



The Functional Foods and Nutraceuticals Survey - 2005

Collected under the author-
ity of the Statistics Act, Revised
Statutes of Canada, 1985,
Chapter S19. Si vous préférez
ce questionnaire en français,
veuillez cocher et retourner ce
questionnaire



The purpose of the survey

Statistics Canada is conducting this survey on behalf of Agriculture and Agri-Food Canada. The objective of the survey is to produce new statistical information on the functional foods and nutraceuticals sector and a profile of firms engaged in activities related to functional foods/nutraceuticals 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

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 the *Statistics Act*.

The data you report are confidential

Statistics Canada is prohibited by law from publishing or releasing statistics that could reveal information obtained from this survey relating to an identifiable individual business or person. The data reported on the questionnaire will be treated in strict confidence, used for statistical purposes and released in aggregated form only. The confidentiality provisions of the Statistics Act are not affected by either the Access to Information Act or any other legislation.

Who should complete this questionnaire?

A senior manager such as a product or research and development manager or someone familiar with the functional food or nutraceutical activities of your company should complete this questionnaire. Please complete the questionnaire on behalf of all functional

food and nutraceutical activities at your firm. **Please return the completed survey in the self addressed prepaid envelope, within 15 days of receipt.**

If you have any questions or require assistance, please contact

Statistics Canada
Small Business and Special Surveys Division
Survey Support Unit
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Ottawa, Ontario K1A 0T6
Telephone: 1-866-888-0379
Fax: 1-866-222-6023
E-mail: sbss-info@statcan.ca

Please complete the following information

Name of Respondent:																												
Title of Respondent:																												
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E-mail:																												
Web address:																												

Please correct pre-printed information, if necessary using the corresponding boxes:

002	Business Name	004	Number and street		
005	City	006	Province or State	007	Postal Code

Health Canada Definitions of Functional Foods and Nutraceuticals

Functional foods are similar in appearance to, or may be, a conventional food, consumed as part of a usual diet, and are demonstrated to have physiological benefits and/or reduce the risk of chronic disease beyond basic nutritional functions.

Nutraceuticals are a subset of natural health products subject to the Natural Health Products Regulations *, that are isolated or purified from foods, sold as pills, powders or other medicinal forms not usually associated with foods, and that are demonstrated to have physiological benefits or provide protection against chronic disease beyond basic nutritional functions.

*Nutraceuticals are now under the Natural Health Products Regulations, which came into effect on January 1, 2004.

Participation in Functional Food and/or Nutraceutical Activities

1. For which of the following functional food and/or nutraceutical type(s) does your firm engage in activity?

Please check all that apply

Fortified foods and beverages beyond the mandatory requirement to enrich certain foods with vitamins and minerals for the purpose of providing added health benefits. (ex. soy beverages, orange juice with calcium, etc.) 1

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 (ex. muffins with beta-glucan, drinks with herb blends, foods with added soluble fibre, yogurts with probiotics etc). 2

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 (ex. tomato with enhanced lycopene level, canola high in carotenoids, strawberries containing increased levels of ellagic acid, omega-3 eggs, etc.) 3

Nutraceuticals that are extracted or purified from plants (ex. 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) 4

Nutraceuticals that are ground, dried, powdered and pressed from plant materials (ex. Echinacea, fenugreek, valerian, black cohosh, and ginseng) 5

Nutraceuticals that are produced, extracted or purified from animals and microorganisms (ex. elk velvet, essential fatty acids (EFAs), enzymes, carotenoids, probiotics, etc) 6

Nutraceuticals that are produced, extracted or purified from marine sources (ex. glucosamine, chitosan, products from algae, seaweed, kelp, fish oils, etc.) 7

Nutraceuticals comprised solely of vitamins and minerals (sold in dosage form) 8

Other, please specify: 9

None of the above: If you are not involved in any functional food or nutraceutical activities please return the questionnaire in the envelope provided Thank you. 10

Firm Characteristics and Financial Profile

2. How does your firm participate in the functional food and/or nutraceutical industry? Please check all that apply.

	Functional Foods	Nutraceuticals
a) Scientific research & development (R & D)	1 <input type="radio"/>	2 <input type="radio"/>
b) Product development/scale up of new products	1 <input type="radio"/>	2 <input type="radio"/>
c) Manufacturer of ingredients	1 <input type="radio"/>	2 <input type="radio"/>
d) Manufacturer of consumer ready products	1 <input type="radio"/>	2 <input type="radio"/>
e) Wholesaler of products	1 <input type="radio"/>	2 <input type="radio"/>
f) Retailer of products	1 <input type="radio"/>	2 <input type="radio"/>
g) Provide services only (equipment, clinical testing, software, regulatory affairs, etc.) for the industry	1 <input type="radio"/>	2 <input type="radio"/>
h) Provide technology pertaining to the production of functional foods/nutraceuticals	1 <input type="radio"/>	2 <input type="radio"/>
i) Other, please specify: <input type="text"/>	1 <input type="radio"/>	2 <input type="radio"/>

3. What is the ownership structure of this firm? Please check all that apply.

Multi-national	1 <input type="radio"/>
Private corporation	2 <input type="radio"/>
Public corporation	3 <input type="radio"/>
Sole proprietorship	4 <input type="radio"/>
Unincorporated partnership	5 <input type="radio"/>
Other, please specify : <input type="text"/>	6 <input type="radio"/>

4. What is the majority firm ownership of this business?

Canadian	1 <input type="radio"/>
Foreign owned	2 <input type="radio"/>
Crown corporation	3 <input type="radio"/>

5. What types of distribution channels do you use for your functional food and/or nutraceutical products? Please check all that apply.

Direct selling to final consumer	1 <input type="radio"/>
Internet sales	2 <input type="radio"/>
Retailer	3 <input type="radio"/>
Wholesaler	4 <input type="radio"/>
Mail order	5 <input type="radio"/>
Multi-level marketing/Network marketing	6 <input type="radio"/>
Broker/3rd party distributor	7 <input type="radio"/>
Direct selling to other companies	8 <input type="radio"/>
Other, please specify <input type="text"/>	9 <input type="radio"/>

6. Does your firm export functional food or nutraceutical products?

Yes 1 No 2 ► Go to question 10.

7. Which of the following products or services does your firm provide?

Please check all that apply.

	Foreign	Domestic
Raw material/ingredients to be used in functional foods/nutraceuticals	1 <input type="radio"/>	1 <input type="radio"/>
Semi-finished functional foods/nutraceuticals to be further processed before sale.	2 <input type="radio"/>	2 <input type="radio"/>
Finished functional foods/nutraceuticals to be sold at wholesale or retail level without further processing (consumer ready products).....	3 <input type="radio"/>	3 <input type="radio"/>
Technology pertaining to the production of functional foods/nutraceuticals	4 <input type="radio"/>	4 <input type="radio"/>
Scientific research & development (R&D)	5 <input type="radio"/>	5 <input type="radio"/>
Equipment, clinical testing, software, regulatory affairs, etc for the functional food and nutraceutical industry	6 <input type="radio"/>	6 <input type="radio"/>
Other, please specify: <input style="width: 450px;" type="text"/>	7 <input type="radio"/>	7 <input type="radio"/>

8. What specific country(s) did your firm export functional food and/or nutraceutical products or services to in 2004?

United States 1 Japan 3
 Korea 2 Other, please specify... 4

9. What new countries are you actively investigating to export your functional food/nutraceutical products or services to within the next 2 years?

United States 1 Japan 3
 Korea 2 Other, please specify... 4

Raising Capital

10. Did your firm attempt to raise capital specifically for functional food and/or nutraceutical related purposes in 2004 ?

Yes 1 No 2 ► Go to question 18

11. Why did you raise or attempt to raise capital for functional food and/or nutraceuticals?

Please check all that apply.

- Scientific research & development (R&D) purposes 1
- Develop or expand production and manufacturing capability 2
- Commercialize current R&D projects 3
- Clinical/regulatory expenses 4
- To expand in existing or enter into new markets 5
- Repay current investors 6
- Other, please specify: 7

12. Were you successful in raising any capital?

- Yes 1 No 2 ► *Go to question 16.*

13. How much capital was raised?

\$

14. Did you reach your target?

- Yes 1 No 2 ► *What percentage did you reach?* %

15. Please indicate which of the following sources contributed to your capital raised.
Please check all that apply.

- Canadian based venture capital 1
- American based venture capital 2
- Other foreign based venture capital 3
- Conventional sources (i.e. banks, IPO) 4
- Angel investors/family 5
- Government sources 6
- Partner(s) from strategic alliances 7
- Other, please specify: 8

16. Was your firm limited or refused any request(s) for funds from any source when raising capital?

Yes 1 No 2 ► Go to question 18.

17. What reason(s) did the lender(s) give in limiting or refusing your request for capital? Please check all that apply.

- Functional food/nutraceutical products/processes not sufficiently developed 1
- Functional food/nutraceutical product line or portfolio limited in scope 2
- Insufficient specific management skills/expertise 3
- Capital not available due to market conditions 4
- Further product development or proof of concept required 5
- Lender does not fund development projects 6
- Lack of intellectual property 7
- Lack of long term strategic planning 8
- Lack of marketing analysis 9
- Failed to meet lending criteria 10
- Lack of evidence to support projections 11
- Other, please specify: 12

Functional Food and Nutraceutical Products

18. In 2004, what was the primary source of origin for the functional food and/or nutraceutical ingredient(s) in your product(s)? (If it is known that products are exported from and re-imported to Canada, please indicate product as Canadian origin, otherwise please indicate foreign origin.)

- | | Canadian origin | Foreign origin |
|--|-------------------------|-------------------------|
| a) Dairy products..... | 1 <input type="radio"/> | 2 <input type="radio"/> |
| b) Oil seeds..... | 1 <input type="radio"/> | 2 <input type="radio"/> |
| c) Meat and poultry, or other animal products | 1 <input type="radio"/> | 2 <input type="radio"/> |
| d) Seafood or other marine species | 1 <input type="radio"/> | 2 <input type="radio"/> |
| e) Grains and cereals | 1 <input type="radio"/> | 2 <input type="radio"/> |
| f) Pulses/Legumes | 1 <input type="radio"/> | 2 <input type="radio"/> |
| g) Fruits | 1 <input type="radio"/> | 2 <input type="radio"/> |
| h) Vegetables | 1 <input type="radio"/> | 2 <input type="radio"/> |
| i) Herbs and/or spices | 1 <input type="radio"/> | 2 <input type="radio"/> |
| j) Other, please specify: <input style="width: 300px; height: 15px;" type="text"/> | 1 <input type="radio"/> | 2 <input type="radio"/> |

19. In the table below, please indicate whether your firm has any functional food and /or nutraceutical products currently in development and/or on the market for sale by the disease state or health aspect.

Note : *Indicate what your product targets are or what your firm would target if it were possible to make such claims in Canada. If any of your products target multiple areas, please check all that apply.*

Disease State or Health Aspect Targeted by Functional Food and/or Nutraceutical	Functional Foods in development	Functional Foods on the market	Nutraceuticals in development	Nutraceuticals on the market
a) Vascular/Heart Health	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
b) Diabetes	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
c) Cancer	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
d) Energy	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
e) Mental Ability	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
f) Gut Health	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
g) Immune System	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
h) Sports Performance / Endurance	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
i) Bone Health	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
j) Eye Health	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
k) Weight Control	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
l) Sexual Performance	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
m) General Nutrition	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
n) Other, specify here below: <div style="border: 1px solid black; height: 20px; width: 100%; margin-top: 5px;"></div>	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>

20. In total, how many functional food/nutraceutical related product lines does your firm currently have on the market?

21. In total, how many of your functional food or nutraceutical product lines are sold only in Canada and not exported?

22. In total, how many of your functional food or nutraceutical product lines are only for export and not sold in Canada?

23. In 2004, which functional food or nutraceutical product area generated the most revenue for your firm?

Please check one only.

- Vascular/Heart Health 1
- Diabetes 2
- Cancer 3
- Energy 4
- Mental Ability 5
- Gut Health 6
- Immune System 7
- Sports Performance / Endurance 8
- Bone Health 9
- Eye Health 10
- Weight Control 11
- Sexual Performance 12
- General Nutrition 13
- Other, please specify: 14

Business Practices

Partnerships involve the active participation in projects between your company and other companies or organizations. These projects involve the development, production or distribution of functional food/nutraceutical products or technology surrounding them. Pure contracting-out work where money is paid for a service is not regarded as a partnership

24. Is your firm involved in functional food and/or nutraceutical related partnership arrangements with other companies or organizations?

- Yes 1 No 2 ► *Go to question 27.*

25. What is/are the purpose(s) of your partnership arrangement(s)?

- To conduct scientific research and development (R&D) 1
- Regulatory affairs 2
- Access others' patents 3
- Production/manufacturing 4
- Access markets/distribution channels 5
- Access capital 6
- Access to intellectual property of partner 7
- Other, please specify: 8

26. Which of the following is/are your partnership(s) with?
Please check all that apply.

- Canadian based company(s)/organization(s) 1
- American based company(s)/organization(s) 2
- Other foreign based company(s)/organization(s) 3

27. Is your firm currently seeking to form new partnership arrangements?

- Yes 1 No 2

28. Did your firm contract out functional food and/or nutraceutical related activities in 2004?

- Yes 1 No 2 ► Go to question 30.

29. For what purpose(s) did you contract out?
Please check all that apply.

- Scientific Research & Development 1
- Technical/Engineering 2
- Regulatory 3
- Intellectual Property 4
- Manufacturing/Production 5
- Sales/Marketing/Advertising 6
- Clinical Affairs 7
- Market Research 8
- Quality Control 9
- Management/ Finance 10
- Business Development 11
- Other, please specify: 12

Human Resources

30. How many employees (include permanent and seasonal/casual/contract) did your firm employ in 2004?

Please report highest employment level for 2004.

31. How many of your employees (include permanent and seasonal/casual/contract), devoted all or any portion of their time to activities related to functional foods/ nutraceuticals or tasks associated (such as administrative or secretarial) with the running of the functional food or nutraceutical portion of this business in 2004?

32. Does your firm currently have unfilled functional food and/or nutraceutical-related positions?

- Yes 1 No 2 ► Go to question 35.

33. For those unfulfilled positions what type of competencies are needed?
Please check all that apply.

- Scientific Research & Development 1
- Technical/Engineering 2
- Regulatory 3
- Intellectual Property 4
- Manufacturing/Production 5
- Sales/Marketing/Advertising 6
- Clinical Affairs 7
- Market Research 8
- Quality Control 9
- Management/ Finance 10
- Business Development 11
- Other, please specify: 12

34. Which of the following obstacles have impacted your efforts to fill your functional food or nutraceutical positions?
Please check all that apply.

- Compensation requirements by candidates too high 1
- Candidates unwilling to relocate 2
- Candidates lack of expertise 3
- Capital/resources insufficient to attract candidates 4
- Competition for qualified candidates 5
- Other, please specify: 6

35. How many new functional food and/or nutraceutical employees did you hire in 2004?

36. Did you hire any functional food and/or nutraceutical staff from outside Canada in 2004?

Yes 1 No 2 ► *Go to question 38.*

37. How many functional food and/or nutraceutical staff did you hire from outside Canada in 2004?

Impact of Regulations

38. How does the ability to use the allowable health claims* on functional foods impact the following areas of your business?

Please circle your response.

	Very Negative	Somewhat Negative	No Impact	Somewhat Positive	Very Positive	Don't Know
a) Domestic Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
b) Export Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
c) Conducting research to support health claims on existing products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
d) Competing with global competitors	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
e) Commercializing new products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
f) Developing new products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>

** In 2003, Health Canada authorized the use of five generic health claims which pertain to: sodium, potassium and hypertension; calcium, vitamin D and osteoporosis; saturated fat, trans fat and cholesterol and coronary heart disease; fruits and vegetables and some types of cancers; and sugar alcohols and dental caries. The framework for the authorization of health claims for foods in Canada distinguishes between generic claims and product-specific claims. Generic health claims can be nutrition function claims or "disease risk-reduction" claims on a general food type or nutrient.*

39. How does the ability to make claims on nutraceuticals under the Natural Health Products regulations impact the following areas of your business?

Please circle your response.

	Very Negative	Somewhat Negative	No Impact	Somewhat Positive	Very Positive	Don't Know
a) Domestic Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
b) Export Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
c) Conducting research to support health claims on existing products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
d) Competing with global competitors	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
e) Commercializing new products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
f) Developing new products	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>

40. How do novel food regulations for functional foods impact the following areas of your business?

Please circle your response.

	Very Negative	Somewhat Negative	No Impact	Somewhat Positive	Very Positive	Don't Know
a) Domestic Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
b) Export Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
c) Conducting research to support health claims on existing products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
d) Competing with global competitors	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
e) Commercializing new products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
f) Developing new products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>

41. In the future, how *would* the ability to use product specific claims* impact the following areas of your business?

Please circle your response.

	Very Negative	Somewhat Negative	No Impact	Somewhat Positive	Very Positive	Don't Know
a) Domestic Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
b) Export Sales	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
c) Conducting research to support health claims on existing products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
d) Competing with global competitors	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
e) Commercializing new products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>
f) Developing new products.	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>

*** Product-specific claims are associated with a specific food which has demonstrated a measurable health benefit beyond normal body function, growth, development or maintenance of good health. This type of claim relates to a health effect of a specific product rather than a general food type or nutrient.**

Intellectual Property

42. Did your firm grant any functional food and/or nutraceutical licensing agreement(s) in 2004?

Yes 1 No 2 ► *Go to question 44.*

43. How much revenue did your intellectual property (IP) licensing agreement(s) related to functional foods/nutraceuticals generate in 2004?

\$

44. Did your firm develop trade secrets in 2004?

Yes 1 Non 2

45. Did your firm register any trademarks in 2004?

Yes ¹ No ²

46. Does your firm have patents or pending patents activities related to functional foods/nutraceuticals?

Yes ¹ No ² ► *Go to question 48.*

47. Please indicate the distribution of functional food and/ or nutraceutical related patents and pending patents your firm has by Patent Office.

	Canadian Intellectual Property Office (CIPO)	US Patent & Trademark Office (USPTO)	European Patent Office	Other
a) Number of Existing Patents	1 <input type="text"/>	2 <input type="text"/>	3 <input type="text"/>	4 <input type="text"/>
b) Number of Pending Patents	1 <input type="text"/>	2 <input type="text"/>	3 <input type="text"/>	4 <input type="text"/>

48. Has your firm obtained intellectual property rights related to functional foods/nutraceuticals from another firm?

Yes ¹ No ²

Revenue and Scientific Research and Development Spending

49. Please indicate your total revenue, export revenues and Scientific R&D expenditures on the table below. If information is not available, please provide a carefully considered estimate. Report for fiscal years ending 2004 and forecast for 2005. If '0' (zero) please indicate '0', do not leave blanks.

	2004	Forecast for 2005
Sales/Revenues		
a) Total firm sales/revenues (all sources)	¹ \$ <input type="text"/>	² \$ <input type="text"/>
b) Sales/revenues from functional foods/nutraceuticals	¹ \$ <input type="text"/>	² \$ <input type="text"/>
Export revenues		
a) Total firm export revenues (all sources)	¹ \$ <input type="text"/>	² \$ <input type="text"/>
b) Export revenues from functional foods/nutraceuticals	¹ \$ <input type="text"/>	² \$ <input type="text"/>
Scientific R & D Spending		
a) Total R&D spending	¹ \$ <input type="text"/>	² \$ <input type="text"/>
b) Total spending on functional foods/nutraceuticals R&D	¹ \$ <input type="text"/>	² \$ <input type="text"/>

