CODEX ALIMENTARIUS COMMISSION

Food and Agriculture Organization of the United Nations

World Health Organization

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Viale delle Terme di Caracalla, 00153 Rome, Italy - Tel: (+39) 06 57051 - E-mail: codex@fao.org - www.codexalimentarius.org

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PROPOSAL FOR DEVELOPMENT OF A STANDARD FOR ROSE WATER (GOLAB)

Submitted by Iran (Islamic Republic of)

1. The purpose and the scope of the Standard

The scope of the standard is rose water of the *Rosa damascena*, which is supplied to the consumers, as a beverage after packaging. This product is different from rose water, which usually is used as a tonic. The objective of the standard is to consider the characteristics of rose water for production within the framework of an international standard**.**

2. Relevance and timeliness

The development of a Codex standard for Golab, agreed upon by consensus among major producing and trading countries, would serve as a critical reference for national legislation and regulatory frameworks. Such a standard would not only facilitate fair and transparent international trade by reducing technical barriers and trade disputes, but also help protect consumer health by addressing potential risks associated with adulteration, contamination, or mislabeling of rose water products.

Establishing quality parameters in line with Codex based approach, will support both consumer confidence and industry growth. This is particularly important as demand for Golab continues to rise and as producers in developing countries seek greater access to international markets.

Moreover, the adoption of a Codex standard for Golab aligns with the objectives of the Codex Alimentarius Commission to develop international food standards that address current and emerging food issues, protect consumer health, and promote fair practices in the food trade. By providing a harmonized benchmark, the standard will ensure that Golab traded globally meets minimum quality requirements, benefiting both consumers and producers. The growing Global demand for Golab and its increasing use in various industries necessitates the establishment of a Codex standard.

This standard will serve as a reliable reference point for the industry, providing guidance on quality and labeling requirements. By setting these standards, the Codex will support the continued growth and development of the rose water market, enabling producers and traders to navigate the international landscape with greater confidence and clarity. In conclusion, the development of a Codex standard for rose water is a timely and necessary step to address the growing trend of worldwide production and trade. This standard will protect consumers' health, promote fair trade practices, harmonize regulations, and support the overall growth and development of the rose water industry globally.

Due to the significant and sustained growth in global production and trade of rose water, there is an urgent need to establish internationally recognized standards that define and safeguard the quality of this product. As Golab is increasingly utilized are essential to ensure product quality for consumers worldwide.

The drafting of a Codex standard for rose water with the common name “Golab” is both highly relevant and timely in light of the rapid expansion and diversification of the global Golab market. In 2024, the global market for Golab reached approximately USD 477 million and is projected to nearly double, surpassing USD 972 million by 2033, with a robust compound annual growth rate (CAGR) of around 7.4–8.9%. This growth is driven by rising consumer demand for natural products, as well as the expanding use of Golab.

As the market grows, so do concerns about product quality and authenticity. Issues such as adulteration, microbial contamination, and inconsistent quality standards across producing and importing countries have been documented, posing risks to consumer health and undermining fair trade. Currently, different countries apply varying standards for rose water, leading to regulatory fragmentation and potential barriers to international trade

Establishing a harmonized Codex standard will address these challenges by providing an internationally agreed-upon reference for quality. This will help protect consumers, support regulatory authorities, and facilitate fair and transparent trade practices in line with the latest international agreements. The standard will also benefit developing countries, which are major producers and exporters, by enabling greater access to global markets and fostering industry growth.

Given the market's rapid expansion, increasing consumer awareness, and the documented risks associated with inconsistent quality, the development of a Codex standard for "Golab" is both urgent and essential to ensure the integrity, and sustainability of the global Golab trade.

More significantly, consumption of "Golab" is not limited to any particular region and hence justifies the elaboration of an international standard.

3. Main aspects to be covered

The standard entails main aspects related to quality and labeling in order to provide adequate product certainty to the consumer on the nature and characteristics. The standard will supply high quality safe products to protect consumers health and against misleading practices by including all the necessary parameters.

The most relevant objective which may be considered are related to:

- Establish the minimum requirements for rose waters, including and in addition to the quality class parameters.
- Establish tolerances regarding quality and characteristics of Golab.
- Include provisions to consider uniformity of the packaged product.
- Include provisions for the labeling and marking of the product in accordance with the general standard for the labeling of prepackaged foods
- Include provisions for contaminants with reference to the general standard for contaminants and toxins in foods
- **4. Assessment against the Criteria for the Establishment of Work Priorities**

General criterion

Ensuring consumer health, preventing deceptive practices, and fulfilling consumer expectations for high-quality products are fundamental components of effective consumer protection. Developing a Codex standard for Golab (rosewater) would be especially advantageous for developing countries, as they are the primary producers, exporters, and consumers of this product. Establishing clear quality standards is essential to guarantee that Golab consistently meets consumer needs while adhering to minimum food safety and quality requirements. Such standards would not only enhance consumer confidence but also facilitate fair trade and support the sustainable growth of the Golab industry in these countries.

Criteria applicable to commodities

a) Volume of production and consumption in individual countries and volume and pattern of trade between countries:

Iran is the dominant global producer of Golab, supplying approximately 90% of the world's rose water demand. The country's production volume is substantial, with estimates indicating over 1,000,000 metric tons annually. Iran's production centers, especially in regions like Kashan, are renowned for high-quality Golab produced mainly from Rosa *Damascena*.

India is another major producer, with a significant share in global exports. India's Golab production supports both domestic consumption and international trade, particularly catering to markets in Asia, Europe, and North America.

Turkey and Bulgaria are also important producers, known for their traditional Golab, especially in regions like Isparta (Turkey) and the Rose Valley (Bulgaria). These countries focus on both domestic use and export to Europe and Middle Eastern markets. Other producing countries include Spain, France, and China, which have smaller but growing production volumes.

In terms of trade, Golab is exported from countries like Iran, Bulgaria, and Turkey to various regions, including Europe, North America and Asia. The United States, in particular, has a well-established market for rose water, driven by the increasing demand for natural and organic products. The European market also has a significant demand for rose water, with countries like France, the United Kingdom, and Germany leading the demand. The Asia Pacific region presents substantial growth opportunities for the rose water market, driven by the growing middle-class population, urbanization, and increasing disposable incomes.

The global Golab market is experiencing robust growth, primarily driven by expanding applications in the food and beverage industry and a rising preference for natural ingredients among consumers. Market projections indicate that the global rose water market will reach approximately $230.4 million between 2025 and 2029, with a compound annual growth rate (CAGR) close to 10%. . This growth is supported by consumer trends favoring organic and chemical-free products, as well as innovations in extraction methods that enhance product quality and sustainability. The Middle East and Africa are the largest producers and consumers, with Iran as the world leader in rosewater production.

Iran supplies approximately 90% of global rosewater demand, making it the top producer worldwide. In recent years, Iran cultivated around 24,000 hectares of Damask rose, the main raw material for rosewater. The major importers of Iranian rosewater include Kuwait, Germany, Italy, UAE, Sweden, Japan, Turkey, France, UK, Iraq, Lebanon, Pakistan, Qatar, Austria, Bahrain, and Afghanistan. The largest buyers of Iranian rosewater are primarily in the Middle East and Europe. In the most recent years, Kuwait was the top importer, purchasing 946 tons valued at $1.53 million. Other major importers include Germany, Italy, UAE, Sweden, Japan, Turkey, France, UK, Iraq, Lebanon, Pakistan, Qatar, Austria, Bahrain, and Afghanistan. Persian Gulf states (including UAE and Kuwait) are especially significant, with about 3.85 million kilograms exported there in one year. Iran exported 1,000,852 metric tons of rosewater (March 2023–24), earning $2.6 million-a 51% increase in volume and 24% in value over the previous year.

The number of export destinations has expanded to about 60 countries over the past decade. There is a growing interest from Asian and European markets, driven by demand for high-quality, rosewater. While Iran leads in rosewater production, India, Spain, and France are also major global exporters, with India holding a 43% share of global shipments. Other notable exporters include Spain (12%) and France (10%). The largest global importers of Golab are Vietnam, Russia, and Kazakhstan.

Top importing countries of Golab by shipment count (Recent Years)

Rank	Country	Shipment Count	Notes
1	Vietnam	9,200	Largest global importer (21% share)
2	Russia	7,588	17% global share
3	Kazakhstan	7,197	16% global share
4	United States	6,955	Major non-Asian importer
5	Peru	>1,000	Significant but less than top 4
6	Ukraine	>1,000	
7	Australia	>1,000	
8	Singapore	>1,000	
9	Malaysia	>1,000	
10	United Kingdom	>1,000	

Top exporting countries of Golab by shipment count, including their market share

Rank	Country	Shipment Count	Market Share (%)
1	India	19,579	43%
2	Spain	5,061	11%
3	France	4,258	9%
4	United States	3,747	-
5	South Korea	3,725	-
6	Turkey	3,043	-
7	China	1,746	-
8	Italy	1,692	-
9	Kenya	1,641	-
10	Vietnam	1,502	-

Top Importers of Iranian Golab (Recent Years)

Country	Volume/Share (where available)
Kuwait	946 tons, $1.53 million (2018-19)
Turkey	963 shipments, 30% of Iran’s exports
Kazakhstan	586 shipments, 18%
Uzbekistan	523 shipments, 16%
UAE	Major buyer, often re-exports

The countries with the highest export volumes of Golab, based on shipment counts and market share

Rank	Country	Shipment Count	Market Share (%)
1	India	19,579	43%
2	Spain	5,061	11%
3	France	4,258	9%
4	United States	3,747	-
5	South Korea	3,725	-
6	Turkey	3,043	-
7	China	1,746	-
8	Italy	1,692	-
9	Kenya	1,641	-
10	Vietnam	1,502	-
11	Iran	Over 1,000,000 metric tons	-
12	Bulgaria	-	-
13	Morocco	-	-

This table reflects shipment counts where available and highlights Iran's massive production volume, which mainly supplies Middle Eastern and Asian markets. Bulgaria and Turkey are notable for their high-quality rose water exports.

b) Diversification of national legislations and apparent resultant or potential impediments to international trade:

There is not any significant impediments or annoying legislations.

c) International or regional market potential:

The international and regional market potential for Golab is exceptionally strong and continues to expand rapidly. Since 2020, the global market for Golab (rose water) has experienced significant growth driven by rising consumer demand. The growing preference for natural, and multifunctional products has positioned Golab as a highly sought-after ingredient worldwide. In 2024, the global Golab market was valued at approximately USD 477 million and is projected to nearly double, reaching around USD 992 million by 2034, with a healthy compound annual growth rate (CAGR) of 7.6%. Some forecasts project even higher growth, with the market potentially reaching USD 2.5 billion by 2033 and CAGRs approaching 8.9% in certain regions. Asia Pacific, North America, and Europe are leading consumers, with Asia Pacific showing the highest regional CAGR at 9.8% and India standing out with an 11.3% CAGR. Growth is also robust in Canada (9.4% CAGR) and other emerging markets.

The import of Golab by most countries is increasing and growing trade of this product in the world over the last ten years.

d) Amenability of the commodity to standardization:

The amenability of Golab to standardization is well supported by its defined and measurable physicochemical and compositional parameters. These existing frameworks demonstrate that Golab's quality attributes are not only measurable but also repeatable and comparable across different batches and producers.

The existence of such national standards in multiple countries further indicates that harmonization at the international level is practical and beneficial, as it would unify quality benchmarks, facilitate fair trade, and protect consumers globally. Thus, the clear, quantifiable characteristics of Golab, combined with the precedent of national regulations, confirm its strong amenability to international standardization.

e) Coverage of the main consumer protection and trade issues by existing or proposed general standards:

There is no general commodity standard covering Golab. The new work will enhance consumer protection and facilitate trading by establishing an internationally agreed quality standard. A single standard for the mentioned product, will cover Golab traded worldwide.

g) Work already undertaken by other international organizations in this field:

There is no work reported by international organizations, but Iran national standard and GCC standard from Gulf Standard Organization, has been implemented and reviewed.

5. Relevance to the Codex strategic objectives

The elaboration of a codex standard for "Golab" will promote the maximum application of codex standards by countries in their national legislation and will consequently facilitate international trade. Likewise, the elaboration of this standard will help to protect consumer health against risks associated with these products. The new work contributes to state the essential quality requirements for Golab for human consumption, with the purpose of protecting the consumer's health and achieving fair practices in the food trade. This proposal is relevant to Strategic Goal 1 – Establish international food standards that address current and emerging food issues and its corresponding objectives of the Codex Strategic Plan.

Moreover, developing a Codex standard for Golab will provide clear, science-based guidelines on quality, ensuring that the product meets minimum food quality requirements globally. This will help prevent deceptive practices and ensure consumer confidence, particularly benefiting developing countries that are major producers, exporters, and consumers of Golab. By harmonizing quality standards, the Codex standard will reduce technical barriers to trade, promote fair competition, and support sustainable industry growth. Ultimately, it aligns with Codex's mission to protect consumer health and facilitate fair practices in the food trade through internationally recognized standards.

6. Information on the relation between the proposal and other existing Codex documents

This is proposed as a new global standard and has no relation to any other existing Codex text on this item, except that the standard will make references to relevant standards and related texts developed by general subject committees. To date, no comparable international standard for Golab has been established by any global organization.

7. Identification of any need for any requirements and availability of expert scientific advice

For the elaboration of this project document, the information generated by the research working group at the national level for the characterization of Golab, has been taken as reference.

8. Identification of any need for technical input to the standard from external bodies so that this can be planned for

There is not expected to be any need for technical input from external bodies on this matter.

9. The Proposed Timeline For Completion of the New Work

The development of this standard is expected to take place in three or fewer CCNE sessions, depending on the agreement reached by CCNE.