



July 19, 2018

Re: AHPA Tonnage Survey 2014-2017

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 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 2014-2017 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 eight previous surveys, representing harvests for the years from 1997 through 2013,¹ the focus of the 2014-2017 survey is on select North American plants that are produced in part from wild-harvested population. This survey identifies all of the plants from earlier surveys.

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 plan for sustainable growth and stability. Simply put, if you are a primary raw material producer, your participation in this survey is essential.

Surveys may be completed via the electronic attached form by clicking the Submit by Email button. They may also be returned by mail or as an email attachment to Holly Johnson, Ph.D., AHPA's Chief Science Officer. **Please make every effort to do so by September 1, 2018.** If you have any questions regarding this survey, contact Holly at (301) 588-1171 x103 or hjohnson@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.

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

Edward J. Fletcher
Chair, AHPA Botanical Raw Materials Committee

¹ AHPA has published this data through 2010 and will include data for 2011-2013 with the newly gathered data for the most recent four years.

AHPA *Botanical Tonnage Survey for 2014-2017*

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 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”) are requested to provide quantitative data in response to this survey. All other companies should encourage their suppliers to participate in the survey.

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 the 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 coming directly from the raw material source in their manufacturing process to produce 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 (301-588-1171 x 103) or e-mail (hjohnson@ahpa.org) Holly Johnson, 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.

AHPA Botanical Tonnage Survey for 2014-2017

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 46 botanical commodities, 2014-2017 harvests

Here follow two worksheet tables for recording specific quantities related to your company's purchase or harvest of the named herbal 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 by you or your company from an individual or company who actually harvested (wild or cultivated) 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 and in what quantities.

Botanical origin of plant material	Plant part	2014		2015		2016		2017	
		Cultivated	Wild	Cultivated	Wild	Cultivated	Wild	Cultivated	Wild
aletris ² (<i>Aletris farinosa</i>)	root								
arnica (<i>Arnica</i> spp.)	any part								
American ginseng (<i>Panax quinquefolius</i>)	root								
barbasco ³ (<i>Dioscorea composita</i>)	rhizome								
bethroot (<i>Trillium erectum</i>)	root								
black cherry ⁴ (<i>Prunus serotina</i>)	bark								
black cohosh (<i>Actaea racemosa</i> ⁵)	root								
Black walnut (<i>Juglans nigra</i>)	hulls								
bloodroot (<i>Sanguinaria canadensis</i>)	root								
blue cohosh (<i>Caulophyllum thalictroides</i>)	root								
cascara sagrada (<i>Frangula purshiana</i> ⁶)	bark								
damiana (<i>Turnera diffusa</i>)	leaf								

² Also known as true unicorn root
³ Also known as Mexican wild yam
⁴ Also known as wild black cherry
⁵ Also known as *Cimicifuga racemosa*
⁶ Also known as *Rhamnus purshiana*

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Botanical origin of plant material	Plant part	2014		2015		2016		2017	
		Cultivated	Wild	Cultivated	Wild	Cultivated	Wild	Cultivated	Wild
<i>Echinacea angustifolia</i>	root								
<i>Echinacea angustifolia</i>	herb ⁷								
<i>Echinacea pallida</i>	root								
<i>Echinacea pallida</i>	herb ⁸								
<i>Echinacea purpurea</i>	root								
<i>Echinacea purpurea</i>	herb ⁹								
false unicorn ¹⁰ (<i>Chamaelirium luteum</i>)	root								
goldenseal (<i>Hydrastis canadensis</i>)	herb ⁹								
goldenseal (<i>Hydrastis canadensis</i>)	root								
hydrangea (<i>Hydrangea arborescens</i>)	root								
lady's slipper (<i>Cypripedium</i> spp.)	root								
lomatium (<i>Lomatium dissectum</i>)	root								

⁷ Any/all above ground parts

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⁹ Any/all above ground parts

¹⁰ Also known as helonias

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Botanical origin of plant material	Plant part	2014		2015		2016		2017	
		Cultivated	Wild	Cultivated	Wild	Cultivated	Wild	Cultivated	Wild
Oregon grape (<i>Mahonia aquifolium</i>)	root								
osha (<i>Ligusticum porteri</i>)	root								
partridge berry (<i>Mitchella repens</i>)	fruit								
passionflower (<i>Passiflora incarnata</i>)	herb ¹¹								
pipsissewa (<i>Chimaphila umbellata</i>)	herb ¹²								
sarsaparilla (<i>Smilax aristolochiifolia</i>)	rhizome								
sarsaparilla, Mexican (<i>Smilax cordifolia</i>)	rhizome								
sarsaparilla, Mexican (<i>Smilax ludellii</i>)	rhizome								
sarsaparilla, Mexican (<i>Smilax moranensis</i>)	rhizome								
sarsaparilla, Mexican (<i>Smilax subpubescens</i>)	rhizome								
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								

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Botanical origin of plant material	Plant part	2014		2015		2016		2017	
		Cultivated	Wild	Cultivated	Wild	Cultivated	Wild	Cultivated	Wild
wild yam (<i>Dioscorea villosa</i>)	root								
witch hazel (<i>Hamamelis virginiana</i>)	bark								
witch hazel (<i>Hamamelis virginiana</i>)	dormant twigs								
witch hazel (<i>Hamamelis virginiana</i>)	leaf								
yerba mansa (<i>Anemopsis californica</i>)	root								
yerba santa (<i>Eriodictyon californicum</i>)	leaf								

¹¹ Any/all above ground parts

¹² Any/all above ground parts

2. DRIED weight harvest quantities: State in pounds the quantity of dried 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 and in what quantities.

Botanical origin of plant material	Plant part	2014		2015		2016		2017	
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yerba mansa (<i>Anemopsis californica</i>)	root								
yerba santa (<i>Eriodictyon californicum</i>)	leaf								

AHPA *Botanical Tonnage Survey for 2014-2017*

AHPA will be conducting another survey to track economically important botanicals that are mostly cultivated in the US and we are starting with the articles listed below. If you are a primary raw material producer (see definition on page 2) of some or all of these plants, please check this box and we will follow up with you to identify which commodities and in what quantities.

- alfalfa (*Medicago sativa*) leaf
- aloe vera (*Aloe vera*) leaf
- Black chokeberry (*Photinia melanocarpa*) fruit
- burdock (*Arctium lappa*) root
- California Poppy (*Eschscholzia californica*) flowering tops and whole plant
- Catnip (*Nepeta cataria*) herb
- chia (*Salvia hispanica*) seed
- feverfew (*Tanacetum parthenium*) leaf
- ginkgo (*Ginkgo biloba*) leaf
- jojoba (*Simmondsia chinensis*) seed
- kava (*Piper methysticum*) rhizome
- red clover (*Trifolium pratense*) inflorescence
- skullcap (*Scutellaria lateriflora*) herb

AHPA Botanical Tonnage Survey for 2014-2017

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY!

PLEASE RETURN VIA EMAIL
(Send to hjohnson@ahpa.org)

OR

RETURN VIA MAIL TO:

AHPA Tonnage Survey 2014-2017
ATTN: Holly Johnson, Ph.D.
8630 Fenton Street, #918
Silver Spring, MD 20910

BY September 1, 2018

Your timely submission is greatly appreciated!

Contact Holly Johnson, Ph.D.
(p: 301 588 1171 x103 or hjohnson@ahpa.org)
with any questions or concerns.