## Patchouli

 Oie

Indonesia is the world's leading producer of essential oil by supplying some $85 \%$ of the world's annual consumption which hovers around 2,000 tons. From 70 plants which can be extracted to produce essential oil, Indonesia climate is suitable to cultivate 40 of them. One of the major essential oils from Indonesia is patchouli oil, which is recognized to have the best quality.
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## EDITOR'S DESK

Dear Valued Readers,

Welcome to the September edition of Export News. This time we are going to discuss patchouli oil, one of popular essential oils. Extracted from flowers, seeds, leaves, barks, woods, or roots of certain plants, essential oil is one of Indonesia's export commodity which huge potentials. Essential oils are used as raw materials in the production of cosmetics, perfumes, soaps and many others.

Among the various essential oils in Indonesia, patchouli oil has good prospect and price in the international market. Cited from Hyung Woo Kim, 2008 and Nasruddin et al, 2009, in cosmetics and perfume industries because there are no natural or synthetic oils which can replace patchouli oil due to its excellence as a scent fixative and its anti-radical and anti-bacterial properties. In term of raw materials, Indonesia is endowed with a rich variety of plants which can be extracted into essential oils.

Other than the development of patchouli oil in Indonesia, the September edition of Export News also includes a list of exporters of patchouli oil whom readers can directly contact, the development of Indonesian trade of patchouli oil and other information which are needed to facilitate prospective buyers in getting Indonesian patchouli oil.

Thank You

# hot issue 

## Patchouli oil producers in Indonesia

Initially patchouli oil is sought for in Asia where patchouli oil is first developed and invented. Every year, the world's consumption of essential oil and its derivatives keeps experiencing increases. The increase in consumption is followed by increased production of patchouli oil in major producers, such as Indonesia, as well as producers of other essential
oils. The increased consumption is triggered by increased demands for essential oil from various industries. Shifting preference from consuming products containing synthetic substances to natural ones also helps boosting demands for world's essential oil.

## Issue

Patchouli is a plant which can be extracted for essential oil. It is very potential to be developed in Indonesia due to climate factor as well as the type and fertility level of soil in Indonesia which is beneficial for patchouli. Ther are three types of patchouli being cultivated in Indonesia: Acehnese patchouli (Pogostemon cablin), Javanese patchouli (Pogostemon hortensis) dan thin patchouli (Pogostemon heyneanus). Acehnese patchouli is the best type because it has the highest content of patchouli oil at between $2.5 \%$ and $5 \%$ while other types only contain $0.5 \%$ of essential oil.

Production centers of patchouli oil are spread in Java, Kalimantan, Maluku, Nusa Tenggara, Papua,

Sulawesi and Sumatra. The coverage of patchouli cultivation and production of patchouli oil in 2014 is displayed in the table below:

| No | Region | People Plantation <br> Cultivated <br> land (Ha) |  |
| :---: | :--- | ---: | ---: |
|  | Production <br> (Ton) |  |  |
| 2 | Sumatera | 10,150 | 776 |
| 3 | Nusa Tenggara | 11,446 | 1,110 |
| 4 | Kalimantan | 80 | 13 |
| 5 | Sulawesi | 94 | 4 |
| 6 | Maluku dan Papua | 9,372 | 746 |
|  | Total | 146 | 41 |

Source: Buku Tanaman Semusim (Book on Seasonal Plants), Plantation Directorate General, Agriculture Ministry

Java produced the most patchouli oil in 2014 at 1,110 tons with a total area of 11,446 hectares. Indonesia's total production was 2,690 tons with a total area of 21,288 hectares.

Patchouli oil is extracted from the distillation of leaves, stems and branches of patchouli plant (Pogostemon cablin Benth). The leaves (three pairs of the youngest leaves) have the highest oil content with patchouli alcohol being the major content at between $30 \%$ and $50 \%$. The oil has a fresh and distinct aroma with strong fixation force which cannot be substituted by synthetic material. Patchouli oil is acquired through oil distillation process which taken from the collection or separation tank. In general, the separation is done by waiting the oil to cool because water particles flying in the oil will be carried away when the separation is conducted when the oil is still hot. Oil contaminated with water will have reduced shelf life which leads to lower price. Farmers often experience this problem which they dub as "cutting water". Pure patchouli oil can last for years without any changes.

Dark-colored glass vessel is the best container to store patchouli oil. Transparent glass vessels are not recommended because the light can change a number of quality requirements. Containers made of plastics also cannot be used to store patchouli oil because patchouli oil can react with plastic especially when the plastic containers are thin. Patchouli oil stored in plastic containers will get thicken easily and reduce the quality which in turn lower the price.

Indonesia's patchouli oil is known for its best quality in the world's market. Patchouli oil is considered as the key for fragrance products and it is also used as a raw material for a number of products such as antiseptics, aromatherapy, cosmetics, pesticides and a fixative to bind other essential oils. Patchouli is an important ingredient in Asian and Arabian traditional medicine which considered patchouli oil as a stimulant.


The marketing chain of patchouli oil from the farmers to the export markets consists of three levels:

1. Sales from the farmers' level to collectors or owners of patchouli distillation plants;
2. Sales from the local collectors to big collectors or exporters;
3. Sales from exporters to importers or consumers abroad.

In general, there are two ways farmers can sell their products. First they sell dried leaves to owners of distillation owners who will then sell the essential oil. The second way is the farmers themselves who will sell the oil after being distilled to local collectors. The
market of patchouli oil is still growing in Indonesia in line with the growth of local cosmetics, perfume and beauty industries. Leading cosmetics producers in Indonesia are using domestic patchouli oil as their raw material.

The main export destination of Indonesian essential oil in 2014 was the United States at US $\$ 31.92$ million followed by Spain at US $\$ 17.93$ million, Singapore US\$24.63 million, India US\$20.65 million and France US $\$ 16.16$ million. The following table shows Indonesia's export of essential oil to the world as of January-June 2015:

## INDONESIAN EXPORT OF ESSENTIAL OIL TO WORLD BY COUNTRY OF DESTINATION, 2010 TO JUNE 2015

| NO. | COUNTRY | 2014 |  |  | \% TREND | JAN - JUN 2014 |  | JAN - JUN 2015 |  |  | \% CHANGE 2015/2014 |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | TONS | US\$ 000 | \% SHARE | $\begin{gathered} 2010- \\ 2014 \end{gathered}$ | TONS | US\$ 000 | TONS | US\$ 000 | \% SHARE | QUANTITY | VALUE |
| 1 | UNITED STATES | 663 | 31.929 | 20,43 | -1,56 | 283 | 14.876 | 283 | 17.254 | 18,52 | 0,21 | 15,99 |
| 2 | SPAIN | 320 | 17.937 | 11,48 | 13,88 | 148 | 8.184 | 283 | 13.059 | 14,02 | 90,63 | 59,57 |
| 3 | SINGAPORE | 744 | 24.630 | 15,76 | -3,22 | 380 | 11.171 | 765 | 12.508 | 13,42 | 101,34 | 11,97 |
| 4 | INDIA | 534 | 20.659 | 13,22 | 7,77 | 285 | 10.252 | 365 | 12.188 | 13,08 | 27,80 | 18,89 |
| 5 | FRANCE | 308 | 16.166 | 10,34 | 6,26 | 137 | 7.127 | 211 | 10.662 | 11,44 | 54,43 | 49,59 |
| 6 | SWITZERLAND | 146 | 9.539 | 6,10 | -0,18 | 43 | 2.483 | 86 | 6.234 | 6,69 | 101,17 | 151,04 |
| 7 | GERMANY | 126 | 7.674 | 4,91 | -4,11 | 65 | 3.680 | 88 | 5.682 | 6,10 | 36,00 | 54,39 |
| 8 | UNITED KINGDOM | 94 | 5.318 | 3,40 | 1,31 | 47 | 2.094 | 58 | 2.883 | 3,09 | 24,66 | 37,73 |
| 9 | CHINA | 155 | 5.109 | 3,27 | 3,31 | 34 | 875 | 106 | 2.644 | 2,84 | 208,23 | 202,36 |
| 10 | UNITED ARAB EMIRATES | 63 | 3.327 | 2,13 | 4,57 | 33 | 1.674 | 35 | 1.775 | 1,91 | 6,46 | 6,07 |
| 11 | MEXICO | 13 | 1.012 | 0,65 | -1,31 | 0 | 20 | 40 | 1.714 | 1,84 | 18.045,25 | 8.335,77 |
| 12 | NETHERLANDS | 88 | 4.615 | 2,95 | -7,44 | 49 | 2.444 | 33 | 1.667 | 1,79 | -33,04 | -31,80 |
| 13 | BRAZIL | 34 | 2.034 | 1,30 | 30,83 | 14 | 619 | 18 | 1.133 | 1,22 | 28,39 | 82,99 |
| 14 | JAPAN | 24 | 1.307 | 0,84 | 25,81 | 15 | 936 | 21 | 666 | 0,71 | 43,41 | -28,85 |
| 15 | TURKEY | 16 | 269 | 0,17 | -19,58 | 14 | 227 | 23 | 496 | 0,53 | 60,97 | 118,23 |
| 16 | AUSTRALIA | 8 | 224 | 0,14 | 23,76 | 4 | 107 | 14 | 459 | 0,49 | 231,78 | 329,78 |
| 17 | KOREA, REPUBLIC OF | 8 | 269 | 0,17 | 40,06 | 4 | 91 | 75 | 357 | 0,38 | 1.640,63 | 291,38 |
| 18 | COLOMBIA | 3 | 237 | 0,15 |  | - | - | 3 | 231 | 0,25 |  |  |
| 19 | MALAYSIA | 271 | 364 | 0,23 | 20,33 | 185 | 98 | 62 | 191 | 0,21 | -66,50 | 94,30 |
| 20 | VIET NAM | 82 | 251 | 0,16 | 66,41 | 2 | 88 | 64 | 172 | 0,18 | 2.647,52 | 95,35 |
| 21 | ARGENTINA | 6 | 433 | 0,28 | 15,49 | 1 | 70 | 2 | 167 | 0,18 | 122,52 | 138,99 |
| 22 | CANADA | 7 | 271 | 0,17 | -1,55 | 4 | 175 | 2 | 138 | 0,15 | -43,82 | -21,22 |
| 23 | ITALY | 7 | 217 | 0,14 | -21,00 | 0 | 0 | 8 | 131 | 0,14 | 30.340,00 | 55.242,80 |
| 24 | SAUDI ARABIA | 8 | 146 | 0,09 | 141,63 | 5 | 50 | 5 | 125 | 0,13 | -0,32 | 148,29 |
| 25 | SOUTH AFRICA | 2 | 36 | 0,02 | -8,94 | 0 | 3 | 2 | 79 | 0,09 | 3.420,00 | 2.540,00 |
| 26 | PAKISTAN | 22 | 304 | 0,19 | 45,89 | 18 | 192 | 15 | 78 | 0,08 | -18,73 | -59,55 |
| 27 | TAIWAN, PROVINCE OF CHINA | 11 | 199 | 0,13 | 36,15 | 10 | 180 | 4 | 67 | 0,07 | -58,58 | -63,01 |
| 28 | THAILAND | 0 | 13 | 0,01 | -45,45 | 0 | 8 | 3 | 61 | 0,07 | 762,84 | 704,34 |
| 29 | EAST TIMOR | 66 | 192 | 0,12 | -7,60 | 29 | 143 | 15 | 48 | 0,05 | -49,39 | -66,34 |
| 30 | EGYPT | 4 | 108 | 0,07 | 9,86 | 2 | 40 | 1 | 47 | 0,05 | -40,25 | 18,02 |
|  | OTHER COUNTRIES | 156 | 1.513 | 0,97 | 4,37 | 53 | 307 | 66 | 261 | 0,28 | 23,56 | -15,10 |
|  | TOTAL | 3.988 | 156.301 | 100,00 | 1,84 | 1.865 | 68.214 | 2.755 | 93.175 | 100,00 | 47,69 | 36,59 |

Source: Central Board of Statistics, prepared by DGNED

## Market Review

## Marketing in foreign countries

Indonesian patchouli oil is very popular in the American and European markets to be used in perfume, cosmetics, health and other products. The commodity retains its existence despite price fluctuations as farmers and oil producers are still getting profits. Indonesia has good potentials as one of essential oils producers. From 70 plants in the world which can be extracted to get essential oils, 40 of them can be produced in Indonesia as the plants can be cultivated in Indonesia.

The following diagram shows the distribution of essential oil in Europe:
home care) and aromatic (derivatives of essential oil when there are plenty of raw materials and competitive price). Essential oils are also used for cooking, potpourri, handicraft, cosmetics, massage, and aromatherapy. Other usage includes repellents for insects and other arthropods such as mosquitos, fleas and ticks.

In world trade, essential oil is considered to have a strategic role in producing both primary and secondary products. The activity to produce national essential oil involves many parties from farmers producing the raw material, small and medium


The marketing of essential oil has to be done through brokers, agents and other marketing chain before being used as raw materials at cosmetics manufacturers in destination countries.

Patchouli oil is one of essential oils produced by Indonesia and used in various sectors. The four major sectors using essential oils are flavoring, pharmacy, body care and industries. Essential oil is used in flavoring (food), fragrance (fragrance, body care,
enterprises distilling essential oils, collecting traders, to processing industries and exporters.

About 85\% of essential oil export to the world comes from clove, patchouli and nutmeg. Essential oils from lemon grass and mint are also important followed by those from vetiver, sandalwood and cananga. The consumption of essential oil in the world reaches 2,000 tons per year with Indonesia being the major producer with $85 \%$ of the world's yield.

## Market Review

Sustainability, efficient production technique, quality of produced essential oil and innovation are keywords in developing export to destination countries such as Europe and other countries. Another important factor is fulfilling requirements in destination countries.

The European Union issued various regulations related to packaging such as Directive 94/62/ EC which regulates minimum standards for packaging. Directive 79/831/EEC delves into details of regulations and administration related to packaging, classification and labelling of hazardous materials. Intensive communication with partners in European Union is very important in determining the right packaging. European partners will provide information on types of packaging which fulfill market standard in Europe. Labelling has to be clear, attached permanently and made of non-toxic materials. In general, the law requires the product
label to declare the plant-producing oil as well as the material used for the label. It is also recommended to include the netto weight and storage requirement as well as name and address of producer or exporter in the label.

Indonesian exporters have fully understood various market challenges to penetrate export opportunities in the destination countries and increase the export of patchouli oil. Environmental issues on the use of plant-based products keep on playing important role on developing cosmetics products. Indonesian produces have also pay serious attention to social and environmental responsibilities. Buyers from the European Union are not only focused on sustainability but they are also interested in the source of materials being used in cosmetics products. There are opportunities for Indonesian producers and exporters to fulfill market demands on new active and functional plants.


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