

The Functional Foods and Natural Health Products Survey 2011

CONFIDENTIAL when completed.

Correct as required

Legal Name
C0001

Business Name
C0002

First Name of Contact
C0008

Last Name of Contact
C0028

Address (number and street)
C0004

City
C0005

Province / Territory
C0006

Postal Code
C0007

Language preference
C0010 1 English 2 Français

Information for the respondent

Survey Purpose

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 business units 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 by the academic community for research purposes.

Authority

This information is collected under the authority of the *Statistics Act*, Revised Statutes of Canada, 1985, Chapter S-19. COMPLETION OF THIS QUESTIONNAIRE IS A LEGAL REQUIREMENT UNDER THIS ACT

Confidentiality

The *Statistics Act* protects the confidentiality of information collected by Statistics Canada.

Data Linkage

To enhance the data from this survey, Statistics Canada may combine it with information from other surveys or from administrative sources.

Fax or other electronic transmission disclosure

Statistics Canada advises you that there could be a risk of disclosure during facsimile or other electronic transmission. However, upon receipt, Statistics Canada will provide the guaranteed level of protection afforded all information collected under the authority of the *Statistics Act*.

Who should complete this questionnaire?

The person(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 business unit. Please complete the questionnaire on behalf of all functional food and natural health product activities at your business unit.

Please return the completed survey in the self addressed prepaid envelope, within 30 days of receipt.

Assistance

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

Telephone: 1-800-565-1685

Fax: 1-888-883-7999

Please complete the following information

First name of person to contact about this questionnaire

C0013

Designation

C0026 Mr. Ms.

Telephone Number

C0017 - C0027

E-mail

C0018

Last name of person to contact about this questionnaire

C0054

Title

C0014

Fax Number

C0016 -

Web Address

C0020

Reporting Instructions

In this questionnaire, we refer to your “**business unit**”. By “**business unit**”, we mean your establishment or local operations (as described on the label on the first page of the questionnaire).

For the purposes of this survey, “**activities**” refers to any combination of research and development activities, services, production of goods, sales or distribution of goods (intermediate or final), where goods are functional foods or natural health products. “**Activities of the business unit**” refers to **activities in Canada in the fiscal year 2011/2012**, unless otherwise directed.

Coverage Statement

For the purpose of this survey, functional food and natural health products intended for human consumption means products created for the ingestion through the mouth for digestion.

Products that are specifically **excluded** from this survey include: pet food, feed, cosmetics and topical creams.

Functional Foods and/or Natural Health Products

1. a. Please indicate the types of functional foods intended for human consumption that your business unit, directly or indirectly, developed and/or produced in fiscal year 2011/2012.

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.

For the purpose of this survey, the definition of functional food is specific to products that have been actively enhanced during production. E.g. Cranberry or berry yogurts are only included under functional food if additional bioactive ingredients (e.g. probiotics, omega-3, sterols) have been added.

“**Bioactive**” is a substance that is demonstrated or purported to have a favourable effect on health. In the context of food, bioactive include nutrients (e.g., vitamins and mineral nutrients) and non-nutrients (e.g., lycopene, live microbes) that may be inherent in or added to food.

Functional Foods

		Yes	No
Foods and beverages that are fortified with vitamins and/or minerals beyond mandatory requirements for the purpose of providing added health benefits.	011010 1	<input type="radio"/>	3 <input type="radio"/>

Foods and beverages that have added active ingredients, excluding vitamins or minerals, that have been scientifically demonstrated to provide health benefits beyond their basic nutritional functions. Examples include:

- | | | | |
|---|----------|-----------------------|-------------------------|
| <ul style="list-style-type: none">• margarine with phytosterols• drinks with herb blends• foods with added soluble fibre• yogurts with probiotics, etc | 011020 1 | <input type="radio"/> | 3 <input type="radio"/> |
|---|----------|-----------------------|-------------------------|

Foods and beverages specially enhanced to contain more of a functional component, through plant breeding techniques, genetic modification, processing, or special livestock feeding techniques, that have been scientifically demonstrated to provide health benefits beyond their basic nutritional functions. Examples include:

- | | | | |
|--|----------|-----------------------|-------------------------|
| <ul style="list-style-type: none">• tomato with enhanced lycopene level• canola high in carotenoids• strawberries containing enhanced levels of ellagic acid• omega-3 eggs, etc | 011030 1 | <input type="radio"/> | 3 <input type="radio"/> |
|--|----------|-----------------------|-------------------------|

Other, please specify	011040 1	<input type="radio"/>	3 <input type="radio"/>
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011050

1. b. Please indicate the types of natural health products intended for human consumption that your business unit, directly or indirectly, developed and/or produced in fiscal year 2011/2012.

Natural Health Products are products made from natural sources, 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 *Natural Health Products Regulations*, which came into effect on January 1, 2004, and under the *Natural Health Products (Unprocessed Product Licence Applications) Regulations*, which came into effect on August 4, 2010.

Natural Health Products

Yes No

Natural health products that are **extracted or purified from plants**.

Examples include:

- beta-glucan from oats
- antioxidants from blueberries
- isoflavonoids from soy
- sterols from wood pulp
- essential fatty acids from primrose oil
- soluble fibre from fenugreek, etc

012010 1 3

Natural health products that are **ground, dried, powdered and pressed from plant materials**. Examples include:

- echinacea
- fenugreek
- valerian
- ginseng, etc

012020 1 3

Natural health products that are produced extracted or purified from **animals or micro organisms**. Examples include:

- elk velvet
- essential fatty acids (EFAs)
- enzymes
- carotenoids
- probiotics, etc

012030 1 3

Natural health products that are produced extracted or purified from **marine sources**.

Examples include:

- glucosamine
- chitosan
- products from algae
- seaweed
- kelp
- fish oils, etc

012040 1 3

Natural health products **comprised solely of vitamins and minerals** (sold in dosage form).

012050 1 3

Other, please specify

012060 1 3

012070

1. c. Please indicate the health benefit(s) of the functional foods and/or natural health products developed or produced by your business unit in fiscal year 2011/2012.

For your business unit's own natural health products, please select the health benefit as claimed on the label of each product.

For your business unit's own functional foods, please select the main targeted health benefit for each product (1 health benefit per product)

Please check one option for each product

Health Benefits

			Yes	No
a.	Reduction of risk of disease (e.g. cardiovascular, cancer, diabetes, arthritis, etc.)	013010 1	<input type="radio"/>	<input type="radio"/>
b.	Health and wellness promotion (e.g. sleep, gut health, eye health, stress, weight control, anti-aging and skin health, etc.)	013020 1	<input type="radio"/>	<input type="radio"/>
c.	Performance enhancement (e.g. sports performance and endurance, energy, sexual performance, mental ability, etc.)	013030 1	<input type="radio"/>	<input type="radio"/>
d.	Special populations (e.g. men's health - prostate, women's health - menopause, children's health, senior's health, etc.)	013040 1	<input type="radio"/>	<input type="radio"/>
e.	Supplements (e.g. vitamins, minerals, amino acids, etc.)	013050 1	<input type="radio"/>	<input type="radio"/>
f.	Other, please specify	013060 1	<input type="radio"/>	<input type="radio"/>
013070	<input type="text"/>			

1. d. For your business unit's functional food and/or natural health product operations, in which of the following activities did your business unit engage directly in fiscal year 2011/2012?

Please check all that apply

Activities

a.	Scientific research & development	014010 1	<input type="radio"/>
b.	Product development or scale up of new products	014020 1	<input type="radio"/>
c.	Extraction of bioactives or medicinal ingredients	014030 1	<input type="radio"/>
d.	Manufacturer of ingredients or raw materials to be used in functional foods or natural health products	014040 1	<input type="radio"/>
e.	Manufacturer of semi-finished functional foods and/or natural health products to be further processed before sales	014050 1	<input type="radio"/>
f.	Manufacturer of consumer-ready products to be sold without further processing	014060 1	<input type="radio"/>
g.	Wholesaler of products	014070 1	<input type="radio"/>
h.	Retailer of products	014080 1	<input type="radio"/>
i.	Other, please specify	014090 1	<input type="radio"/>
014100	<input type="text"/>		

2. a. Did your business unit provide services to other business units involved in the functional food and/or natural health product industry in fiscal year 2011/2012?

For this survey, a **service** is the providing of facilities and/or activities required by other business unit for a fee. Examples include; accounting, insurance, extraction, custom manufacturing, scientific research and development, technical or engineering or mechanical, etc.

021001 1 **Yes** ➡ go to Question 2 b

3 **No** ➡ My business unit did not provide any services to other business units involved in the functional food and/or natural health product industry **and does not have** functional foods (question 1a) **and** natural health products (question 1b) in development or in production.

Please return the questionnaire in the envelope provided.

Thank you

2. b. For what purpose(s) did your business unit provide these services to other business units during fiscal year 2011/2012, either in Canada or in foreign markets?

Please check all that apply

<u>Purposes</u>	Canada	Foreign
a. Scientific research & development	022011 <input type="radio"/>	022012 <input type="radio"/>
b. Intellectual property	022021 <input type="radio"/>	022022 <input type="radio"/>
c. Regulatory	022031 <input type="radio"/>	022032 <input type="radio"/>
d. Clinical trials	022041 <input type="radio"/>	022042 <input type="radio"/>
e. Custom manufacturing or production or formulation	022051 <input type="radio"/>	022052 <input type="radio"/>
f. Extraction of bioactives or medicinal ingredients	022061 <input type="radio"/>	022062 <input type="radio"/>
g. Technical or engineering or mechanical	022071 <input type="radio"/>	022072 <input type="radio"/>
h. Quality control	022081 <input type="radio"/>	022082 <input type="radio"/>
i. Sales or marketing or advertising	022091 <input type="radio"/>	022092 <input type="radio"/>
j. Market research or business development	022101 <input type="radio"/>	022102 <input type="radio"/>
k. Other, please specify	022111 <input type="radio"/>	022112 <input type="radio"/>

022120

Business unit activities

4. Please provide your best estimate of your business unit's proportion of sales, in fiscal year 2011/2012, of functional foods, natural health products, or bioactive/medicinal ingredients through the following distribution channels:

Medicinal Ingredient is any substance that is intended to furnish pharmacological activity or other direct effect in the diagnosis, treatment, mitigation, or prevention of a disease, disorder or abnormal physical state or its symptoms in humans; or restoring or correcting organic functions in humans; or modifying organic functions in humans, such as modifying those functions in a manner that maintains or promotes health.

"Bioactive" is a substance that is demonstrated or purported to have a favourable effect on health. In the context of food, bioactive include nutrients (e.g., vitamins and mineral nutrients) and non-nutrients (e.g., lycopene, live microbes) that may be inherent in or added to food.

Distribution methods

% of sales

a. Direct selling	040010	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
b. Internet sales or mail order	040020	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
c. Wholesaler	040030	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
d. Direct to retailer	040040	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
e. Direct to other manufacturers	040050	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
f. Multi-level marketing or network marketing	040060	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
g. Broker or 3rd party distributor	040070	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
h. Other, please specify	040080	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
040090		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Total sales of all functional foods, natural health products and bioactive/medicinal ingredients

100%

5. Please provide your best estimate of your business unit's proportion of sales, during fiscal year 2011/2012, of functional foods, natural health products, or bioactive/medicinal ingredients to the following customer types:

Customer types

% of sales

a. Direct to consumers	050010	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
b. Health food store	050020	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
c. Other retail (e.g. grocery store, mass merchandiser)	050030	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
d. Pharmacy	050040	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
e. Wholesaler	050050	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
f. Private label	050060	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
g. Other manufacturers	050070	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
h. Other, please specify	050080	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
050090		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Total sales of all functional foods, natural health products and bioactive/medicinal ingredients

100%

6. a. From the ingredient list provided below, please indicate which source of the bioactive and/or medicinal ingredients was used in the production of your business unit's functional food and/or natural health products during fiscal year 2011/2012.

Sources of the bioactive and/or medicinal ingredients

			Yes	No
a. Dairy products	061010	1	<input type="radio"/>	<input type="radio"/>
b. Oil seeds	061020	1	<input type="radio"/>	<input type="radio"/>
c. Meat and poultry or other animal products	061030	1	<input type="radio"/>	<input type="radio"/>
d. Seafood or other marine species	061040	1	<input type="radio"/>	<input type="radio"/>
e. Grains and cereals	061050	1	<input type="radio"/>	<input type="radio"/>
f. Pulses or Legumes	061060	1	<input type="radio"/>	<input type="radio"/>
g. Fruits	061070	1	<input type="radio"/>	<input type="radio"/>
h. Vegetables	061080	1	<input type="radio"/>	<input type="radio"/>
i. Floriculture, herbs and spices	061090	1	<input type="radio"/>	<input type="radio"/>
j. Trees (bark, leaves, symbiotics (mushroom or other fungus))	061100	1	<input type="radio"/>	<input type="radio"/>
k. Synthetics	061110	1	<input type="radio"/>	<input type="radio"/>
l. Other, please specify	061120	1	<input type="radio"/>	<input type="radio"/>

061130

For information only

6. b. In fiscal year 2011/2012, for each of the following sources of the bioactive and/or medicinal ingredients used in your business unit's product(s), what was the country of origin? (Include only the origin of the manufacturer of the ingredient and not the origin of the wholesaler or distributor).

If the ingredient(s) were acquired from both Canadian and foreign markets; please select both options: Canada and foreign.

<u>Sources of the bioactive and/or medicinal ingredients</u>	<i>Please check all that apply</i>			
	Canada	Foreign	Don't know	Not applicable
a. Dairy products	062011 <input type="radio"/>	062012 <input type="radio"/>	062013 <input type="radio"/>	062014 <input type="radio"/>
b. Oil seeds	062021 <input type="radio"/>	062022 <input type="radio"/>	062023 <input type="radio"/>	062024 <input type="radio"/>
c. Meat and poultry, or other animal products	062031 <input type="radio"/>	062032 <input type="radio"/>	062033 <input type="radio"/>	062034 <input type="radio"/>
d. Seafood or other marine species	062041 <input type="radio"/>	062042 <input type="radio"/>	062043 <input type="radio"/>	062044 <input type="radio"/>
e. Grains and cereals	062051 <input type="radio"/>	062052 <input type="radio"/>	062053 <input type="radio"/>	062054 <input type="radio"/>
f. Pulses or Legumes	062061 <input type="radio"/>	062062 <input type="radio"/>	062063 <input type="radio"/>	062064 <input type="radio"/>
g. Fruits	062071 <input type="radio"/>	062072 <input type="radio"/>	062073 <input type="radio"/>	062074 <input type="radio"/>
h. Vegetables	062081 <input type="radio"/>	062082 <input type="radio"/>	062083 <input type="radio"/>	062084 <input type="radio"/>
i. Floriculture, herbs and spices	062091 <input type="radio"/>	062092 <input type="radio"/>	062093 <input type="radio"/>	062094 <input type="radio"/>
j. Trees (bark, leaves, symbiotics (mushroom or other fungus))	062101 <input type="radio"/>	062102 <input type="radio"/>	062103 <input type="radio"/>	062104 <input type="radio"/>
k. Synthetics	062111 <input type="radio"/>	062112 <input type="radio"/>	062113 <input type="radio"/>	062114 <input type="radio"/>
l. Other, please specify	062121 <input type="radio"/>	062122 <input type="radio"/>	062123 <input type="radio"/>	062124 <input type="radio"/>
062130	<input type="text"/>			

6. c. In fiscal year 2011/2012, for those sources of the bioactive and/or medicinal ingredients which were available both in Canada and in foreign market, how important were the following factors for importing?

Please check only one option for each type of factor

<u>Factors</u>		<i>Please check only one option for each type of factor</i>				
		Very unimportant	Unimportant	Neither important or unimportant	Important	Very important
a. Lower total cost	063010	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
b. Higher quality	063020	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
c. Year-round availability	063030	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
d. Regulatory approval process reduced	063040	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
e. Other, please specify	063050	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
063060	<input type="text"/>					

6. d. For each of the sources of the bioactive and/or medicinal ingredients imported, during fiscal year 2011/2012, what were the volumes imported? (If the ingredient(s) was purchased in both formats, kilograms and litres, please indicate accordingly)

Sources of the bioactive and/or medicinal ingredients

		Kilograms		Litres	Not applicable	
a. Dairy products	064011	<input type="text"/>		064012	<input type="text"/>	064013 <input type="radio"/>
b. Oil seeds	064021	<input type="text"/>		064022	<input type="text"/>	064023 <input type="radio"/>
c. Meat and poultry or other animal products	064031	<input type="text"/>		064032	<input type="text"/>	064033 <input type="radio"/>
d. Seafood or other marine species	064041	<input type="text"/>		064042	<input type="text"/>	064043 <input type="radio"/>
e. Grains and cereals	064051	<input type="text"/>		064052	<input type="text"/>	064053 <input type="radio"/>
f. Pulses or Legumes	064061	<input type="text"/>		064062	<input type="text"/>	064063 <input type="radio"/>
g. Fruits	064071	<input type="text"/>		064072	<input type="text"/>	064073 <input type="radio"/>
h. Vegetables	064081	<input type="text"/>		064082	<input type="text"/>	064083 <input type="radio"/>
i. Floriculture, herbs and spices	064091	<input type="text"/>		064092	<input type="text"/>	064093 <input type="radio"/>
j. Trees (bark, leaves, symbiotics (mushroom or other fungus))	064101	<input type="text"/>		064102	<input type="text"/>	064103 <input type="radio"/>
k. Synthetics	064111	<input type="text"/>		064112	<input type="text"/>	064113 <input type="radio"/>
l. Other, please specify	064121	<input type="text"/>		064122	<input type="text"/>	064123 <input type="radio"/>

064130

Business unit characteristics

7. What was the structure of your business unit in fiscal year 2011/2012?

Please
check
one option
only

Structure

- | | | | |
|--------------------------------|--------|---|-----------------------|
| a. Private corporation | 070010 | 1 | <input type="radio"/> |
| b. Publicly traded corporation | | 2 | <input type="radio"/> |
| c. Sole proprietorship | | 3 | <input type="radio"/> |
| d. Unincorporated partnership | | 4 | <input type="radio"/> |
| e. Cooperative | | 5 | <input type="radio"/> |
| f. Other, please specify | | 6 | <input type="radio"/> |
- 070020

8. Was your business unit's head office located in Canada in fiscal year 2011/2012?

- 080001 1 Yes
- 3 No

9. Was your business unit a subsidiary of a Multi-National Enterprise (MNE) in fiscal year 2011/2012?

- 090001 1 Yes
- 3 No

Business practices

Contracting out

10. Did your business unit contract out functional food and/or natural health product related activities in fiscal year 2011/2012?

Contracting out work can be referred to as outsourcing whereby money is paid in part or in whole for a service on a contractual agreement.

100001 1 Yes

3 No ➡ go to Question 12a

11. For what purpose (s) did your business unit contract out functional food and/or natural health product related activities, either in Canada or in foreign markets in fiscal year 2011/2012?

Please check **all** that apply

Purposes	Canada	Foreign	Not applicable
a. Scientific research & development	110011 <input type="radio"/>	110012 <input type="radio"/>	110013 <input type="radio"/>
b. Intellectual property	110021 <input type="radio"/>	110022 <input type="radio"/>	110023 <input type="radio"/>
c. Regulatory	110031 <input type="radio"/>	110032 <input type="radio"/>	110033 <input type="radio"/>
d. Clinical trials	110041 <input type="radio"/>	110042 <input type="radio"/>	110043 <input type="radio"/>
e. Custom manufacturing or production or formulation	110051 <input type="radio"/>	110052 <input type="radio"/>	110053 <input type="radio"/>
f. Extraction of bioactive or medicinal ingredients	110061 <input type="radio"/>	110062 <input type="radio"/>	110063 <input type="radio"/>
g. Technical or engineering or mechanical	110071 <input type="radio"/>	110072 <input type="radio"/>	110073 <input type="radio"/>
h. Quality control	110081 <input type="radio"/>	110082 <input type="radio"/>	110083 <input type="radio"/>
i. Sales or marketing or advertising	110091 <input type="radio"/>	110092 <input type="radio"/>	110093 <input type="radio"/>
j. Market research or business development	110101 <input type="radio"/>	110102 <input type="radio"/>	110103 <input type="radio"/>
k. Other, please specify	110111 <input type="radio"/>	110112 <input type="radio"/>	110113 <input type="radio"/>

110120

Cooperative and/or collaborative arrangements

12. a. In fiscal year 2011/2012, was your business unit involved in functional food and/or natural health product related cooperative/collaborative arrangements with other business units or organizations? (Please include both those inside and outside of Canada.)

Cooperative and/or collaborative arrangements involve the active participation in projects between your business unit and other business units or organizations in order to develop and/or continue work on new or significantly improved functional foods or natural health products and/or related activities (e.g. scientific expertise, regulatory affairs, training, marketing, distribution, clinical trials, etc.). Pure contracting out work, where money is paid for a service, is not regarded as cooperative and/or collaborative arrangement.

121001 1 Yes

3 No ➔ go to Question 15

12. b. In fiscal year 2011/2012, how many cooperative/collaborative arrangements did your business unit have with other business units or organizations?

122001 Number of arrangements

12. c. In fiscal year 2011/2012, how many of these cooperative/collaborative arrangements involved more than one other partner?

123001 Number of arrangements

13. Please indicate which of the following types of collaborative partners your business unit collaborated with during the previous 3 fiscal years (2009/2010, 2010/2011 and 2011/2012).

Please
check
all that
apply

Partner types

a. Other business units in Canada

130010

b. Other business units outside Canada

130020

c. University in Canada

130030

d. University outside Canada

130040

e. Federal government agency or laboratory

130050

f. Provincial government agency or laboratory

130060

g. Other, please specify

130070

130080

14. Please rate the level of importance that each of the following reasons had on your business unit's decision to cooperate/collaborate with partners during the previous 3 fiscal years (2009/2010, 2010/2011 and 2011/2012).

Please check **only one** option for each type of reason

<u>Reasons for cooperative/collaborative arrangements</u>			Please check only one option for each type of reason								
			Very unimportant	Unimportant	Neither important or unimportant	Important	Very important				
a. Access to outside scientific expertise or knowledge	140010	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
b. Conduct research and development	140020	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
c. Access to bioactive or medicinal ingredients	140030	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
d. Access to marine or terrestrial biomass	140040	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
e. Access to production or manufacturing facilities	140050	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
f. Access to extraction facilities or technologies	140060	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
g. Access to marketing or distribution channels	140070	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
h. Access to partner's intellectual property	140080	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
i. Access to capital	140090	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
j. Access to regulatory affairs expertise	140100	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
k. Other, please specify	140110	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>

140120

Raising capital

22. Did your business unit attempt to raise capital specifically for functional food and/or natural health product related purposes in fiscal year 2010/2011 and/or 2011/2012?

220001 1 Yes

3 No → go to Question 27

23. Was your business unit successful in raising any capital specifically for functional food and/or natural health product related purposes in fiscal year 2010/2011 and/or 2011/2012?

230001 1 Yes

3 No → go to Question 26

24. Please indicate your business unit's targeted amount of capital and actual amount of capital raised for the fiscal year(s) 2010/2011 and/or 2011/2012, in thousands of Canadian dollars (\$'000).

If '0' (ZERO) please indicate '0', do not leave blanks. If your business unit was not in operation or did not attempt to raise capital for a specific year, please check 'Not applicable'.

Year	Target amount		Amount raised		Not applicable
	\$ '000		\$ '000		
2010/2011	240011	\$ <input type="text"/> ,000	240012	\$ <input type="text"/> ,000	240013 <input type="radio"/>
2011/2012	240021	\$ <input type="text"/> ,000	240022	\$ <input type="text"/> ,000	240023 <input type="radio"/>

25. Please indicate which of the following sources contributed capital to your business unit, and provide a percentage distribution of total capital raised from each source, during fiscal year 2011/2012.

Source	Percent
a. Canadian based venture capital	250010 <input type="text"/> %
b. American based venture capital	250020 <input type="text"/> %
c. Other foreign based venture capital	250030 <input type="text"/> %
d. Conventional funds (i.e. banks, credit union, Initial Public Offering (IPO), Secondary Public Offering (SPO))	250040 <input type="text"/> %
e. Angel investors or family members	250050 <input type="text"/> %
f. Government(s) (i.e. Business Development Corporation (BDC), Farm Credit Canada (FCC), Export Development Corporation (EDC), Industrial Research Assistance Program (IRAP))	250060 <input type="text"/> %
g. Partner(s) from strategic alliance(s)	250070 <input type="text"/> %
h. Other, please specify	250080 <input type="text"/> %

250090

Total funds raised

100%

26. What were the reasons your business unit raised or attempted to raise capital for functional foods and/or natural health products related purposes in fiscal year 2010/2011 and/or 2011/2012?

Please check all that apply

Reasons

- a. Scientific research & development purposes 260010
- b. Develop or expand production and manufacturing capability 260020
- c. Commercialize current research & development projects 260030
- d. Clinical or regulatory expenses 260040
- e. To expand in existing or enter into new markets 260050
- f. Repay current investors 260060
- g. Other, please specify 260070

260080

For information only

27. Please rate the level of importance of each of the following barriers to the production and/or development of functional foods and/or natural health products for your business unit in fiscal year 2011/2012.

Please check **only one** option for each type of barrier

Barriers

Inputs

		Very Unimportant	Unimportant	Neither Important or Unimportant	Important	Very Important
a. Access to capital	270010	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
b. Access to technology	270020	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
c. Access to bioactive or medicinal ingredients	270030	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
d. Cost of bioactive or medicinal ingredients	270040	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
e. Access to human resources and adequate skills	270050	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
f. Access to information	270060	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

Markets

g. Domestic market too small	270070	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
h. Lack of domestic distribution and marketing channels	270080	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
i. Lack of access to international markets	270090	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
j. Lack of international market distribution and marketing channels	270100	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

Other

k. Lack of public awareness or acceptance	270110	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
l. Regulatory requirements in Canada	270120	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
m. Labeling requirements in Canada	270130	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
n. Regulatory requirements in international markets	270140	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
o. Labeling requirements in international markets	270150	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
p. International harmonization	270160	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
q. Patent rights held by others	270170	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
r. Protecting intellectual property	270180	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
s. Lack of quality assurance or control	270190	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
t. Access to an establishment with good manufacturing practices (GMP)	270200	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
u. Access to an establishment with a site license	270210	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
v. Approval time for acquiring a site license	270220	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
w. Other, please specify	270230	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

270240

Human resources

28. How many employees (include permanent, seasonal, casual and contract) did your business unit employ in fiscal year 2011/2012?

(Please report highest employment level for fiscal year 2011/2012).


280001 Number of employees

29. How many of your business unit's employees (include permanent, seasonal, casual and 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 2011/2012?

290001 Number of employees

30. Did your business unit have unfilled functional food and/or natural health product related positions in fiscal year 2011/2012?

300001 1 Yes

3 No  go to Question 32

31. For those unfulfilled positions in your business unit, what type of competencies were needed?

Please indicate those which are critical to the long-term strategic goals of your business unit.

Please check all that apply

Competencies

- | | | |
|--------------------------------------|--------|-----------------------|
| a. Scientific research & development | 310010 | <input type="radio"/> |
| b. Intellectual property | 310020 | <input type="radio"/> |
| c. Regulatory | 310030 | <input type="radio"/> |
| d. Clinical trials | 310040 | <input type="radio"/> |
| e. Manufacturing or production | 310050 | <input type="radio"/> |
| f. Technical or engineering | 310060 | <input type="radio"/> |
| g. Quality control | 310070 | <input type="radio"/> |
| h. Sales or marketing or advertising | 310080 | <input type="radio"/> |
| i. Market research | 310090 | <input type="radio"/> |
| j. Management or finance | 310100 | <input type="radio"/> |
| k. Business development | 310110 | <input type="radio"/> |
| l. Other, please specify | 310120 | <input type="radio"/> |

310130

32. Did your business unit experience any difficulty in filling vacant functional food and/or natural health product related positions in fiscal year 2011/2012?

320001 1 Yes

3 No ➡ go to Question 34

33. Which of the following obstacles have impacted your business unit's efforts to fill your functional food and/or natural health product positions in fiscal year 2011/2012?

Please check all that apply

Obstacles

a. Compensation requirements by candidates too high 330010

b. Candidates unwilling to relocate 330020

c. Candidates lack of expertise 330030

d. Capital / resources insufficient to attract candidates 330040

e. Competition for qualified candidates 330050

f. Lack of qualified candidates 330060

g. Access to training 330070

h. Lack of business predictability 330080

i. Other, please specify 330090

330100

34. How many new positions with any type of functional food and/or natural health product responsibilities did your business unit create in fiscal year 2011/2012? (Please indicate "0" if 0 is appropriate, do not leave blank.)

340001 Number of new positions created in your business unit

Regulations

35. Did your business unit have any contact with either Health Canada or the Canadian Food Inspection Agency in fiscal year 2011/2012?

350001 1 Yes

3 No ➡ go to Question 38

36. Which specific regulatory contact has your business unit experienced in fiscal year 2011/2012 regarding a functional food and/or natural health product?

Please check all that apply

<u>Contact types</u>	Health Canada Food Directorate	Health Canada Natural Health Products Directorate	Canadian Food Inspection Agency	Not Applicable
a. Novel food designation	360011 <input type="radio"/>	N/A	360013 <input type="radio"/>	360014 <input type="radio"/>
b. Submission for health claim on food	360021 <input type="radio"/>	N/A	360023 <input type="radio"/>	360024 <input type="radio"/>
c. Site license for natural health products	N/A	360032 <input type="radio"/>	N/A	360034 <input type="radio"/>
d. Product license for natural health products	N/A	360042 <input type="radio"/>	N/A	360044 <input type="radio"/>
e. Health claim for natural health products	N/A	360052 <input type="radio"/>	N/A	360054 <input type="radio"/>
f. Clinical trial approval	360061 <input type="radio"/>	360062 <input type="radio"/>	N/A	360064 <input type="radio"/>
g. Labeling and advertising	360071 <input type="radio"/>	360072 <input type="radio"/>	360073 <input type="radio"/>	360074 <input type="radio"/>
h. Export of food and/or natural health products	360081 <input type="radio"/>	360082 <input type="radio"/>	360083 <input type="radio"/>	360084 <input type="radio"/>
i. Import of food and/or natural health products	360091 <input type="radio"/>	360092 <input type="radio"/>	360093 <input type="radio"/>	360094 <input type="radio"/>
j. Other, please specify	360101 <input type="radio"/>	360102 <input type="radio"/>	360103 <input type="radio"/>	360104 <input type="radio"/>
360110	<input type="text"/>			

37. a. Please rate the level of agreement to the following statements as they relate to your business unit's experience with Health Canada's Food Directorate.

Please check **only one** option for each experience

<u>Experiences with Health Canada's Food Directorate</u>	Level of agreement			
	Low	Medium	High	Not applicable
a. I was able to identify the regulatory requirements needed	371010 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
b. The guidance documents were easy to understand and follow	371020 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
c. I was able to communicate with an individual regulator to obtain information prior to submission	371030 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
d. I was able to provide all supporting data required in the initial application	371040 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
e. I was able to request an update on the status of my submission	371050 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
f. I was aware of the time required to obtain regulatory approval for my product	371060 1 <input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>

37. b. Please rate the level of agreement to the following statements as they relate to your business unit's experience with Health Canada's Natural Health Products Directorate.

Please check **only one** option for each experience

Experiences with Health Canada's Natural Health Products Directorate

Level of agreement

			Low	Medium	High	Not applicable
a. I was able to identify the regulatory requirements needed	372010	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
b. The guidance documents were easy to understand and follow	372020	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
c. I was able to communicate with an individual regulator to obtain information prior to submission	372030	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
d. I was able to provide all supporting data required in the initial application	372040	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
e. I was able to request an update on the status of my submission	372050	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>
f. I was aware of the time required to obtain regulatory approval for my product	372060	1	<input type="radio"/>	3 <input type="radio"/>	5 <input type="radio"/>	9 <input type="radio"/>

38. Did any of the following categories of claims increase your product sales in Canada in fiscal year 2011/2012?

Please check **only one** option for each claim category

Claims categories

			Yes	No	Not applicable
a. Any of the approved Canadian health claims for a natural health product	380010	1	<input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
b. Any of the seven approved Canadian health claims for food products	380020	1	<input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
c. Any approved Canadian function claims for food - these include nutrient function claims (formerly called biological role claims) and other function claims. Examples of such claims include: <ul style="list-style-type: none"> • "Vitamin A aids in the maintenance of night vision" • Green tea helps to protect blood lipids from oxidation" 	380030	1	<input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
d. Any approved US health claims (i.e. although the claim is not on your product, your product benefits incrementally from consumer awareness of a claim made on a product similar to yours that is sold in the US)	380040	1	<input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
e. Any approved health claims in countries other than the US (i.e. although the claim is not on your product, your product benefits incrementally from consumer awareness of a claim made on a product similar to yours that is sold in a country other than the US)	380050	1	<input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>

39. Did any of the following categories of claims increase your product sales in international markets in fiscal year 2011/2012?

Please check **only one** option for each claim category

Claims categories

		Yes	No	Not applicable
a. Any of the approved Canadian health claims for a natural health product.	390010	1 <input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
b. Any of the seven approved Canadian health claims for food products.	390020	1 <input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
c. Any approved Canadian function claims for food - these include nutrient function claims (formerly called biological role claims) and other function claims. Examples of such claims include <ul style="list-style-type: none"> • "Vitamin A aids in the maintenance of night vision" • Green tea helps to protect blood lipids from oxidation." 	390030	1 <input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
d. Any approved US health claims (i.e. although the claim is not on your product, your product benefits incrementally from consumer awareness of a claim made on a product similar to yours that is sold in the US).	390040	1 <input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>
e. Any approved health claims in countries other than the US (i.e. although the claim is not on your product, your product benefits incrementally from consumer awareness of a claim made on a product similar to yours that is sold in a country other than the US).	390050	1 <input type="radio"/>	3 <input type="radio"/>	9 <input type="radio"/>

For information only

Comments

Please provide any comments you may have below.

9920

9913

9914

9915

For information only

**Thank you for your assistance.
Please return the questionnaire in the
accompanying self addressed prepaid envelope.**

General information

Coverage Statement

For the purpose of this survey, functional food and natural health products intended for human consumption means products created for the ingestion through the mouth for digestion.

Products that are specifically excluded from this survey include: pet food, feed, cosmetics and topical creams.

Confidentiality

Statistics Canada is prohibited by law from releasing any information it collects which could identify any person, business, or organization, unless consent has been given by the respondent or as permitted by the *Statistics Act*. The confidentiality provisions of the *Statistics Act* are not affected by either the *Access to Information Act* or any other legislation. Therefore, for example, the Canada Revenue Agency cannot access identifiable survey records from Statistics Canada.

Information from this survey will be used for statistical purposes only and will be published in aggregate form only.

Data-sharing agreements

To reduce respondent burden, Statistics Canada has entered into data-sharing agreements with provincial and territorial statistical agencies and other government organizations, which must keep the data confidential and use them only for statistical purposes. Statistics Canada will only share data from this survey with those organizations that have demonstrated a requirement to use the data.

Section 11 of the *Statistics Act* provides for the sharing of information with provincial and territorial statistical agencies that meet certain conditions. These agencies must have the legislative authority to collect the same information, on a mandatory basis, and the legislation must provide substantially the same provisions for confidentiality and penalties for disclosure of confidential information as the *Statistics Act*. Because these agencies have the legal authority to compel businesses to provide the same information, consent is not requested and businesses may not object to the sharing of the data.

For this survey, there are **Section 11** agreements with the provincial and territorial statistical agencies of Newfoundland and Labrador, Nova Scotia, New Brunswick, Quebec, Ontario, Manitoba, Saskatchewan, Alberta, British Columbia, and the Yukon.

The shared data will be limited to information pertaining to business establishments located within the jurisdiction of the respective province or territory.

Section 12 of the *Statistics Act* provides for the sharing of information with federal, provincial or territorial government organizations. Under **Section 12**, you may refuse to share your information with any of these organizations by writing a letter of objection to the Chief Statistician and returning it with the completed questionnaire. Please specify the organizations with which you do not want to share your data.

For this survey, there are **Section 12** agreements with the statistical agencies of Prince Edward Island, the Northwest Territories and Nunavut.

For agreements with provincial and territorial government organizations, the shared data will be limited to information pertaining to business establishments located within the jurisdiction of the respective province or territory.