities for genuine and authentic essential oils for use in aromatherapy.
- The aromatherapy market in **Germany** is developing strongly, as health insurance companies are increasingly paying for alternative therapies. Compared to most West European countries, alternative therapies in Germany (such as aromatherapy) have a stronger focus on curing illness, as opposed to preventive health. Essential oils are used both internally and externally. Aromatherapy is regarded as a medical treatment, and is administered in conjunction with doctors. **Austria** and **Switzerland** have a similar market for medical aromatherapy according to industry experts.
- The aromatherapy oil market in the **UK** was estimated to grow almost 2% in both 2013 and 2014, after the market dropped from 2008 to 2011 ([Research and Markets, 2013](#)). UK consumers, but also **Dutch** consumers, still use aromatherapy mostly for relaxation or preventative care rather than as a form of medication targeting particular health issues. Oils are less often used internally as compared to France and Germany. Aromatherapists are recognised as a separate profession.

Tips:

- Focus your exports on the UK, France, Germany, Switzerland and Austria, as these are important markets for aromatherapy products. Be aware that for countries where aromatherapy is often marketed and administered as a medicinal product (e.g. France, Germany), you most likely need to comply with legislation for herbal medicinal products (see [Buyer Requirements](#)).
- Look for distributors that can maximise your impact and presence on the aromatherapy market. Some manufacturers may also buy directly from you as a producer in an origin country.
- Please refer to [CBI Trade Statistics for Natural Ingredients for Health Products](#) for statistics on European markets for herbal medicinal products and food supplements.

What trends offer opportunities on the European market for aromatherapy?

Several trends on the European market aid the interest in aromatherapy oils:

- Consumers see natural health products, such as aromatherapy, as milder and thus **safer options** as compared to conventional medicine. Consumer awareness of side effects from conventional medicine is increasing, especially for strong medicines taken over long periods of time.
- According to industry experts, there is growing trust in the **effectiveness of essential oils** for various health indications. For example, there are more accounts of resistant bacteria, which antibiotics cannot defeat. Some researchers are looking into the use of essential oils, which may be effective on these resistant bacteria.
- To both consumers and companies, massive, and growing, amounts of **information** are available on aromatherapy and essential oils used for specific effects. Some essential oils do not even need product claims and information on applications because consumers already know or can easily find information on how and for what effect to use them.
- Be aware that you are not allowed to make medicinal claims in your product documentation or marketing materials when marketing your product to cosmetics manufacturers. You can make such claims if you target the herbal medicinal products market, but then you also need to comply with relevant legislation.

Tips:

- Be careful with the claims you make on your essential oil. Consider not making claims at all and sell essential oils as natural ingredients based on proven product identity. If you want to make claims for your essential oils, ensure you can back up these claims to any potential buyer.
- You need to guarantee safety and efficacy according to the mode of use and the respective legislation as an ingredient/chemical or as a final consumer product. For more information on claims, refer to the [Buyer Requirements](#) section of this factsheet.

Traceability of oils used in aromatherapy is key. Since aromatherapy relies on the chemical composition of essential oils, product identity and origin is vital.

Sustainable and ethical production of essential oils is of particular importance when consumers use them as aromatherapy. Organically produced oils are seen as having a higher quality than conventionally produced oils. Moreover, many consumers of essential oils for health purposes are also interested in ethically produced oils.

Tips:

- Demonstrate traceability and sustainable future access to raw materials, particularly with regard to scarce ingredients.
- For more information on traceability and sustainability, please refer to the [Buyer Requirements](#) section below.

Essential oils used for holistic aromatherapy require a good marketing campaign to show how and for which indications they can be used. You can use several elements to build such marketing stories:

- Along with traceability, **traditional usage** is important, since aromatherapy oils often lack scientific proof of their effectiveness. Together with the oil's image, traditional use forms the basis for their use in aromatherapy. Although you cannot make claims which are not backed up by monographs, you can refer to **publications** on aromatherapeutical use of your product. At the retail level, essential oils used in aromatherapy are often marketed without claims, but in conjunction with literature, even in the same display.
- An oil's **origin** can be used, especially when this "fits" with the indication area it is traditionally used for. For example, an exotic origin can be marketed as a place where you can reduce stress, which would fit with oils targeting stress & anxiety issues (e.g. rose geranium oil from Réunion).
- Organic or fair trade **certification** may add value to your oil, but this depends on your (prospective) buyer.

Tips:

- Create thematic marketing stories for aromatherapy oils that include how and for what indication these oils were traditionally used. Try to link to available literature, and where available to pharmaceutical monographs. Clearly communicate the country of origin so your buyer can communicate these to end-users.
- Discuss certification options with your buyers before you apply for organic or other certifications.
- Please refer to [CBI Trends](#) for more market trends.

What requirements should aromatherapy oils comply with to be allowed on the European market?

Which requirements you need to comply with depends on how your essential oil is marketed in Europe. European companies can market essential oils as a **food ingredient**, **medicinal ingredient/product** and/or a **cosmetic ingredient/product**. How essential oils are marketed in Europe (as an ingredient or a consumer product and in which market segment) determines which market access requirements you need to comply with. For some essential oils more than one option exists. **This section focuses on the medicinal framework conditions**. For their use as food or cosmetic ingredients, please refer to the Module Buyer Requirements for Natural Ingredients for [Cosmetics](#) and [Natural Colours, Flavours and Thickeners](#), respectively. For a more detailed overview of the medicinal product framework and the route to market, have a look at the Module Buyer Requirements for Natural Ingredients for [Health Products](#).

What requirements do I need to comply with to export natural ingredients?

- You need to comply with the **Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)**. CITES regulates the trade in (for example) wild-collected endangered plants and provides guidance on the species for which trade is prohibited or restricted.
- Your ingredient might require you to establish **Access and Benefit Sharing (ABS)** agreements. These 'mutually agreed terms' detail the terms and conditions of access and use of genetic resources and/or traditional knowledge and supply of raw materials.
- You need to ensure **sustainable sourcing** of your ingredients. This is important to buyers, as they are facing supply shortages for an ever-increasing number of cultivated, but especially wild-collected species. You do not always have to certify sustainable sourcing; have a look at these value-addition opportunities in the section [Competition](#).

Tips:

- Conduct a resource assessment and implement a resource management system.
- If you are an exporter of wild-collected botanicals or their derivatives, take into account the provisions of [CITES](#) in order to guarantee the EU entry of your products. Check [Annex A and B of Regulation \(EC\) No 338/97](#) to ascertain whether import and export permits are required for your product. You can also contact the [local CITES authority](#).
- Read more about [CITES](#) in the EU Export Helpdesk.
- Put a procedure in place to check whether ABS applies. Contact the competent authorities in your country as a starting point. [UEBT](#) and [FairWild](#) provide thorough information on the practical implications of ABS, as established by the [Convention on Biological Diversity](#).

What requirements do I need to comply with to export essential oils?

In principle, essential oils are bound by the legislation on chemical substances. Therefore, with few exceptions, they need to be registered with the European Chemicals Agency under **REACH** (Registration Evaluation and Authorisation of Chemicals) legislation. If volumes remain under 1 tonne per importer, registration is not required except for the most hazardous chemicals. In all cases, the burden of proof lies with the EU importer/manufacture that wishes to employ this exemption (an absence of information on the properties of a substance does not mean an absence of hazardous properties).

Tips:

- Familiarise yourself with the [REACH regulation](#); annexes IV and V list details of exemptions from registration. The European Chemicals Agency (ECHA) offers [guidance on exemptions](#).
- Check the REACH [registration status](#) of your essential oil. If your product is not registered, it may need to be (subject to exemption status). REACH registration is an expensive procedure and must be initiated by European manufacturers, EU importers or by an Only Representative of a non-EU manufacturer.

The EU sets requirements on the **Classification, Labelling and Packaging of chemicals (CLP)**. This also includes required symbols and phrases on labels warning users and providing safety advice. These requirements have been adopted from the United Nations' [Globally Harmonised Systems](#) (GHS).

Tips:

- Use the [database on classification and labelling](#) on the ECHA website to determine which symbols and warning phrases apply to your product.
- Refer to the EU Export Helpdesk for more information on [REACH and CLP](#).
- Get acquainted with the United Nations' [Globally Harmonized System](#) (GHS).

What requirements do I need to comply with to enter the EU market for aromatherapy oils marketed as herbal medicinal products?

If your (potential) buyer wants to market essential oils as a herbal medicinal product, you also need to comply with [EU legislation for herbal medicinal products](#) (Directive 2004/24/EC). This procedure provides a specific, simplified regime for traditional herbal medicinal products which can meet certain requirements. Compliance is still required with the detailed quality, documentation, labelling, packaging, certification and traceability standards as established in [the rules governing medicinal products in the European Union](#). This set of rules also governs [marketing authorisation](#) of medicinal products - if and when applicable - to be sold in the EU market.

Tips:

- Refer to the [WHO herbal monographs](#) (Volume 1-4) for more information on product identity, safety and efficacy of your essential oils.
- Provide Material Safety Data Sheets (MSDS) for handling of the essential oils as natural ingredients, together with your product specification.
- Read more about [marketing authorisation for pharmaceutical products](#) in the EU Export Helpdesk.
- Read more about the simplified procedure for homeopathic and herbal products on the [website of the European Commission](#).
- Consult the [EU Export Helpdesk](#) and the [CBI Module Buyer requirements: natural ingredients for health products](#) for a full list of requirements for natural ingredients in health products.

GACP and GMP for essential oils: If your essential oils are marketed as, or used in, medicinal products for human use, you need to follow Good Agricultural and Collection Practices (GACP) and Good Manufacturing Practices (GMP). These are established specifically for the industry to ensure your product meets all identity, quality, efficacy and safety requirements. You can support the implementation of these Good Practices by developing Standard Operating Procedures (SOPs) and work instructions (WIN). SOPs should be developed for your specific processes and products, but some institutions are developing SOPs, such as Europam, the European Herb Growers Association.

Tip:

- Which guidelines you need to comply with depends on your product:
 - Raw plant materials: [Guideline on Good Agricultural and Collection Practice for Starting Materials of Herbal Origin](#) (GACP). GMP starting material needs to comply with [Part II - Basic Requirements for Active Substances used as Starting Materials](#).
 - Essential oils and other extracts: GACP or GMP requirements depend on stage of product and intended use. Comply with requirements on page 3 of the [EU Guidelines to Good Manufacturing Practice Medicinal Products for Human and Veterinary Use, Annex 7: Manufacture of Herbal Medicinal Products](#).
 - Develop company specific SOPs and WINs to implement the GACP (and GMP if and when applicable – see above).

What additional requirements do buyers often have?

Buyer specifications and requirements: Many buyers have additional quality requirements which can go beyond legislation and standards of an individual product sector, as they sell essential oils in more than one sector (food, cosmetics and health). These include requirements on active ingredient content, contaminants, residues, etc., and are established in buyer specifications. To show that you meet buyers' specifications, they also require well-structured company and product information, including detailed technical data sheets.

Tips:

- Make sure you meet international product standards and buyer specifications.
- Include plant identification through a national and/or a company herbarium in your product specifications; this is important as a reference.
- Prevent (un-)intended adulteration and contamination by other foreign materials by keeping facilities and equipment clean, and by ensuring full documentation and traceability. Establish cost based pricing of essential oils to avoid the need for intentional adulteration.
- Meet buyer requirements in terms of processing methods for your essential oils. Validate and document distillation and extraction conditions: temperature, pressure/vacuum, etc.
- Make sure your documentation and labelling comply with the respective legislation and buyer requirements. Information on possible dangerous characteristics of chemical substances must be provided on Material Safety Data Sheets (MSDS). Furthermore, it is likely that your buyer requires test reports.
- Implement and document Standard Operating Procedures, which provide a lot of trust on the part of buyers that you will keep up with quality standards.

What are the standards and requirements for niche markets?

Social and environmental sustainability:

- If you want to market **organic essential oils** in the EU, you need to comply with EU requirements on the production and labelling of organic products of agricultural origin. Herbal medicinal products cannot be labelled as organic and fair trade. However, for essential oils used in aromatherapy, organic certification is more common (see [Value-addition opportunities](#) below).
- Verifying and certifying **sustainable production** represents a niche market, but can add value to your product. For more information on such value addition, please refer to value-addition opportunities in the section [Competition](#). Better-known sustainability standards include:
 - The [UNCTAD BioTrade Initiative BioTrade Principles and Criteria](#) or [FairWild Principles and Criteria](#)
 - Social: Fair Trade certification, such as [FLO Fairtrade](#) or [FairForLife](#).
 - Some EU buyers may expect you to comply with their supplier **codes of conduct** regarding **social responsibility**, which are often based on ILO labour standards or on Global Compact reporting.

Tips:

- Discuss with (potential) buyers whether they would be interested in certified sustainable natural ingredients of the above standards.
- If you choose to obtain a certificate for organic production, find out more about [Organic production and labelling](#).
- Also for organic production, dedicate the processing plant to the exclusive production of organic ingredients. If this is not possible, ensure thorough cleansing of machinery and equipment at all times.
- Consult the [Standards Map database](#) for different sustainability and organic standards.
- For more information on responsible business practices, refer to the [UN Global Compact](#) and ISO 26000 as guidance, and use the [SEDEX](#) online database, where members can share information on ethical and responsible practices. You can also use SEDEX to prepare for possible audits/questions from your buyers.

Quality management: European buyers expect a good and reliable level of quality. Most buyers expect suppliers to at least follow the Hazard Analysis & Critical Control Points (HACCP) principles. Moreover, compliance with quality safety management as specified in [ISO 9001:2008](#) is required for health ingredients. Product standards for essential oils under [ISO](#) are also referred to in the product specifications of buyers, so as to assure the quality. Other examples include [ISO 31.000](#) (risk management).

Tip:

- Consider carefully whether to comply with the above standards and certifications. Verify whether your buyer truly demands compliance, whether compliance will facilitate market access or offer you a better price or whether compliance will benefit your company's supply security or internal processes.

What competition do I face on the European market for aromatherapy?

As a medical form to treat or prevent health conditions, many alternatives to aromatherapy exist on the European market. These stem from both **synthetic** (e.g. conventional medicine and synthetic food supplements) and **natural** sources (traditional herbal medicinal products, homeopathy or natural food supplements).

Moreover, the popularity of (medical or holistic) aromatherapy in treating or preventing illnesses varies depending on the indication area. In indication areas where aromatherapy has a weak position, competition from other health products will be particularly strong. Aromatherapy is especially strong in infections, such as cough & cold (respiratory system), as well as for stress & anxiety, pain relief and muscle/joint issues.

Tip:

- For synthetic and natural alternatives to aromatherapy oils in each indication area, please refer to the CBI Product Factsheets on [Stress & Anxiety](#), [Energy](#), [Cognition](#), [Digestive Health](#), [Immune System](#), [Joint Health](#), [Obesity](#) and [Vascular System](#).

Competition with other health products

The competitive position of aromatherapy depends on the type of aromatherapy and its status in a particular country.

Use of **medical aromatherapy** competes with both herbal medicinal products and food supplements. This form of aromatherapy requires the use of licensed practitioners (pharmacy, aromatherapist, depending on the national legislation), and is most commonly practised in France and Germany. Here, medical aromatherapy has an advantage over food supplements, which cannot make a medical claim. In most other European countries, the position of medical aromatherapy is less strong, as these countries do not have a tradition of using aromatherapy medically.

Alternatively, the use of **holistic aromatherapy** competes with food supplements but especially with various cosmetics products, and even home fragrances, air fresheners and 'aromatherapy' candles (which have distinctive legal requirements). The use of this type of aromatherapy is often aimed at general wellbeing, which can be achieved with such other products as well. What is more, with the growing popularity of aromatherapy, consumers are confronted with many products that claim feel-good sensations because of their scent, so knowledge of the actual therapeutic benefits of essential oils is less common in Europe.

Tips:

- Focus production on essential oils traded in small volumes that have clearly defined properties. Elaborate on these properties and their potential benefits in aromatherapy when communicating with (prospective) buyers.
- Please refer to [CBI Competition](#) and CBI Top 10 Tips for doing business for more information.

Company competition

Changing one essential oil for another is not common in aromatherapy. The chemical composition of oils differs and their application in aromatherapy is based on that composition. Consumers might change to another oil which also targets a specific indication.

It may be difficult to enter the markets of certain essential oils used in aromatherapy. Examples include lavender, citrus and mint oils. These are traded in large volumes and constitute established and competitive markets, also with substantial production in European countries. Moreover, confusion and challenges on their product identity are a common feature in the market.

Tips:

- Consider whether your ingredient is already used in this segment.
- Check the product identity of your essential oil before relating it to WHO or European Pharmacopoeia herbal monographs, as well as reputable literature for the use and application of your essential oil.
- Online resources to assist with this include herbal medicinal product manufacturers' websites, [EMA monographs](#), [Pharmacopoeia](#) and websites such as the [European Medicines Agency](#), [MedlinePlus](#) or [Herbmed](#).

Value-adding opportunities when competing in the market

You can create your own distinct market profile and more attractive products by adding value. You can add value with further processing (e.g. from raw material to extract to final product):

- Processing raw materials into essential oils is guided by the existence of standards, and buyer demands are well understood. However, opportunities to add value to **essential oils as ingredients** are often not fully exploited. Proper documentation of your product and process can get you a better price.
- Marketing **finished products** is generally beyond the scope of most companies in developing countries. Marketing of aromatherapy products may be an exception, especially if related to a particular tradition of use.
- South-South trade for expanding regional aromatherapy markets also offers good opportunities for this type of final product, as it is relatively simple and well established.

Tips:

- Help manufacturers build their story, e.g. by documenting and visualising your product and your company's unique value proposition.
- For use in holistic aromatherapy, images linked to traditional uses and wellbeing can contribute considerably towards your own marketing effort.
- Final manufacturers can use this information to market the end-product in Europe.
- Align quality improvements to your product with buyer requirements (specifications) and their willingness to pay for them. Quality improvements can be costly, and you need to ensure that the potential exists for getting an adequate return on investment.
- Determine your option to market finished aromatherapy products.

You can also add value by certifying your company according to social and environmental sustainability principles. For aromatherapy oils, organic certification offers a good market potential. Although it still represents a niche market share, it is more important in aromatherapy than in other health products. Since consumers and manufacturers of aromatherapy are particularly concerned with the purity of essential oils, organic certification can be used as a guarantee of the oil's quality. However, the potential of organic certification depends on your prospective buyer. In general, producers with a company image focused on sustainability (ethical/environmental) place more value on certification of their ingredients.

Tips:

- Before committing to a certification scheme, always verify your buyer's interest in certified ingredients:
 - Organic certification also acts as a quality control system and can help to improve your quality image.
 - Fair Trade and FairWild certification can help indicate to your buyer that the production of ingredients is generating rural income and does not harm local communities (this could jeopardise the buyer's image).
- Certification demonstrating sustainable sourcing (e.g. FairWild) can help show potential buyers that you could be a reliable future partner.

What do the trade channels and interesting market segments look like in Europe for aromatherapy?

Market segments

Genuine and authentic essential oils are commonly sold as natural ingredients or as final consumer products. Some expensive essential oils, such as sandalwood or rose, are also sold in diluted form. These are more commonly used in holistic aromatherapy than in medical aromatherapy. Moreover, essential oils are also used in cosmetics (fragrance, aromatherapy) and food (flavours). These categories form the largest market for essential oils in Europe.

Innovation and product development are limited in aromatherapy, as it is very uncommon for new oils to be included. Around 80 essential oils are commonly used in aromatherapy, according to industry experts. In cases where new oils are introduced to aromatherapy, such as Jatamansi from Nepal (*Nardostachys jatamansi*), it takes a long time for the oil to be used due to claim substantiation and marketing needs.

Market channels

Essential oils for use in aromatherapy are exported as genuine and authentic oils and often do not require further refinement or standardisation. They can be sold directly to manufacturers more easily than other ingredients, due to the small volumes required. Moreover, they can potentially be marketed as final products (see [Competition](#)). However, it remains common for most SME exporters to export to traders via agents or brokers. Established importers/ distributors are likely to already have registered their imports in accordance with the REACH regulation (where applicable).

Tips:

- For tips on finding buyers, have a look at the CBI Module Finding Buyers. Use your knowledge of product development activity and potential for marketing your product more specifically to the right buyer.
- Please refer to [CBI NIHP Market Channels and Segments](#), where the various players at the various levels of the value chain are discussed in more depth. This module also gives an overview of the key market characteristics and trends for the herbal medicinal products and food supplements segments.

Useful sources

Visiting and, above all, participating in trade fairs is highly recommended as one of the most efficient methods of testing market receptiveness, obtaining market information and finding prospective business partners. The most relevant trade fairs in Europe for exporters of natural health ingredients are:

- [SANA](#) in Bologna, Italy.
- [Hi/Ni](#) (Health ingredients/Natural ingredients): Travelling trade fair.
- [Biofach](#) in Nuremberg, Germany (for organic producers).

Trade press/news and organisations

- [Nutra Ingredients](#): News on supplements and nutrition in Europe.
- [Nutraceuticals Now](#) ([spring issue 2015](#)) technical review of functional products and ingredients which are defined as disease preventing and/or health promoting in addition to nutritional value.
- [International Federation of Aromatherapists](#) for clinical and holistic aromatherapy.
- [Aromatherapy Trade Council \(ATC\)](#): UK trade association for the specialist aromatherapy essential oil trade.
- [Forum Essenzia](#): German non-profit association that works for the promotion, protection and dissemination of aromatherapy. The website contains European and International literature on aromatherapy and essential oils.

More information:

CBI market information: Promising EU export markets.

EU Expanding Exports Helpdesk - <http://exporthelp.europa.eu>.

Eurostat - <http://epp.eurostat.ec.europa.eu/newxtweb> - statistical database of the EU. Several queries are possible. For trade, choose 'EU27 Trade Since 1995 By CN8'.

International Trade Statistics - <http://www.trademap.org> - you have to register



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This survey was compiled for CBI by ProFound
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Annex I

Indication areas and exemplary essential oil species

Indication area	Common name	Botanical name	Effects/applications	Monographs (herbal) medicinal use
Stress & Anxiety For CBI product Factsheet click here	Neroli	<i>Citrus aurantium</i> var. <i>Amara</i> (flowers)	Neurotonic Relieves chronic anxiety, depression, fear, shock and stress Calming effect Sedative effect	European Pharmacopoeia monograph: # 1175 Neroli aetheroleum
	Petitgrain	<i>Citrus aurantium</i> var. <i>Amara</i> (green twigs, young leaves, immature fruits)	Relaxing properties Used with sleeplessness and insomnia	No references available
	Frankincense	<i>Boswellia carterii</i>	Mood uplifting Calming	No references available
	(Rose) geranium	<i>Pelargonium odorantissimum</i> , <i>P. graveolens</i> , <i>P. Asperum</i>	Relaxant Calming, used in anxiety	No references available
	Ylang-ylang	<i>Cananga odorata</i>	Balancing Mood enhancer Used in anxiety	No references available
Energy For CBI product Factsheet click here	Citronella	<i>Cymbopogon nardus</i>	Used in lack of energy Activating qualities on physical and mental levels	No references available
	Cypress	<i>Cupressus sempervirens</i>	Refreshing Helps with focusing	No references available
Digestive health For CBI product Factsheet click here	Ginger	<i>Zingiber officinale</i>	Digestive stimulant Stomach and intestine issues	No references available
	Fennel	<i>Foeniculum vulgare</i>	As a herbal medicinal product, claim for traditional use: "expectorant in cough associated with cold"	European Pharmacopoeia monographs: # 1826 Foeniculi amari fructus aetheroleum # 2380 Foeniculi amari herbae aetheroleum # 1629 Foeniculi dulcis aetheroleum Community herbal monograph
	Caraway	<i>Carum carvi</i>	As a herbal medicinal product, claim for traditional use: "symptomatic relief of digestive disorders"	Draft Community herbal monograph
	Cardamom	<i>Elletaria cardamomum</i>	Digestive stimulant Colitis Flatulence	No references available
Immune system For CBI product Factsheet click here	Cinnamon	<i>Cinnamomum zeylanicum</i>	As a herbal medicinal product, claim for traditional use: "symptomatic treatment of mild, spasmodic gastrointestinal complaints"	European Pharmacopoeia monographs: # 1501 Cinnamomi zeylanici cortices aetheroleum # 1608 Cinnamomi zeylanici folii aetheroleum Community herbal monograph
	Lemon	<i>Citrus limonum</i>	General cleanser and tonic	European Pharmacopoeia monograph: # 620 Limonis aetheroleum
	Angelika	<i>Angelica archangelica</i>	May help fight infections Provides a boost for the immune system	No references available

Joint Health For CBI product Factsheet click here	Wintergreen	<i>Gaultheria fragrantissima</i>	Useful for joint and muscular pain	European Pharmacopoeia monograph: # 3004 Gaultheriae aetheroleum
	Boswellia	<i>Boswellia carterii, B. serrata</i>	Relieve pain associated with rheumatism and muscular aches	No references
	Juniper	<i>Juniperus communis</i>	As a herbal medicinal product, claim for traditional use (a.o.): "in the relief of minor muscular and articular pain"	European Pharmacopoeia monograph: # 1832 Juniperi aetheroleum Community herbal monograph
	Rosemary (CT Camphor)	<i>Rosmarinus officinalis</i>	As a herbal medicinal product, claim for traditional use (as bath additive): "relief of minor muscular and articular pain"	European Pharmacopoeia monograph: # 1846 Rosmarini aetheroleum Community herbal monograph
Cognition (in terms of alertness and concentration) For CBI product Factsheet click here	Lemongrass	<i>Cymbopogon citratus</i>	Neuro-vegetative distony	
	Rosemary	<i>Rosmarinus officinalis</i> (chemotype 1.8 cineol)	Neurotonic As a herbal medicinal product, claim for traditional use (a.o.): "disorders of the gastrointestinal tract"	Community herbal monograph
Vascular system For CBI product Factsheet click here	Marjoram	<i>Origanum majorana</i>	Vasodilator	No references available
	Cypress	<i>Cupressus sempervirens</i>	Varicose veins	European Pharmacopoeia monograph: # 3003 Cupressi aetheroleum
	Juniper	<i>Juniperus communis</i>	Atherosclerosis As a herbal medicinal product, claim for traditional use: "adjuvant in minor urinary tract complaints" and "relief of digestive disorders"	European Pharmacopoeia monograph: # 1832 Juniperi aetheroleum Community herbal monograph
Cough & cold (respiratory system)	Eucalyptus	<i>Eucalyptus globulus, E. adiate, E. smithii</i>	As a herbal medicinal product, claim for traditional use (a.o.): "relief of cough associated with cold"	European Pharmacopoeia monograph: # Eucalypti aetheroleum Community herbal monograph
	Thyme	<i>Thymus vulgaris</i>	As a herbal medicinal product, claim for traditional uses: "expectorant in cough associated with cold" and "relief of symptoms in coughs and colds"	European Pharmacopoeia monograph: # 1374 Thymi typi thymolo aetheroleum Community herbal monograph Assessment Report
	Cajeput	<i>Melaleuca leucadendra</i>	As a herbal medicinal product, claim for traditional use (a.o.): "symptomatic treatment of minor inflammation of oral mucosa"	European Pharmacopoeia monograph: # 3007 Cajeputi aetheroleum Community herbal monograph
	Niaouli	<i>Melaleuca viridiflora</i>	As a herbal medicinal product, claim for traditional use (a.o.): "symptomatic treatment of minor inflammation of oral mucosa"	European Pharmacopoeia monograph: # Niaouli typi cineolo aetheroleum Community herbal monograph