

Select Examples of Market Assessment and Evaluation Studies

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Market assessment and evaluation is a discipline integral to business development, designed to deliver answers in support of informed analyses and decisions. The instrument also lends itself to the legal and judicial sectors, as acknowledged by the Competition Bureau of Canada and the Langdon Hall Competition Law and Policy Forum. The cross-section of examples provided herein, illustrates the diversity of the practice, and the value gained from its skilled implementation.

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Client	Project Description	Outcome
<p>Agriculture and Agri-Food Canada (sub-contracted by MRSB Consulting Group, PEI)</p>	<p><u>Deliverable:</u> Determine the market potential, in Canada, of granules prepared from a new variety of potato with significant anti-oxidant content. <u>Phase:</u> Pre-commercialization <u>Geographical Scope:</u> Canada <u>Regulatory:</u> Described the regulations governing anti-oxidant claims and outlined the procedures for ensuring compliance of the potatoes with the regulatory requirements. <u>Bonus Value Added:</u> Identified additional/alternative market opportunities for the granules, apart from the potatoes' antioxidant content.</p>	<p>Report currently being reviewed by Agriculture and Agri-Food Canada personnel and pertinent stakeholders in the potato producer sector.</p>
<p>Ontario-based Producer Association</p>	<p><u>Deliverable:</u> Determined the market volume and dollar value of Vitamin D in Canada, as both a food fortificant and a nutritional supplement. <u>Phase:</u> Pre-commercialization <u>Geographical Scope:</u> Canada <u>Regulatory:</u> Specified all foods to which Vitamin D may be and must be added. <u>Bonus Value Added:</u> Identified new market opportunities for Vitamin D₂ as a food fortificant.</p>	<p>Commercialization has begun.</p>
<p>Atlantic-Canada based Research Network</p>	<p><u>Deliverable:</u> Determined Canadian consumer reaction to, intention to buy, acceptable price points and elements of resistance to coloured flesh potatoes; determined consumer recognition and understanding of claims such as polyphenolics, antioxidants and low-glycemic index. <u>Phase:</u> Pre-commercialization <u>Geographical Scope:</u> Canada <u>Regulatory:</u> Identified all anti-oxidant type claims permissible in Canada and compositional requirements thereof. <u>Bonus Value Added:</u> Recommended several detailed regulatory strategies in support of the desired anti-oxidant claims.</p>	<p>Research ongoing into organoleptic and compositional aspects of these new potatoes.</p>
<p>Infant Formula Developer</p>	<p><u>Deliverable:</u> Determined market volume and dollar value of the North American infant formula market and the market potential for this intervention. <u>Phase:</u> Pre-commercialization <u>Geographical Scope:</u> Canada and the USA <u>Regulatory:</u> Infant formula is the most strictly regulated processed food, in all jurisdictions. Detailed the pre-market safety information requirements for regulators in both jurisdictions (Health Canada and the FDA); efficacy information requirements with respect to product claims; impact of other legislation such as US Bioterrorism Act, NAFTA, tariff rates and regulations regarding exportation and importation of infant formula. <u>Bonus Value Added:</u> Recommended several service providers with the required expertise to bring this product to market including a certified co-packer, a clinical trial Principal Investigator and certified laboratory.</p>	<p>Commercialization has begun.</p>

Client	Project Description	Outcome
Private Investor	<p>Deliverable: Determined the market potential in terms of volume and dollar value of a bioactive, previously approved as a novel food by Health Canada. Identified target market segments; prevalence of diseases, syndromes and conditions which could be treated with this bioactive; identified most conducive food carriers.</p> <p>Phase: Pre-commercialization</p> <p>Geographical Scope: Canada and the USA</p> <p>Regulatory: Identified all potential regulatory categories: USA: (orphan drug, dietary supplement, medical food, food with/without health claim) and GRAS; Canada: (drug, medical food, food with/without health claim), and pre-market information requirements.</p> <p>Bonus Value Added: Directed the client towards the claims and market positioning which could fulfill regulatory requirements and be supported by clinical research results.</p>	Investor assessed Return on Investment.
Toronto-based Internationally-acclaimed Research Hospital	<p>Deliverable: Determined the market potential in terms of volume and dollar value of a patented, clinically-validated innovation designed to permit the safe and prosperous growth of Very-low Birth Weight (VLBW) infants on an out-patient basis.</p> <p>Phase: Pre-commercialization</p> <p>Geographical Scope: Canada, USA and six EU Member States</p> <p>Regulatory: Described the pertinent regulatory pre-market safety and efficacy information requirements for this product in each of the eight jurisdictions. Identified drug reimbursement regimes (eligible due to product being sole source of nutrition for these infants) in each jurisdiction, a factor which would significantly impact market potential.</p> <p>Bonus Value Added: Identified the key market characteristic which, other than drug reimbursement, will act as the dominant market driver for this product.</p>	Commercialization has begun.
Agriculture and Agri-Food Canada - Food Regulations Issues Division (subcontracted by JRG Consulting Group)	<p>Deliverable: Determined "The Nature and Magnitude of Economic, Business and Market Value Activity Generated by Health Claims along the Agriculture and Agri-Food Value Chain"</p> <p>Phase: Commercialized</p> <p>Geographical Scope: Canada and the USA</p> <p>Regulatory: Identified pertinent regulatory instruments; detailed the compositional requirements; described the necessary characteristics and quality of the primary inputs (agricultural crops, marine products) required to support each of these claims.</p> <p>Bonus Value Added: Worked as one of a team of three experts, who identified the value generated by health claims along the agri-food chain, and, developed a business case for health claims on food.</p>	Report posted on the AAFC website.

Client	Project Description	Outcome
Canadian Agricultural Policy Institute (CAPI)	<p><u>Deliverable:</u> Conducted a "Regulatory Impact Assessment of Farm Income in the Canadian Horticultural Sector"</p> <p><u>Phase:</u> Commercialized</p> <p><u>Geographical Scope:</u> Canada</p> <p><u>Regulatory:</u> Primary research identified pesticide regulations as having a negative effect on producer income. Researched pertinent legislation including FD A, NAFTA, CA PA and others.</p> <p><u>Bonus Value Added:</u> Identified high foreign component of Canada's fresh fruit and vegetable market (70% imported content). The primary research cited <i>Foodland Ontario</i>® as a government intervention program which generates revenue for the horticulture sector in Ontario.</p>	<p>Report selected to be presented to a meeting of CAPI stakeholders</p>
Atlantic Canada Opportunities Agency (ACOA)	<p><u>Deliverable:</u> Identified the market potential, in Canada and in the Northeastern United States, for a mayonnaise-based frozen lobster salad which can be reconstituted without loss of cell turgor .</p> <p><u>Phase:</u> Pre-commercialization</p> <p><u>Geographical Scope:</u> Canada and the Northeastern USA</p> <p><u>Regulatory:</u> Assurance that the active ingredient which maintains the cell turgor had received FDA and Health Canada approval.</p> <p><u>Bonus Value Added:</u> Identified a multi-national foodservice chain interested in listing the product on a temporary promotional basis during the busy east-coast tourist season.</p>	<p>Product was commercialized.</p>
Girl Guides of Canada	<p><u>Deliverable:</u> The organization faced business risk in its major fundraiser – Girl Guide Cookies. To mitigate the risk, the organization tendered its cookie business for the first time in almost 50 years and engaged our expertise to lead them through this process. The assignment was fulfilled by identifying a set of 'inclusion criteria' and 'exclusion criteria' so as to qualify potential contenders throughout North America; creation of an "Invitation to Tender" document; invited biscuit manufacturers in both Canada and the USA, who fulfilled all qualifying criteria, to bid on this multi-million dollar business.</p> <p><u>Phase:</u> Commercialized</p> <p><u>Geographical Scope:</u> Canada and the USA for potential contenders</p> <p><u>Regulatory:</u> With respect to nut-free claims.</p> <p><u>Bonus Value Added:</u> The 'nut-free bakery' requirement laid the groundwork for Girl Guide Cookies to become the first Canadian national brand of cookie to offer a nut-free attribute, a groundbreaking accomplishment soon followed by several child-friendly branded snacks.</p>	<p>Contract was awarded to a new supplier, a Canadian-based biscuit manufacturer. Business risk was mitigated through terms of the contract.</p>
<p>Intravenous Manufacturer (Solution and Delivery System)</p>	<p><u>Deliverable:</u> Validated the market demand for, and determined the market potential of, a nutrient-dense solution to be administered only by intravenous.</p> <p><u>Phase:</u> Pre-commercialization</p> <p><u>Geographical Scope:</u> Canada</p> <p><u>Regulatory:</u> The healthcare applications determined by the market assessment identified the pertinent regulatory pathways.</p> <p><u>Bonus Value Added:</u> Primary research via interviews with healthcare institution-based professionals identified an additional market for this product, for patients recovering from trauma. The exact causes of, and treatment of trauma continue to elude the medical profession. Validated market demand in the treatment of HIV-AIDS, and, for oncology patients undergoing chemotherapy (both of which compromise the absorption of nutrients).</p>	<p>Product was commercialized</p>

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<p>Ontario Home Economics Association</p> <p>Canadian Institute of Food Science & Technology</p> <p>National Association of the Specialty Food Trade</p>	<p>Deliverable: Wrote a balanced market definition and characterization of genetically-modified food</p> <p>Phase: Commercialized</p> <p>Geographical Scope: Canada and the USA</p> <p>Regulatory: Description of the types of regulatory overview given to genetically-modified crops in different jurisdictions.</p> <p>Bonus Value Added: The NASFT published a shorter conveniently-accessible version in a small-booklet format as a member service.</p>	<p>Peer recognition identified author Carol Culhane as one of 24 global experts qualified to participate in a worldwide post-marketing surveillance of the safety of genetically-modified food. See: A Survey of Post-Marketing Surveillance of Potential Late Human Health Effects of Genetically-Modified Foods Initiatives: Lessons for Canada's Strategy</p>
<p>Canadian International Trade Tribunal (CITT)</p>	<p>Background: The importation of a dairy-product blend (51% sugar, 49% butterfat) was displacing a portion of industrial butter sales in Canada, to which several dairy producers objected. The then Minister of Agriculture directed the CITT to rule on the legality of this importation.</p> <p>Deliverable: Retained as an expert witness by the CITT, along with associate Dr. Margaret Treloar, to determine the volume and value of displacement of industrial butter resulting from the importation of the dairy-product blend.</p> <p>Phase: Commercialized</p> <p>Geographical Scope: Canada</p> <p>Regulatory: Identified the products to which the dairy-product blend could be added. Reviewed the tariff legislation in terms of importation quotas and tariff rates.</p> <p>Bonus Value Added: All parties and their legal counsel reviewed the report prior to the trial date. Following expert witness testimony, legal counsel for both sides praised the objectivity and rigor of the report. In 2006, the Competition Bureau of Canada highlighted this report, and three others undertaken by the CITT, as examples of the merit, value and informed discussion which can be gained from systematic, disciplined market studies.</p>	<p>An Inquiry into the Importation of Dairy Product Blends Outside the Coverage of Canada's Tariff-rate Quotas</p>
<p>Agriculture and Agri-Food Canada – Market Industry Services Branch</p>	<p>Deliverable: Conducted a market definition study of nutraceuticals and functional foods, the first study of its kind conducted in the Western world.</p> <p>Phase: Pre-commercialized and commercialized</p> <p>Geographical Scope: Global</p> <p>Regulatory: Identified the barrier posed by food regulations in several jurisdictions to the growth and development of functional foods and nutraceuticals.</p> <p>Bonus Value Added: Laid the groundwork for several other market studies dedicated to nutraceuticals and functional foods. Cited and referenced globally, by academia, government, not-for-profit organizations and industry.</p>	<p>Nutraceuticals/Functional Foods: An Exploratory Study of Canada's Potential</p>