



Nutri-Net CANADA

Accelerating the Growth of the Canadian Functional Food and Natural Health Products Sector

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Funding for Nutri-Net Canada has been provided in part by Agriculture and Agri-Food Canada under the Agricultural Policy Framework, an agreement among federal, provincial and territorial governments to make Canada's agricultural sector a world leader in science and innovation.



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Nutri-Net Canada



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Nutri-Net Canada



- Alliance of national and regional organizations
- Includes national not-for-profit industry associations, researchers, government-funded agencies and provincial government departments
- Accelerate the growth and development of the Canadian Functional Food and Natural Health Products Industry (domestically and internationally)



Origins



- December 2005 Workshop, Winnipeg
- Funded by AAFC, Wellness West, BCFN
- Identification and consensus on issues and opportunities
- To define a proposal leading to the development of a Strategic Plan for the FFNHP Industry in Canada



Opportunities



- Functional foods and NHPs are demonstrated to contribute to good nutrition and health
- Significant opportunity exists for reduction of healthcare costs through informed choice and use of FFNHPs
- Canada's FFNHP Industry is under-developed relative to those of other developed countries
- Opportunities for economic growth are obvious



Challenges



- Lack of over-arching coordination, strong leadership & a clear strategy in Canada
- Consumers and health care professionals are under informed about diet-health relationships and potential of FFNHP to contribute to health
- Lack of clearly defined regulations, policies and pathways for functional foods in Canada



Challenges



- Need for transparent interpretation and uniform implementation of Natural Health Products Regulations
- Need for predictable and timely market access
- Absence of validated methods
- Lack of laboratory capacity



Challenges



- FFNHP SMEs require assistance with:
 - ❑ Research
 - ❑ Product development and commercialization
 - ❑ Path-finding
 - ❑ Identifying and accessing scale-up facilities
 - ❑ Protection/ownership of IP
 - ❑ Market information
 - ❑ Networking, and strategic alliances



Need for a Collaborative Approach



- Industry organizations individually lack the resources to address these issues
- Challenges are better addressed using a planned, inclusive, collaborative approach across all regions of Canada
- Collectively, industry organizations are able to leverage resources to accomplish tasks that would not be possible otherwise



Outcome



- Formation of Nutri-Net Canada Steering Committee to assist in developing a funding application
- Committee maximizes regional, national & organizational representation
- Canadian Health Food Association to chair the Committee



Steering Committee Members



- (Advanced Food & Materials Network)
- (Ag-West Bio Inc.)
- AVAC Ltd.
- (BioAtlantech)
- Canadian Health Food Association
- Canadian Herb, Spice and Natural Health Product Coalition
- Centre Québécois de Valorisation des Biotechnologies (Nutra-Innovation Network)
- MaRS Landing
- Natural Health Product Research Society of Canada
- Wellness West
- Western Canadian Functional Food and Natural Health Product Network



Funding



- Proposal submitted to AAFC's Agricultural Policy Framework (APF) in May, 2006
- Ministerial announcement June 2007
- Agreement is with AAFC & CHFA on behalf of the Steering Committee
- Close to \$2 million in funding & in kind contributions
- APF Science and Innovation Broker Program funding for 12 months, extended now until March 31, 2009



Development & Implementation of the Strategic Plan

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Work Plan

2007/08



- Core objective was to develop a strategic plan for the sector
- Projects and activities in 2007/2008 were largely designed to provide input into the strategic plan
- Opportunity to engage stakeholders
- Some outputs were used as inputs to public policy and regulatory modernization



Projects and Activities 2007/08



- 8 Regional & Sector Strategy Workshops
 - Eastern Canadian FFNHP Industry Strategy Workshop (January 2008)
 - Western Canadian FFNHP Industry Strategy Workshop (December 2007)
 - Central Canadian FFNHP Industry Strategy Workshop (September 2007)
 - Nutri-Net Canada Stakeholder Workshop (September 2007)

- Nutri-Net Canada / Health Canada Food Health Claims Symposium (November 2007)

- Canadian FFNHP market analysis



Projects and Activities 2007/08



- International FFNHP market analysis
- Compendium of funding assistance resources
- Comparative analysis of Canada's regulatory requirements for health claims intended for foods – **“A Comparison of International Regulations”**
- 2 case studies of health claims for foods



Projects and Activities 2007/08



- Canadian NHP Product Quality Initiative
- National Nutri-Net Canada Forum Conference, Quebec City (February 2008)
- Nutri-Net web site www.nutrinetcanada-nnc.ca



Projects and Activities 2007/08



- Completion of a sector strategy –

***“Working Together for a Healthy Canada:
A Strategy for the Canadian Functional
Foods and Natural Health Products Sector”***



Outcomes



- Industry requires both leadership and a mechanism to accelerate investment and growth
- FFNHP industry needs to act with **ONE VOICE**
- Need to strengthen the industry's position through legislative authority (policies and regulations)
- Support investment and commercialization
- Expedite the facilitation of research and development for the industry



The Vision



- *“The Canadian Functional Foods & Natural Health Products (FFNHP) industry will be globally competitive and at the heart of a healthy Canada.”*



The Mission



- *Be at the forefront of FFNHP innovation*
- *Achieve sustainable growth and profitability through domestic and international collaboration and market development*
- *Create safe and effective products that sustain and promote the health and wellness of Canadians*



Figure 1: Working Together for a Healthy Canada



Role of Nutri-Net Canada



- Promote collaboration
- Leadership
- Build consensus
- Communicate clear recommendations
- Avoid duplication of efforts
- Develop new resources & channels

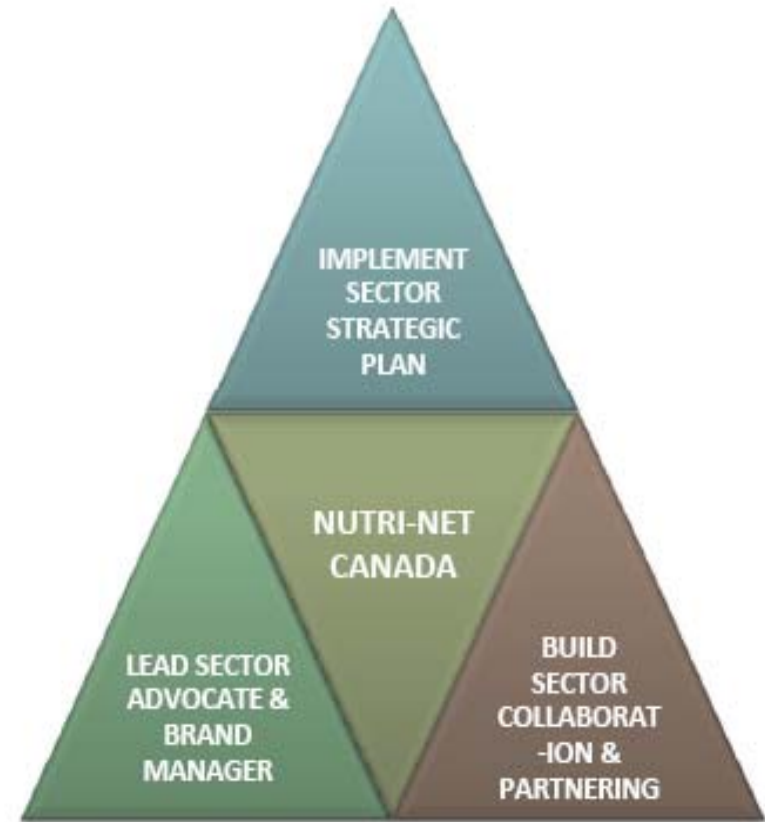


Figure 6: The Role of Nutri-Net Canada in the FFNHP Sector



Strategic Themes

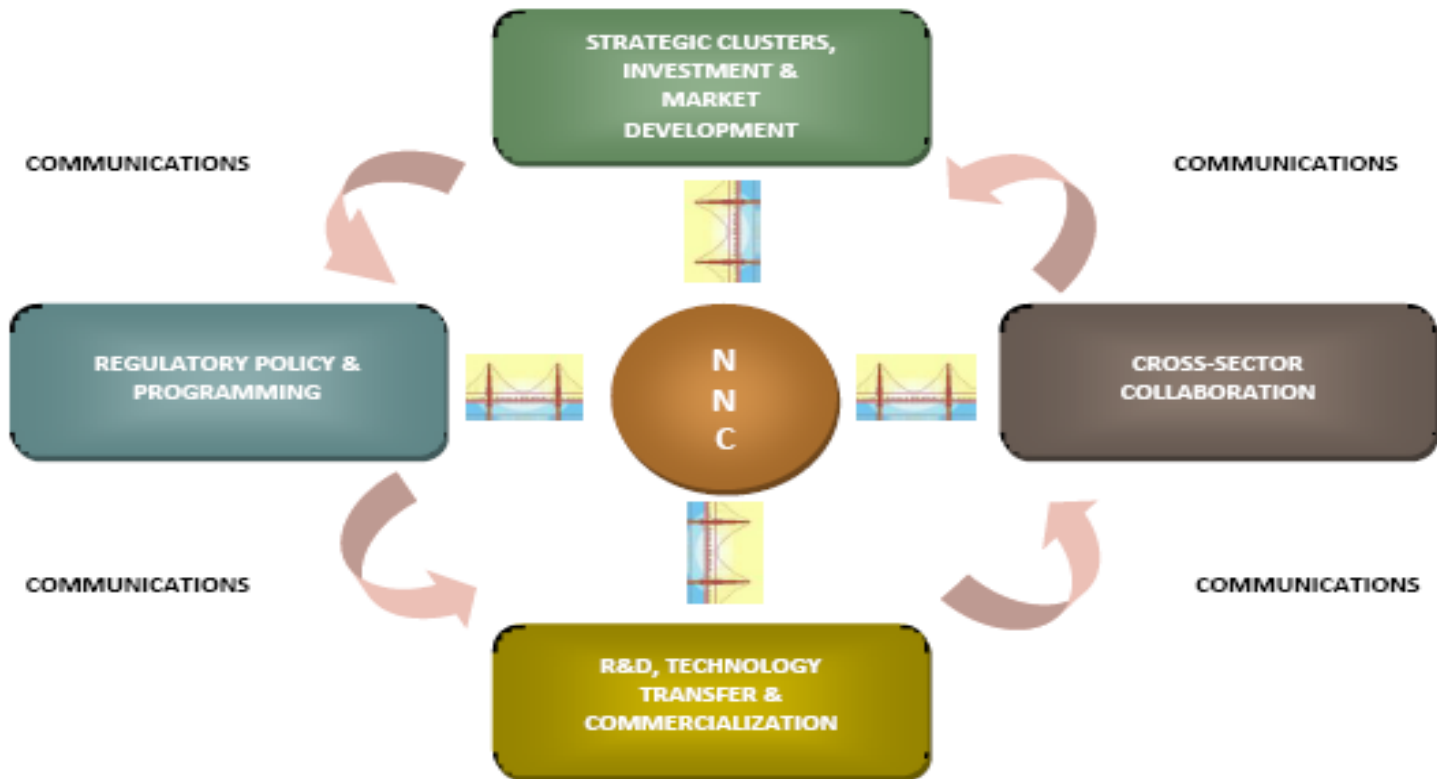


Figure 7: Canadian FFNHP Sector Strategy Themes and Linkages

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Objectives: R&D, Tech Transfer, Commercialization



- Improve industry and researcher understanding of regulatory requirements and pathways
- Improve access to basic safety and efficacy data required for pre-market evaluation
- Enhance industry understanding of available research and development resources - researchers, facilities
- Improve researcher understanding of market requirements



R&D, Tech Transfer, Commercialization



Core Program: **Canadian FFNHP Quality Program**

■ **Short-Term:**

- ❑ Develop and maintain an inventory of current FFNHP research projects and infrastructure
- ❑ Extend *NNC Product Quality Program* (analytical methods for validation and laboratory proficiency testing)
- ❑ Build on *NNC Funding and Incentives Database* (research incentives and support programs)



Objectives: Strategic Clusters, Investment & Market Development



- Identify international market opportunities for Canadian resources and FFNHP products
- Develop mechanisms/processes that build market development partnerships and alliances
- Provide funding for short term projects - specific market research activities, business case development



Strategic Clusters, Investment Attraction and Market Development



Core Program: **National Asset Map and Inventory of the Canadian FFNHP Sector**

■ **Short-Term**

- Initiate the development of a *National Asset Map* by building upon existing work

■ **Medium-Term**

- Identify national and regional areas of unique expertise, research and technology
- Track sales to provide information on market size and trends – develop a *Canadian FFNHP Market Intelligence System*
- Raise global awareness about Canadian FFNHP sector



Objectives: Regulatory Policy & Programming



- Clarify and establish appropriate pre-market evaluation information requirements for FFNHPs
- Provide readily accessible guidance to researchers and industry on meeting information requirements
- Make financial & human resources available to support development of submissions and pre-market approval process



Regulatory Policy & Programming



Core Programs: **Regulatory Roadmap** **Regulatory Assistance Program**

- **Short-Term**
 - Using studies and reports, develop a portfolio of regulatory guidance and communication tools
 - Take part in FFNHP stakeholder legislative and regulatory reviews

- **Medium-Term**
 - Develop and promote a **Regulatory Assistance Program** (provide financial support and consulting)
 - Develop product ingredient and product monographs (accelerate market entry of new products)

- **Long-Term**
 - Influence modernization of Canada's regulatory infrastructure



Objectives: Cross Sector Collaboration



- Sustained networking and information dissemination
- Identify collaborator strengths and facilitate success of those with capacity to lead initiatives
- Constructive engagement in advocacy for public policy, public funding and regulation that are supportive of the FFNHP sector



Cross-Sector Collaboration



Core Program: **Canadian FFNHP Information Portal**

■ **Short-Term**

- Design, develop, maintain and market a web-based search portal

■ **Medium-Term**

- Address the need for business-aware graduates and skilled labour force through the development of curricula with educational institutions
- Support linkages with medical community, health agencies and related NGOs

■ **Long-Term**

- Establish relationships with FPT departments and agencies (funding and tax relief)



Objectives: Communications



- Provide stakeholders with relevant and credible information
- Influence consumer food choices, particularly those of parents and children
- Influence food choices of institutions - schools, hospitals, care facilities



Communications



■ Short-Term

- ❑ Communicate the **Strategic Plan** to stakeholders
- ❑ Seek endorsement, support and commitment to implementation
- ❑ Raise sector awareness with partner organizations

■ Medium-Term

- ❑ Develop and distribute communication briefings
- ❑ Bring investment, research and industry communities together on regular basis

■ Long-Term

- ❑ Establish NNC as a source of timely and reliable information for the FFNHP sector



Current Nutri-Net Canada Initiatives



- Regulatory Road Map
 - Regulatory Information Portal
 - Guidance Document Initiative
- National Assets Map
- Communications Plan
- National Product Quality Initiative
- Annual Meeting, February 10, 2009





Thank You



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