

MEETING OF MEMBER ASSOCIATIONS LONDON, 20 JUNE 2018



CRN US, Food Supplements
Europe and ABIAD Brazil were
invited to share their learnings
on conducting healthcare costs
saving surveys. Some of the tips
for success are in the following
slides and presentations in
Annex.

Healthcare costs savings Tips for success

International Alliance of Dietary/ Food Supplement Associations

Select those ingredients with strong science behind them and available healthcare cost data for the studied outcome

Case may need to remain within the remit of the definition of the category.

It is recommended to give priority to claims not disputed at national level.

Need scientific team / external consultant to provide input.

Make sure that the outcomes can link to available data. Not all healthcare cost data is available and accessible everywhere.

Be conservative

Be careful in how the results are managed and communicated.

Be sure to include the total cost to supplement the entire at risk population

Methodology has to fit the healthcare system in the country. Important to appreciate that the cost savings relate to the cost of healthcare. Therefore, if healthcare is generally low cost, the savings will most likely be lower.

3

4

Get the methodology vetted by an external, local health economist before starting

Since the studies are industryfunded, the immediate challenge will come on the validity of the methodology used.

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Results of each study are not comparable to one another for either:
Absolute savings, or
Cost / benefit ratio

Results of each study should not be summed together with the others for an overall cost-savings effect.

5

Practically

Need confidentiality agreements with all who are seeing the draft materials.

It can take longer than envisaged.

Depending on the benefits measured, funders need to be aware that some healthcare cost savings may, in some countries or for some substances, not be significant.

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Proper communication tools, a must have

Understand that the methodology is not easy to understand.

Full report is hard to digest.

It is the communication material that matters most.



More tips... See presentations in Annex



In October last year IADSA participated in the International Congress of Nutrition (ICN) in Argentina. The congress is organised every four years by the International Union of Nutritional Sciences (IUNS).

It was the first time that the food supplement sector had held an event in this congress and, as expected, it confirmed that the supplement category has not yet reached the point of being recognised as one of the solutions to the nutrition challenges being faced by the scientific community.

Following an introduction from Andrew Shao on why to engage with nutrition societies, the member associations were invited to reflect on why the attitude of these nutrition societies to supplements is not so positive at the moment and what can possibly be done to improve the situation.

Shaping scientific opinion



Why engage with nutrition societies? Introduced by Andrew Shao

IADSA's strategic objectives have expanded from engaging regulators of supplements to demonstrating the public health value of supplementation. Nutrition societies and their members represent a key group of stakeholders with which to engage. Both have direct and indirect impact on the supplement industry through their influence on research, policy and education.

What the nutrition societies do:



- Lobby for funding for nutrition research (the foundation of supplement efficacy and safety substantiation).
- Develop and disseminate (via publications) frameworks for nutrition science and policy (directly or indirectly affecting supplement sector), e.g. nutrient reference intakes, dietary guideline, research standards, including those related to industry funding, publication standards.
- Sponsor and develop education initiatives.

Who are members of nutrition societies:

- Comprised of industry, academic, government and NGO scientists.
- Include KOLs, regulators and/or experts who advise government at several levels for a range of purposes
 - Regulatory advisory committees
 - Nutrition policy committees
 - "Best practices" committees.
- Include KOLs who serve as spokespersons to the media and consumers.
- Include graduate students and young scientists who represent the future scientific leadership.



The Nutrition (or similar) Society serves as "umbrella" organizations under which scientists from all nutrition-related disciplines can convene to address issues, challenges and opportunities of common interest. Shaping the agenda and priorities of nutrition societies at the national and eventually global level is critical to the future growth and viability of the supplement sector.

To what extent do these perceptions below impact the views of the society about supplementation?

Balanced and healthy diet more appropriate than supplementation

83%

Average scoring among respondents

Some dietary problems cannot be solved through supplementation

75%

Average scoring among respondents

Little gained if intakes already in normal range and already sufficient

80%

Average scoring among respondents

Risk of over consumption

83%

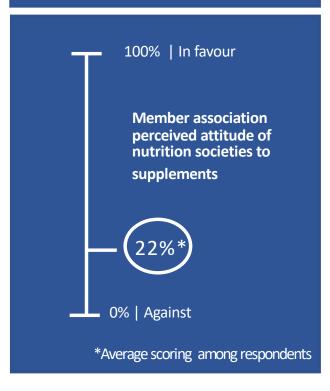
Average scoring among respondents

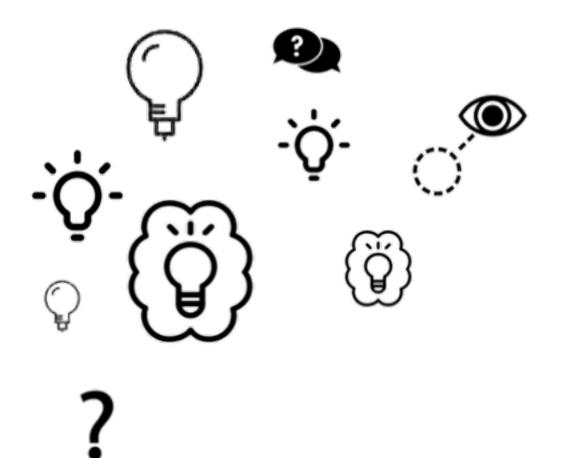
IADSA MEMBER ASSOCIATION RESPONSES ON NUTRITION SOCIETIES

(Survey, May 2018)

For **63**%

of the respondents, nutrition societies are not currently a priority for their organization





Observations/ Reflections





Why is it difficult to engage with nutrition societies?

Some observations

Different agendas/ priorities/ not common ground: issues the supplement sector are facing not always a priority for nutrition societies or not within their remit. e.g. botanicals

No or insufficient resources/ skillset/ time to connect with nutrition societies

Nutrition societies not functional/influential

No willingness to connect with industry

Negative image of the sector





Why is the national society attitude to supplements rather negative?

A few hypotheses

No understanding of the concept of supplementation / supplement

Safety risk due to potential over-dosages.

Fortification often seen as a better alternative

Lack of awareness of gaps in consumption

Carry over of legacy /image of supplements being wild west/ over claims etc...

Fear that the use of supplements will lead to poor diet / damage foundation of the balanced diet concept



Connect

- Via event/ symposium/roundtable
- Involve society members on advisory boards of supplement associations
- Training around the category at early stage (e.g. university)

Support their work or stimulating new scientific work

- Sponsoring
- Awards / Grant

Link agendas

- White papers on certain issues
- Look at ways to leverage WHO ageing strategy
- Focus on deficiencies/ demonstrate gaps

Demonstrate supplement value

- Develop new food pyramids with supplement category included
- Consumer survey showing that supplements do not replace health diet



Way forward What can we do?



Food Supplement Associations

The IADSA engagement guide was presented by Simon Pettman. Follow-up material will be developed focusing on case studies.

Carl Gibson (CMA Australia) and Samet Serttas (GTBD Turkey) presented national approaches that have helped make a positive difference: Australian charter mandating the authorities to work hand-in-hand with industry and promote Australian industry overseas; and in Turkey a widespread media action to address misconception of the category in a country where the young population is the largest in Europe.



Gaining influence: Case studies

IADSA

International Alliance of Dietary, Food Supplement Associations

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Andrew Shao IADSA Chair Scientific Council

Antje Preussker BLL AK NEM

Bernd Haber IADSA Vice Chair/ Chair of the meeting

Boon-Hwa Lim HSIAS
Bruce Dennison HPA
Carl Gibson CMA

Carlos Torres ANAISA

Daniel Quek HSIAS

David Richardson CRN UK Ellen Schutt GOED

Fernanda Nogueira ABIAD

Gerhard Gans IADSA Chair Company Council

Harry Rice GOED
Hideko Ikeda JIHFS
James Griffiths CRN US

Janjira Intra HFSA Jukka Ropponen Luontaistuotteiden Kaushik Desai HADSA

Mariana Alegre ALANUR Michael McGuffin AHPA

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Nick Bennett CRN UK Penny Viner EHPM

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Ric Hobby IADSA Chair

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Participants

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Simon Pettman IADSA Secretariat



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O⁺ Annexes

Smart Prevention:
Lessons Learned from
CRN's Healthcare Cost
Savings Study



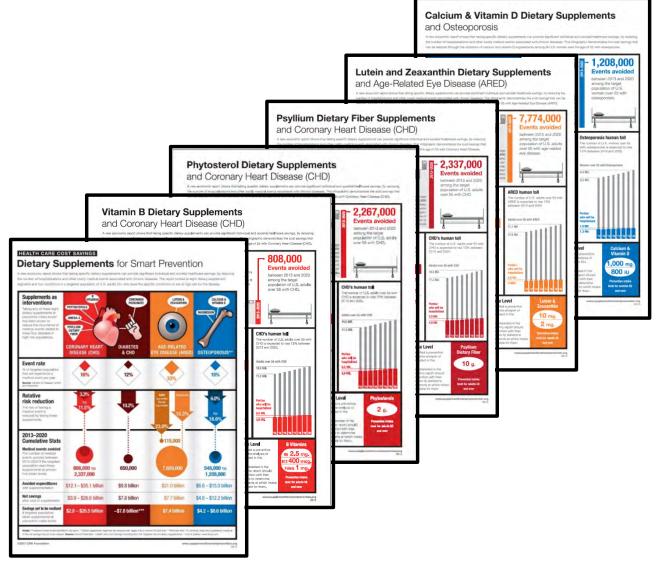
The Hypothesis:

We hypothesized that if the selected dietary supplement regimens were taken at the same preventive levels as used in the clinical research by those at-risk populations, there would be a cost savings to the health care system and to individual providers and payers from reduced medical expenses associated with those lower risks of disease.



The Conclusion:

The report demonstrates that significant cost savings can be realized through the smart use of scientifically-substantiated dietary supplements among high risk populations.



www.supplementforsmartprevention.org

Lesson 1: Each link is critical.



Two steps in the research chain:

- 1. To critically review the research literature which shows an association between dietary supplement intake and disease risk reduction to quantify the risk reduction; and then
- 2. To determine the potential net health care cost savings from the use of certain dietary supplements as a result of avoided disease-related medical events.

Lesson 2: Carefully Select Those Ingredients with Strong Science Behind Them



Coronary heart disease (CHD) and the potential net health care cost savings when using **omega-3 fatty acids**, three **B vitamins** (folic acid, B6, and B12). **phytosterols** and **psyllium dietary fiber**



Diabetes and the potential net health care cost savings from diabetes-attributed CHD when using **chromium picolinate**



Osteoporosis and the potential net health care cost savings when using the combination of <u>calcium and vitamin D</u> or when using <u>magnesium</u>



Age-related eye disease (ARED), specifically age-related macular degeneration and cataracts, and the potential net health care cost savings when using **lutein and zeaxanthin**

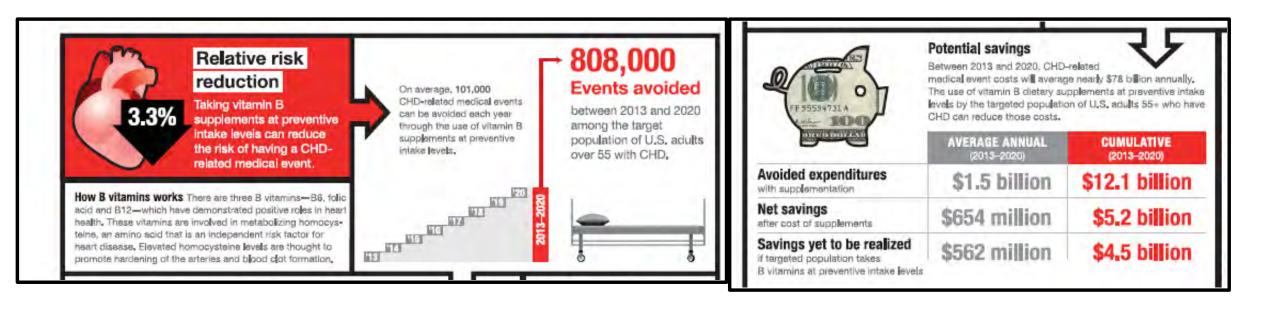
Supplements we did not choose to study:

- Saw palmetto
- Glucosamine/Chondroitin
- Probiotics
- Garlic
- Even the multivitamin was considered and not included.

What is the strength of the evidence for reduction in acute healthcare incidents?

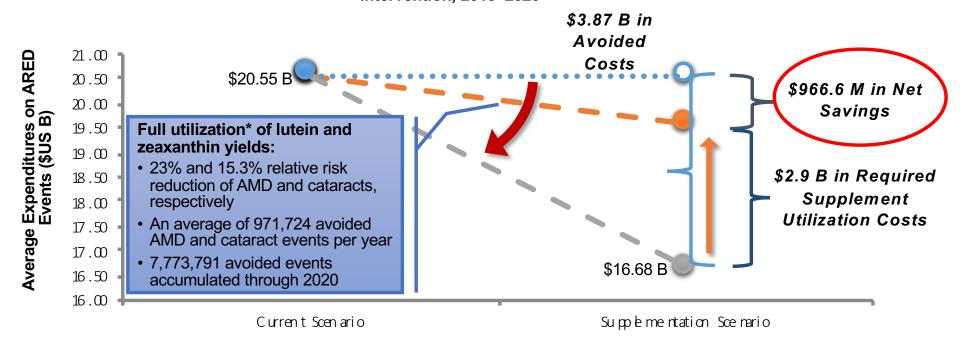


Lesson 3: Be conservative at every opportunity to be speculative.



Lesson 4: Be sure to include the total cost to supplement the entire at risk population.

Net Annual Average Cost Savings due to Avoided Health Care Expenditures through Lutein and Zeaxanthin Intervention, 2013–2020



Note: * Among all adults over the age of 55 with ARED, **Time horizon = 2013 to 2020.

Includes Results of ARED II

Lesson 5: Acknowledge Limitations and Research Caveats Up Front



- The results from these eight regimens may not be generalizable to all supplements.
- This report is not intended to be a prescription for everyone to begin these eight regimens.
- Results of each supplement regimen should not be summed together with the others for an overall cost-savings effect.
- Results of each regimen are not comparable to one another for either:
 - Absolute savings, or
 - Cost / benefit ratio,

although each regimen independently demonstrates significant cost savings for that supplement.



Healthcare cost savings: Now and beyond





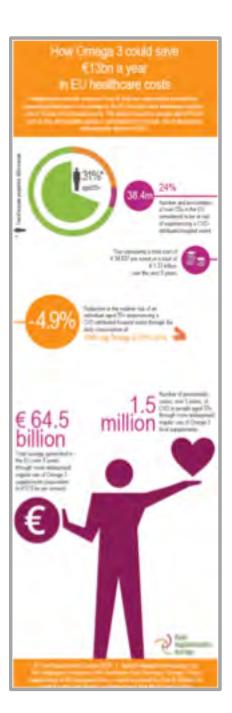
HEALTHCARE COST SAVINGS OF PHYTOSTEROL FOOD SUPPLEMENTS IN THE EUROPEAN UNI



HEALTHCARE COST SAVINGS OF CALCIUM AND VITAMIN D FOOD SUPPLEMENTS IN THE EUROPEAN UNION



HEALTHCARE COST SAVINGS OF OMEGA 3 FOOD SUPPLEMENTS IN THE EUROPEAN UNION











Methodology

Methodology



- Methodology has to fit the healthcare system in the country. Important to appreciate that the cost savings relate to the cost of healthcare. Therefore, if healthcare is generally low cost, the savings will most likely be lower.
- FSE science group helped to modify the methodology to meet the European conditions.
- Methodology was vetted by an external health economist before starting
- Need to make sure that the outcomes will link to available data. Not all data available everywhere.
- The case being made needs to keep within the remit of the definition of the category. For example, for lutein what population do you look at? Patients with AMD? Depends on where you are located.
- For some things you want to demonstrate, it is hard to have the data. The
 ingredients were chosen since the data existed. In Europe, only substances
 with an EFSA claim were chosen.



Time



Time

- Takes longer than envisaged.
- Expected completion in 1.5 years and has taken 3.
- It has worked out positively that these have been issued periodically.



Management



Management

- Can't do this work without raising additional funding.
- Need scientific people who can provide input.
- Understand at the beginning that the outcome could be negative.
- Need confidentiality agreements with all who are seeing the draft materials.



Communication



Communication

- Complicated across the EU with multiple languages.
- Down-side of periodic timing of release of the studies is increased need for communication budget.
- Understand that the methodology is not easy to understand.
- Full report is hard to digest.
- It is the communication material that matters most.



Impact



Impact

- Positive story and members and the industry in general love them.
- Impact varies widely depending on the country.
- Opens doors and starts conversations with decision makers at a high level.
- Puts supplements on the map for the right reasons.
- HCCS studies jumped a number of steps...ideally need to demonstrate gaps at same time or before.



food supplements europe











International Alliance of Dietary/ Food Supplement Associations

Engaging with Government Case Study Australia

June 2018













Australian Government

Department of Health

Therapeutic Goods Administration

Customer Service Charter

- The Therapeutic Goods Administration is part of the Australian Government Department of Health.
- Its overall purpose is to protect public health and safety by regulating medicines and medical devices manufactured, imported, supplied in, and exported from Australia

In doing so we will:

 work with industry to ensure the delivery of high quality, cost-effective regulatory practice and controls designed to meet the needs of consumers.

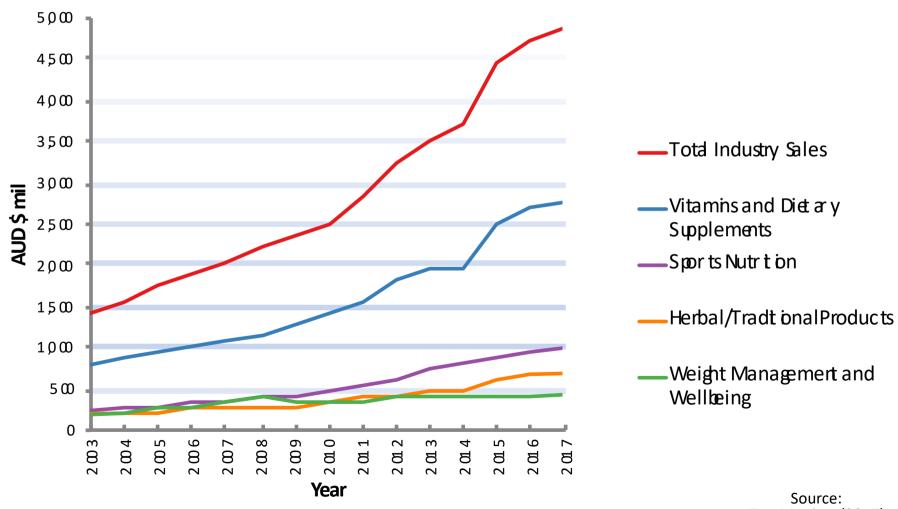








Australia: Industry Sales



Source: EuroMonitor (2017)









2018 Australian Legislative Changes: Highlights



- A New 'Assessment' Registration Pathway rewarding evidence based products
- Permitted Indications
- Improved Access to New Ingredients
- Market Exclusivity for New Ingredients
- Use of information from Overseas Regulators
- IP Protection
- Reforms to Advertising











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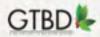


Samet Serttaş

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- MA political science Ankara University, Phd (candidate) political science
- O Msc, University of Nottingham Food Production Mangement
- Licence, Gaziantep University, Food Engineering & Anadolu University International Relations and Affairs



Food Supplement & Nutrition Association



General Framework

- Food Supplement & Nutrition Association established in November 2016
- Founder members are Amway, BASF, Bayer, Capsugel, DSM, Herbalife Nutrition, Merck, Pfizer, Sanofi









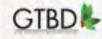






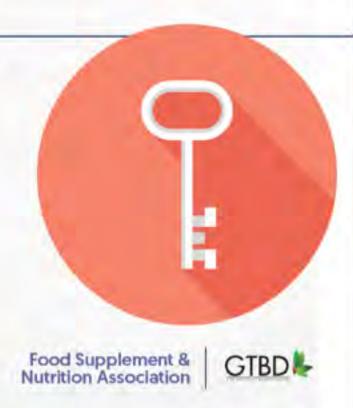






Target of the Association

- To become credible source of information provider to decision makers
- Develop industry alliance
- Inform public on food supplements
- Develop interest in academia to focus research on food supplements



Co-operations

- GTBD is a member of IADSA
- GTBD is a member of TGDF

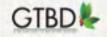


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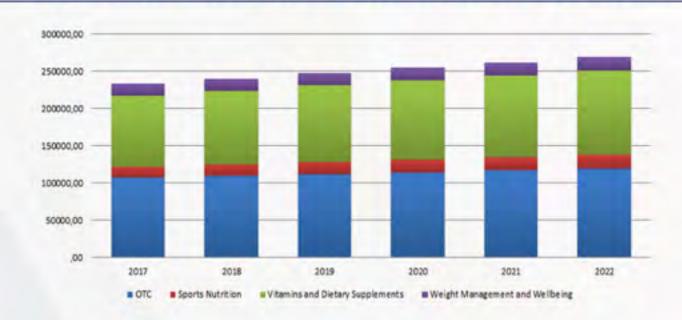




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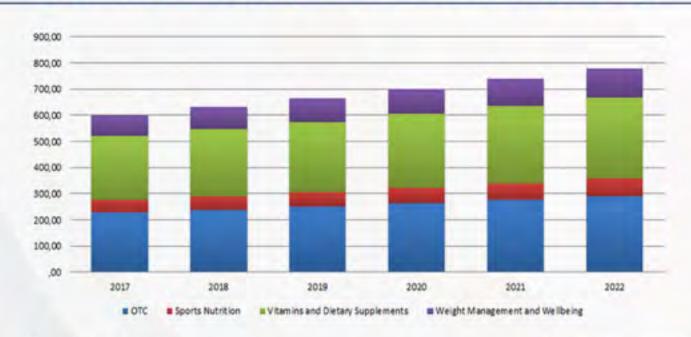
Consumer healthcare market size (World)



Source: euromonitor

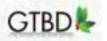


Consumer healthcare market size (Turkey)

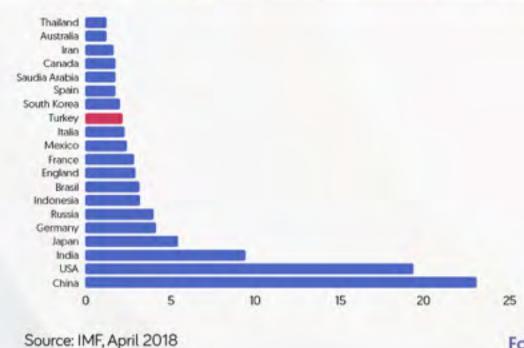


Source: euromonitor

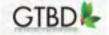




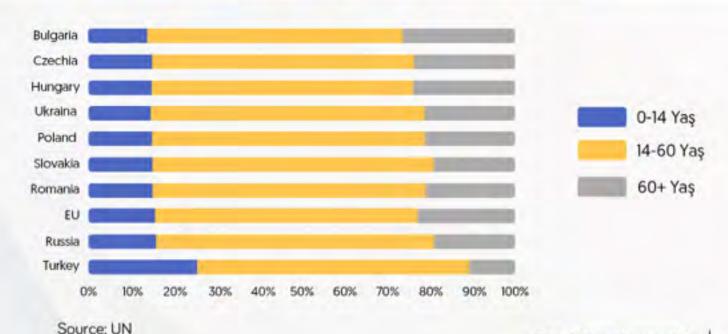
World Biggest Economies (Trillion \$, 2017)



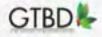
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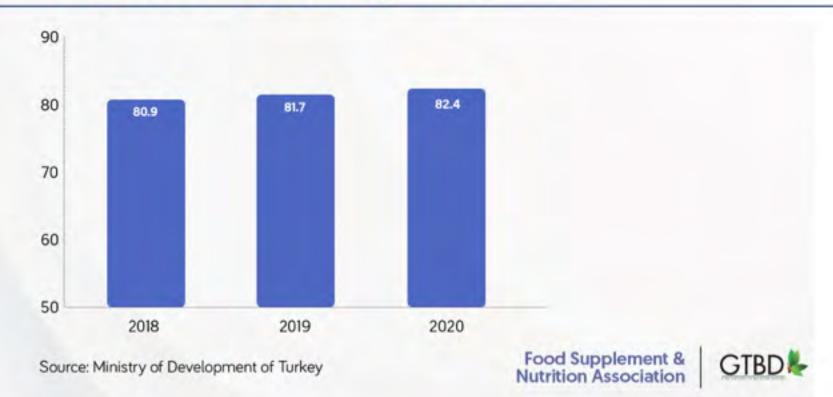
Countries Demographic Profiles (2013)



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Population Forecasts (Milion)



Major Achievements

- IADSA workshops in Turkey to develop food supplement regulation & approval system in 2015 and 2016
- Technical trip in 2017
- Food supplement conference
- Food supplement magazine
- Food supplement social media



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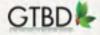


Major Activities

- Social media
- Animated video
- Video cards
- Sectoral reports
- IPSOS consumer survey



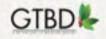




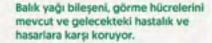


1. Food & Nutrition Conference - November 23, 2017









Louisiana Eyalet Universitesi (New Orleans) bilim adamlan balik yagi bilapaninin görme hücelenni sadece hasar durumlarında korumakla kalmayip, ileride oluşabilecek travmalara karşı da konuduğunu ortaya koymuşlardır. Bu çalışma ile Omega-5 yağı asitesinin, DHA, ve türevlerinin fotoresaptör ve retinal pigment epitelyum (RPE) hücrelerinin hayatta kalmasını sağladığı bulunmuştur.



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Social Media Accounts







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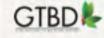




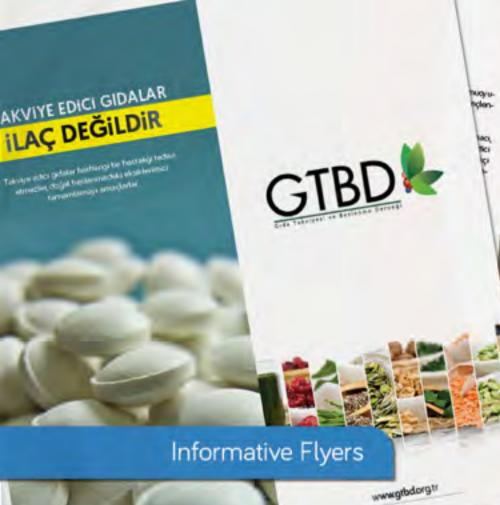
GTBD 🛌











diğimiz konferanslar ve penyodik olarak yayınladığırıcı "Gida ve Besterme' Dergis assologija kamuquru taloiye edici gidalar konutunda bégilendirmékte, diğer taraftan de, kamu otostelerinin mencusta aykın oretim yapan firmalarla ligib yorotmoş olduğu ça-

2017

1 Gide ve Beskimme Konfesans; Gide Takriyesi ve Beslenme Demeginin ev sahiptiginde 23 Kasım 2017 tarihinde Ankara HittonSa Chelde yapılıdı. İlgili mevzuat, gıda takoyaları, yeritikçi grislar le seksorun gelecelý ele akrobý konferensa Gide Tanm ve Hayvancek Bakarkig de Saçak Bakarkig yedsilleri, akademasyeriler, seksor ternsilolleri ve öğrenciler kusid.



Armegimizin bir diğer önemli faaliyet de Gida ve Beslenme gergiade, Kamu karar alicianna, gada ve beslenme alanenda andersik çalışmatar yapan akadamayanlarin, bu konuda düg len, yazan, aragteran ve okuyan har kesimden insaran tuduş-And political committee armiculary an Guda ve Bestervice Dorgest, persolarak yayımlarınılda ve ücrecüz olarak dağıdırınıktadır.

VERI VE ICERIK

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Food Supplement & GTBD **Nutrition Association**





















Iftar meal - June 2018





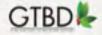


Official visits

- MINFAL visits to general directors to head of codex departments and division managers
- MoH visits
- MINFAL-Minister visit
- MoH- Minister visit



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2018 Plan

- To lead a group to visit FDA in August 2018
- To develop series of lectures at Universities
- To organize second food supplement & nutrition conference on November 07, 2018









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