

Canadian Consumer Adoption and Scientific Support for **Natural Health Products** and **Functional Food Ingredients**

Natural Health Products (NHP)

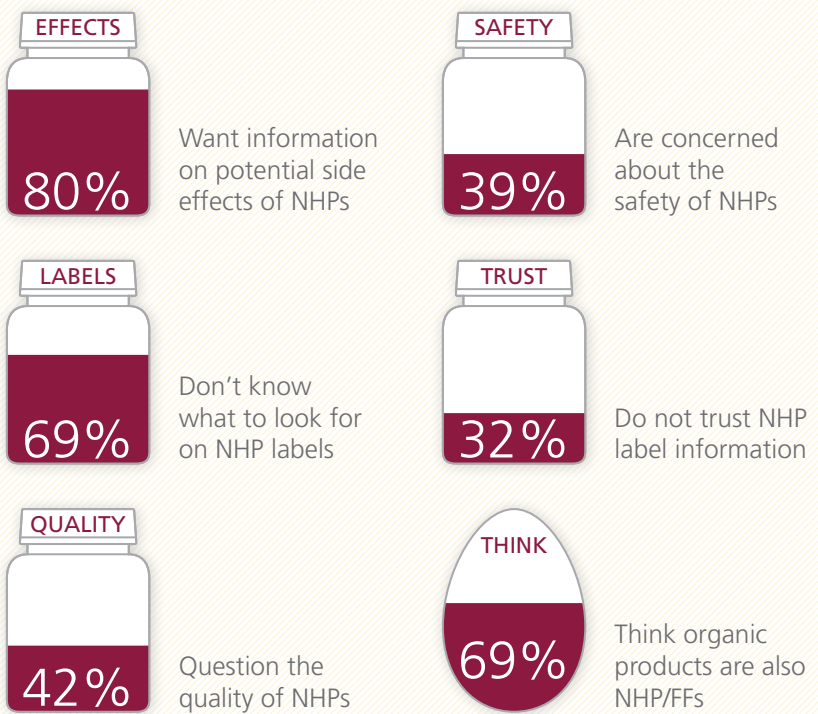


Functional Food Ingredients (FF)



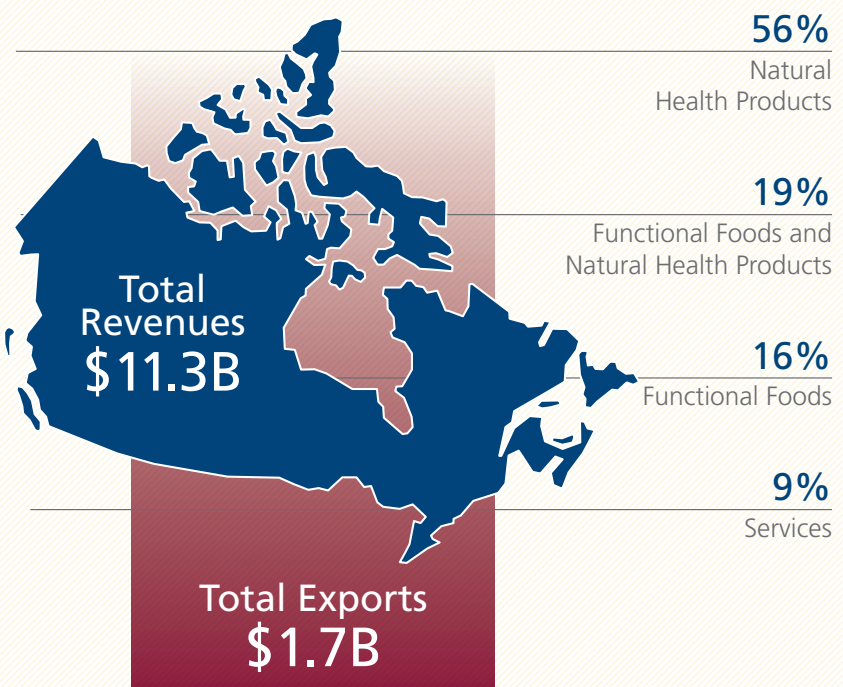
CONSUMER PERCEPTIONS (AS OF 2010)*

3 in 4 Canadians use NHPs and 1/3 use them every day

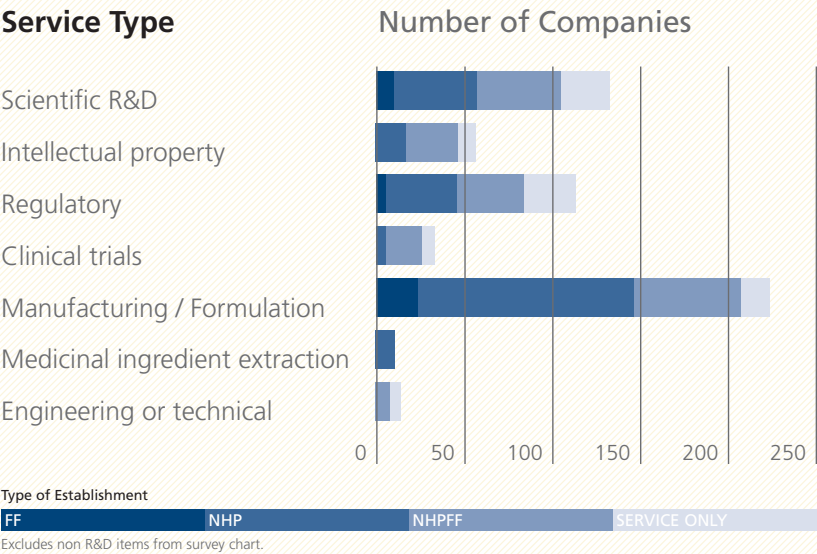


CURRENT ROLE IN CANADA'S ECONOMY**

750 businesses generated a total of \$11.3B in Natural Health Product and Functional Food revenue



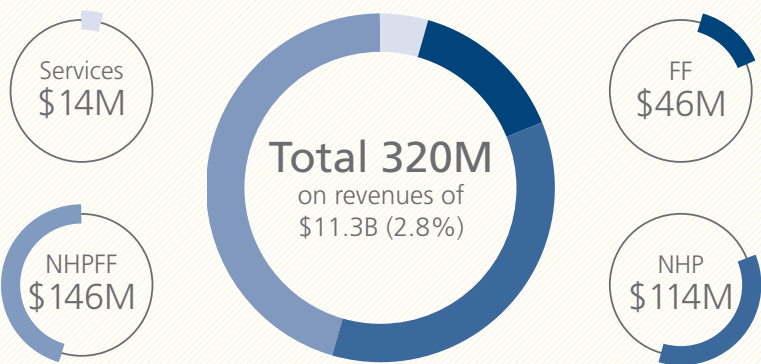
NUMBER OF ESTABLISHMENTS PROVIDING R&D SERVICES**



INVESTING FOR MARKET GROWTH**

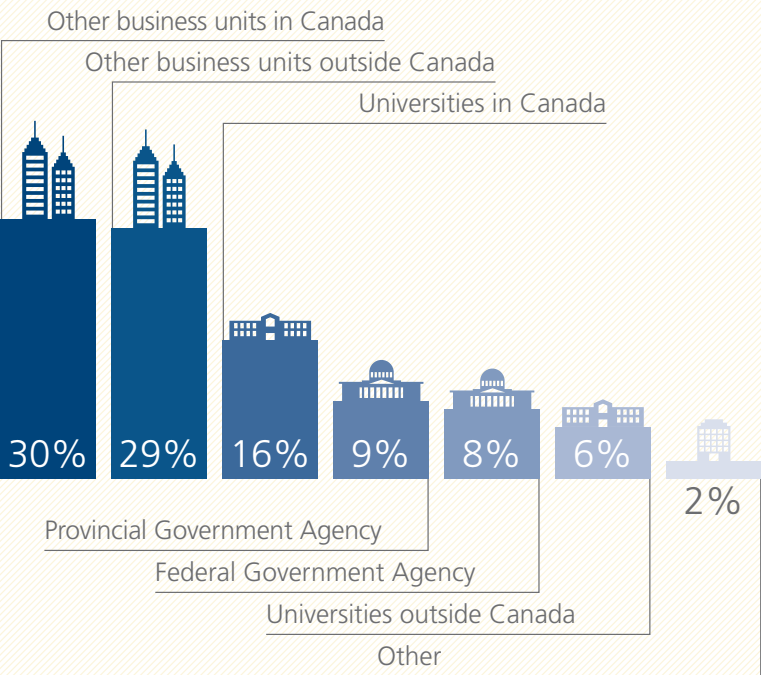
NHPFF businesses invest 2.8% of revenues back into R&D, compared to 9.75% for the pharmaceutical industry.

R&D Spending (rounded to the nearest million)



PARTNERING AND CONTRACTING**

59% of NHPFF partnerships are with internal business units, 22% with universities, and 17% with government agencies



Brought to you by the National Research Council of Canada[†] (NRC), a federal research and technology organization with scientific and technical expertise and co-development opportunities. Committed to addressing consumer concerns through science to increase the safety and effectiveness of NHPs.

Sources
* Ipsos Reid - Natural Health Product Tracking Survey – 2010
<http://epe.lac-bac.gc.ca/100/200/301/pwgs-c-tpsgc/por-ef/health/2011/135-09/report.pdf>
** Statistics Canada - Functional Foods and Natural Health Products Survey – 2011
<http://www5.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=18-001-X2013001&lang=eng>
[†] NRC - http://www.nrc-cnrc.gc.ca/eng/solutions/collaborative/nhp_index.html