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DEVELOPMENT OF INDUSTRIAL PRODUCTION OF ESSENTIAL OILS,
AROMAS AND FLAVOURS

DP/VIE/84/010

THE SOCIALIST REPUBLIC OF VIETNAM

Technical report: International Markets of Essential Oils*

Prepared for the Government of the Socialist Republic of Vietnam
by the United Nations Industrial Development Organization
acting as executing agency for the United Nations Development Programme

Based on the work of Mr. J.G. Meredith
Expert in marketing of essential oils

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United Nations Industrial Development Organization
Vienna

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* This document has not been edited.

Abbreviations used where relevant

CNRS	Centre National de Recherches Scientifiques (National Centre for Scientific Research)
ENTEROIL	Essential Oils Enterprise
GENERALEXIM <u>Hanoi</u> (North)	Viet Nam National General Export-Import Corporation 1
GENERALIMEX <u>South</u> Ho Chi Minh City	General Commodities Import and Export Corporation
NAFORIMEX	Viet Nam National Forest and Native Produce Export-Import Corporation
VEGETEXCO	Viet Nam National Vegetables and Fruits Import-Export Corporation
VIETINSPECT	Viet Nam Inspection and Testing Office
VINAFA	Viet Nam National Pharmacy
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organisation
ITC	International Trade Centre, Geneva.
BSI	British Standards Institution
ISO	International Standards Organisation

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I. INTRODUCTION

In 1986 a Project Document was drawn up which in October 1987 was signed by the Government of the Socialist Republic of Vietnam and the United Nations Development Programme. The effective starting date was April 1988.

The Project bore the number DP/VIE/84/010/A/014 with a proposed duration of 24 months.

The Government Implementing Authority was to be the CNRS (National Centre for Scientific Research) and the Executing Agency for the UNDP was to be UNIDO, the United Nations Industrial Development Organisation.

The Development objective of the project was in line with the National Development orientation consistent with the Five Year Plan for the period 1986-1990 and will contribute to the increase in the production of Vietnamese essential oils and related natural products thus enhancing rural development and providing raw materials for local industries not only ensuring their controlled development but contributing also to foreign exchange earnings.

The Immediate objective of the project was the building up of technical expertise and the developing of marketing links with overseas consumers. To achieve this, the CNRS was appointed the principal organisation responsible for technology transfer and quality control in the programme of increasing the production and improving the quality of Vietnamese essential oils and related products in order to contribute more effectively to the production of goods for export.

Furthermore, the traditional merchandising channels of GENERALEXIM, NAFOR-IMEX and VINAPA was strengthened by the establishing of ENTEROIL, the Essential Oils Enterprise within the CNRS, thus coordinating the activities of production and marketing to achieve the required results.

The UNDP Inputs to the project covered the purchasing of selected equipment and the fielding of agreed international experts, amongst them a Marketing Specialist with practical experience of up-to-date trading methods in essential oils and related natural products.

The Ministry of Foreign Trade, through the traditional channels has given impetus to the development following enquiries received from Trading companies and direct consumers in Europe (East and West), in the U.S.A., in Japan as well as from the Trading Centres of Hong Kong and Singapore. The enquiries have come in either directly or through the Special Government Agencies appointed abroad.

The activity of ENTEROIL has sparked off a renewal of direct contact between Viet Nam and the traditional and potential outlets abroad.

The links established between FOREIGN TRADE, ENTEROIL and the International Markets are to be strengthened by the visit of the marketing consultant as well as by means of study tours.

II. SUMMARY

The mission took place between 12 April and 3 May 1989, during which time the Consultant was attached to the Essential Oils Enterprise (ENTEROIL) specially set up by the Government of Viet Nam within the CNRS to carry out the objectives of Project DP/VIE/84/010 (see Annexes 4 & 5).

The mission began with the presentation by ENTEROIL of its scheduled activity within the CNRS on behalf of the Project. Preliminary discussions highlighted those specific areas requiring seminars or teach-ins and enabled the consultant to assist ENTEROIL in the preparation of telex and mail offers to prospective clients. During these discussions the TOTAL CONCEPT of marketing was explained by the consultant and it was agreed that where necessary seminars and/or conferences would be conducted on the interplay between the technical and commercial aspects of the industry.

The UNIDO presentation would be both marketing and technical, with the application response provided by the marketing and technical departments of ENTEROIL.

The meetings took place as planned and according to the needs of the moment and are shown in the Work Programme (Annexe 3).

The consultant had recommended a partitioning of the seminars into different components, all necessary to the development programme:

- 1st Seminar : Two-way communication
- 2nd Seminar : Selling and feed-back
- 3rd Seminar : Promotion
- 4th Seminar : Joint Marketing/Quality control, with the Expert Analyst

The application session mentioned in the work programme covered the practical points arising out of the seminars and served as further demonstrations of up-to-date practices in marketing and management.

During the mission, the Consultant submitted a Marketing Strategy Proposal (Annexe 11) to help crystallise the general thinking about the promotion and sale of Vietnamese essential oils and other related products.

The final part of the mission consisted of discussions with the CTA and the

National Project Director to clarify special points requiring assistance and to establish some means of assessment prior to the follow-up mission planned for 1990.

III. FINDINGS AND OBSERVATIONS

The opening discussions with ENTEROIL brought out two salient points, the first being the dedication of ENTEROIL to meet its obligations under the directives, both technical and commercial that it received upon its setting-up.

The second point was the need to strengthen, in the shortest possible time, the marketing activity by the fostering of close contact with the overseas markets and by the setting up of a documentary system enabling quick reference to clients or products for purposes of sales promotion. The particular position of SALES within the marketing cycle was dwelt upon by the Consultant and implemented with the resources available. Systems of placing on record past activity and future prospects were demonstrated, by means of reference cards, and fully participated in by ENTEROIL.

III.1 Essential oils

On the understanding that there is substantial flora in Viet Nam of essential oil or alkaloid bearing plants, the raw materials of botanic origin with which the project seemed preoccupied in the initial stages are the following :

- | | |
|----------------------------|--|
| - Basil oil | Ocimum basilicum (90% methyl chavicol) |
| - Basil oil | Ocimum gratissimum (65% eugenol min.) |
| - Cassia oil | Cinnamomum cassiae (80% cinnamaldehyde) |
| - Citronella oil "Java" | Cymbopogon winterianus Jowitt
(Geraniol/Citronellal 85/32%) |
| - Eucalyptus oil | Eucalyptus globulus |
| - Litsea oil | Litsea cubeba |
| - Palmarosa oil | Cymbopogon martini Stapf. |
| - Pemou oil (Bois de Siam) | Pokienia hodginsii (Pokinol 45%/Siamol 83/90%) |
| - Peppermint oil | Mentha arvensis (Menthol 60%) |
| - Star anise oil (Badiane) | Illicium verum Hook (congealing point 15°C.) |
| - Ylang-Ylang oil | Cananga odorata |
| - Vetyver oil | Vetiverria zizanioides Stapf. |

These oils are the subject of a promotion programme because some clients have become established and there are workable stocks of material

available for sampling and shipment.

However, it must be emphasized that the stocks referred to are not easily controllable and in the opinion of the consultant are minimal for international trading.

Nevertheless, the equipment input of the project and the fully equipped quality control laboratory (100% completed) make it feasible to expect substantial increases in quantities over the coming months.

A specific activity of ENTEROIL is that of procurement, that is buying essential oils or raw materials from producers not under local control. This appears to be very successful although certain constraints, like the need to purchase on the basis of payment in goods make guaranteed continuity of supply difficult unless a beneficial two-way deal can be effected.

This seems to be the case between ENTEROIL and the growers who are often paid in fertilizer, etc.

The autonomy granted to ENTEROIL has been strengthened by the transfer to ENTEROIL of some key personnel from GENERALEXIM and NAFORIMEX. This further emphasizes the change in policy of the Vietnamese Government and the modification of the directive which until a year ago would have placed this export activity within that of Generalexim.

Other essential oils are being investigated for promotion and sales based upon actual up-country availability.

III.2 Establishing Standards

It is understood and accepted that there exists in Viet Nam a system of quality control applied by VIETINSPECT to those products, essential oils and natural products coming under its jurisdiction.

Viet Nam National Standards and Sectorial Technical Regulations issued by the Ministry of Foreign Trade are in use but the Consultant feels that some time should be spent on clarifying the position in relation to the standards applicable at the moment to products sold on world markets.

National Formularies, Pharmacopoeia Codexes and standards, emanating from many countries are still used in determining the standards of quality acceptable to buyers and this fact must be considered when establishing commercial standards of purity in respect of specific markets and consumers.

The ENTEROIL is responsible for setting the standards that will be subject to certification if requested. It is expected that these standards will comply not only with those of the BSI and ISO but will meet any

specific requirement laid down by a purchaser.

The establishing of standards is one of the stabilising factors in any promotional project aimed at introducing new or competitive products onto world markets.

III.3 Sampling and pre-shipment control

Although these activities truly come within the obligations of quality control it can never be over-emphasised that sampling and pre-shipment control carried out with care are the foremost and surest way of any assurance that a client may require as to the quality of product and service being offered. This has been discussed in detail and presented in Annexe 6.

III.4 Storage and packaging

From a marketing and selling point of view, packaging and storage form part of those conditions which can ensure delivery of commercially satisfactory products. Although storage tends to be particular to each companies' knowledge and requirements, packaging has an important effect on the image of the Company as seen and appreciated by the purchaser. See Annexe 6.

III.5 Markets

The term "market" tends to cover all those areas in which a product is made available to a buyer. This in effect is an extension of the use of the term market-place used to define a place or area where specific goods were or are offered to selective buyers. As far as essential oils and related natural products are concerned, the use of the term market now refers to a world-wide demand for products of an odoriferous or aromatic nature capable of satisfying the specific requirements of widely differing industries. The Western Trade Pathway for Essential oils has been recorded in an ITC Survey dated 1986 (Annexe 7).

Bearing in mind the position once enjoyed on international markets by essential oils of Vietnamese origin, some clarification was desirable concerning those markets which might be within reach. Discussion showed that the research already undertaken provided information on home and export markets.

III.5.1 Market Research

Although not undertaken in the modern acceptance of the term, the export organisations of GENERALEXIM and NAFORIMEX had in the past achieved some distinction and success via Vietnamese Official

Representation Overseas and the appointment of special agencies.

These however, were limited and the advent upon the scene of ENTEROIL has highlighted the need for specific market study leading to selective promotion both from the client point of view as from that of products available. The subject was carefully dealt with by the Consultant so as not to offset any advantages already obtained; the need however for a break-down of the markets was discussed.

III.5.2 Home markets

At present the home market requirements in essential oils and related natural products is handled by VINAPA, with twenty factories preparing and selling pharmaceutical goods. Prominent among these are Cao Sao Vang, a "Golden Star Balm"; Cao Ba Dinh, an "Aromatic Balm" and Dentoxit, a "Piper lolot tincture" based on *Ocimum gratissimum*, chlorophyll and menthol. A number of medicinal preparations based on traditional formulae and using extracts of medicinal plants as well as essential oils are currently being manufactured; this tendency is on the increase.

Also being manufactured are some sweet-meats and culinary or confectionary items that call for small quantities of flavour or perfume but at present this is outside the scope of this report.

III.5.3 Export markets

As there are no independent brokers, dealers or merchants active at present in Viet Nam, the traditional export pathway via Generallexim and Naforimex has been broadened to include ENTEROIL not only as a specialised Export Unit but as a centre of quality control and Certification. ENTEROIL is thus free to establish direct links with clients abroad, actual and potential, without passing necessarily through the traditional official channels. Assistance in the form of establishing the right documentation has been provided "in situ" by the Consultant. The importance of keeping true and up-to-date records of all transactions has been demonstrated especially from the point of building close relationships between the producer/exporter and the client/user.

The nature of competition on international markets was made clear in respect of possible quality and price differences.

III.5.4 Feedback

The Consultant mentioned during the seminars the interpretation of the term "FEEDBACK" as being the pathway by which technical and commercial (i.e. Market) information finds its way from the client or customer back to the Exporter or even to the centre of production.

This important component of the marketing concept enables the producing/exporting authority to prepare offers that should satisfy quality and price requirements as stipulated by the client. The more honest the feedback, the more accurate will be the offer and quotation. Feedback from a "friendly" client or an Agent enables the producer/exporter to learn what other suppliers are offering and the relevant prices being quoted.

Feedback properly used helps the producer to understand the forces of supply and demand that affect his markets, he can thus modify or alter his policy and the methods used to penetrate into a given market.

III.5.5 Marketing Strategy

From the foregoing, it follows that Market Research is one of the elements most used in establishing a marketing policy.

The strategy to be followed depends largely on the type of products or services offered as well as on the nature and specific requirements of the clients to be approached. The Customers using Essential Oils are many and varied, the final user Industries ranging from Household and Industrial products using Fragrances, to manufacturers of Cosmetics, Toiletries, Perfumes and Extracts wherein top quality raw materials and specialities are used to produce "finished" products for their respective markets.

The Marketing Strategy is usually prepared on the basis of the resources available both technical and financial and is aimed at those areas most likely to provide favourable results. Further considering is set out in the MARKETING STRATEGY PROPOSAL (Annexe 11) which was submitted separately during the mission.

IV. PRACTICAL IMPLEMENTATION

The whole Programme of MARKETING, encompassing the activities of ENTEROIL, GENERALEXIM and NAFORIMEX was concentrated in the Agenda specifically prepared for ENTEROIL acting authoritatively as the Centre not only of quality control but of Certification. The Seminar programme was devised so as to highlight certain areas of trading which were felt to be possible sources of weakness.

Four Main Aims were established and discussed with the CTA and the National Project Director, the following schedule being adopted.:

- Wednesday April 19 : 1st SEMINAR : To deal with "communication", more precisely TWO-WAY HUMAN COMMUNICATION as the important link between the client and the supplier.
- Friday April 21 : 2nd SEMINAR : To deal with SELLING and FEEDBACK as representing the two-way communication taking place under the accepted terms of "offer and acceptance".
- Wednesday April 26 : 3rd SEMINAR : To deal with the promotional aspect of trading more specifically the effort needed to introduce the Essential Oils of Viet Nam to clients on world markets.
- Friday April 28 : 4th SEMINAR : A joint seminar conducted by the Marketing Consultant and the Expert on Analysis of essential oils to clarify the true object of QUALITY CONTROL and the ESTABLISHING of STANDARDS.

The programme was supported by discussion and where possible demonstration of techniques and practices of Product recording, Customer recording and the use of well prepared CARD INDEX SYSTEMS.

Demonstration cards were prepared by the consultant to illustrate the usual presentation of such information, as indicated below :

- Client cards (OFFER and ORDER)
- Product cards (OFFER and ORDER)
- Product information (varying SOURCES or SUPPLIERS)
- Product Analysis Record (TRADITIONAL and INSTRUMENTAL)

The cards were left with ENTEROIL and photocopies appear as Annexes 8, 9 & 10.

A recommendation was made by the Consultant that more use should be made of TRADE INDEXES, TRADE JOURNALS and PAPERS as well as TRADE MAGAZINES as a good source of information covering potential clients and other buyers on given export markets. In the absence of sufficient trade documentation in Hanoi, the suggestion was put forward that better and more consistent use should be made of the Official Viet Nam Representation abroad to obtain such commercial information.

There followed discussions covering specific points of mail presentation, clear and precise offers, accurate product definition, as well as the PROMOTION by Direct Mail of the products and services available. This is advocated as the Telex link between Hanoi and the rest of the World is not yet fully operational.

Reviewing the existing methods of product promotion, the Consultant was requested to assist ENTEROIL in the preliminary stages. This was done as follows.

Letters of introduction to specific clients, signed by the General Director of ENTEROIL and countersigned by the consultant, were sent together with the official Enteroil promotion letter which included specific offers of essential oils. Where contact already exists, the messages were dispatched in telex form.

A MARKETING STRATEGY PROPOSAL was prepared by the Consultant and duly circulated. It is attached as a documentary output (Annexe 11).

V. CONCLUSIONS AND RECOMMENDATIONS

Certain comments must be made concerning the topics set out in the Consultant's JOB DESCRIPTION. Whereas it is possible to discuss and point out verbally the practices recognised internationally, viz: packaging, storage and warehouse practices, these depend entirely on the facilities and/or constraints prevailing in Viet Nam. Likewise, price structure is particular and strictly Vietnamese in application. The pattern of trading is very strongly influenced by the bi-lateral agreements which exist between the Socialist Republic of Viet Nam and the Countries of the Eastern Block, mainly : the USSR, POLAND, BULGARIA, EAST GERMANY and TCHEKO-SLOVAKIA.

Each of these Countries entertains Trade Relations with Viet Nam and often the nature of that trade is "BARTER" thus ensuring the supply of basic raw materials (and some finished goods) from the Eastern Block to assist in the development programmes. This special trade has some important effect on the supply position of essential oils but the UNDP Programmes, including DP/VIE/84/010, are assisting ENTEROIL in developing an overall policy aimed at expanding and rationalising the export distribution to meet all possible demands and to contribute to the earning of foreign exchange.

Formats of Certification documents were discussed and insisted upon at Quality Control level. The nature and location of international markets and the available statistical information was discussed but found to be somewhat beyond present levels of available production.

V.1 Conclusions

On arrival in Hanoi, the consultant was introduced to the activity of ENTEROIL, the organisation formed under the name "ESSENTIAL OILS ENTERPRISE" to meet the aims of the Project DP/VIE/84/010.

Under the guidance of the Chief Technical Adviser and the General Director of ENTEROIL, the Project is meeting not only its objectives but paving the way to further development. This sense of purpose was of great assistance to the Marketing consultant in that the proper development attitude fostered had the result of ensuring that all the participants in the marketing programme were fully aware of what the project hopes to achieve in that direction.

V.2 Recommendations

The Marketing component of the Project benefits from positive experience gained by its members due to their activity within other State Export organisations. However, the knowledge and outside contacts need to be broadened and the Consultant recommends the following for consideration.

- Whenever Workshops or Seminars are to be conducted within reach of Hanoi, selected members of ENTEROIL should be invited to participate.
- The Marketing activity of ENTEROIL should be encouraged to submit to the Directors of the project a monthly report (short & brief) setting out those offers made and orders received.
- In the negative, the offers are to be re-examined for any lapses in price consideration or quality control.
- Direct communications received by ENTEROIL from abroad should be discussed by the ENTEROIL Management with the Technical services to determine what action should be taken.
- Any problems arising in the supply of raw materials or processed products must be notified to existing customers if the need is felt.
- To avoid sampling problems, adequate bottling is to be obtained by the Project. Recommended sizes: 5gr., 15gr., 25gr., 50gr., and 100grs.
- The Project should provide ENTEROIL with a complete set of WORLD TRADE INDEXES, as issued by "KOMPASS".

UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANISATION

U N I D O

PROJECT IN THE GOVERNMENT OF VIETNAM
DP/VIE/84/010/11-05

JOB DESCRIPTION

Post title Expert in marketing of essential oils
Duty station Hanoi with internal travel
Purpose of project The project for Processing of Vietnamese Essential Oils and related Natural Products is primarily focused on the modernisation of distillation technology in order to improve yield and quality of oils produced locally.

Duties The Expert will function as part of a specialist team assisting the CNRS in the development of essential oils from its resources of raw materials. Specifically the expert will, under the joint supervision of the CTA and the National Project Director, be responsible to UNIDO for carrying out the following tasks:-

- a) Deliver instruction, as well as lectures for the benefit of National Project Personnel on selected topics which will include some of the following:-
 - Essential oil production centres throughout the world.
 - Global statistics on essential oil production.
 - Nature and location of markets and marketing patterns.
 - Factors affecting price fluctuations and forecasting.
 - Future trends - production and marketing in essential oils.
 - International and National standards for marketing of essential oils.
 - Quality assessment and certification procedures,
 - Packaging procedures for essential oils for export markets.
 - Storage and Warehouse practices in the essential oil industry.
 - Information sources of trade and prices, catalogues and journals.
- b) Establish practical marketing links between the CNRS and buyers and supervise the preparation of samples for despatch to brokers and buyers.
- c) Prepare a format for data necessary to accompany each specific sample of oil, to be despatched to purchasers.
- d) In addition to the above, the expert will carry out any contingency duties related to the project that may be deemed necessary by the CTA and/or the National Project Director, and which fall within the expert's specialised knowledge and expertise.

The expert will at the end of his mission present a report outlining the substantive information on the subjects indicated in a) above, which are considered relevant to the context of Vietnam and its Essential Oils industry and, after discussions with national counterparts, he will formulate and include in his report a proposed marketing strategy for the essential oil industry in Vietnam.

Qualifications: A marketing expert, with chemist or technologist background, with up-to-date knowledge of the sale and distribution of essential oils and related natural products on world markets. A knowledge of trading practices and quality assessment and experience in teaching and instructing on marketing methods, an added qualification.

Language : English and French.

PERSONS AND INSTITUTIONS CONTACTED

ENTEROIL

- Mr. LE VAN THU	General Director Essential Oils Enterprise
- Mr. LE TRONG VONG	Deputy General Director
- Mr. VAN NGOC DANH	Marketing Manager
- Mrs. DOAN THI HOA BINH	Assistant Marketing Manager
- Mr. LE NHI HOA	Production Manager
- Mr. DO PHO	Chief Technical Engineer
- Mr. NGUYEN DUC HONG	Assistant Manager
- Mr. NGUYEN NHA DUC	Assistant Marketing Manager Secretary to Project DP/VIE/84/010

PROJECT DP/VIE/84/010

- Dr. C.K. ATAL	Chief Technical Adviser
- Dr. A.L. JAYWARDENE	Expert in analysis of essential oils
- Mr. NGUYEN NHA DUC	Project Secretary

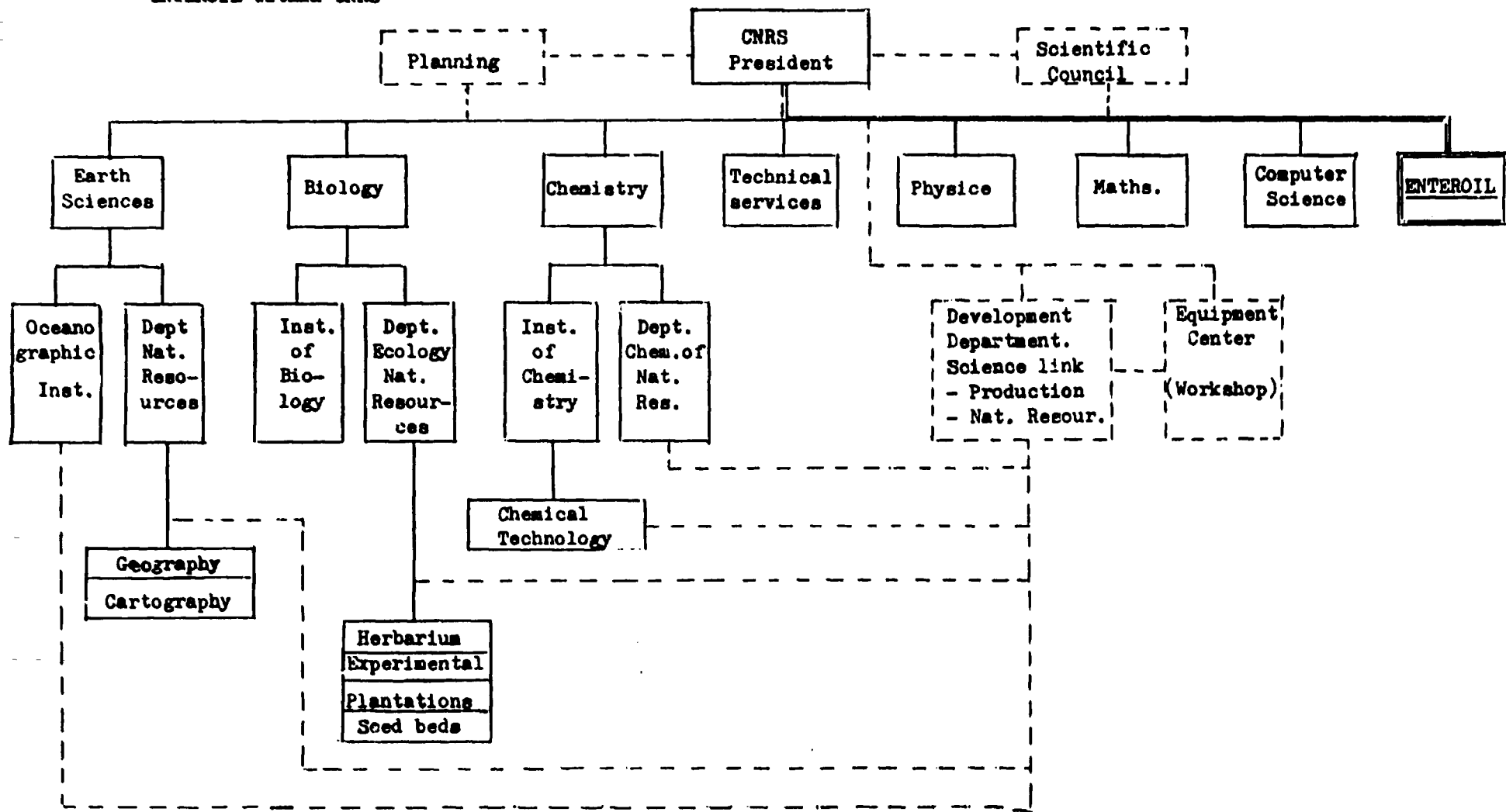
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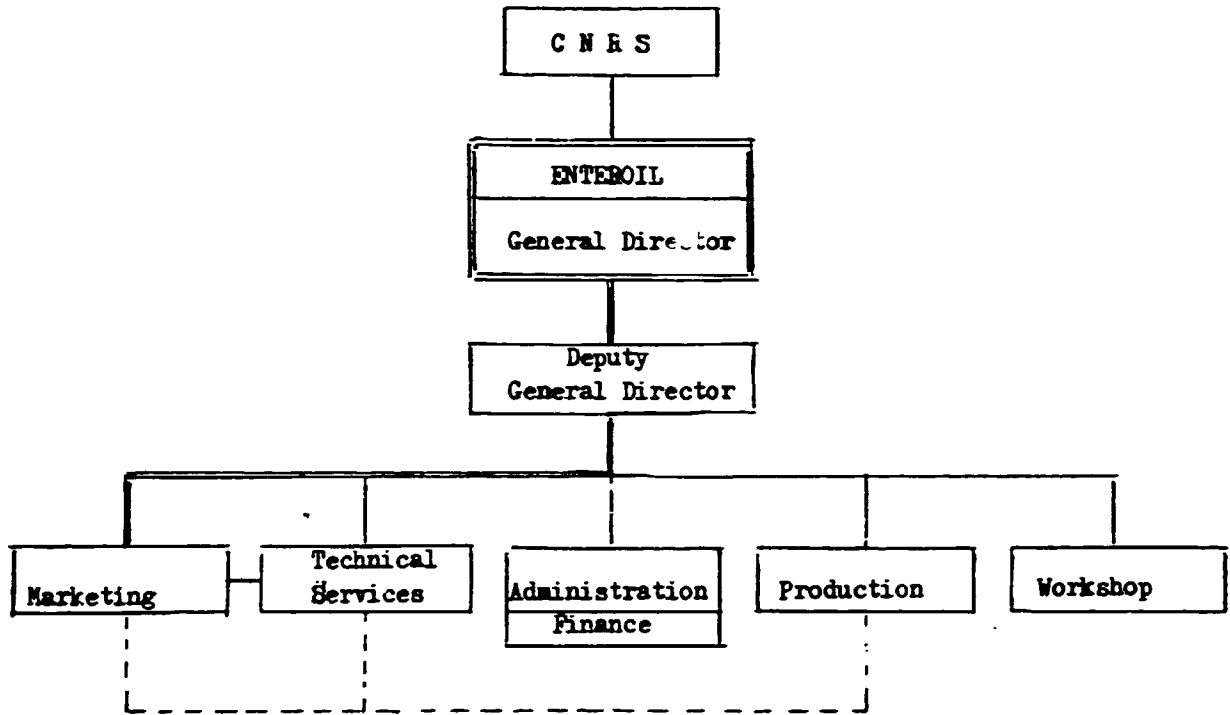
- Mr. DAVID SMITH	Resident Representative
- Mr. T. ROSE	Deputy Resident Representative
- Mr. G. PADMANABHAN	Finance Officer
- Mr. JEAN-MARC BONNAMY	Senior Industrial Development Field Adviser (UNIDO)

WORK PROGRAMME
(12 April - 3 May 1989)

April 12 :	AM	Depart Bangkok	-	PM	Arrive Hanoi
" 13 :	AM	UNDP Registration, contact with CNRS	-	PM	Initial discussion with CNRS
" 14 :	AM	UNDP then CNES	-	PM	Prepare Work Programme
" 17 :	AM	ENTEROIL, Introduction to Markets.	-	PM	Discussion and programme details
" 18 :	AM	Market Research, Preparation of lists	-	PM	Practical application
" 19 :	AM	<u>1st SEMINAR</u> (Communication)	-	PM	Discussion of Seminar
" 20 :	AM	Management Communication	-	PM	Marketing Techniques
" 21 :	AM	<u>2nd SEMINAR</u> Selling and Feedback	-	PM	Demonstration on blackboard of operational sequence
" 24 :	AM	Preliminary Report to CTA	-	PM	Report amendments
" 25 :	AM	Chau Giang Farm (Mentha arvensis)	-	PM	Return to Hanoi
" 26 :	AM	<u>3rd SEMINAR</u> (Promotion)	-	PM	Samples and Packaging
" 27 :	AM	Typing of Report by Project Staff	-	PM	Discussion of Report and photocopying
" 28 :	AM	<u>JOINT SEMINAR</u> (Specification, Analysis and Quality Control)	-	PM	Marketing Lecture to Managers Club.
May 1 :	L A B O U R D A Y -				
" 2 :	AM	Visit to Materia Medica, then UNDP (Report of Mission)	-	PM	Final discussions with ENTEROIL
" 3 :	AM	Depart Hanoi	-	PM	Arrive Bangkok en route for Zürich,
" 4 :	AM	Arrive Zürich	-	PM	Arrive Alicante and Rojales.

ORGANISATION CHART
ENTEROIL within CNRS





Elements involved in the MARKETING CYCLE

Pre-shipment inspection : This is usually carried out at the factory or processing plant before the drums or other containers are sealed. If they are to be checked again at the port of embarkation, the test readings taken by classical analyses must comply with the standards set by the Inspection office.

Statistical quality control : This is the method used to estimate the quality of the "whole" from the quality of the samples taken from the drums or containers making up the whole consignment. The method, used extensively in industry, is based upon the Laws of chance and has a sound mathematical base.

In the field of essential oils and resins, the total number of samples to be taken is rarely likely to be hundreds, much less thousands, so the statistical interpretation does not call for the control limits of "means" or "average". A trial shipment of 10 MT (10,000 kgs) of turpentine, exported from Viet Nam to Japan, packed in 50 drums of 200 kg each cannot be compared in size to the average annual shipment of 280 MT (280,000 kgs) of turpentine packed in 1000 barrels of 280 kgs each, sold by the United States of America or any other major producer. Nevertheless, in a shipment of essential oils involving 50 drums or more, the greater the number of samples taken, the better the control. If this is to be done at a port where wharfage charges are expensive, the time-factor becomes a major consideration. This can be dealt with if the producer is considered to be reliable and if all the required quality control checks of the material have been effected at the point of production, quite simply because the necessity of total sampling is less acute and the method used can be that known as "random-sampling".

Random sampling : In the essential oil industry this consists of taking samples from a defined number of containers, say 1 in 5, or 1 in 10 and comparing the physical constants with the parameters laid down by the quality control office. The ratio is dependent on the total number of containers, the reliability of the producer and the experience of the exporters Control Office.

Packaging : The risks inherent in packaging, whether for sample quantities or shipment lots, are those of product deterioration through exposure to light, heat or excess oxygen. The international practice of considering the sample as a true representation of the product to be delivered is nearly always accepted. The samples can vary from a few grammes to 28 grs (1 ounce), 50 grs and 100 grs. Occasionally samples of $\frac{1}{2}$ or 1 kg may be requested but these are usually paid for.

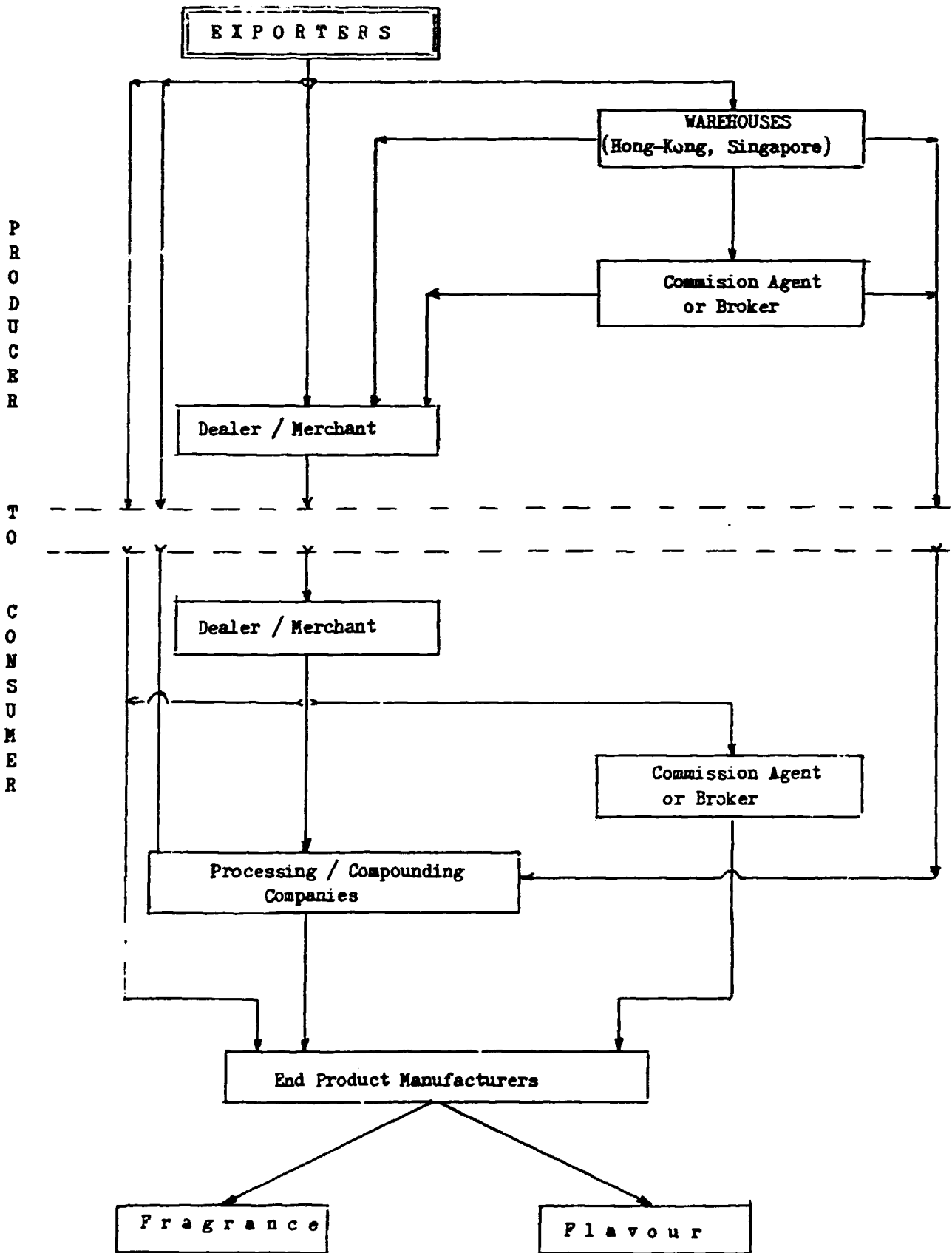
The containers may be glass bottles, preferably amber or blue, possibly green as well as aluminium containers, preferably lacquered or anodized. The use of aluminium should be avoided for acidic oils such as thyme, cinnamon, clove, etc. It is important to remember that very often the presentation of the sample is as important as its quality and plays a great part in the forming of the buyers' opinion concerning the producer and/or the shipper.

Storage : Most essential oils are subject to variations on storage, some more than others but certain steps can be taken to minimize the risks of deterioration by oxidation or polymerization. The containers must be filled so as to leave minimum air-space between the liquid and the filling cap or stopper which must be well sealed. Care must be taken to store under the coolest conditions available. Tinned steel containers and steel drums are widely used, aluminium can be used but should in no case be used for acidic oils.

Export : Large quantities are usually shipped in galvanised drums, smaller lots or more expensive oils like vetiver being shipped in small 50 kgs drums. The type and size of the container may be specified by the buyer or by the importer. It is usual for pre-shipment documents sent to the importer or the buyer to indicate quite clearly not only the name and origin of the oil as well as the weight and value but the size and type of packaging used or recommended and the number of containers making up the shipment. It is important to remember that not only the shipping documents (Bills of Lading) but the individual containers must bear all the marks required by the buyer or by the importer as well as the directive - "KEEP AWAY FROM HEAT" or more specifically "STORE AWAY FROM THE BOILERS", this latter recommendation applying to shipment by sea.

ORGANISATION CHART

Western Trade Pathway - Essential Oils (ITC Survey 1986)



<u>OFFER CARD (SPECIMEN)</u>		CLIENT Card			
Client : JOHN SMITH & Sons Ltd.					
Address :					
Date	Commodity	Ref.	Q'ty	Price	Remarks
24/3/89	Cassia oil (Cinnamomum cassia)	1002	1000 kgs	\$ 35.- kg	forward

<u>ORDER CARD (SPECIMEN)</u>		CLIENT Card				
Client : JOHN SMITH & Sons Ltd.						
Address :						
Date	Order No.	Commodity	Ref.	Q'ty	Price	Remarks
24/4/89	012345	Cassia oil (Cinnamomum cassia)	1002	1000 kgs	\$ 35.00kg	June/July

OFFER CARD (SPECIMEN)		PRODUCT Card			
Product : CASSIA OIL		Origin : Viet Nam			
Other names : Cinnamomum cassia					
Date	Client	Ref.	Q'ty.	Price/kg	Remarks
24/3/89	JOHN SMITH & Sons Ltd.	1002	1000 kgs	\$ 35.00	New client
24/3/89	PAUL WHITE & Co. Ltd	54	50 kgs	\$ 42.00	
25/3/89	SAMUEL JONES PLC.	103	2000 kgs	\$ 34.50	Repeat

ORDER CARD (SPECIMEN)		PRODUCT Card				
Product : CASSIA OIL		Origin : Viet Nam				
Other names : Cinnamomum cassia.						
Date	Order No.	Client	Ref.	Q'ty	Price/Kg	TOTAL
24/4/89	012345	JOHN SMITH & Sons Ltd.	1002	1000 Kgs	\$ 35.00	\$ 35,000.00

PRODUCT INFORMATION CARD (SPECIMEN)			PRODUCT Card	
Name : STAR ANISE Oil				
Other names : Essence de Badiane				
Source : Steam distillation of the fruits of Illicium verum Hooker.				
Date	Supplier	Price/Kg.	Availability	Remarks
24/4/89	ENTEROIL (ex Lang Son)	N/A	in production	Spot and shipment

ANALYSIS RECORD (SPECIMEN)		PRODUCT Card	
Product name : CHINESE MINT OIL (Dementholised)			
Obtained by : Steam distillation of leaves & stems of Mentha arvensis var. piperascens Mal.			
Appearance : liquid			
Colour : colourless to pale yellow			
Odour : strong, characteristic			
<u>Physical constants</u>			
a)	Specific Gravity	d_{20}^{20}
b)	Refractive Index	n_D^{20}
c)	Optical rotation	α_D^{20}
d)	Solubility : soluble in roughly 3 volumes of 70° alcohol.		
e)	Freezing point : when required.		
<u>Chemical constants</u>			
a)	Total alcohols % (in this case menthol)		
b)	Esters % (in this case menthyle acetate)		
c)	Ketones % (in menthone)		
d)	Phenols % (when required)		
e)	Acid Index		
<u>N.B.</u> : The Headings or items are those generally accepted, the figures are specific to each oil.			
INSTRUMENTAL ANALYSIS : GLC, HPLC, Infra-red, etc. ., when applicable.			

INTERNATIONAL MARKETS OF ESSENTIAL OILS

DP/VIE/84/010/11-05

THE SOCIALIST REPUBLIC OF VIET NAM

MARKETING STRATEGY PROPOSAL

Submitted by

Mr. John G. Meredith, UNIDO Consultant

UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANISATION
V I E N N A

Definition

Any Marketing Strategy Proposal must be concerned not only with the conditions existing on the markets at which it is aimed but on the facilities and/or constraints prevailing within the Country or Organisation from which the proposal is prepared.

This proposal is based on the need to provide practical assistance to ENTEROIL, the Essential Oil Enterprise of Hanoi, Viet Nam in the execution of its duties and the fulfilling of the objectives of Project DP/VIE/84/010.

Scope of the Proposal

The proposal covers the activity required to produce the results deemed likely in view of the development of the project.

There are certain aspects of marketing (more specifically the Trading Component) that are often neglected in the search for outlets or clients for the goods being sold.

As far as Essential Oils and related Natural Products are concerned, the world markets are well known and in many cases the requirements of specific Countries have been established and even broken down into the requirements of specialised companies or consumers.

In the context of the development of Viet Nam's natural resources in terms of Essential Oils it must be remembered that Indochina once enjoyed a special position as a source of aromatic raw materials to Western Europe. Any efforts to renew the contacts and regain a full participation in the raw materials industry on an international scale requires an understanding of the prevailing conditions.

- Offers : Wherever and whenever possible, offers should be made in the language most acceptable to the client or buyer. In the absence of particular facilities, submissions can be made in English.

The offers should state clearly the nature of the goods to be supplied as well as any special conditions affecting either the price of the goods or the quality.

The terms of payment should be mentioned clearly and if contract terms are applicable, these should be stated.

- Orders : These normally follow the offers or proposals and usually state clearly the requirements of the buyer and the terms of payment agreed. Specific quality definitions must be inserted in order to avoid any litigation or misunderstanding. Terms of delivery should be clear.

In view of Viet Nam's isolation from World essential oil markets during the past two decades, the proposal recommends action along the following lines.

PROPOSED ACTION

A. Market Research

In order to broaden the penetration of specific markets, use must be made of the Commercial Sections of the Vietnamese Governments representation abroad. In the absence of appointed Agents, a Legation or Consulate can be called upon to assist in making available information leading to the drawing up of lists of potential customers.

Whenever possible, Trade Directories or Trade Journals must be used to make contact by letter or by Telex with reputable and important customers. This preliminary activity results in the building up of information concerning potential Clients and their requirements.

The knowledge thus gained must be recorded in a Customer Index System for daily and regular reference purposes. On the basis of the information recorded, specific offers must be made either by letter or by telex, setting out the services and products offered by ENTEROIL.

A proper record keeping system, preferably in Card Index form must be set up for quick Client or Product reference.

B. Follow-up

This is certainly the most important of all the activities pertaining to the sales component of marketing.

Offers made must be flagged so as to be brought up for review after a given lapse of time, sufficiently long to enable the client to study the offer.

In view of the slowness of postal communication from Viet Nam, and the relatively high cost of telex services, reminder letters should be sent out one month after the original offer, mentioning new products, modified prices or improved services but reminding the client of the offer made.

Offers not followed up often result in orders being lost by default.

C. Visits to Purchasing Centers

On Home markets, offers to potential clients can be followed by visits from trained personnel (salesmen or technicians) whose duty it is to obtain the order or to find out why the order has been turned down.

On Export or far distant markets, that liability rests with an appointed Agent or Representative but in the absence of either, direct contact must be established in order to forge close links between the supplier and the customer.

In the case of ENTEROIL, plans must be made for visits by trained personnel to specific consuming Centers in Europe, South-East Asia, the Far East and eventually the U.S.A.. Centers like Hamburg, Zürich, Paris, Marseille and Grasse, Holzwinden, London and New York, Singapore and Hong Kong, Tokyo and Osaka are all internationally linked with the large and important Companies which make up the purchasing power of the Perfumery and Toiletry markets.

At the appropriate time appointments should be made with selected potential clients to pave the way to closer ties in the future.

D. Study Tours

These tours have a certain usefulness on a short-term basis but it would be preferable to try to arrange visits, possibly of one month duration, to selected market Centers like London, Paris, Geneva or Hamburg, where the appointed person could be attached (by previous agreement) to a Chamber of Commerce or to a Professional Association. Short study tours have the failing of not allowing sufficient time for the establishing of other than passing contacts.

The proposed longer term study tours could be arranged and sponsored by the UNIDO as part of a Fellowship programme.

E. Programming

ENTEROIL should prepare two distinct programmes, one covering products and the other covering commercial priorities.

- Products : This can depend on agro-industrial directives or requirements but must be backed by accurate knowledge of quantities available. The final selection may depend upon the results of market research and Government Policy.

- Commercial priorities : These are either dictated by the need to sell or export specific products, to specific destinations (as in the case of barter trade) to achieve a determined production target or are set by the requirements of the market place.

In both cases, ENTEROIL must be prepared to envisage a certain elasticity in the fixing of sales prices so as to meet changes in market conditions influenced either by supply and demand or by legislation and restrictive practices.

F. Samples

Samples prepared for submission to prospective buyers must either relate to a specific offer or must be in reply to a client's request.

The sample must at all times comply with the standards and quality control requirements as laid down either by ENTEROIL or as stipulated by the client.

G. Operational sequence

The sequence proposed is generally considered appropriate to the sales of essential oils but is frequently adjusted to meet conditions applicable to a particular source of supply.

1. Preparation of promotional material consisting of written descriptions of products.
2. Preparation of samples for examination then submission to the buyer.
3. Checking proposed sales price against known or last price quoted.
4. Checking sales price against the price being quoted on the market from other sources.
5. Checking true quantity of product available ex stock.
6. Checking the delivery times, for example :
 - ex Stock (immediate)
 - ex crop (following distillation or extraction)
 - Specified time (three months, six months, etc)
 - Specified shipment date (if requested)
7. Establish follow-up time :
 - two weeks
 - one month
 - quarterly
 - half-yearly, etc.

GENERAL COMMENT

The success of any attempt at market penetration depends on the knowledge obtained concerning the market and the proper application of that knowledge.

It call for sustained effort, rapid follow-up and critical evaluation.

It requires care in the preparation of samples and quotations.

Above all, it means the building up of a close relationship with the Client by proving through clear and positive action that ENTEROIL are offering impeccable products and competitive prices backed by the dedication of the organisation to offering its clients efficient and reliable service.

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Wickenstr 3
Postfach 102869
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5 rue Jules Lefebvae
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- Giovanni Fenaroli
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