Science, Innovation and Electronic Information Division



# The Functional Foods and Natural Health Products Survey 2007

#### **CONFIDENTIAL** once completed

Si vous préférez ce questionnaire en français veuillez cocher et retourner ce questionnaire ......

Correct as required
Company Name
Establishment Name
C/O
Address
City
Province/Territory Postal Code

#### Information for the respondent

#### The purpose of the survey

Statistics Canada is conducting this survey on behalf of Agriculture and Agri-Food Canada. The objectives of the survey are to produce statistical information on the functional food and natural health product sector and a profile of firms engaged in functional food and/or natural health product related activities in Canada. Information from this survey may be used by businesses for economic or market analysis, by trade associations to study industry performance, by government departments and agencies to assist policy formation, and Ly the academic community for research purposes.

#### Authorization

Canada

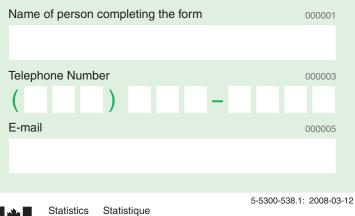
Canada

Collected under the authority of the *Statistics* Act Havised Statutes of Canada, 1985, Chapter S-19. Completion of this guestionnaire is a **legal requirement** under the statistics Act.

#### The data you report are confidential

Statistics Canada is prohibited by law from publishing or releasing statistics that could reveal in mation obtained from this survey relating to an ver ifiable individual business or person. The data reported will be treated in strict confidence, used for statistical purposes and released in aggregated form only. To enhance its usefulness, Statistics Canada may create a database combining individual responses from this survey with

#### Please complete the following information



other information that Statistics Canada has from other surveys or from administrative records. The confidentiality provisions of the *Statistics* and affected by the *Access to Information Act* or any other legislation.

#### Who should complete this questionnaire?

The p. rson(s) completing this questionnaire should be a senior manager such as a product or research and development manager, and someone who is familiar with, or has access to, the functional food or natural health product activities and financial information of your company. Please complete the questionnaire on behalf of all functional food and natural health product activities at your firm.

Please return the completed survey in the self addressed prepaid envelope, within 15 days of receipt.

#### Assistance

If you have any questions or require assistance, please contact:

Telephone : 1 866 334-3393 Fax : 1 888 869-0972 E-mail: sieidinfo@statcan.ca



### **Definitions of Functional Foods and Natural Health Products**

**Functional Foods** are similar in appearance to, or may be, a conventional food, consumed as part of a usual diet, which is demonstrated to have physiological benefits and/or to reduce the risk of chronic disease beyond basic nutritional functions. *Examples include: orange juice with calcium, yogurts with probiotics and omega-3 eggs.* 

**Natural Health Products** are products made from natural sources, often sold in dosage form and are designed to maintain or promote health; to restore or correct human health function; or to diagnose, treat or prevent disease. Examples include vitamins and minerals, herbal remedies, homeopathic medicines, traditional medicines such as Chinese medicine; probiotics, and other products like amino acids and essential fatty acids. (Natural health products are regulated under the <u>Natural Health Products Regulations</u>, which came into effect on January 1, 2004.)

### **Reporting Instructions**

For the purposes of this survey, "activities" refers to any combination of research and development activities, production of goods (intermediate or final) or sales or distribution of goods (intermediate or final), where goods are functional foods or natural health products. "Activities of the firm" refers to **activities in Curaca in the Fiscal Year 2007/2008**.

# **Functional Foods and/or Natural Health Products**

# 1. a. Please indicate the types of Functional Foods intended for human consumption that your firm develops, produces or sells.

011001
011002
011003
011004

(you responded "No" to all of the Functional Food categories above)  $\rightarrow$  Go to Question 2a.

# 1. b. Please indicate the importance of Functional Food products (in development, in production or for sale) to your firm's Canadian operation in terms of their health purpose.

Types of products are of "major importance" if they contribute significantly to the current sales of the firm or are otherwise deemed by management to be of strategic importance to the future of the firm. Types of products are of "minor importance" if they are part of the firm's activities but do not meet the criteria of major importance. A category is "not applicable" if the firm has no activities of any kind related to this type of product.

				Plea	ase check o	ne in each row.	
					Importance		
Health	n Purposes		Ν	Major	Minor	Not applicable	
a.	Diabetes	012001	5		1	0	
b.	Cancer	012002	5		1	0	
c.	Arthritis	012003	5		1	0	
d.	Vascular / heart health	012004	5				
e.	Bone health	012005	5	•		0	
f.	Gut health	012006	5	5	1	0	
g.	Eye health	012007	5	5	1	0	
h.	Urinary tract health	012018	5		1	0	
i.	Prostate health	012009	5		1	0	
j.	Menopause	012010	5		1	0	
k.	Immune system	012011	5		1	0	
I.	Energy	012012	5		1	0	
m.	Sports perfor nance / endurance	012013	5		1	0	
n.	Sexue' performance	012014	5		1	0	
0.	Mental ability	012015	5		1	0	
p.	Weight control / loss or gain	012016	5		1	0	
q.	Overall health and well-being	012017	5		1	0	
r.	Other, please specify	012018	5		1	0	
stxt							

012018tx

F

2. a. Please indicate the types of Natural Health Products intended for human consumption that your firm develops, produces or sells.

Natural Health Products		Yes	I	No
Natural health products are those <b>extracted or purified from plants</b> . (Examples include: beta-glucan from oats, antioxidants from blueberries, isoflavanoids from soy, sterols from wood pulp, essential fatty acids from primrose oil, soluble fibre from fenugreek, etc.)			3	
Natural health products that are <b>ground, dried, powdered and pressed from plant materials</b> . (Examples include: echinacea, fenugreek, valerian and ginseng, etc.)	021002	•	3	
Natural health products that are produced extracted or purified from <b>animals or micro organisms</b> . (Examples include: elk velvet, essential fatty acids (EFAs), enzymes, carotenoids, probiotics, etc.)	021003		3	
Natural health products that are produced, extracted or purified from <b>marine sources</b> (Examples include: glucosamine, chitosan, products from algae, seaweeu, help, fish oils, etc.)	021004 1		3	
Natural health products <b>comprised solely of vitamins and minerals</b> (sold in dosage form).	021005 1		3	
Other, please specify	021006 1		3	
1006txt				
If your firm <b>doe</b> , <b>not have</b> Natural Health Products in production, for sa develor mont (you responded "No" to all of the Natural Health Product ca above, <b>Source Go to Question 3a</b> .				

# 2. b. Please indicate the importance of Natural Health Products (in development, in production or for sale) to your firm's Canadian operation by health purpose.

Types of products are of "major importance" if they contribute significantly to the current sales of the firm or are otherwise deemed by management to be of strategic importance to the future of the firm. Types of products are of "minor importance" if they are part of the firm's activities but do not meet the criteria of major importance. A category is "not applicable" if the firm has no activities of any kind related to this type of product.

		Plea	ase check one	in each row.
	Importance			
alth Purposes		Major	Minor	Not applicab
a. Diabetes	022001	5	1	0
b. Cancer	022002	5	1	0
c. Arthritis	022003	5	1	0
d. Vascular / heart health	022004	5		
e. Bone health	022005	5		0
f. Gut health	022006	5	1	0
g. Eye health	022007	5	1	0
h. Urinary tract health	0225.3	5	1	0
i. Prostate health	022009	5	1	0
j. Menopause	022010	5	1	0
k. Immune system	022011	5	1	0
I. Energy	022012	5	1	0
m. Sports perfor nance / endurance	022013	5	1	0
n. Sexual performance	022014	5	1	0
o. Mental ability	022015	5	1	0
p. Weight control / loss or gain	022016	5	1	0
q. Overall health and well-being	022017	5	1	0
r. Other, please specify	022018	5	1	0
8txt				

3. a. Did your firm provide Functional Food and/or Natural Health Product services such as those listed in question 3b below, in Fiscal Year 2007/2008?

Yes
No

1

3

If your firm did provide Functional Food and/or Natural Health Products services (you responded "Yes" to the above)  $\rightarrow$  Go to Question 3b.

If your firm did not provide any Functional Food and/or Natural Health Product services <u>and</u> <u>does not have</u> Functional Foods (Question 1a) <u>AND does not have</u> Natural Health Products (Question 2a) in production, for sale or in development, please return the questionnaire in the accompanying self addressed prepaid envelope.

Thank you.

3. b. For what purpose(s) did you provide these services, either in Canada a abroad?

		Please check	call that conly
Purpo	se	Canadian	Foreign
a.	Scientific research & development	032011	032012
b.	Intellectual property	032021	032022
C.	Regulatory	052031	032032
d.	Clinical trials	J32041	032042
e.	Manufacturing / production	032051	032052
f.	Technical / engineering	032061	032062
g.	Quality control	032071	032072
h.	Sales / marker, ŋg / advertising	032081	032082
i.	Marke' reseurch	032091	032092
j.	Mansgement / finance	032101	032102
k.	Business development	032111	032112
I.	Other, please specify	032121	032122
032121txt			

#### 3. c. Which purpose was the most important for your firm?

Consider importance in regards to the current sales of the firm or that which is otherwise deemed by management to be of strategic importance to the future of the firm

033001

032

(Provide corresponding letter)

# 4. How many Functional Food and/or Natural Health Product related product lines does your firm currently have on the market?

Do not consider different package sizes, labels, and product flavors or formats as separate product lines. For example, fenugreek sold in 10g and 50g packages, in both a liquid and tablet form would constitute one product line, a product labeled for sale in the USA and in Canada would constitute one product line as well.

Products sold only in Canada	040001	
	040002	
Products sold only outside of Canada		
	040003	
Products sold both in Canada and outside of Canada		
	040004	4
Total		

## **Firm Activities**

5. a. For your firm's Functional Food product operations in Canada, in w. ich of the following activities does your firm engage directly?

		Please check all that apply
Activi	<u>y</u>	Functional Foods
a.	Scientific research & development	051001
b.	Product development / scale up of new prod cts	051002
с.	Manufacturer of ingredients or raw man rials to be used in functional foods	051003
d.	Manufacturer of semi-finished functions foods to be further processed before sales	051004
e.	Manufacturer of consumer-ready products to be sold without further processing	051005
f.	Wholesaler of product.	051006
g.	Retailer or , routiets	051007
h.	Provide convices only (equipment, clinical testing, software, regulatory affails, etc.) for the industry	051008
i.	Provide technology pertaining to the production of functional foods	051009
j.	Other, please specify	051010
1010txt		

#### 5. b. Which activity was the most important to your firm?

Consider importance in regards to the current sales of the firm or that which is otherwise deemed by management to be of strategic importance to the future of the firm.

052001

05

(Provide corresponding letter)

6. a. For your firm's Natural Health Product operations in Canada, in which of the following activities does your firm engage directly?

			Please check all that apply
Ac	tivit	<u>y</u>	Natural Health Products
	a.	Scientific research & development	061001
	b.	Product development / scale up of new products	061002
	C.	Manufacturer of ingredients or raw materials to be used in natural health products	061003
	d.	Manufacturer of semi-finished natural health products to be further processed before sales	0610.04
	e.	Manufacturer of consumer-ready products to be sold without further processing	061005
	f.	Wholesaler of products	061006
	g.	Retailer of products	061007
	h.	Provide services only (equipment, clinical testing, software, reguintory affairs, etc.) for the industry	061008
	i.	Provide technology pertaining to the production of natural health products	061009
	j.	Other, please specify	061010
6101	Otxt	ONI	

#### 6. b. Which activity was the most in portant to your firm?

Consider importance in regards to the current sales of the firm or that which is otherwise deemed by management to be of strategic importance to the future of the firm.

062001

(, rewide corresponding letter)

7. Please provide your best estimate of the proportion of sales of Functional Foods and/or Natural Health Products through the following distribution channels:

\_\_\_\_

		of fur	6 of sales actional for and/or health pro	
Dis	tribution method	nataral		
	Direct selling/ internet sales/ mail order	070001		%
		070002		%
	Wholesaler	070003		%
	Direct to retailer	070004		%
	Multi-level marketing / network marketing	070005		
	Broker / 3rd party distributor	070006		%
	Other, please specify			%
070006txt		$\mathcal{D}_{\mathcal{F}}$		
	Total sales of all functional foods and/or natural health products	/	100	%
	provide your best estimate of the proportion of sales of I Health Products to the following ou stomer types:	f Functio	nal Foods	and/or
	e provide your best estimate of the proportion of sales of I Health Products to the following oustomer types:	9	6 of sales	
		% of fur	% of sales	ods
Natura	I Health Products to the following customer types:	% of fur	6 of sales actional for and/or	ods
Natura	Stomer type	9 of fur natural	6 of sales actional for and/or	ods ducts %
Natura	I Health Products to the following customer types:	9 of fur natural 080001	6 of sales actional for and/or	ods ducts % %
Natura	I Health Products to the following customer types:	9 of fur natural 080001 080002	6 of sales actional for and/or	ods ducts % %
Natura	I Health Products to the following customer types: stomer type Final consume.	9 of fur natural 080001 080002 080003	6 of sales actional for and/or	ods ducts % %
Natura <u>Cu</u>	I Health Products to the following customer types:     stomer type     Final consume.s     Retailer     Wholesaler	9 of fur natural 080001 080002 080003 080004 080005	6 of sales actional for and/or	ods ducts % %
Natura	I Health Products to the following it stomer types:     stomer type     Final consume.s     Retailer     Wholesaler     Private label	9 of fur natural 080001 080002 080003 080004 080005	6 of sales actional for and/or	ods ducts % % %

# **Firm Characteristics**

# 9. What is the business structure of this firm?

9. v	vnatis	s the bus	siness structure of this	11rm ?
		Please	check one only	
C	90001	1	Private corporation	
		2	Publicly traded corporation	n
		3	Sole proprietorship	
		4	Unincorporated partnershi	ip
		5	Other, please specify	
		090001txt		
10. ls	s your	firm Ca	nadian controlled?	
1	00001	1	Yes	
		3	No	
Βι	usine	ss Prac	ctices	

Partnership or collaborative arrangements involve the active participation in projects between your firm and other firms or organizations. These projects involve the oevelopment, production and/or distribution of functional foods and/or natural health product products or technology surrounding them. Pure contracting-out work, where money is paid for a service, is not regarded as a partnership.

11. Is your firm involver' in Functional Food and/or Natural Health Product related partnership(s) or collaborative arrangements with other firms or organizations?

110001 No + Go to Question 14.

12. What is/are the purpose(s) of your partnership(s) or collaborative arrangements? Provide the <u>number</u> of arrangements by specified purpose and partner type.

	Partner type Please report all that apply						
Purpose of partnership	Functional Food / Natural Health Product firm	Other firm	Private non-profit	Academic Institution / hospital	Government lab, agency or organization		
Conduct scientific research and development	120001	120002	120003	120004	120005		
Regulatory affairs	120011	120012	120013	120014	120015		
Clinical trials	120021	120022	120023	120-12-	120025		
Production / manufacturing	120031	120032	120033	120034	120035		
Access markets / distribution channels	120041	120042	1200-, 3	120044	120045		
Access capital	120051	120052	120053	120054	120055		
Access patents	120061	.200.'2	120063	120064	120065		
Access to other intellectual property	120071	120072	120073	120074	120075		
Other, please specify	1200011	120082	120083	120084	120085		

#### 13. Is your firm currently seeking to form new partnership(s) or collaborative arrangements?

130001	1	Yes	
	3	No	

14. Did your firm contract out Functional Food and/or Natural Health Product related activities such as those listed in Question 15a below in Fiscal Year 2007/2008?

140001	1	Yes		
	3	No	+	Go to Question 16.

15. a. For what purpose(s) did you contract out, either in Canada or abroad?

		Please che	ck all that apply
Purpo	se	Canadian	Foreign
a.	Scientific research & development	151011	151012
b.	Intellectual property	151021	151022
c.	Regulatory	151031	151032
d.	Clinical trials	151041	151042
e.	Manufacturing / production	151051	).51052
f.	Technical / engineering	1510.1	151062
g.	Quality control	15,071	151072
h.	Sales / marketing / advertising	151081	151082
i.	Market research	151091	151092
j.	Management / finance	151101	151102
k.	Business development	151111	151112
I.	Other, please pecify	151121	151122
51121txt			
	E C		

### 15. b. Which purpose was the most important for your firm?

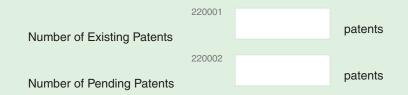
Consider importance in regards to the current sales of the firm or that which is otherwise deemed by management to be of strategic importance to the future of the firm.

152001

(Provide corresponding letter)

# **Intellectual Property** 16. Did your firm grant any Functional Food and/or Natural Health Product licensing agreement(s) in Fiscal Year 2007/2008? 160001 Yes Go to Question 18. No 17. How much revenue did your Functional Food and/or Natural Health Product related intellectual property (IP) licensing agreement(s) generate in Fiscal Year 2007/2008? 170001 \$ 18. Did your firm acquire any Functional Food and/or Natural Health Product licensing agreement(s) in Fiscal Year 2007/2008 180001 Yes No 19. Did your firm develop trade secrets in Fiscal Year 2007/2006 190001 Yes No 20. Did your firm register any trademarks in Ficcal Year 2007/2008? 200001 Yes 3 No 21. Does your firm have Sunctional Food and/or Natural Health Product related patents or pending patents? 210001 Yes No Go to Question 23.

22. Please indicate the number of Functional Food and/or Natural Health Product related patents and pending patents your firm has world wide.



Raising Capital					
23. Did your firm attempt to raise capital specifically for Functional Food and/or Natural Health Product related purposes in Fiscal Year 2007/2008?					
230001 1 Yes					
<sup>3</sup> No $\rightarrow$ Go to Question 30.					
24. Were you successful in raising <u>any</u> capital?					
240001 1 Yes					
<sup>3</sup> No $\rightarrow$ Go to Question 28.					
25. Did you reach your target?					
250001 1 Yes					
<sup>3</sup> No → What percentage of your target did you reach? %					
26. How much capital was raised?					
\$					
27. Please indicate which of the following sources contributed to your capital raised, and provide					

a distribution of total capital raised from each source.

	Percent	
270001		%
270002		%
270003		%
270004		%
270005		%
270006		%
270007		%
270008		%
	100	%
	270002 270003 270004 270005 270006 270007	270002     270003     270004     270005     270005     270006     270007     270008

8.a. Wa	s your firm limited or refused any request(s) for funds from any sourc	e when raising capital?
280	<sup>201</sup> <sup>1</sup> Yes	
	<sup>3</sup> No $\rightarrow$ Go to Question 29.	
	No → Go to Question 29.	
8. b. Wh	at reason(s) did the lender(s) give for limiting or refusing your reques	t for capital?
Re	asons for limiting or refusing capital	Please check all that apply
	Functional food and/or natural health product process not sufficiently developed	282001
	Functional food and/or natural health product, product line or portfolio limited in scope	282002
	Insufficient specific management skills / expertise	282003
	Capital not available due to market conditions	22004
	Further product development or proof of concept required	282005
	Lender does not fund development projects	282006
	Lack of intellectual property	282007
	Uncertainites of market demand for product or service	282008
	Other, please specify	282009
282009txt		

## 29. a. Why did you raise, or attempt to raise capital for Functional Foods and/or Natural Health Products?

Reaso	ons for raising capital	Please chee	ck all that apply
a.	Scientific research & development purposes	291001	
b.	Develop or e. manufacturing capability	291002	
C.	Commencialize current research & development projects	291003	•
d.	Clinica / regulatory expenses	291004	
e.	To expand in existing or enter into new markets	291005	
f.	Repay current investors	291006	
g.	Other, please specify	291007	
291007txt			
9. b. Which	reason was the most important for your firm?		

292001

(Provide corresponding letter)

30. Rate the following obstacles affecting the competitive ability in your firm.

Obstacles			ree of impor		
Inputs		High	Medium	Low	Not applicable
Access to capital	300101	5	3	1	0
Access to technology	300102	5	3	1	0
Access to information	300103	5	3	1	0
Markets					
Domestic market too small	300204	5	3		0
Lack of domestic distribution and marketing channels	300205	5	3	1	0
Lack of access to international markets	300206	5	3	1	0
Lack of international market distribution and marketing channels	300207	5	3	1	0
Constraints	KP	¥ .			
Lack of public awareness or acceptance	400508	5	3	1	0
Regulatory requirements in Canada	300309	5	3	1	0
Regulatory requirements in international markets	300310	5	3	1	0
Labeling requirements in international markets	300311	5	3	1	0
International harmonization	300312	5	3	1	0
Patent rights held by others	300313	5	3	1	0
Protecting intellectual property	300314	5	3	1	0
Other, please specify	300315	5	3	1	0
txt					

300315txt

# Human Resources

31	. How many employees (include the number of permanent and seasonal/casual/contract),	did your fir	m
	employ in Fiscal Year 2007/2008?		

Please report highest employment level for Fiscal Year 2007/2008.

	310001 employees
32.	How many of your employees (include permanent and seasonal/casual/contract), devoted all or any portion of their time to Functional Food and/or Natural Health Product related activities, or tasks
	associated (such as administrative or secretarial) with the running of the Functional Food and/or Natural Health Product portion of this business in Fiscal Year 2007/2008?
	320001 employees
33.	Does your firm currently have unfilled Functional Food and/or Nature' Health Product related positions?
	<sup>3</sup> No → Go to Question 35.
34.	For those unfulfilled positions, what type of competencies are needed?
	Please indicate those which are critical to the long-term strategic goals of your firm.
	Please check all that apply

Scier tific research &	340007 Quality control
340002	340008 Sales / marketing / advertising
340003 Aegulatory	340009 Market research
340004 Clinical trials	340010 Management / finance
340005 Manufacturing / production	Business development
340006 Technical / engineering	Other, please specify
	340012txt

35. Did your firm experience difficulty in filling vacant Functional Food and/or Natural Health Product related positions in Fiscal Year 2007/2008?

350001	1	Yes	
	3	No + Go to Question 37.	

36. a. Which of the following obstacles have impacted your efforts to fill your Functional Food and/or Natural Health Product positions?

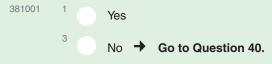
Obsta	acles	Please check all that c pply
a.	Compensation requirements by candidates too high	361001
b.	Candidates unwilling to relocate	36100.
c.	Candidates lack of expertise	11003
d.	Capital / resources insufficient to attract candidates	361004
e.	Competition for qualified candidates	361005
f.	Lack of qualified candidates	361006
g.	Other, please specify	361007
361007txt	n obstacle was the most significant?	
362001	(Provide curresponding letter)	

If the appropriate response is '0' (zero), please indicate '0', do not leave blanks.

Number of new employees hired from Canada	370001	new employees
Number of new employees hired from outside of Canada	370002	new employees

# Regulations

# 38. a. Did your firm have any contact in the Fiscal Year 2007/2008 with either Health Canada or the Canadian Food Inspection Agency?



# 38. b. What specific regulatory contact has your firm experienced in the Fiscal Year 2007/2008 regarding a Functional Food and/or Natural Health Product?

	Please check all that apply						
	Health Canada Food Directorate	Health Canada Natural Health Products Directorate	Canadia.1 Fo. d Inspection A gency	Not Applicable			
Novel food designation	382011		382013	382010			
Submission for health claim on food	382021		382023	382020			
Site license for natural health products		382032		382030			
Product license for natural health products		382042		382040			
Health claim for natural health products		382052		382050			
Adverse reaction reporting	382061	382062	382063	382060			
Clinical trial approval	382071	382072		382070			
Labeling and advertising	382081	382082	382083	382080			
Allergies and sensitive les	382091	382092	382093	382090			
Export of food and/or natural health products	382101	382102	382103	382100			
Import of food and/or natural health products	382201	382202	382203	382200			
Other, please specify	382301	382302	382303	382300			
382300txt							

39. a. Please rate your degree of agreement with the following statements as they relate to your firm's experience with Health Canada's Food Directorate.

			Please check	c <u>one</u> only	
Experience with Health Canada's Food		Lev	vel of Agree		
Directorate		High	Medium	Low	Not applicable
I was able to identify all the regulatory requirements needed	391001	5	3	1	0
The guidance documents were easy to understand and follow	391002	5	3	1	0
I was able to identify and communicate with an individual regulator to obtain information prior to submission	391003	5	3	A	0
I was able to provide all supporting data required in the initial application	391004	5	3		0
I was able to track the approval process for my product	391005	5		1	0
I was aware of the time required to obtain regulatory approval for my product	391006	5	3	1	0

39. b. Please rate your degree of agreement with the following statements as they relate to your firm's experience with Health Canada's <u>Natural Health Products Directorate</u>.

			Please check	one only	
Experience with Health Canada's		Lev			
Natural Health Froducts Dire 19 Ade		High	Medium	Low	Not applicable
I was able to identify all the regulatory requirements needed	392001	5	3	1	0
The guidance documents were easy to understand and follow	392002	5	3	1	0
I was able to density and communicate with an individual regulator to obtain information prior to submission	392003	5	3	1	0
I was able to provide all supporting data required in the initial application	392004	5	3	1	0
I was able to track the approval process for my product	392005	5	3	1	0
I was aware of the time required to obtain regulatory approval for my product	392006	5	3	1	0

### 40. Have the following designations increased your product sales in Canada?

		Plea	ise che	ck one in	each row.
Designation type		Y	es	No	Not applicable
Canadian health claim on a Natural Health Product	400001	1	з		0
One of the five Canadian-approved health claim label statements	400002	1	З		0
Approved Canadian Function Claims - these include both biological role claims and other function claims. Examples of such claims include "Vitamin A aids in the maintenance of night vision", and "Beverage X is absorbed up to 30% faster than water."	400003	1	З	21	0
USA-approved health claim label statement (Nutritional Labelling and Education Act or authoritative claim)	400004	1			0
USA qualified health claim label statement	400005	1	3		0
		/			

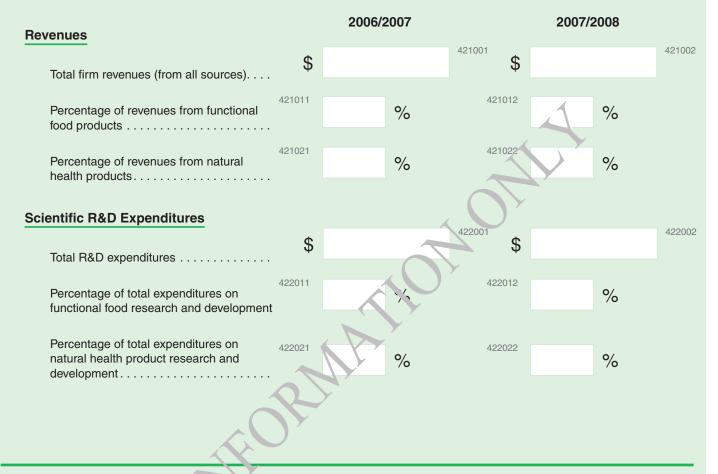
# 41. Have the following designations increased your product soles in international markets?

	Please o	check one in	each row.
	Yes	No	Not applicabl
410001	1	3	0
410002	1	3	0
410003	1	3	0
410004	1	3	0
410005	1	3	0
	410002 410003 410004	Yes   410001 1   410002 1   410003 1   410004 1	410001   1   3     410002   1   3     410003   1   3     410004   1   3

# **Financial Information**

42. Please indicate your total revenue and R&D expenditures in the table below. If precise information is not available, please provide a carefully considered <u>estimate</u>. Report for fiscal years ending 2006/2007 and 2007/2008.

If the appropriate response is '0' (zero), please indicate '0', do not leave blanks.



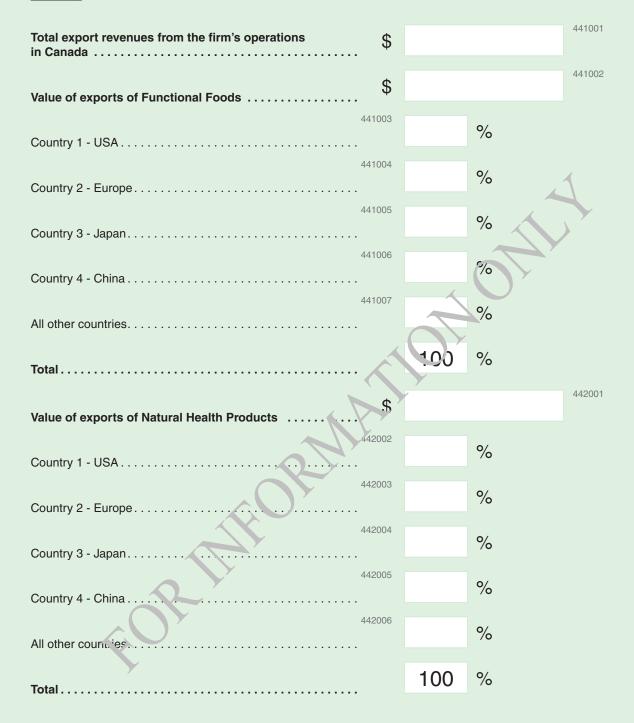
43. Did your firm export Functional Foods and/or Natural Health Products in Fiscal Year 2007/2008?



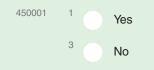
Go to Question 45.

Yes

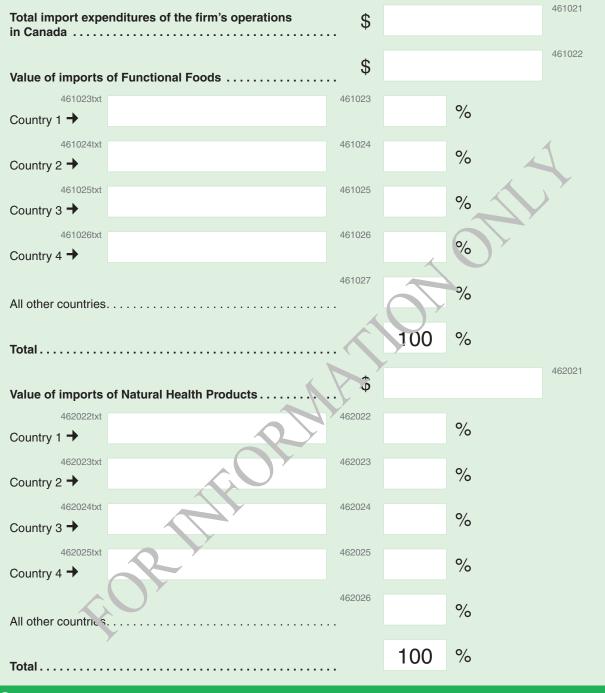
44. Please indicate total exports as a dollar amount in the first line, followed by exports of Functional Foods, and exports of Natural Health Products separately. Indicate the percentage of export revenue for each country.



#### 45. Did your firm import any Functional Foods and/or Natural Health Products in Fiscal Year 2007/2008?



46. Please indicate total import expenditures as a dollar amount in the first line, followed by imports of Functional Foods, and imports of Natural Health Products separately. Specify your most significant import markets by country and <u>indicate the percentage of import expenditures for each country</u>. Please enter in the countries.



### Comments

Please provide any comments you may have below.

# Thank you for your assistance.

Please return the questionnaire in the accompanying self addressed prepaid envelope.