



September 3, 2008

**Re: AHPA Tonnage Survey 2006–2007**

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Dear Valued Member of the Herbal Industry,

Primary suppliers of raw materials have a vested interest in continuing the harvest of plants in a manner that assures their use by generations to come. The American Herbal Product Association's biannual Tonnage Survey is "a vital index of native U.S. botanical consumption," according to the Fish and Wildlife Service of the U.S. Department of the Interior, and a key resource in support of this effort. As AHPA prepares the 2006-2007 Tonnage Survey, we invite you to play a crucial part in the sustainable harvest of herbs through your completion of this survey.

As with our five previous surveys, representing harvests for the nine years from 1997 through 2005, the focus of this survey is on select North American plants that have been the subject of expressed conservation or agricultural concerns. In the 2006-2007 survey, we have simplified the information collected on goldenseal to be identical to that requested for the other commodities. We have also added a request to identify certified organic materials, whether cultivated or wild harvested.

Harvest information, already available in its components to individual companies, is a more powerful tool when tabulated to include the whole. By working together in this manner, AHPA and the community of companies who are in the business of herbs can gain valuable information that helps us all to plan for sustainable growth and stability. Simply put, if you are a primary raw material producer, your participation in this survey is essential.

Surveys should be returned by mail, fax (301.588.1174) or as an email attachment to Steven Dentali, Ph.D., AHPA's Chief Science Officer, by **October 03, 2008**. If you have any questions regarding this survey, contact Steven at (301) 588-1171 x103 or [sdentali@ahpa.org](mailto:sdentali@ahpa.org).

Additionally, please notify us if you know of someone who should participate in this survey and may not have done so in the past. If you prefer you may refer colleagues directly to a copy of this survey on AHPA's website: [www.ahpa.org](http://www.ahpa.org).

Thank you! Your time and support is appreciated by AHPA and the herbal community of today and tomorrow.

Sincerely,

Edward J. Fletcher  
Chair, AHPA Board of Trustees and Botanical Raw Materials Committee

## AHPA *Botanical Tonnage Survey for 2006-2007*

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### **Introduction**

AHPA's earliest attempt to perform these kinds of surveys (1990–1992) was flawed by inclusion of raw material data at each stage of distribution. This resulted in significant over-accounting in most cases, as the same material was counted at several different points in the supply chain. For that reason, only persons and companies involved in the actual production of these raw materials (“primary raw material producer”) should provide quantitative data in response to this survey. All other companies should encourage their suppliers to participate in this survey.

This survey has been simplified compared to the 2004-2005 one with respect to goldenseal (*Hydrastis canadensis*) root. Previously we included questions regarding acreage under cultivation, future agricultural plans, and planting sources of goldenseal root. These sections have not been retained. However, a request to identify certified organic harvested materials has been added.

### **Definition: Primary Raw Material Producer**

For purposes of this survey, a primary raw material producer is defined as an individual or company that obtains the plants that are the subject of this survey by either:

- harvesting these plants directly (from either wild or cultivated sources), **OR**
- contracting, purchasing, and/or consolidating these plants from others who harvest them directly (from either wild or cultivated sources), where these others are not likely to fill out this survey.

A primary raw material producer includes companies that use these plants directly in the manufacture of processed herbal ingredients, such as extracts, or of finished herbal products, and also includes companies that sell these ingredients to one or more other companies.

### **Parameters on reporting quantities**

All primary raw material producers should limit the quantities reported on this survey to:

- raw materials harvested directly from wild or cultivated sources, or
- raw materials purchased directly from the individual or company who harvested the raw material (wild or cultivated), UNLESS that harvester is likely to complete this survey.
- In the case of wild raw materials, those materials purchased from a local buyer who purchases the material from the individual who actually harvests the material, UNLESS that local buyer is likely to complete this survey.

Some subjective evaluation as to whether a contracted “grower/harvester” or “local buyer” is likely to complete this survey is necessary to assure its accuracy. As a rule, it should be assumed that the established farmers who specialize in growing medicinal herbs ARE likely to complete the survey. On the other hand, a small, local or specialized grower who is primarily growing these materials only for your company should generally be assumed to be UNLIKELY to complete the survey.

Similarly, the established and centralized distributors of wild raw materials ARE likely to complete the survey, whereas a local collector for whom you are one of only a few significant customers IS NOT likely to complete the survey. If in doubt, call the grower/harvester or local buyer and inquire. Alternately, call (561-588-1171 x 103) or e-mail ([sdentali@ahpa.org](mailto:sdentali@ahpa.org)) Steven Dentali, Ph.D. at AHPA for directions and advice.

Those companies that purchase all of these botanicals from primary raw material producers, and do not produce any of these raw materials themselves, need not provide any quantitative data for this survey. Keep in mind that all information provided to AHPA, whether written or oral, will be maintained in the strictest confidence.

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**Optional Identifying Data** – The purpose of the information gathered by this survey is to quantify the current industry-wide harvest of each of the materials identified here. As such, no specific data about any one company will be made known, and all of the data provided here will be maintained in the strictest confidence. However, in order to provide resources in the event that additional information is needed such as reporting harvests of organic materials, we request that the following information be provided:

Company Name:

Contact Name:

Address:

Phone:

E-Mail:

### Quantities of 27 botanical commodities, 2006–2007 harvests

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Here follow two worksheet tables for recording specific quantities related to your company's purchase or harvest of the named botanical commodities. The first worksheet (section 1) is for recording quantities of **fresh** materials and the second (section 2) is for recording quantities of **dried** materials. Please follow all directions thoroughly to assure accuracy of the tabulated totals. Please also check the boxes above the worksheets if your reported harvests include certified organic materials.

In order to assure that the raw materials that are the subject of this survey are not double counted, include **ONLY** those quantities that were either:

- Harvested (wild or cultivated) directly by you or your company.
- Purchased (wild or cultivated) by you or your company from an individual or company who actually harvested the material **UNLESS** that harvester is likely to complete this survey. If in doubt, call the harvester and inquire.
- In the case of cultivated material, purchased from a grower who grew the material for you or your company on a contractual basis and who is not likely to complete this survey (see discussion on previous page). If in doubt, call the grower and inquire.
- In the case of wild material, purchased from a local buyer (who purchased the material from the individual who actually harvested the material) who is not likely to complete this survey (see discussion on previous page). If in doubt, call the local buyer and inquire.

**1. FRESH** weight harvest quantities: State in pounds the quantity of fresh plant material, that is, material harvested in the fresh form and used or sold in the fresh form. Do not include any amounts reported in worksheet 2 for dried materials. If any reported harvest materials are certified organic in conformity with the USDA National Organic Program then also check this box  and we will follow up with you to identify which commodities in what quantities.

Botanical origin of plant material	Plant Part	2006		2007	
		Cultivated	Wild	Cultivated	Wild
aletris <sup>1</sup> ( <i>Aletris farinosa</i> )	root				
arnica ( <i>Arnica</i> spp.)	any part				
American ginseng ( <i>Panax quinquefolius</i> )	root				
bethroot ( <i>Trillium erectum</i> )	root				
black cohosh ( <i>Actaea racemosa</i> ) <sup>2</sup>	root				
bloodroot ( <i>Sanguinaria canadensis</i> )	root				
blue cohosh ( <i>Caulophyllum thalictroides</i> )	root				
casacara sagrada ( <i>Frangula purshiana</i> ) <sup>3</sup>	bark				
<i>Echinacea angustifolia</i>	root				
<i>Echinacea angustifolia</i>	herb <sup>4</sup>				
<i>Echinacea pallida</i>	root				
<i>Echinacea pallida</i>	herb <sup>4</sup>				
<i>Echinacea purpurea</i>	root				
<i>Echinacea purpurea</i>	herb <sup>4</sup>				
false unicorn <sup>5</sup> ( <i>Chamaelirium luteum</i> )	root				
goldenseal ( <i>Hydrastis canadensis</i> )	leaf				
goldenseal ( <i>Hydrastis canadensis</i> )	root				
lady's slipper ( <i>Cypripedium</i> spp.)	root				
lomatium ( <i>Lomatium dissectum</i> )	root				
osha ( <i>Ligusticum porteri</i> )	root				
saw palmetto ( <i>Serenoa repens</i> )	fruit				
slippery elm ( <i>Ulmus rubra</i> )	bark				
sundew ( <i>Drosera</i> spp.)	whole plant				
usnea ( <i>Usnea</i> spp.)	lichen				
Venus flytrap ( <i>Dionaea muscipula</i> )	whole plant				
Virginia snakeroot ( <i>Aristolochia serpentaria</i> )	root				
wild yam ( <i>Dioscorea villosa</i> )	root				

1. Also known as true unicorn root. 2. Also known as *Cimicifuga racemosa*. 3. Also known as *Rhamnus purshiana*. 4. Any/all above ground parts. 5. Also known as helonias.

**2. DRIED** weight harvest quantities: State in pounds the dried quantity of plant material, that is, material used or sold in the dried (dehydrated) form. Do not include any amounts reported in worksheet 1 for fresh materials. If any reported harvest materials are certified organic in conformity with the USDA National Organic Program then also check this box  and we will follow up with you to identify which commodities in what quantities.

Botanical origin of plant material	Plant Part	2006		2007	
		Cultivated	Wild	Cultivated	Wild
aletris <sup>1</sup> ( <i>Aletris farinosa</i> )	root				
arnica ( <i>Arnica</i> spp.)	any part				
American ginseng ( <i>Panax quinquefolius</i> )	root				
bethroot ( <i>Trillium erectum</i> )	root				
black cohosh ( <i>Actaea racemosa</i> ) <sup>2</sup>	root				
bloodroot ( <i>Sanguinaria canadensis</i> )	root				
blue cohosh ( <i>Caulophyllum thalictroides</i> )	root				
casara sagrada ( <i>Frangula purshiana</i> ) <sup>3</sup>	bark				
<i>Echinacea angustifolia</i>	root				
<i>Echinacea angustifolia</i>	herb <sup>4</sup>				
<i>Echinacea pallida</i>	root				
<i>Echinacea pallida</i>	herb <sup>4</sup>				
<i>Echinacea purpurea</i>	root				
<i>Echinacea purpurea</i>	herb <sup>4</sup>				
false unicorn <sup>5</sup> ( <i>Chamaelirium luteum</i> )	root				
goldenseal ( <i>Hydrastis canadensis</i> )	leaf				
goldenseal ( <i>Hydrastis canadensis</i> )	root				
lady's slipper ( <i>Cypripedium</i> spp.)	root				
lomatium ( <i>Lomatium dissectum</i> )	root				
osha ( <i>Ligusticum porteri</i> )	root				
saw palmetto ( <i>Serenoa repens</i> )	fruit				
slippery elm ( <i>Ulmus rubra</i> )	bark				
sundew ( <i>Drosera</i> spp.)	whole plant				
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Venus flytrap ( <i>Dionaea muscipula</i> )	whole plant				
Virginia snakeroot ( <i>Aristolochia serpentaria</i> )	root				
wild yam ( <i>Dioscorea villosa</i> )	root				

1. Also known as true unicorn root. 2. Also known as *Cimicifuga racemosa*. 3. Also known as *Rhamnus purshiana*. 4. Any/all above ground parts. 5. Also known as helonias.

**AHPA *Botanical Tonnage Survey* for 2006-2007**

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THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY!

**OR**

RETURN VIA MAIL TO:

**AHPA Tonnage Survey 2006-2007**

ATTN: Steven Dentali, Ph.D.

8630 Fenton Street, #918

Silver Spring, MD 20910

**OR**

FAX TO: (301) 588-1174

**BY OCTOBER 3, 2008**

Your timely submission is greatly appreciated!

Contact Steven Dentali  
(Tel: 301 588 1171 x 103 or [sdentali@ahpa.org](mailto:sdentali@ahpa.org))  
with any questions or concerns.