

Appendix 5.32

Project Report

Title: International Market Survey Report for Marula and Crabwood Products

Author: Poulson, U.

Produced by: Centre for Ecology & Hydrology, Wallingford, U.K.

Date: 2001

This publication is an output from a research project funded by the United Kingdom Department for International Development (DFID) for the benefit of developing countries. The views expressed are not necessarily those of DFID. Project R7795, Forestry Research Programme.

Winners and Losers in Forest
Product Commercialisation
ZF0140/R7795

International Market Survey Report
for Marula and Crabwood products

prepared by Uffe Poulsen
CEH Wallingford

This publication is an output from a project funded by the UK Department for International Development (DFID) for the benefit of developing countries. The views expressed are not necessarily those of DFID.

Contents:

- 1.1. Introduction
- 1.2. Telephone Interviews (Introduction)
- 1.3. Marketing Survey Methodology
- 1.4. Commercial Sellers List
- 1.5. List of Japanese Exporters/Manufacturers in Survey
- 1.6. List of CTPA (UK) Companies in Survey
- 1.7. List of Natural Cosmetic Producers in Survey
- 1.8. Interview Letter Japan
- 1.9. Interview Letter Japan (2nd mailing - in Japanese)
- 1.10. Interview Form Japan
- 1.11. Interview Form Japan (2nd mailing – in Japanese)
- 1.12. Interview Letter UK and Natural Cosmetic Producers
- 1.13. Interview Form UK and Natural Cosmetic Producers
- 1.14. Interview Results UK/Natural Cosmetic Companies
- 1.15. Interview Results Japan
- 1.16. Letter to JICA
- 1.17. Telephone Interview Results
- 1.18. Review (Conclusion) of Telephone Interview Results
- 1.19. Telephone Interview Survey Form
- 1.20. Standard Safety Statement
- 1.21. Mailing List – New Brochure

1.1. Introduction

Marketing Survey Mailing Lists: (Japan, United Kingdom and Natural Cosmetic Producers)

Winners and Losers project (Crabwood and Marula oils)

We have written to all companies on the lists of Japanese Manufacturers and Exporters (around 65 companies) obtained through JETRO (Japan External Trade Organisation).

Also we have written to all companies on the Natural Cosmetic Producers list chosen from previous knowledge.

Regarding the membership list of the United Kingdom Cosmetic and Toiletries Producers Association, we have written to a selected number of companies in the membership list, in order to keep the number of companies to around 65, keeping the same population for our survey in the UK as in Japan. We have tried to choose companies typically representative of the cosmetic industry.

Copies of the survey forms and letters are attached.

Finally we have attached a copy of a letter written to the JICA (Japan International Cooperation Agency) London office concerning cooperation on the project.

1.2. Telephone interviews (Introduction)

About 10 % of the companies who replied to the mailing list survey agreed to a telephone interview. The results of these interviews can be found under 1.17.

1.3. Marketing Survey Methodology

Winners and Losers project (Crabwood and Marula oils)

The Winners and Losers project requires a survey of potential markets in the OECD and other developed economies and estimation of market potentials with companies interested in NTFP's (Non-Timber Forest Products).

The first step has been to send out a survey form to companies that were selected for this purpose. The selection took place in form of the companies on the membership lists of the industry organisations of the cosmetic industry in Japan and the United Kingdom, the 2nd and the 4th largest world economies, and to this was added a few natural cosmetic companies known from previous experience. A total of 125 survey forms were sent out in August 2001 and for the United Kingdom and natural cosmetic industry the number of replies has been around 10 % and this also proved to be the final result. See survey interview results under 1.14. and 1.15.

The reply rate for Japan, the world largest single cosmetic market, was significantly lower, but this is probably due to the fact that the first interview form was submitted in English. A translation into Japanese of a possible future survey form and of information material about Crabwood and maybe Marula, is now being considered and also more time should be given for the replies to arrive back in the UK, due to both the geographical, cultural and language distance. Japanese cosmetic and medical companies typically are oriented towards their domestic market due to the considerable size of the market. A second form in Japanese was sent out, but this also yielded a very limited number of replies. Therefore the reason for this should be seen as a lack of knowledge about the project. It should be considered making the new brochure (December 2001) of the project in Japanese language and send out the Japanese survey form once more in the new year (2002) together with this brochure.

The next step will be to telephone the companies who have told us they are interested in an interview due to an interest in Crabwood and Marula oil. This oral interview will be conducted in English, German or Japanese and should be backed up by further written material (in English or Japanese) in case the companies become more interested in Crabwood and Marula during or after the interview. These interviews were carried out in December 2001.

The interview survey form mailed in August 2001 asked the respondent to come up with the following information: (see survey forms later under 1.9 and 1.13 for the initial mailing and under 1.11 for the 2nd mailing in Japanese)

- 1) Number of employees in company
- 2) Number of products in product range
 - a) cosmetics
 - b) medicinal

- 3) Whether the company would be interested to hear more about the Winners and Losers project
- 4) If we can conduct a telephone interview with them
- 5) If they have heard of Crabwood or Marula before
- 6) What is their source of raw materials
- 7) Whether they export products or only sell in the domestic market

The telephone interviews were conducted in December 2001 and the results (including survey form) can be seen under 1.17.

Companies showing interest in being interviewed are companies selling or producing cosmetic ingredients, end-product manufacturers or natural cosmetic producers. Only one of the companies so far has heard about Crabwood and Marula before.

Other companies have replied to the survey, but do not wish to take part since they do not want to give away commercially sensitive information. One such company is Boots The Chemist Ltd.

The company respondents were asked from what sources they get their raw materials at the moment, but the answers to this have been rather vague, like "numerous suppliers" or no answer at all. This is also a sign that such information is considered commercially sensitive.

In addition to the above mentioned company survey, a survey on commercial sellers presently offering Crabwood oil on the Internet was carried out. See detailed Commercial Sellers List under 1.4.

10 companies were contacted with us acting as potential consumers asking for information about Andiroba (the Brazilian name for Crabwood) products and how to use them. Nearly all companies have replied, some of them giving detailed information about the use of their products (Aveda and Uhma Nagri) and others (Raintree Nutrition) informing that they are unable to export Andiroba oil from Brazil due to a country wide infestation of insects that are carriers of a tropical disease in humans and that Brazil health authorities have prohibited the harvesting of Andiroba.

Already we have reverted to Raintree Nutrition asking if we could put them in contact with Crabwood producers in Guyana where we have not been informed that harvesting of Crabwood has been prohibited.

Another company, Tropilab, through their Chief Botanist Dr. Sally Wongsoredjo in South America, has replied that they only sell the seeds of *Carapa guianensis*, but that the oil is used in the cosmetic industry and for medicinal applications such as snake bite, scorpion stings, kidney infection caused by yellow fever, treatment of jaundice and liver ailments, treatments of rheumatism, etc.

We have also, due to our survey being conducted with Japanese cosmetic and medicinal companies, contacted the JICA (Japan International Cooperation Agency) London office in order to try to enter into cooperation with the major Japanese development assistance organisation concerning

commercialisation of Crabwood and Marula oils into the Japanese cosmetic industry market. See copy of letter under 1.11.

When starting the interviews mentioned earlier more specific information should be provided, getting into the actual botanics of Crabwood and also its present use (cosmetic and medicinal) in South America. The respondents might ask for further information about this and then we will have to provide them with such information from for instance Iwokrama, or the respondents might wish to communicate directly with the Crabwood producers.

The commercial sellers found through Internet research were the following:

- 1) Aveda Corporation
- 2) Beraca Ingredients
- 3) etradeChem
- 4) Gaines Nutrition
- 5) Green Cottage
- 6) Herbal Advisor.Com
- 7) Raintree Nutrition Inc.
- 8) Tropilab
- 9) Uhma Nagri Skin Care
- 10) Vitamin Life

1.4. Commercial Sellers List

- of *Carapa guianensis*, Crabwood or Andiroba NFTP's

Web-sites of the listed companies are to be found at the bottom of this list.

1. **Agro Biofloresta Ind.Com**

Av. Vembere, 2603 Setor 04 –
Cx. Postal 139
Brazil
Tel: +55 69 5355322
Fax: +55 69 5355322
E-Mail: weldecy@ariquemes.com.br

The company sells products from the Amazon forest like powdered Guarana, Urucum, Bixina, Andiroba, Cocoa, Coffee, Soy and Flour.

2. **Amazon Co-Op Inc.**

Rua Tancredo Neves s/n
Altamira Para
Cep 68371-020
Brazil
E-Mail: coopamazon@aol.com

This Brazilian co-operative company specializes in essential oils, herbal medicines and ecotourism. It uses Andiroba in several herbal medicines. It is developing the processing of Andiroba oil for export to industries in North America and Europe.

3. **Aveda Corporation**

MN, USA
Phone: + 1 800 AVEDA 24
E-Mail: custrel@aveda.com

This is a major cosmetics company founded by Horst Rechelbacher, who has been a major force in the beauty industry for nearly four decades. Its products are sold worldwide. The mission of the company as laid out by the founder is: "To care for the world we live in, from the products we make to the ways in which we give back to society. At Aveda we strive to set an example for environmental leadership and responsibility, not just in the world of beauty, but around the world".

The company sells Chakra Complete Body Moisturizer with contains andiroba oils together with Brazil nut and Acerola. The product replenishes hands and body and helps retain moisture.

4. **Beraca Ingredients**

Rua Souza Melo, 73
Cep 03707-000
Sao Paulo
Brazil
Tel: + 55 11 6641 8722
Fax: + 55 11 6641 2595
E-mail: correio@beraca.com.br

The company has a partner in Europe, Henry Lamotte GmbH in Bremen, Germany. The products are rain forest oils like Andiroba Oil. Suggested applications are anti-inflammatory action, anti-rheumatic and insect repellent action. The oil is very bitter with a too high viscosity. The bitter taste promotes insect repellence.

5. etradeChem, Inc.

4 Fl., Daejin Bldg,
9-8, Moonjeong-Dong,
Songpa-Ku, Seoul
138-200
Korea
Tel: + 82 2 406 7626
Fax: + 82 2 401 4055
E-Mail: bckim@etradechem.com

The company supplies natural and chemical ingredients in Korea. One of the cosmeceuticals it offers is Andiroba oil. The product is described as Amazone natural anti-inflammatory made from seeds, the INCI name being Carapa Guianensis. The oil is being described as suitable for creams, emulsions and soaps and it has a good penetration of the skin due to a high oleic acid content (50.5 %). Also it has a calming, anti-inflammatory effect on itchy skin and wound healing effects due to a content of linoleic acid (9 %).

6. Fair Trade Zone

436 A Haight Street
San Francisco, CA 94117
USA

Tel: + 1 415 864 7170
Fax: + 1 415 293 4133
E-Mail: contact@fairtradezone.com

The company was founded in 1996 as a collaboration of two graduates of the Yale School of Forestry and Environmental Studies. The essence of the company is to provide access to the US market for products that are sustainably and ethically produced. The company is currently developing marketing analyses for additional products from Brazil, Ecuador, Thailand, Costa Rica, South Africa and Indonesia. The company sells colognes and soaps formulated with Andiroba oil. The price for a single 92 g bars soap is USD 4.50 and for the cologne the price for a 60 ml glass bottle is USD 17. Latest: The company has stopped its operations.

7. Gaines Nutrition

USA
Tel: + 1 909 307 2100
Fax: + 1 909 307 2111

The company sells Body Lotion with Andiroba and Aloe Vera for USD 3.89 for 12 oz. Normal retail price is set at USD 6.49

8. Green Cottage

11253 Regal Drive
Surrey, BC V3V 2S5

Canada
Tel: + 1 604 584 7627
Fax: + 1 604 589 7634

The company sells Andiroba oil and other natural oils online. Furthermore it offers a line of soaps, body care, herbs and butters. It mentions that Andiroba oil is very often used as a solvent for annatto. Also it is mentioned that in the traditional Amerindian pharmacopoeia, andiroba oil is used as a liniment against muscular fatigue.

The cosmetic uses for andiroba oil are described as profitable for dry, dehydrated or atonic skins, as anti-wrinkle products, skin restructuring emulsions or body lotions. This is due to the content of linoleic acid.

9. Herbal Advisor.Com

46560 Fremont Blvd.
CA 94538, USA
Phone: +1 510 252 0441
Fax: + 1 510 252 0443

The company sells Emerald Forest Andiroba/Aloe Vera Soothing Body Lotion at a price of USD 5.19 per 12 oz bottle.

10. Raintree Nutrition Inc.

10609 Metric Blvd., Suite 101
Austin, Texas 78758
USA
Tel: + 1 512 833 5006
Fax: + 1 512 833 5414
E-Mail: info@rain-tree.com

The company is trying to create a worldwide market demand for sustainable rainforest resources. To do so the firm focuses on targeting health-promoting medicinal plants.

It offers over 100 rainforest botanicals in various forms. Andiroba or Carapa guianensis oil sells for USD 2.90 for 1 oz..

11. Trend-Natur.De

Germany

The company sells Andiroba Massage Oil 75 ml from Brazil, price 28.75 DEM.

12. Tropilab Inc.

8240 Ulmerton Road
Largo, Fl. 33771
USA
Tel: + 1 727 531 3538
Fax: + 1 727 530 4854

The company is exporter and wholesaler of medicinal plants, herbs and tropical seeds. It is a fairly young company with ambition to grow. It has its own collecting team in Suriname and ships the plants immediately after harvesting. The company states that preservation of the tropical rainforest is of utmost importance and therefore they work closely with the authorities in Suriname to help ensure a responsible fashion in the way botanicals are collected and processed. The company only sell wildy harvested plants

and herbs from the Amazonian rainforest. The company sells *Carapa guianensis* seeds with 1 packet (2 seeds) costing USD 4.00.

13. Uhma Nagri Skin Care

11721 SW 119 Ter.
Miami, FL 33186
USA
Tel: + 1 305 969 7707
Fax: + 1 305 969 7708
E-Mail: info@uhmanagri.com

Uhma Nagri is a line of beauty products which speaks to women who believe that beauty comes in different forms. The company's understanding of today's needs in personal care is: practical, clean, light and effective cosmetics with unusual yet sophisticated scents. The company brings together technologies from Swiss labs and from ancient civilizations in the Amazon. The prices are upmarket. The Luan body moisturizer with Andiroba extract sells for USD 20.80 for 7 oz.

14. VitaminLife

15940 Redmond Way
Redmond, WA 98052
USA
Tel: + 1 425 702 8363
Fax: + 1 425 869 7750
E-Mail: customerservice@vitaminlife.com

The company offers hundreds of name brands and thousands of items at low prices through the Internet. It delivers worldwide. It sells Emerald Forest lotion with Andiroba and Aloe for USD 4.19 for 12 oz.

15. Yvesrocherusa.com

Tel: + 1 888 909 0771

This major cosmetics company operates worldwide. In the USA, where the Internet is widely used, this company, like others, use the Internet frequently to sell products. The company sells an Instant Contouring Spray in its Skin Care series which is based on Andiroba oil. The advertising for the product goes as follows: "For all women seeking to slim and firm the figure". The claim is followed up by studies. The price is USD 12.50 for 4.05 oz. Yves Rocher operates in many countries. In Denmark for instance, the company sells a Gel with Andiroba. Andiroba is said to block the activity of enzymes which result in fatty concentration of the skin, thus helping to keep the skin more smooth. The price is DKK 79.50 for 150 ml.

Web-sites of commercial sellers

- 1) <http://www.ariquemes.com.br>
- 2) <http://www.amazoncoop.org>
- 3) <http://www.aveda.com>
- 4) <http://www.beraca.com.br>
- 5) <http://www.etradechem.com>
- 6) <http://www.fairtradezone.com> (not operative any longer)
- 7) <http://www.gaines.com>
- 8) <http://www.greencottage.com>
- 9) <http://www.herbal-remedies.com>
- 10) <http://www.rain-tree.com>
- 11) <http://www.trend-natur.de>
- 12) <http://www.tropilab.com>
- 13) <http://www.uhmanagri.com>
- 14) <http://www.vitaminlife.com>
- 15) <http://www.yvesrocherusa.com>

1.5. List of Japanese Manufacturers/Exporters in Survey

COSMETIC MATERIALS

Milbon Co Ltd 1-7-19 Miyakojima Hondori Miyakojima-ku Osaka 534-0021 Fax: 06 (6927) 2162	Raw & auxiliary materials for hair-care cosmetics. Plastic caps, plastic tubes, aluminum tubes, mimi bottles for hair-care cosmetics.
Nikko Chemicals Co Ltd 1-4-8 Nihonbashi-Bakurocho Chuo-ku Tokyo 103-0002 E-Mail: inter@nikkol.co.jp Fax: 03 (3664) 8620	Raw materials for cosmetics. Vitamin C derivatives for cosmetic use. Lecithin derivatives for cosmetic use. Polyglyceryl fatty acids esters for cosmetic use.
Nippon Chemical Feed Co Ltd 3-6 Asano-cho Hakodate City Hokkaido 040-0076 Fax: 0138 (41) 7444	Cholesterol for cosmetic & medical use.
Q P Corporation 4-7-1 Minami-cho Itami-shi Hyogo 664-0854 Fax: 06 (6421) 5605	Cosmetic materials. Health food materials.
Snowden Co Ltd 6th Fl Marume Building 3-7-16 Iwamotocho Chiyoda-ku Tokyo 101-0032 E-Mail: snowden@ma4.jstnet.ne.jp Fax: 03 (3864) 4916	Cosmetic products. Cosmetic materials.
Taihai Chemical Industrial Co Ltd 1-16 Higashi-Koraibashi Chuo-ku Osaka 540 Fax: 06 (6942) 2514	Hydroxy apatite for cosmetics.

Tosco Co Ltd
Magyo Kaikan Building
1-1-10 Nihonbashi Ningyocho
Chuo-ku
Tokyo 103-8584
Fax: 03 (3667) 3862

Ramie, linen, & chitosan powders for cosmetics, etc. Chitosan soap, shampoo, & sponge.

COSMETIC RAW MATERIALS

Azuma Koryo Co Ltd
3-12-7 Higashinakamoto
Higashinari-ku
Osaka 537
Fax: 06 (6972) 0232

Cosmetic raw materials. Cosmetics. Cosmetic with/without alcohol.

Nihon Kolmar Co Ltd
Nissei-Fushimi-cho Building Honkan 4F
4-4-1 Fushimi-machi
Chuo-ku
Osaka 541
Fax: 06 (6227) 5264

Cosmetic raw materials. Cosmetics.

Tochimoto Tenkido Co Ltd
Seiwajisho Ogimachi Building
3-21 Suehiro-cho
Kita-ku
Osaka 530
Fax: 06 (6311) 6036

Cosmetic raw materials.

COSMETICS, VARIOUS

Arimono Co Ltd
5-22 Shimo Ochiai 1-chome
Shinjuku-ku
Tokyo 161
Fax: 03 (3363) 8219

Hair cosmetics.

Aubex Corp
1-12 Narihira 5-chome
Sumida-ku
Tokyo 130
Fax: 03 (3625) 9342

Cosmetics. Sports wear. Men's wear.

Avon Products Co Ltd
12-19 Shibuya 2-chome

Cosmetics. Toiletries.

Shibuya-ku
Tokyo 150
Fax: 03 (5466) 2653

C'Bon Cosmetics Co Ltd
18-12 Roppongi 7-chome
Minato-ku
Tokyo 106
Fax: 03 (3404) 7574

Cosmetics.

Chemical Procosmetics Mfg Ltd
16-30 Oizumigakuen-cho 7-chome
Nerima-ku
Tokyo 178
Fax: 03 (3978) 8528

Cosmetics. Health care and
therapeutic apparatus. Chemical
goods.

Club Cosmetics Co Ltd
6-11 Nishihonmachi 2-chome
Nishi-ku
Osaka 550
Fax: 06 (6543) 2012

Cosmetics.

Dahlia Cosmetic Co Ltd
25 Tendo-cho 3-chome
Kita-ku
Nagoya 462
Fax: 052 (916) 1483

Cosmetics. Toiletries.

Eisai Co Ltd
6-10 Koishikawa 4-chome
Bunkyo-ku
Tokyo 112
Fax: 03 (3814) 9400

Medicinal & pharmaceutical products.
Chemicals. Cosmetics. Feed
additives.

Hakujju Co Ltd
23-12 Takata 3-chome
Toshima-ku
Tokyo 171
Fax: 03 (3983) 6854

Cosmetic puff.

Juju Cosmetics Co Ltd
12-3 Koenji Minami 2-chome
Suginami-ku
Tokyo 166
Fax: 03 (3314) 1386

Cosmetics (basic and make-up lines).

Kaminomoto Co Ltd
3-25 Kumochibashi-dori 3-chome
Chuo-ku
Kobe 651

Hair care products & cosmetics.

Fax: 078 (221) 4104

Kanebo Ltd
5-90 Tomobuchi-cho 1-chome
Miyakojima-ku
Osaka 534
Fax: 06 (6922) 8128

Cosmetics. Pharmaceuticals.

Kiss Me Cosmetics Co Ltd
7 Goban-cho
Chiyoda-ku
Tokyo 102
Fax: 03 (3262) 4823

Cosmetics.

Kose Corp
6-2 Nihombashi 3-chome
Chuo-ku
Tokyo 103
Fax: 03 (5566) 9240

Cosmetics & perfumes.

Lion Corp
3-7 Honjo 1-chome
Sumida-ku
Tokyo 100
Fax: 03 (3621) 6048

Cosmetics, toiletries.

Mandom Corp
5-12 Jyuniken-cho
Chuo-ku
Osaka 540
Fax: 06 (6767) 5043

Cosmetic and toilet preparations.

Max Factor K K
17 Koyo-cho Naka 1-chome
Higashinada-ku
Kobe 658
Fax: 078 (845) 6940

Cosmetic general, theatrical and
movie make-up.

Mitsuyoshi Cosmetic Co Ltd
6-14 Koishikawa 3-chome
Bunkyo-ku
Tokyo 112
Fax: 03 (3814) 7640

Cosmetics for TV, cinema & stage
use.

Mochida Pharmaceutical Co Ltd
7 Yotsuya 1-chome
Shinjuku-ku
Tokyo 160
Fax: 03 (3358) 7887

Baby cosmetics. Skincare products.
Pharmaceuticals.

<p>Momotani Juntanken Ltd 4-30 Ichioka 2-chome Minato-ku Osaka 552 Fax: 06 (6575) 1357</p>	<p>Cosmetics.</p>
<p>Mory Pencil Co Ltd 10-21 Nishisuminoe 1-chome Suminoe-ku Osaka 559 Fax: 06 (6675) 0374</p>	<p>Eyebrow pencils. Eye liner pencils. Eye-shadow pencils. Dress marking pencils. Lip pencils.</p>
<p>New Osaka Industry Ltd 1-9-315 Nishiawaji 1-chome Higashiyodogawa-ku Osaka 533 Fax: 06 (6323) 9737</p>	<p>Eau de Toilette. Eau de Cologne. Perume compounds. Cosmetic making machine.</p>
<p>Nippon Lace Co Ltd 5th Fl Kyoto Tokai Building Karasumadori Sijyo Agaru Nakagyo-ku Kyoto 604 Fax: 075 (231) 4522</p>	<p>Cosmetics.</p>
<p>Nippon Menard Cosmetic Co Ltd 5-24 Marunouchi 3-chome Naka-ku Nagoya 460 Fax: 052 (961) 0245</p>	<p>Cosmetics.</p>
<p>Nishikawa Rubber Co Ltd 2-8 Misasa-machi 2-chome Nishi-ku Hiroshima 733 Fax: 082 (238) 3051</p>	<p>Sponge rubber goods.</p>
<p>Nisshin Perfumery Co Ltd 3-12 Nishitemma 4-chome Kita-ku Osaka 530 Fax: 06 (6363) 0105</p>	<p>Fragrance for cosmetic soaps & toiletries.</p>
<p>Noevir Co Ltd 13-1 Minatojimanaka-machi 6-chome Chuo-ku Kobe 650 Fax: 078 (303) 1424</p>	<p>Skincare products. Make-up. Hair- care/bodycare products. Soap. Toiletries. OEM cosmetic products.</p>
<p>Pias Corp</p>	<p>Cosmetics (foundation, cream &</p>

21-3 Toyosaki 3-chome Kita-ku Osaka 531 Fax: 06 (6374) 6605	lotion, lipsticks, eye make-up aid).
Pola Cosmetics Inc 2-3 Nishigotanda 2-chome Shinagawa-ku Tokyo 141 Fax: 03 (3494) 8541	Cosmetics.
Riken Perfumery Co Ltd 2-2 Tsukiji 2-chome Chuo-ku Tokyo 104 Fax: 03 (3541) 3536	Cosmetic perfumeries.
Sankyo Co Ltd 5-1 Nihonbashi-honcho 3-chome Chuo-ku Tokyo 103 Fax: 03 (5255) 7109	Cosmetics. Surgical supplies. Pharmaceuticals, chemicals & preparations.
Shiseido Co Ltd 5-5 Ginza 7-chome Chuo-ku Tokyo 104-10 Fax: 03 (3574) 8380	Cosmetics.
Siboley Co Ltd 18-18 Hojo 2-chome Daito Osaka-pref 574 Fax: 0720 (77) 1771	Cosmetics.
Sunstar Inc 3-1 Asahi-machi Takatsuki Osaka-pref 569 Fax: 0726 (82) 0329	Shampoos. Cosmetics. Toothpaste & brushes. Hairspray. Toiletries.
T Hasegawa Co Ltd 4-14 Nihonbashi Hon-cho 4-chome Chuo-ku Tokyo 103 Fax: 03 (3278) 8075	Cosmetics. Aromatic chemicals. Flavours. Essential oils.
Takeda Chemical Industries Ltd 1-1 Dosho-machi 4-chome Chuo-ku	Cosmetics.

Osaka 541
Fax: 06 (6204) 2943

Toyo Beauty Co Ltd
13-8 Higashi Nakamoto 3-chome
Higashinari-ku
Osaka 537
Fax: 06 (6981) 4348

Cosmetics. Toiletries. Quasi drugs.

Tsumura & Co Ltd
12-7 Niban-cho
Chiyoda-ku
Tokyo 102
Fax: 03 (3221) 5282

Toiletries. Cosmetics.

Tsumura Cosmetics Inc
4-10 Nihonbashi 3-chome
Chuo-ku
Tokyo 101
Fax: 03 (3273) 4669

Cosmetics (face powder, foundation, astringent, lotion, cold cream, lipstick, perfume). Cosmetics for men.

Wakodo Co Ltd
20 Kanda Sakuma-cho 4-chome
Chiyoda-ku
Tokyo 101
Fax: 03 (3851) 9986

Baby cosmetics. Wet tissue.

Yakult Honsha Co Ltd
1-19 Higashi Shimbashi 1-chome
Minato-ku
Tokyo 105
Fax: 03 (3574) 8907

Cosmetics. Health foods & drinks.

Yanagiya Honten Co Ltd
1-10 Nihombashi 2-chome
Chuo-ku
Tokyo 103
Fax: 03 (3281) 0598

Cosmetics (hair products, hair oil, men's face cream, Eau de Cologne, aftershave lotion).

YSK International Corp
Horikawadori Hanayacho-agaru
Shimogyo-ku
Kyoto 600
Fax: 075 (341) 5533

Cosmetics. Active health foods.

EXPORTERS

Hatton Merchandising Associates
Room No 4C
Tatsuno Shin-Osaka Building

Drugs and cosmetic products.

7-1-7 Nishi-Nakajima
Yodogawa-ku
Osaka 532
Fax: 06 (6390) 1338

Hayashibaba Co Ltd
2-3 Shimoishii 1-chome
Okayama City
Okayama 700
Fax: 086 (225) 5630
086 (221) 0534

I & M Tsusho Co Ltd
Yoshida Building 1/2F
5-11 Mita 2-chome
Meguro-ku
Tokyo 153
Fax: 03 (3791) 8505

Jimmy's Company Ltd
56-3 Iai-cho
Matsuyama City
Ehime 790
Fax: 089 (958) 2405

Kakudai Shosan Co Ltd
1-4 Kitamachi
Kawagoe City
Saitama 350
Fax: 0492 (25) 6128

KMI Corporation
Asakawa Building 7F
5-5 Yaesu 1-chome
Chuo-ku
Tokyo 103
Fax: 03 (3281) 0716

Naris Cosmetics Co Ltd
11-17 Ebie 1-chome
Fukushima-ku
Osaka 553
Fax: 06 (6458) 5949

Natural Co Ltd
1-16-12 uchikanda
Chiyoda-ku
Tokyo 101
Fax: 03 (5359) 8686

"Up & Up" (hair restore lotion).

Cosmetics.

Cosmetic soaps and creams.

Kaolin hair care shampoos, hair growing lotion, hair treatment grape seed oil, hair styling gel made of plant roots.

Natural cosmetics.

Cosmetics.

Pearl moisturizing cream.

Novel Co Ltd (Associated with SWIK Corporation)
F2 1-16-5 Hamamatsu-cho
Minato-ku
Tokyo 105
Fax: 03 (5401) 0958
03 (5401) 0969

Cosmetics, skin & body-care products & supplies.

Original Co Ltd
2-1-2 Mohri
Koto-ku
Tokyo 135
Fax: 03 (3631) 8186

Bath salts, hand cream, perfume, eau de cologne.

Rohto Pharmaceutical Co Ltd
1-8-1 Tatsumi-Nishi
Ikuno-ku
Osaka 544
Fax: 06 (6757) 5155

Sunscreen cream.

Yamahatsu Sangyo Kaisha Ltd
1-1-25 Dojima
Kita-ku
Osaka 530
Fax: 06 (6344) 5770

Powder hair dyes-black and dark brown, liquid hair dyes cover grey and fashion colours, hair shampoos, hair treatments for damaged and dyed hair, permanent wave lotions.

ASSOCIATION

Japan Cosmetic Industry Association
Hatumei Building
2-9-14 Toranomom
Minato-ku
Tokyo 105
Fax: 03 (3502) 0829

1.6. List of CTPA (Cosmetic and Toiletries Producers Association of the United Kingdom) companies in Survey

AROMATIQUE INC

Full Member

154 Brompton Road
Knightsbridge
London
SW3 1HX
020 7 591 1950
020 7 591 1951
info@aromatique.co.uk

AVON COSMETICS LIMITED

Full Member

Nunn Mills Road
Northampton
NN1 5PA
01604 232425
01604 232444

BEIERSDORF UK LIMITED

Full Member

PO Box 3261
Alum Rock Road
Birmingham
B8 3DW
0121 327 4750
0121 326 8519

BOOTS COMPANY PLC, THE

Full Member

Thane Road
Beeston
Nottingham
NG2 3AA
0115 959 6111

BRISTOL-MYERS COMPANY LIMITED

Full Member

Swakeleys House
Milton Road
Ickenham
Uxbridge
UB10 8NS
01895 628000
01895 636975

CALVIN KLEIN COSMETICS (UK) LTD

Full Member

3rd Floor
55 New Bond Street
London
W1Y 9DG
020 7399 3435
020 7355 2398

CLINIQUE LABORATORIES LTD

Full Member

71/73 Grosvenor Street
London
W1X 9FH
020 7493 9271
020 7409 6900

COLGATE-PALMOLIVE (UK) LIMITED

Full Member

Guildford Business Park
Middleton Road
Guildford
Surrey
GU2 5LZ
01483 302222
01483 464442 / 464445

CRABTREE & EVELYN TRADING LIMITED

Full Member

Cowbridge Road
Talbot Green
Pontyclun
Mid-Glamorgan
CF72 8YN
01443 223993
01443223856

CUSSONS (UK) LIMITED

Full Member

Cussons House
Bird Hall Lane
Stockport
SK3 0XN
0161 491 8000
0161 491 8188

DEWHIRST TOILETRIES LIMITED

Full Member

Lorien House
Sunderland Road
Sandy
Bedfordshire
SG19 1RB
01767 691990
01767 691908

ELIZABETH ARDEN (UK) LIMITED

Full

Member

271 Regent Street
London
W1R 8AA
020 7574 2700
020 7574 2727

FINE FRAGRANCES & COSMETICS LIMITED

Full Member

74 Oldfield Road
Hampton

Middlesex
TW12 2HR
020 8979 8156
020 8979 6602

GILLETTE UK LIMITED

Full Member

Gillette Corner
Great West Road
Isleworth
Middlesex
TW7 5NP
020 8560 1234
020 8568 4082

GLAXOSMITHKLINE

Full Member

Wallis House
Great West Road
Brentford
Middlesex
TW8 9BD
020 8560 5151
020 8847 0830

GUERLAIN LIMITED

Full Member

Marble Arch House
66 Seymour Street
Marble Arch
London
W1H 5AF
020 7563 7555
020 7563 7500

HELENA RUBINSTEIN LTD

Full Member

255 Hammersmith Road
London
W6 8AZ
020 8762 4040
020 8762 4001

HERBALIFE (UK) LIMITED

Full Member

Senator Court
4 Belmont Road
Uxbridge
Middx
UB8 1HB
01895 819000
01895 819016

JETLAG INTERNATIONAL LIMITED

Full Member

Carrwood Road
Chesterfield Trading Estate
Chesterfield
Derbyshire
S41 9QB

01246 450002
01246 260497

JOHNSON & JOHNSON LIMITED

Full Member

Foundation Park
Roxborough Way
Maidenhead
Berkshire
SL6 3UG
01628 822222
01628 821222

JULIETTE COSMETICS LIMITED

Full Member

168 Eastgate
Louth
Lincolnshire
LN11 9AB
01507 605242
01507 600656

KMS RESEARCH LABS UK LIMITED

Full Member

Gardiners Lane South
Basildon
Essex
SS14 3AP
01268 290300
01268 290301

LANCASTER (UK) LTD

Full Member

St George's House
5 St George's Road
Wimbledon
London
SW19 4DR
020 8971 1300
020 8971 1399

LEVER FABERGÉ LIMITED

Full Member

3 St James Road
Kingston Upon Thames
Surrey
KT1 2BA
020 8481 6000
020 8481 6304

MAVALA (UK) LIMITED

Full Member

16 Morewood Close
Sevenoaks
Kent
TN13 2HU
01732 459412
01732 740819
sales@mavala.co.uk

NATURAL WHITE (UK) LIMITED

Full Member

Unit 2
94-106 Church Street
Staines
Middx
TW18 4YA
01784 464547
01784 464344
fddnwuk@binternet.com

NIMBUS LABORATORIES LIMITED

Full Member

Lower Farm Road
Moulton Park
Northampton
NN3 6XF
01604 646411
01604 647375

NOVARTIS CONSUMER HEALTH

Full Member

Wimblehurst Road
Horsham
West Sussex
RH12 4AB
01403 210211
01403 323939

ORIGINAL ADDITIONS (BEAUTY PRODUCTS)

Full Member

Ventura House
Bullsbrook Road
Hayes
Middlesex
UB4 0UJ
020 8573 9907
020 8573 6824

PARFUMS GIVENCHY LTD

Full Member

Marble Arch House
66 Seymour Street
Marble Arch
London
W1H 5AF
020 7563 8800
020 7563 8815

POTTER & MOORE LIMITED

Full Member

1210 Lincoln Road
Werrington
Peterborough
Cambridgeshire
PE4 6ND
01733 281000
01733 281025

PROCTER & GAMBLE UK

Full Member

The Heights
Brooklands
Weybridge
Surrey
KT13 0TP
01932 896000
01932 896200

REVLON INTERNATIONAL CORPORATION

Full Member

Highgate Studios
53-79 Highgate Road
London NW5 1TL
020 7284 8700
020 7428 5625

ROBERT McBRIDE LTD

Full Member

Middleton Way
Middleton
Manchester
M24 4DP
0161 653 9037
0161 653 0705

SARA LEE HOUSEHOLD & BODY CARE UK LTD

Full Member

225 Bath Road
Slough
Berkshire
SL1 4AU
01753 523971
01753 508805

SCHWARZKOPF LTD

Full Member

Penn Road
California Industrial Estate
Aylesbury
Bucks
HP21 8HL
01296 314000
01296 398179

STAFFORD-MILLER LIMITED

Full Member

Broadwater Road
Welwyn Garden City
Hertfordshire
AL7 3SP
01707 331001
01707 373370

SWALLOWFIELD PLC

Full Member

Station Road
Wellington
Somerset
TA21 8NL

01823 662241
01823 663642

UNILEVER PLC

Full Member

Unilever House
Blackfriars
London
EC4P 4BQ
020 7822 5252
020 7822 5951/5898

WARNER-LAMBERT CONSUMER HEALTHCARE

Full Member

Lambert Court
Chestnut Avenue
Eastleigh
Hampshire
SO53 3ZQ
023 8062 0500
023 8062 9726

WHITMAN LABORATORIES

Full Member

Bedford Road
Petersfield
Hampshire
GU32 3DD
01730 266522
01730 261500

YVES ROCHER (LONDON) LIMITED

Full Member

3rd Floor, Queens House
Kymberley Road
Harrow
HA1 1YD
020 8901 3900
020 8861 4965

A & E CONNOCK (PERFUMERY & COSMETICS)

Associate Member

Alderholt Mill House
Fordingbridge
Hampshire
SP6 1PU
01425 653367
01425 656041

BP AMOCO PLC

Associate Member

Building A
Chertsey Road
Sunbury-on-Thames
Middx TW16 7LN
01932 762000
01932 767912

CPL AROMAS PLC

Associate Member

Barrington Hall
Hatfield Broad Oak
Bishops Stortford
Hertfordshire
CM22 7LE
01279 718493
01279 718527

CREATIONS AROMATIQUES LIMITED

Associate Member

Fieldhouse Lane
Marlow
Bucks
SL7 1NA
01628 472051
01635 562007

ELEMENTIS SPECIALITIES

Associate Member

Nettlehill Road
Houstoun Industrial Estate
Livingston
Scotland
EH54 5DL
01506 430331
01506 432219

FRAGRANCE OILS (INTERNATIONAL) LTD

Associate Member

Eton Hill Industrial Estate
Eton Hill Road
Radcliffe
Manchester
M26 2FR
0161 724 9311
0161 725 5216

IFF (GB) LIMITED

Associate Member

Commonwealth House
Hammersmith International Centre

London
W6 8DN
020 8741 5771
020 8741 2566

INDEPENDENT FRAGRANCE CO LTD, THE

Associate Member

15 Scotia Close
Brackmills Industrial Estate
Northampton
NN4 0HR
01604 702882
01604 702814

JAMES ROBINSON LIMITED

Associate Member

PO Box B3
Hillhouse Lane
Huddersfield
West Yorkshire
HD1 6BU
01484 320000
01484 320300

LONZA UK LIMITED

Associate Member

Imperial House
Lypiatt Road
Cheltenham
Gloucestershire
GL50 2QJ
01242 513211
01242 222294

NIPA LABORATORIES LIMITED

Associate Member

Llantwit Fardre
Pontypridd
Mid-Glamorgan
CF38 2SN
01443 205311
01443 207746

QUEST INTERNATIONAL LIMITED

Associate Member

Willesborough Road
Ashford
Kent
TN24 0LT
01233 644444
01233 644146

SEQUANI LIMITED

Associate Member

Bromyard Road
Ledbury
Herefordshire
HR8 1LH
01531 634121
01531 634753

SIBER HEGNER LIMITED

Associate Member

County House
221- 241 Beckenham Road
Beckenham
Kent
BR3 4UF
020 8659 2345
020 8659 1292

THOR SPECIALITIES (UK) LIMITED

Associate Member

Biocides Division
Commercial Avenue
Cheadle Hume
Chester
SK8 6QH
0161 486 1051
0161 485 4155

WILLIAM RANSOM & SON PLC

Associate Member

104 Bancroft
Hitchin
Hertfordshire
SG5 1LY
01462 437615
01462 420528

MARKS & SPENCER PLC

Non-Man Associate

Michael House
Baker Street
London
W1U 8EP
020 7935 4422
020 7487 2679

VIRGIN COSMETICS COMPANY LTD, THE

Non-Man Associate

Salisbury House
City Fields Business Park
Chichester
West Sussex
PO20 6FP
01243 622226
01243 536346

1.7. List of Natural Cosmetic Producers in the Winners and Losers Marketing Survey

Weleda AG
Heilmittelbetriebe
Postfach 1320
73503 Schwaebisch Gmuend
GERMANY

Dr. Hauschka
Wala Heilmittel GmbH
Bosslerweg 2
73087 Eckwaelden/Bad Boll
GERMANY

The Body Shop International Plc
Watersmead
Littlehampton
West Sussex
BN17 6LS

Melissa Naturkosmetik
Hoersholm Kongevej 21
2970 Hoersholm
DENMARK

Urtekram A/S
Klostermarken 20
9550 Mariager
DENMARK

Laboratoires Maurice Messegue
Chemin de Berdoulet
325000 Fleurance
FRANCE

1.8. Interview Letter Japan



Maclean Building, Crowmarsh Gifford
Wallingford, Oxfordshire OX10 8BB
United Kingdom

Tel: +44 1491 692530 (Direct)
+44 1491 838800(Switchboard)
Fax +44 1491 692338
Email: upo@ceh.ac.uk

Company XX
JAPAN

2001-08-14

Dear Sir/Madam,

We apologise for not writing to you in the Japanese language, but hope it will still be possible for you to read this letter.

We are currently researching the market for Crabwood oil (*Carapa Guianensis*) and Marula (*Sclerocarya Birrea*) oil used in cosmetics and medicinal purposes. We are contacting your company since it might be of benefit to you to learn more about our research.

We would like to ask whether we could possibly contact you by telephone to conduct an interview in Japanese language about your company's possible interest in natural ingredients, like Crabwood and Marula oils.

If you have any interest we could also, at a later stage, establish a first contact between you and producers of Crabwood in Guyana, South America or Marula in Southern Africa.

This research is being conducted to investigate the possible use of non-timber forest products and the potential for sustainable income generation from them for local communities. The project is being funded by the UK government, Department for International Development, Forestry Research Programme.

We would greatly appreciate it if you could respond to this letter by completing the attached form and returning it to the address above. We hope that by doing so, we will be able to assist you by sharing with you some of the results of our work. Please direct your correspondence to Mr. Uffe Poulsen, who is a Japanese speaker.

Thank you very much for your time. We look forward to hearing from you.

Best wishes,

Dr. Caroline Sullivan - Project Leader
Head of Water Policy and Management,
Centre for Ecology and Hydrology, Wallingford, United Kingdom

1.10. Interview Form Japan

Company XX
JAPAN

Company XX
London

21. August 2001

Dear Sir/Madam,

We are currently researching the market for Crabwood oil (*Carapa Guianensis*) and Marula (*Sclerocarya Birrea*) oil used in cosmetics and medicinal purposes. We are contacting your company since it might be of benefit to you to learn more about our research.

This research is being conducted to investigate the possible use of non-timber forest products and the potential for sustainable income generation from them for local communities. The project is being funded by the UK government, Department for International Development, Forestry Research Programme.

We would greatly appreciate if you could respond to this letter by completing and returning the attached survey form in the addressed envelope. We hope that by doing so, we will be able to assist you later, by sharing some of the results of our work with you. Please direct your correspondence to Mr. Uffe Poulsen, who is doing the survey.

If you do have an interest in this work, we could also, at a later stage, establish a first contact between yourselves and producers of Crabwood oil in Guyana (South America) or Marula oil from Southern Africa.

Thank you very much for your time. We look forward to hearing from you.

Best wishes,

Dr. Caroline Sullivan - Project Leader
Head of Water Policy and Management,
Centre for Ecology and Hydrology, Wallingford, United Kingdom

1.13. Interview Form UK and Natural Cosmetic Producers

Company XX
London

1) Name of respondent:

2) Number of employees in your company:

3) Number of products in your product range:

g) Cosmetics

h) Medicinal

i) Others

4) Would you be interested to hear more about this project? Yes No

5) Can we conduct a telephone interview with you? Yes No

If yes, who should we speak to?

6) Have you heard about "Crabwood" or "Marula" before? Yes No

7) From what sources do you get your raw materials at the moment?

8) Do you sell your products in the domestic market? Yes No

9) Do you export your products? Yes No

10) If so, to which countries?

1.14. Interview Results UK/Natural Cosmetic Companies

Marketing Survey Respondents

Name of company/ Respondent	Number of employees	Number of products	Want to hear more	Telephone interview okay?	Heard of Crabwood or Marula before?	Raw material source	Domestic or export sales
Perfums Givency	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Asked us to contact France HO
James Robinson Ltd.	Unknown	Unknown	No	No	No	Unknown	Unknown
The Independent Fragrance Co. Ltd./ Lynne	70	Unknown	Yes	Yes	Not sure	Numerous Suppliers	Export Worldwide/ No sale to public
Boots The Chemist	Unknown	Unknown	No	No	Unknown	Unknown	Unknown
CPL Aromas Plc/ Tim Whiteley	More than 200	More than 500	Yes	Yes	No	Sources from all over the world	Domestic sales and export worldwide
Robert McBride Ltd./ June Graham	More than 4,000	1,000	Yes	Yes	No	Not used	Domestic sales and export to mainly Europe
A & E Connock/ Alan J Connock	10	100s	Yes	Yes	Yes	Many different suppliers worldwide	Export sales worldwide
Dr. Hauschka/ Wala Heilmittel GmbH/ Dr. Reinhard Toedt	400	1300	Yes	Yes	No	No answer	Domestic sales and export
The Virgin Cosmetics Company Ltd./ Andrew Jones	About 60	About 500	Yes	Yes	No	No clear answer	Domestic sales plus export to Hong Kong, Malaysia, Taiwan, Singapore and expanding
Potter & Moore/ Jennifer Bell	About 200	About 1100	Yes	Yes	Marula Yes Crabwood No	Various suppliers	Domestic sales plus export to EU, America and Far East
Calvin Klein Address wrong	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown
Sequani Ltd./ Roy Ovel	150	None	Yes	Yes	Yes	N/A	Service company (research) Sells service to domestic and export markets
GlaxoSmithKline	Unknown	Unknown	No	No	Unknown	Unknown	Unknown
Johnson & Johnson/ Nathan Hughes	Over 200	About 220	Yes	No	No	Various	Domestic Sales and Export to EU and North Africa

1.15. Interview Results Japan

Marketing Survey Respondents

Name of company/ Respondent	Number of employees	Number of products	Want to hear more	Telephone interview okay?	Heard of Crabwood or Marula before?	Raw material source	Domestic or export sales
Sun Chlorella	Unknown	Unknown	No	No	No	Unknown	Unknown
Rohto Pharmaceutical Co Ltd/ Kosuke Matsumoto	1,000	350	Yes	Yes	No	Domestic Suppliers	Only domestic sales
Mandom Corporation	573	235	Yes	Yes	No	Domestic Suppliers	Domestic and International

The last respondent, Mandom Corporation, answered the Japanese language survey form (2nd mailing). The first two respondents answered the English language survey form (1st mailing).

1.16. Letter to JICA



**Centre for
Ecology & Hydrology**

NATURAL ENVIRONMENT RESEARCH COUNCIL

Maclean Building, Crowmarsh Gifford
Wallingford, Oxfordshire OX10 8BB
United Kingdom

Tel: +44 1491 692530 (Direct)
+44 1491 838800 (Switchboard)
Fax +44 1491 692338
Email: upo@ceh.ac.uk

JICA UK
45 Old Bond Street
London
W1X 4HS

22. August 2001

Dear Sir/Madam,

We are currently researching the market for Crabwood oil (*Carapa Guianensis*) and Marula (*Sclerocarya Birrea*) oil used for cosmetic and medicinal purposes. We are this week sending a letter to each company on the JETRO list of cosmetic companies in Japan to conduct a survey.

We wonder whether it would be of interest to you to participate in our project. It would be advantageous to have a Japanese organisation dealing with development issues involved. The producers in the project are based in Guyana, South America (Crabwood) and in Southern Africa (Marula).

The research is being conducted to investigate the possible use of non-timber forest products and the potential for sustainable income generation from them for local communities. The project is being funded by the UK government, Department for International Development, Forestry Research Programme.

We would be very interested to hear from you and are attaching a copy of a new brochure which we just made for Marula. A similar type of brochure is planned for Crabwood.

Best wishes,

Dr. Caroline Sullivan - Project Leader
Head of Water Policy and Management,
Centre for Ecology and Hydrology, Wallingford, United Kingdom

1.17. Telephone Interview Results

8 companies were interviewed by telephone during December 2001. We promised to send them our new Crabwood/Marula brochure. See mailing list under 1.21. The questions were the following:

Name of Company/Tel no. Internet address If Company/Product Material is being sent	Which plant ingredients are used?	Which active plant ingredients are important?	Do you tell about them in your advertising ?	Any important plants being researched at present?	What information would you need on Crabwood and Marula?	Do you normally buy from the producer or from a wholesaler?	Can we put you in contact with local suppliers ?	Are you interested in fair trade issues?	Do you try to give your company a green profile?
Wala-Dr. Hauschka/ Dr. Reinhard Toedt Tel: +49 7164 930 258 http://www.wala.de Will send material about company and products	Tincture, Oil, Extract	Salvia, Camomile, Calendula	Yes, very often – both medicinal and cosmetic	No	From the producer: where and how is plant grown, extract and essential oil info	Both, but mostly producing on our own	Yes	Yes, no business with unethical producers	Yes
CPL Aromas Plc/ R&D Manager Tim Whiteley Tel: 01279 718 573 http://www.cplaromas.com	Extracts for fragrances and end products	Essential Oils for odour value and anti-ageing/anti-oxidant indications	Only for retailers	Yes, but through 3 rd parties	Full specifications of extracts, attributes of extracts like if anti-oxidant or other properties	Combination of both, but often from the producer	Yes	Yes	Yes, for instance no use of animal tested fragrance
Potter and Moore/ Jennifer Bell Tel: 01733 281000 No website	Extracts	n/a	Only for retailers	None - Work with well known extracts	Specification and Certificate of Analysis	From wholesalers	Yes	Yes, if ingredient fit into their formulas and are specified	Yes, but difficult since many materials in that quality can be difficult to obtain
A & E Connock Ltd./ Alan J Connock Tel: 01425 653367 http://www.connock.co.uk Company/Product Material already received	Oil – Already promoting Marula in creams and lotion	n/a	n/a	For instance Marula Oil or Manketti Oil	Sample (250g), Material Data Safety Sheet, Botanic Info, Local (Native) Use over the years, Price CIF UK, Mode of packaging, Measure of e.g. gravity and acid values	Rarely from producers, but depends. Almond and Sunflower Oil through wholesalers	Yes	Agrees with fair trade – special interest in Papua New Guinea	Not heavily involved
Robert McBride Ltd./ June Graham Tel: 01274 844 844 http://www.mcbride.co.uk	Extracts	Variety of extracts – fashioned, changes every year, at the moment Green Tea and Tea Tree	Only private label to among others Tesco	Limited research on natural ingredients	Only interested if well-known	Most extracts come from wholesalers – otherwise mixed	Limited interest	Only in specific projects – business to business	No
The Independent Fragrance Company/	Extract – Lavender	n/a	No	No research	INCI name, if	Depends – if large	Prefers to work with	Are working	Trying to become

Technical Manager Lynne Wright Tel: 01604 702882 No website					water/oil/alcohol solubility tested, what product types, price	quantities from the producer	manufacturers or importers, not agricultural producers	on a number of fair trade contracts	more green, but not essential company platform
Sequani Ltd./ Business Development Executive Roy M. Ovel Tel: 01531 632 854 http://www.sequani.com	Research Organisation for testing of pharmaceutical and cosmetic products	Testing of natural ingredients	Produces Reports to Service Industry	Test plant extracts	Background info, Former studies, if possible cosmetic in-vitro data, standard safety statement (see 1.20 in this survey)	n/a	n/a	Prefers to work ethical, but no emphasis	No – research company
The Virgin Cosmetics Company td./Andrew Jones - Formula Section Tel: 01243 622 285 http://www.virgincosmetics.com Will send brochure of products	Tincture, Oil and Extracts	Yes – e.g. Seaweed	Sometimes	At the moment – none	Plant source, breakdown of extracts, oil composition, claims of effect, testing data – if possible in -vivo	Only sales/marketing company – uses other companies as manufacturers	Yes	Not strong issue – preferably yes	Don't think so

1.18. Review (Conclusion) of Telephone Interview Results

The use of plant ingredients are spread over different material, but with an emphasis on extracts. Interestingly for the Winners and Losers project, one company, A & E Connock is already promoting Marula in creams and lotions. Concerning what actual plant ingredients are being used, often the companies are not very open about this, but Wala/Dr. Hauschka, a German natural cosmetics company told of several species and they are also sending a brochure over their products. Other companies told us that they applied anti-ageing or anti-oxydant plant properties in their products (CPL Aromas), both quite popular fashion-led indications, and also Robert McBride, which among others produces for Tesco, was fashion-led in their approach by for instance using Green Tea and Tea Tree extracts. Virgin Cosmetics are, possibly with a special view to the large Japanese cosmetic market, applying Seaweed in their products. The Virgin brand being well known worldwide makes this approach possible. Often companies are quite reluctant to use the active effects of plant ingredients in their advertising. The laws are different from country to country, Germany and Switzerland being the only two countries in Europe, and possibly in the world, where a company can openly register a medicinal effect of a plant. Denmark has tried to follow up on this in recent years, but with much more limited indications and numbers of ingredients being allowed on the market. The more well-known approach in many countries is to use advertising towards the retailer who then, orally, advises the consumer who enters the shop. Often companies make manuals for the retailers for that purpose.

Plant ingredients have often already been intensively researched making further research unlikely. Plant ingredient effects in medicine and cosmetic are often based on folkloristic traditions and are quite well known. All companies had none or only limited research within plant ingredients.

The requirements for making Crabwood and Marula interesting for companies were extensive. All of them bar one were interested in getting a contact with a supplier of Crabwood or Marula but they expect a list of information to be provided in order for them to be professionally interested. The requirements were different from company to company in the interviews, but as a rule one would suggest that by adding up the different requirement from different companies a full picture of what is actually required on a larger scale becomes evident.

Most companies buy from both producers and wholesalers. Sometimes larger quantities are bought from producers only. One company Wala/Dr. Hauschka prefers to grow most plants themselves in their own medicinal plant garden for quality control purposes. Another company, not mentioned in this survey, Bioforce A. Vogel from Switzerland, does the same thing.

The interest in fair trade issues varies from company to company. Most companies have an ethical approach to the issue and know that it would be best to follow the "right path". A few companies look at it from a business point of view saying that if it is in their client's interest they will follow this approach. The question is what comes first – like with the chicken and the egg.

A similar case can be argued for the companies interest in being “green”. It is often seen as a marketing issue and thus regulated by the theory of demand and supply and the perceptions within a company can be different from within another company. They might think they are doing a whole lot both in order to be green and to support fair trade, but seen from the outside and from NGO’s then again it might not look like a very strong effort.

For all companies, telephone numbers are given of the particular person interviewed and also the website of the company (if set up) is given where often further information about products can be found.

Some companies do not have a website, but then again this does not depend on size since A & E Connock has quite a good website.

This company sent quite interesting and informative material to us at a very early stage in the project survey. Later Wala/Dr. Hauschka and Virgin Cosmetics have agreed to send out material, which should follow in December 2001 shortly after the interviews have ended.

1.19. Telephone Interview Survey Form

Telephone Interview: Winners and Losers

Name of company:
Name of respondent:
Tel no.:
E-Mail:
Date:

Is this a convenient time to talk?

1) Thank you for participating in our recent marketing survey on Marula and Crabwood. We will send you more information soon about the Marula and Crabwood project in the form of a brochure which we are working on at the moment.

2) Which plant ingredients:

a) do you use

and in what forms:

tincture

oil

extract

b) do you know about

3) Which active plant ingredients are important in your company's range of products?

4) Do you tell people about them in your advertising?

If yes, in what way?

- 5) Which are the most important plants you work at, at research level for the time being?
- 6) In order to use Crabwood and/or Marula as ingredients, what would you need of further information from CEH or the local producer?
- 7) Do you normally get your plant ingredients from the producer or from a wholesaler?
- 8) Can we put you in contact with local suppliers of Crabwood in Guyana, South America and of Marula in South Africa?
- 9) Are you interested in fair trade issues?
If yes, do you pursue them in your company and in that case how?
- If no, would you like to pursue them in the future?
- 10) Do you try to give your company a “green” profile?
- 11) Do you think trade actually help improve peoples lives in poor countries?

12) Can you send any advertising material on your products containing plant ingredients?

1.20. Standard Safety Statement

STANDARD SAFETY STATEMENT

Having considered the formulae for the products:

List of products:

I wish to confirm that these products contain ingredients that are commonly used in cosmetic products at similar concentrations. There is no reason to believe that any of these ingredients present a safety hazard to healthy volunteers. They are suitable for the proposed testing.

Signed and dated

(To be presented on headed paper and including the job title and qualifications of the person signing the statement.)

Explanation:

The above statement is what is required from Sequani Ltd., a research company that makes test on pharmaceutical and cosmetic products. The requirement is for all materials or products that are to be tested by the company.

1.21: Mailing List – New Brochure

A copy of the new Crabwood/Marula brochure is being sent out in December 2001/January 2002 to the following respondents of telephone interviews and (in the case of Japan) written survey interview respondents:

- 1) The Virgin Cosmetics Company Ltd.
Salisbury House
City Fields, Business Park
Chichester
West Sussex
PO20 6FP
Att: Andrew Jones – Formula Section

- 2) Dr. Hauschka/Wala Heilmittel GmbH
Bosslerweg 2
73087 Eckwaelden/Bad Boll
GERMANY
Att: Dr. Reinhard Toedt

- 3) Potter & Moore
1210 Lincoln Road
Werrington
Peterborough
Cambridgeshire
PE4 6ND
Att: Ms. Jennifer Bell

- 4) CPL Aromas Plc
Barrington Hall
Hatfield Broad Oak
Bishops Stortford
Hertfordshire
CM22 7LE
Att: R&D Manager Tim Whiteley

- 5) A & E Connock Ltd.
Aldersholt Mill House
Fordingbridge
Hampshire
SP6 1PU
Att: Alan J Connock

- 6) Robert McBride Ltd.
Middleton Way

Middleton
Manchester
M24 4DP
Att: June Graham

7) The Independent Fragrance Co Ltd.
15 Scotia Close
Brackmills Industrial Estate
Northampton
NN4 0HR
Att: Technical Manager Lynne Wright

8) Sequani Ltd.
Bromyard Road
Ledbury
Herefordshire
HR8 1LH
Att: Business Development Executive Roy M. Ovel

If at a later stage a brochure is printed in Japanese this should, apart from the English language brochure, be sent to: (both respondents to written survey)

1) Mandom Corp.
5-12 Jyuniken-cho
Chuo-ku
Osaka 540-8530
JAPAN
Att: Mr. Yoshio Endo

2) Rohto Pharmaceutical Co Ltd.
1-8-1 Tatsumi-Nishi
Ikuno-ku
Osaka 544
JAPAN
Att: Mr. Kosuke Matsumoto