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Innovation Networks for Cork, Resins & Edibles
in the Mediterranean basin

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Policy Forum “Untapping the potential of non-wood forest products for Europe's green economy”

16th - 17th March 2021
Online event

Coordinator



Partners



CTFC



Forestas
Agenzia forestale regionale pro sviluppo de su
territòriu e de s'ambiente de sa Sardigna
Agenzia forestale regionale per lo sviluppo del
territorio e dell'ambiente della Sardegna
SardegnaForeste



INIA
Instituto Nacional de Investigación
y Tecnología Agraria y Alimentaria



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Applications and Technology



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Values and potentials of Medicinal and Aromatic Plants (MAP)

Hamed Daly-Hassen, ONAGRI, Tunisia

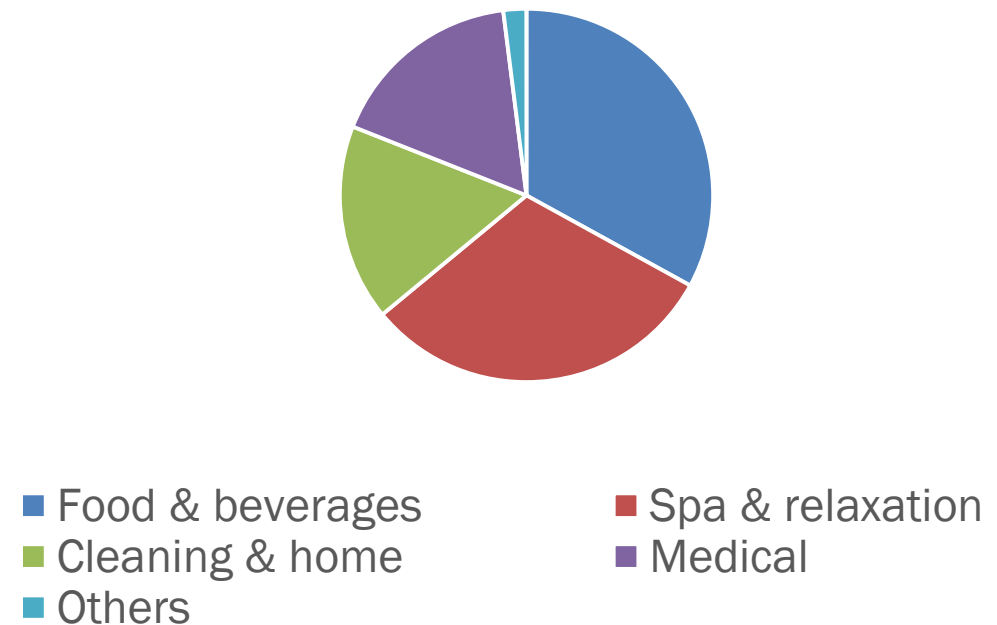
Plan

- **Presentation of the MAP value chain**
- **The MAP value chain at economic perspective**
- **Challenges and orientation strategies**
- **Main recommendations**

The MAP value chain : The richness and diversity

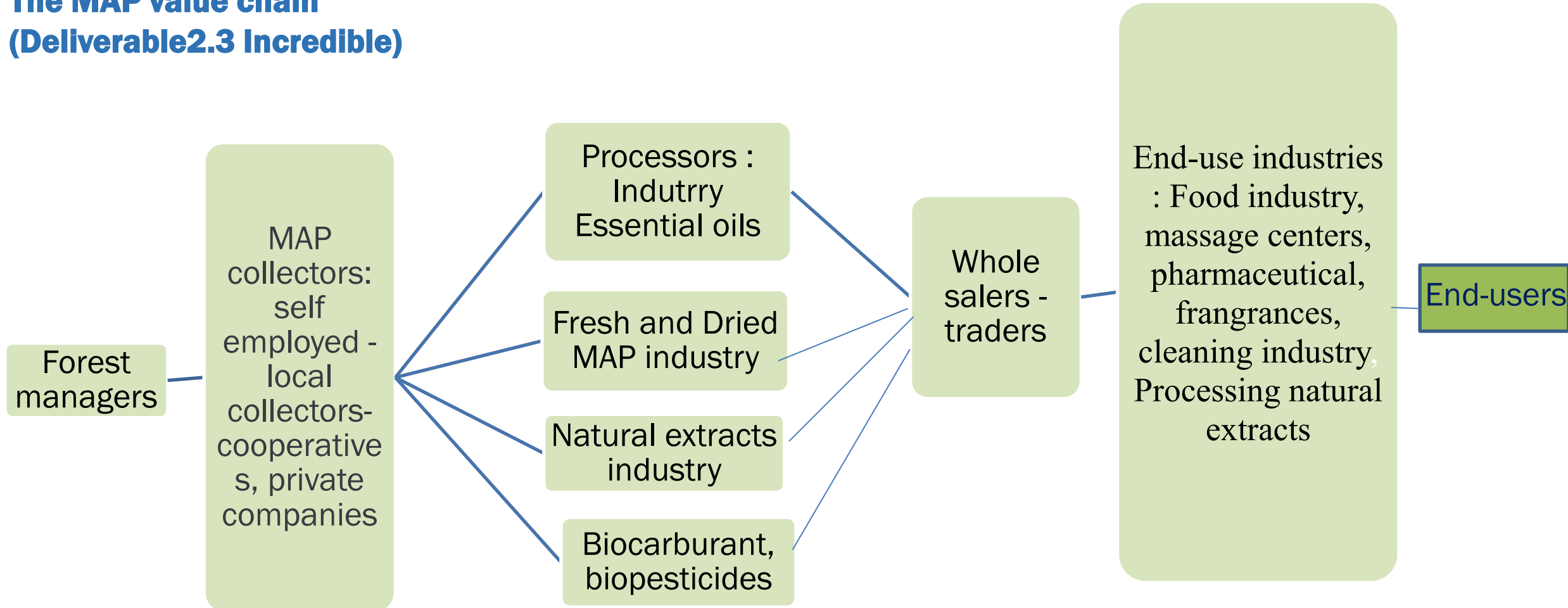
- **High diversity of MAP in mediterranean forest, some of them are undervalorized**
- **High growth of the global herbal market size**
- **MAPs are used for processed natural products : Essential oils, fresh plant materials, dried pm, plant extracts and oleoresins**
- **It is difficult to distinguish between wild and cultivated material**

Global essential oils market share by application



Source : Grand View Research, 2018

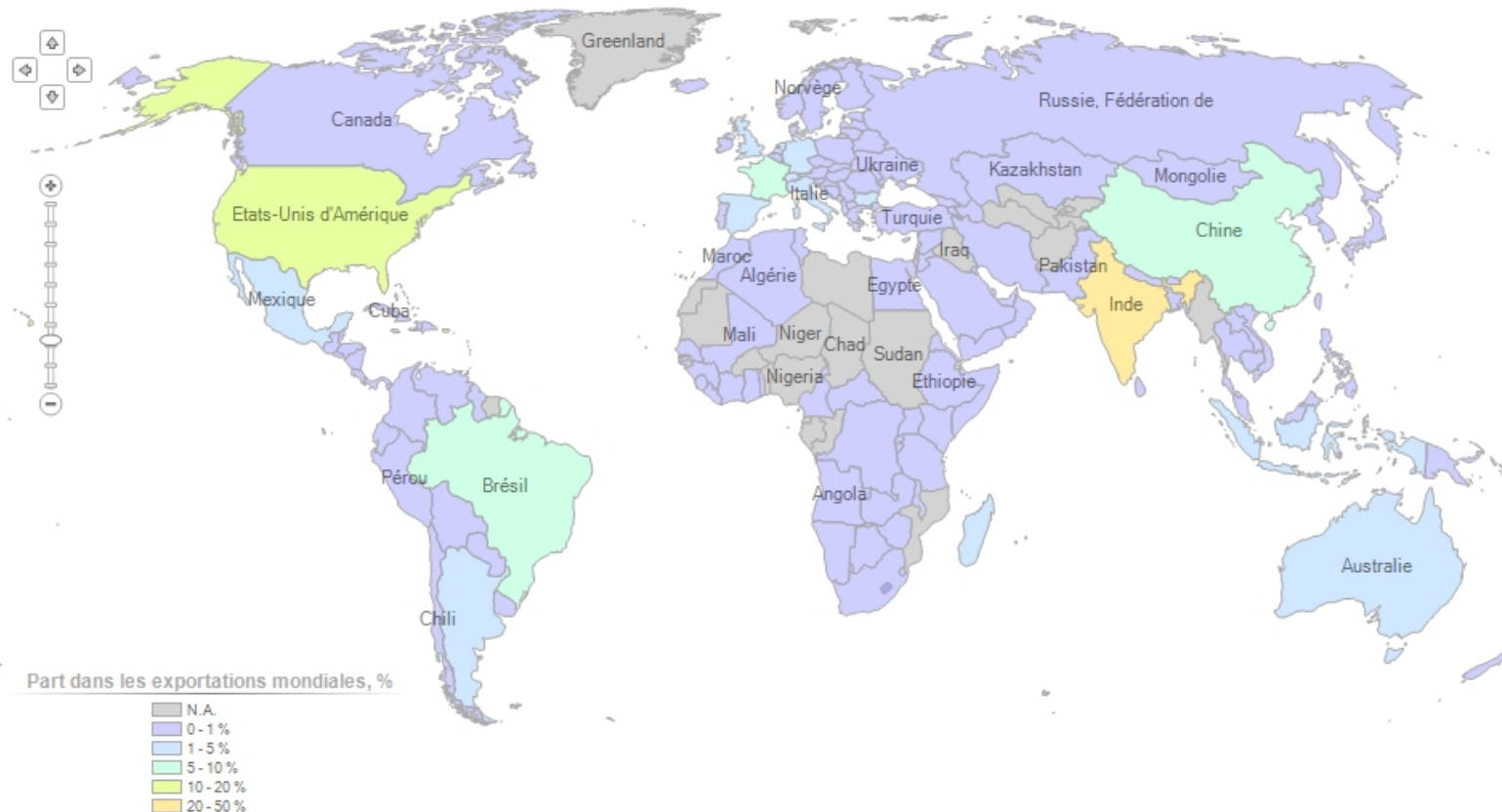
**The MAP value chain
(Deliverable2.3 Incredible)**



Main world exporters of essential oils

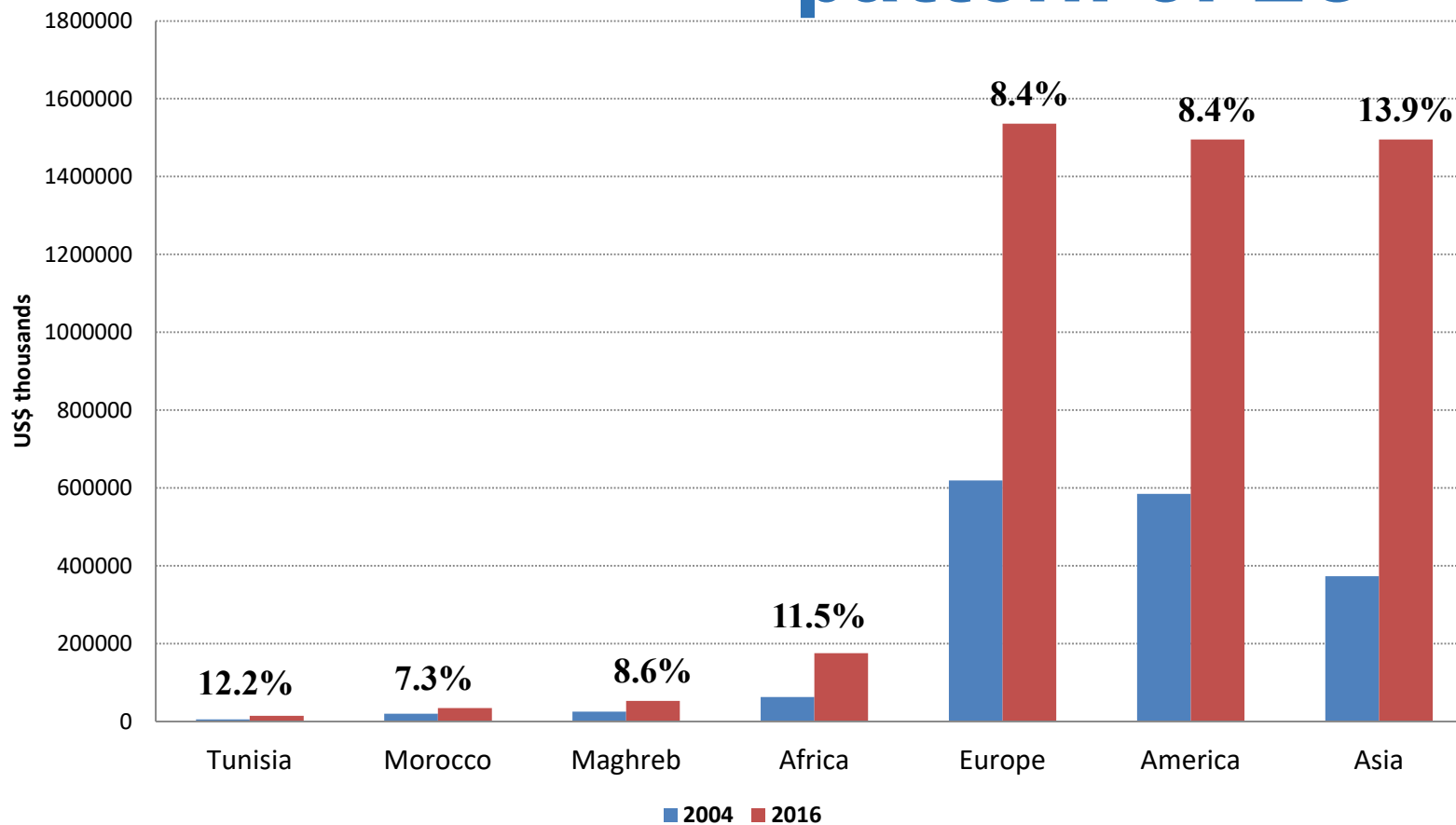
Liste des pays exportateurs pour le produit sélectionné en 2019

Produit : 3301 Huiles essentielles, déterpénées ou non, y.c. celles dites 'concrètes' ou 'absolues'; résinoïdes; oléorésines
d'extraction: solutions concentrées d'huiles essentielles dans les graisses. les huiles fixes. les cires ou matières analogues. obtenues



World exports of \$ 5646 Million in 2019, among them France(8%), Italy and Spain(3%), and other mediterranean countries (ITC)

Economic perspective : International Export pattern of EO



Expanding market with an annual growth of exports by 5% (2015-2019), especially in Slovenia and Croatia, Tunisia, Egypt, Italy and Spain (more than 10%) (ITC)

The United States followed by France and Germany are the leading importers (ITC)

Main challenges : How to stay competitive and respond to market demand changes, ensure sufficient and equitable returns and secure sustainable supply of MAP ?

Orientation strategies

Networking

Market
development

Sustainable
supply

How **Networking** can add value and benefits

- ✓ Development of partnerships between different actors
 - ✓ Contract arrangements with local communities and forest administration

Network participation

Creation of producers' associations

Development of clusters between landowners, collectors, and industry / consumers

How **market development** can add value and benefits

- ✓ Change existing processes and introduction of new techniques for better quality development of final products
- ✓ Introduction of new purposes of production to create added value :
Bioprospecting herbicidal activity of natural extracts

promote local economy, synergies with tourism
Product trading, certification and niche markets
Selection of MAP plants according to market demand

How **Sustainable production** can add value and benefits

✓ Introducing new methods of forest management

Establishing local and collaborative management plans addressed to the main species collected
Greater control for sustainable harvesting

Recommendations

MAP value chain can be enhanced through :

- a demand driven approach targeting final products with high added value
- Promoting networking between Forest managers /local communities / international, national & local firms
- Looking for more domestic buyers to develop local territories : Alliances with established marketing partners (ecotourism, hotels...)
- Data and Information flow, Knowledge development and innovation
 - Market requirements
 - Species extracts and uses, surface area, yield & quality

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Thank you!



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