Data from this session powered by Nutrition Business Journal

Use the promo code STATENBJ for $50 off the Dark Issue 2, available now at newhope.com/darkissue2
Objectives for this Session

Provide latest market, financial, and regulatory data/trends for the supplement industry

Discuss some of the recent challenges facing our industry and ideas to address these challenges

Updates on OWL Initiative

You walk away with a better understanding of how to lead your business and how to participate in improving our industry
Panel Agenda

I. Opening Remarks– Thomas Aarts
II. Featured Speaker– Senator Martin Heinrich
III. Market Overview and Trends– Thomas Aarts & Rick Polito
   IV. Financial Overview – William Hood
   V. Regulatory Overview
I. What is OWL and how will it improve the supplement industry?
   i. Steve Mister
VI. Discussion and Q&A from the audience
20th Annual NBJ Summit Agenda Highlights:

July 17th -20th, 2017

Theme:
“Building Consumer Confidence through Disruption, Trust & Transparency”

Panels/Topics:
- NBJ State of the Industry
- The Power of Digital Connection in Growing Your Business and Community
- Personalized Nutrition: Innovation in Nutrition Customization
- The Future of Supplement Retail for Supplements
- Inside the World of Amazon: What’s Coming and How Your Brand Can Thrive in This Brave New World
- Radical Transparency in the Ingredient Supply Chain

Featured Speakers:
Colin Watts, Doug Rauch, JJ Virgin, Brian Gonsalves, William Hood
U.S. Natural Products Sales grew 7.7% to $195B in 2016– adding $14B in Sales

Source: Nutrition Business Journal
(2016 preliminary estimates; $mil, consumer sales)
2016 growth estimates

SUPPLEMENTS

+6.6%

$41.4 BILLION

Source: Nutrition Business Journal
U.S. Functional Food & beverage Sales hit $59.7B in 2016, on Estimated 7.6% Growth

Source: Nutrition Business Journal
(2016 preliminary estimates; $mil, consumer sales)
Total U.S. Supplement Sales Grew 6.6% to $41.4B in 2016—Adding $2.6B in New Sales

Source: Nutrition Business Journal
(2015 estimates; $mil, consumer sales)
Supplement Bright Spot: Herbs & Botanicals

Category Growth for Supplements

<table>
<thead>
<tr>
<th>Category</th>
<th>2015 Sales</th>
<th>2016 Forecast</th>
<th>Y-O-Y Growth (e)</th>
<th>Dollars Gained/Lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probiotics</td>
<td>$1.61B</td>
<td>$1.88B</td>
<td>17.0%</td>
<td>$0.27B</td>
</tr>
<tr>
<td>Sports nutrition</td>
<td>$5.28B</td>
<td>$5.72B</td>
<td>8.3%</td>
<td>$0.44B</td>
</tr>
<tr>
<td>Meals</td>
<td>$4.51B</td>
<td>$4.86B</td>
<td>7.6%</td>
<td>$0.34B</td>
</tr>
<tr>
<td>Vitamin D</td>
<td>$0.83B</td>
<td>$0.89B</td>
<td>7.5%</td>
<td>$0.06B</td>
</tr>
<tr>
<td>B vitamins</td>
<td>$2.02B</td>
<td>$2.12B</td>
<td>5.3%</td>
<td>$0.11B</td>
</tr>
<tr>
<td>Vitamin C</td>
<td>$1.08B</td>
<td>$1.11B</td>
<td>2.5%</td>
<td>$0.03B</td>
</tr>
<tr>
<td>Homeopathics</td>
<td>$1.23B</td>
<td>$1.27B</td>
<td>3.4%</td>
<td>$0.04B</td>
</tr>
<tr>
<td>Multis</td>
<td>$5.78B</td>
<td>$5.92B</td>
<td>2.4%</td>
<td>$0.14B</td>
</tr>
<tr>
<td>Omegas</td>
<td>$1.13B</td>
<td>$1.15B</td>
<td>1.4%</td>
<td>$0.02B</td>
</tr>
<tr>
<td>Calcium</td>
<td>$1.15B</td>
<td>$1.15B</td>
<td>-0.4%</td>
<td>-$0.004B</td>
</tr>
</tbody>
</table>

Source: Nutrition Business Journal

Multis and Omegas are coming back; significant opportunity in probiotics, sports, and meal replacements.
US Dietary Supplement Industry $41.4 Billion in 2016: Sales by Segment

- The category lines continue to blur because of the trend of multi-ingredient formulations
- Combination formulas are helping to boost the herb and botanical category, which has struggled for several years

Source: Nutrition Business Journal Early Estimates
US Dietary Supplement Industry $41.2 Billion in 2016: Sales by Channel

- Internet and Practitioner are poised to be the biggest growth channels in the future
- Mass market continues to garner large shares because of low pricing, but customers are looking for the highest quality and are looking to natural retail first- or the store-within-the-store of mass market in retail

Source: Nutrition Business Journal Early Estimates
US Supplement Sales Growth by Channel in 2016

- Internet is showing highest growth for several years in a row; Amazon continues to drive this and is starting to focus on its own private label.

Source: Nutrition Business Journal
Amazon’s Moves to Supplements

Officially launching private label supplements that include Vitamins K and D, tumeric and Calcium
Amazon Go: Where Internet Meets Mass Market

Amazon, the e-commerce technology company, has opened their first grocery cashier-less grocery store.

- Mass market competitors need to have a strong presence on the Internet to remain competitive.
- Amazon has leased over 3,000 properties to open up additional stores throughout the USA.

“The goal is for Amazon to completely control the physical flow of products from warehouses to the end consumer, opening up a rivals alternative to Target and Walmart.”
Consumer Supplement Sales by Channel: 2009-2020e

Sales in 2009
- Natural & Specialty Retail: 37%
- Mass Market Retail: 29%
- Mail/DRTV, Radio: 5%
- MLM: 17%
- Practitioner: 8%
- Internet: 4%

Sales 2016
- Natural & Specialty Retail: 37%
- Mass Market Retail: 26%
- Mail/DRTV, Radio: 4%
- MLM: 16%
- Practitioner: 9%
- Internet: 7%

Sales 2020e
- Natural & Specialty Retail: 36%
- Mass Market Retail: 25%
- Mail/DRTV, Radio: 4%
- MLM: 15%
- Practitioner: 10%
- Internet: 10%

Source: Nutrition Business Journal
<table>
<thead>
<tr>
<th>Condition Specific Supplements (mil., consumer sales)</th>
<th>2015</th>
<th>2016</th>
<th>Y-O-Y Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports/Energy/Weight-Loss</td>
<td>11,740</td>
<td>12,654</td>
<td>7.8%</td>
</tr>
<tr>
<td>General Health</td>
<td>5,187</td>
<td>5,366</td>
<td>3.4%</td>
</tr>
<tr>
<td>Cold/Flu-Immune</td>
<td>2,595</td>
<td>2,725</td>
<td>5.0%</td>
</tr>
<tr>
<td><strong>Gastrointestinal health</strong></td>
<td>2,284</td>
<td>2,672</td>
<td>12.6%</td>
</tr>
<tr>
<td>Heart health</td>
<td>2,457</td>
<td>2,535</td>
<td>3.2%</td>
</tr>
<tr>
<td>Bone health</td>
<td>1,998</td>
<td>2,065</td>
<td>3.3%</td>
</tr>
<tr>
<td>Joint health</td>
<td>1,651</td>
<td>1,678</td>
<td>1.6%</td>
</tr>
<tr>
<td>Diabetes</td>
<td>1,458</td>
<td>1,552</td>
<td>6.5%</td>
</tr>
<tr>
<td>Anti-cancer</td>
<td>1,423</td>
<td>1,467</td>
<td>3.1%</td>
</tr>
<tr>
<td>Hair/Skin/Nails</td>
<td>860</td>
<td>898</td>
<td>4.4%</td>
</tr>
<tr>
<td><strong>Sexual Health</strong></td>
<td>710</td>
<td>760</td>
<td>7.1%</td>
</tr>
<tr>
<td>Brain Mental</td>
<td>643</td>
<td>657</td>
<td>2.2%</td>
</tr>
<tr>
<td>Insomnia</td>
<td>569</td>
<td>594</td>
<td>4.5%</td>
</tr>
<tr>
<td>Mood</td>
<td>575</td>
<td>592</td>
<td>3.0%</td>
</tr>
<tr>
<td>Menopause</td>
<td>500</td>
<td>513</td>
<td>2.4%</td>
</tr>
<tr>
<td>Vision</td>
<td>436</td>
<td>445</td>
<td>2.2%</td>
</tr>
<tr>
<td>Anti-aging</td>
<td>418</td>
<td>436</td>
<td>4.4%</td>
</tr>
<tr>
<td><strong>Liver &amp; Detox</strong></td>
<td>125</td>
<td>135</td>
<td>8.4%</td>
</tr>
<tr>
<td><strong>Sum of top 18 Conditions</strong></td>
<td>35,628</td>
<td>37,646</td>
<td>5.7%</td>
</tr>
<tr>
<td><strong>Other Conditions</strong></td>
<td>3,217</td>
<td>3,600</td>
<td>10.8%</td>
</tr>
<tr>
<td><strong>Total Supplements</strong></td>
<td>38,845</td>
<td>41,407</td>
<td>6.6%</td>
</tr>
</tbody>
</table>
In a consumer survey conducted by NBJ in 2015, over 30% of participants indicated having issues with sleep or suffering from lack of energy (lack of sleep also causes lack of energy).
Top Macro Supplement Trends 2016-2018

1. Protein goes mainstream with plant proteins being the next big thing
2. New convenient delivery forms are of interest to consumers
3. Personalization and Semi-Personalization are coming to a theater near you
4. Whole foods supplements holding their own
5. Pet supplements are becoming a legitimate category
6. Non-GMO interest and consumer awareness is impacting supplements
7. Gut health is still hot and the science is becoming stronger – next hot topic here is the “microbiome”
8. Brain health interest is still growing
9. Internet is a big factor
10. Detox Category leaning towards Liver
11. Sleep remains a huge opportunity that is an unmet need in the mass market
12. Inflammation supplements are very high on consumer radar
13. More transparency and science will be required to succeed
Trend #1: Protein Goes Mainstream with Plant Proteins Being the Next Thing

Protein is moving out of the gym as more and more people are moving into the gym.
Number of Consumers Looking for Foods High in Protein hasSkyrocketed

% of General Population Who Seek Out Foods High in Protein

In 2014, 21% of general population considered themselves as deficient in protein.
Consumers Are Changing and Adopting More Plant-Based Diet Options

% of General Population Who Have Used in Past 3 Months

- **Plant Protein**: 40%
- **Soy Protein**: 24%
- **Whey Protein**: 24%
- **Insect Protein**: 7%

Consumers are also being more selective about the source of protein: grass-fed, pasture-raised and plant-based proteins are attempting to meet the growing demand for humanely and sustainably-raised proteins.
Trend #2: Pill vs. Non-Pills

Non-Pills account for $13.3 Billion (34%) of $38.8 Billion Supplement Industry

Source: IRI data analysis
Gummies: Not Only for Kids

Gummies successfully crossed into the adult VMS category—what is next for gummies? (eg. Pectin, sugar free, etc.)

65% Adult Gummy products
35% Children’s Gummy products
Trend #3: Personalization
Coming to a Theater Near You

- **Yesterday:** Shakes and a Scale

- **Today:** Engineered foods and supplements with a saliva, urine, skin, cheek-swab, blood or skin test

- **Tomorrow:** Real-time, wearable diagnostic and monitoring technology with graphical display of nutrients and biomarkers
Recent Personalized Approaches for Nutrition and Supplements

Ask the experts. Use our interactive tool to get your customized supplement plan.

The Vitamin Guide

How do I know what’s right for me?

GET STARTED NOW

Arivale
Your Scientific Path to Wellness

23andMe

STYR Labs™

PureGenomics™

Produced by
Technology and Personalized Nutrition is Trending
Unique new trends found at CES 2017

- A wearable device that increases relaxation and sleep restoration
- Magnesium supplements are also given to increase functionality of the wearable device

- Styr Labs is a razor blade company that sells innovative technology on the forefront
- The main goal of Styr though, is to sell customized supplements following the sales of the technology
The Future of Healthcare Driven by Paradigm Shifts in Medicine & Technology

Public Health Initiatives (e.g. ObamaCare)

Healthcare Crisis

Private Health Initiatives (Insurers, Corp. Wellness)

Lifestyle Healthcare/Medicine

P4 Medicine (Personalized, Preventative, Predictive, Participatory)

Personalized Lifestyle Medicine

Innovative* Diagnostics

Innovative* Self Care (Quantified Self)

Nutrition, Rx, Lifestyle Therapies

Accessible Diagnostics (Genetics & Biomarkers)

Mobile Technology

Social Networks

Computing Power

Big Data

Sources: PLMI, Eric Topol, G. Ferrier

*Innovative = Simpler, Faster, Better, Real Time Products & Services
In 2015, probiotics reached $1.6B in sales across all channels. By the end of 2017, the category is expected to break $2B.

The future of probiotics is in both pills and food/beverage applications.

**CASE STUDY: Bacillus coagulans GBI-30, 6086**

**OCT 2010: TPG buys 25% stake in Schiff for $50M**

**JUN 2011: Schiff buys exclusive BC30 rights in supplements & OTC for $40M**

**Ganeden** focuses on functional applications and is currently used in multiple products:

- food service (*Jamba Juice*, *Red Mango*, *Naked Pizza*)
- yogurt, pasta, chocolate
- alternative sweeteners
- baked goods
- others and growing significantly

**Trend #7: Getting the Gut**
Consumers Exhibit a Growing Desire to Add Probiotics to Their Diet

<table>
<thead>
<tr>
<th>% of General Population</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Want more <strong>probiotics</strong> in their diet</td>
<td>42%</td>
</tr>
<tr>
<td>Want more <strong>prebiotics</strong> in their diet</td>
<td>17%</td>
</tr>
<tr>
<td>Use probiotic enriched F&amp;B</td>
<td>19%</td>
</tr>
<tr>
<td>Use probiotic supplements</td>
<td>18%</td>
</tr>
</tbody>
</table>

Up from 12% in 2008
The Future of Probiotics

Pre-biotics
Food for bacteria!
Prebiotics are substances that can only be metabolised by the gut bacteria, and not the human host.

Syn-biotics
Live bacteria!
Synbiotics are a combination of both pro and prebiotics.

Pro-biotics
Probiotics are active bacterial cultures.

The human Microbiome is an evolving collection of trillions of Probiotic Microbes living in and on the human body that may be more than just digestion. They may be responsible for supporting a broad variety of metabolic and developmental processes.
Brain Health: Still a Significant and Untapped Market Opportunity

Source: Nutrition Business Journal
The Prevagen Dilemma: What Does it Mean for the Brain Space?

Opportunity of Caution Flag?
While sports supplements have seen the strongest growth of internet sales over the last decade (10.9%), herbs & botanicals are expected to post the strongest growth over the next 5 years (12.7%).
Trend #13: More Transparency and Science Will Be Required to Succeed

Since 2015 NBJ CEO Summit, the industry has coalesced around a coordinated effort to raise standards for supplements in all categories.

Voluntary chain information with traceability from seed to shelf
- Megafoods has already tapped into this trend

2015 was the year of “We’ve got to do something!” wake-up call moment

Key companies and trade groups have joined in programs to elevate the industry to new levels of quality and trust

Notable efforts include:
- Product Registry (OWL) led by CRN
- GNC Quality Control Initiative led by GNC and AHPA
- NPA Audit Scorecard led by NPA and GNC
- Global Retailer and Manufacturer Alliance Initiative led by NSF and top retailers
- Attorney General outreach led by CRN, AHPA and UNPA

The Dark Side of the new political reality and the “Post-Regulatory Age”

Rick Polito
Editor in Chief NBJ
Going Dark

Source: Nutrition Business Journal ($mil., consumer sales)
Percent of Total 15,000 Dietary Ingredients on the Pre-DSHEA List

Percentage: 23.3%

Source: Healthnotes

Source: Nutrition Business Journal ($mil., consumer sales)
SKU’s by Dietary Ingredient Count

- 1 to 5: 26,787 (52%)
- 6 to 10: 8,720 (17%)
- 11 to 15: 5,933 (12%)
- 16 Plus: 9,846 (19%)

Number of Active Dietary Ingredients per SKU
Into the darkness

In the “post-regulatory age,” will supplement makers succumb to the dark side?

By Rick Polito

When you hear the words “there’s a new sheriff in town,” it typically implies that this new sheriff is tougher, more vigilant, feared by criminals and beloved by the townsfolk who walk onto the street without worrying about gunslingers and cattle rustlers.

But what if the new sheriff is half-blind and hires the town drunk as his deputy? What if that half-blind sheriff is “business friendly”?

That’s the obvious interpretation of the new Trump administration’s approach to regulatory enforcement. When a new sheriff declares a freeze on new regulations, and announces that when the freeze thaws it means two other regulations get pulled off the books for every new regulation issued,

Source: Nutrition Business Journal ($mil., consumer sales)
Getting Started on the Supplement OWL™

Natural Products Expo
Saturday, March 11, 2017
Steve Mister
President & CEO, CRN

www.SupplementOWL.org
CONFIDENCE IN THE SAFETY, QUALITY AND EFFECTIVENESS OF DIETARY SUPPLEMENTS
2006 - 2016

85% of U.S. adults have overall confidence in the safety, quality and effectiveness of dietary supplements

U.S. Adults (n = 2,007)
Our Stakeholders are Watching...

- **Congress** – Proposed Third Party Certification of Products on Military Bases
- **State Attorneys General** – New York, Oregon, Vermont
- **State Legislatures** – New York, Massachusetts, New Jersey
- **Consumer Organizations** – continued concerns for quality
- **Retailers** – uneasiness about what’s on the shelf, concerns for liability
- **Consumers** – questions about safety, benefits and quality
Regulators Should Know the Industry They Regulate

✓ Who are the companies in the industry?
✓ What brands are being marketed?
✓ What ingredients are in the marketplace?
✓ Which products contain which ingredients?
A single authoritative registry of dietary supplement product information where all stakeholders can find information about products, ingredients, and additional quality and safety information.
What is THE Supplement OWL™?

• Industry-wide, self-regulatory initiative that promotes transparency and accountability.

• Assists regulators, retailers and other stakeholders in understanding the marketplace.

• Demonstrates responsibility by the industry.
Self-regulation is a hallmark of a mature and responsible industry

- A voluntary product registry, developed and supported by industry, is preferable to a mandatory federal or state registry.

The OWL will connect outside stakeholders to other industry quality and safety initiatives.
What’s in The Supplement OWL?

Two Tiers of product information

• **Tier 1** is **FREE** to all product marketers who are willing to provide the basic information about their products.
  • It will include the information that is accessible from the product label.
  • It will provide regulators with information about the product manufacturer and packager.

• **Tier 2** will allow product marketers who want to provide additional documentation and supporting materials to specific audiences they select.
  • Tier 2 will generate financial resources to support the administration of the registry.
What information will be included?

• **Tier 1** information will include:
  • brand, product name, product category, delivery description, intended users, ingredients, Daily Values, serving size, label claims, precautionary statements, storage information, seals & certifications, allergy statements;
  • Images of the product and the product label;
  • A unique alpha-numeric identifier (may be used on the product, but not required).

• **Tier 2** information will include:
  • Product specification sheets, supporting documents for product attributes and certifications, evidence of third-party audits and GMP compliance.
Example of results from clicking on Chewable Vitamin C on search results page

Tier 2 feature. Only visible to users that manufacturer provides access. This can be, a single person, multiple people, a company, and/or an entire persona such as retailers. Users without access would only see General Information.

Tier 1 Information in tabular format

See label by clicking
### Product Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Form</td>
<td>Water</td>
</tr>
<tr>
<td>Footnote</td>
<td>* Percent Daily Values are based on a 2,000 calorie diet. ** Daily Value not established.</td>
</tr>
<tr>
<td>Intended User(s)</td>
<td>Adult, male or female</td>
</tr>
<tr>
<td>Label Type</td>
<td>Supplement Facts</td>
</tr>
<tr>
<td>Product Category</td>
<td>Specialty (Condition Specific)</td>
</tr>
<tr>
<td>Statement of Identity</td>
<td>Dietary Supplement</td>
</tr>
<tr>
<td>UPC</td>
<td>15764072331</td>
</tr>
</tbody>
</table>

### Nutritional Product Facts

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allergen Statements / Claims</td>
<td>NO YEAST NO WHEAT NO SOY NO MILK NO PRESERVATIVES NO ARTIFICIAL COLORS NO ARTIFICIAL FLAVORS NO ARTIFICIAL SWEETENERS</td>
</tr>
<tr>
<td>Net Contents Quantity</td>
<td>90 Waters</td>
</tr>
<tr>
<td>Other Ingredients</td>
<td>Other Ingredients: Fructose, orange juice concentrate, glucose, honey, starch, stearic acid, natural orange flavor, silica, magnesium stearate, cellulose, maltodextrin.</td>
</tr>
<tr>
<td>Serving Directions</td>
<td>Adults chew one (1) wafer daily. As a reminder, discuss supplements and medications that you take with your health care providers.</td>
</tr>
<tr>
<td>Serving Size</td>
<td>1 wafer</td>
</tr>
<tr>
<td>Servings Per Container</td>
<td>90</td>
</tr>
</tbody>
</table>

### Label Statements

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FDA Disclaimer Statement</td>
<td>These statements have not been evaluated by the Food and Drug Administration. This product is not intended to diagnose, treat, cure, or prevent any disease.</td>
</tr>
<tr>
<td>Precautions</td>
<td>CAUTION: If you are pregnant or nursing, taking medication or planning a surgery, consult your doctor before using this product. If any adverse reactions occur, stop taking the product and consult your doctor.</td>
</tr>
<tr>
<td>Seals / Symbols / Certifications / Related</td>
<td>CERTIFIED GLUTEN-FREE by QFC.org RECYCLABLE PACKAGING MANUFACTURING SUPPORTS WIND POWER</td>
</tr>
<tr>
<td>Storage and Handling Information</td>
<td>Do not accept if seal is broken. Store in a dry place between 59°-86° F. Keep out of the reach of children.</td>
</tr>
</tbody>
</table>
## Tier 1 Information (Continued)

### Confidential contact Information only viewable by FDA-
Manufacturing company and Packaging company or responsible
senior quality professional contact information

### Public Contact Information

| Contact Information | Confidential contact Information only viewable by FDA-
|---|---|
| | Manufacturing company and Packaging company or responsible
| | senior quality professional contact information

### Nutritional Product Facts Per Serving

<table>
<thead>
<tr>
<th>Amount Per Serving</th>
<th>% Daily Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calories</td>
<td>10</td>
</tr>
<tr>
<td>Sodium (as Sodium Ascorbate)</td>
<td>5mg</td>
</tr>
<tr>
<td>Total Carbohydrates</td>
<td>2g</td>
</tr>
<tr>
<td>Vitamin C (as Ascorbic Acid, Calcium Ascorbate, Sodium Ascorbate, Rose Hips (Fruit), Acerola Berry Extract 4:1)</td>
<td>500mg</td>
</tr>
<tr>
<td>Citrus Bioflavonoid Complex Blend (Providing: Orange Peel Powder, Lemon Bioflavonoids (Peel), Turmeric Extract (Rhzizome), Grape Seed Extract (Seed), Orange Bioflavonoids (Peel), Grapefruit Bioflavonoids (Peel), Rutin (From Sophorae Japonica Linn) (Flower), Hesperidin (From Orange, Lemon, Grapefruit)</td>
<td>20mg</td>
</tr>
<tr>
<td>Sugar</td>
<td>2g</td>
</tr>
</tbody>
</table>

The information presented here was acquired by UL from the producer of the material. UL makes substantial efforts to assure the accuracy of this data. However, UL assumes no responsibility for the data values and strongly encourages that upon final material selection data points are validated with the material supplier.
We want everyone to participate in the Supplement OWL!
The Supplement OWL is taking flight.

Don’t get left behind.
The industry-wide dietary supplement product registry, the Supplement OWL, is going public.
Are your company’s labels in yet?
Help our industry create a more complete picture of the marketplace.
Get on board and soar.
LEARN MORE...
GUEST ARTICLE

The Supplement OWL takes self-regulation under its wing

By Duffy MacKay, ND, Sr VP, scientific and regulatory affairs, CRN®, 07-Mar-2017
Last updated on 07-Mar-2017 at 15:39 GMT

We urge companies to participate in the Supplement OWL by uploading their finished product labels. We are confident that this product registry will become an important tool for regulators to help differentiate responsible companies from those that prefer to hide in the shadows. We are also confident that, as the Supplement OWL gains traction, retailers, both large and small, will expect their manufacturers to be part of this product registry. Absence will suggest your company is not confident enough to allow FDA (and ETC) to see you.

Can a Registry Build Trust?

By Steve Mister, president & CEO, CRN®, 25-Jan-2017
Last updated on 25-Jan-2017 at 15:39 GMT

WELCOME TO THE SUPPLEMENT OWL

CRN: The Short Report

A topline report from the Council for Responsible Nutrition (CRN), the leading trade association for the dietary supplement and functional food industry

CRN launches ad campaign to promote the Supplement OWL

CRN is investing in a dynamic, six-month ad campaign in industry trade publications to

WELCOME TO THE SUPPLEMENT OWL

www.SupplementOWL.org
OPENING TO THE PUBLIC ON APRIL 10TH

We want the industry to be well represented on opening day
Getting Started
Step #1

1. Request Service Order Form (SOF) – it’s easy
Send email to: OVP.SalesSupport@ul.com
Subject: Request for OWL SOF
Documents/Information that will be needed:

- Signed Order Form & Service Agreement
- Manufacturing and Packaging Company Contact
  - [Company name, address, phone number]
  - Information is only viewable by regulatory agencies (FDA, etc.)
  - (OR)
- Senior Quality Professional Contact
  - [Name, title, phone number and email address of responsible professional that can provide manufacturing / packaging company contact information]
  - Information is only viewable by regulatory agencies (FDA, etc.)
- Label in readable PDF format
  - (300 dpi recommended)
  - (Carton image can be provided in addition – ensure does not contain confidential information (i.e. die line, color scheme, etc.)
- A Picture of the Product itself
  - (min of 72 dpi recommended)
- ODS/DSLD verification form, if applicable
- Other tier 2 documentation
  - (Certifications, etc.), if applicable
Sending Information and Content to UL – it’s easy

Web Upload
Website for document upload:
https://www.ulprospector.com/media/upload.htm

Email
Email documents to
OVP.SalesSupport@ul.com

Thumb Drive
Mail to: UL
Attn: Supplements Label
7930 Santa Fe, 3rd floor
Overland Park, KS 66204

Faster
Speed to get information loaded
Slower
Getting information from your labels into the OWL – *this requires some thought*

**Manual Entry**
Product information may be manually entered into the template spreadsheet using the Manual Upload Guide.

**Use an Upload Service**
UL or other vendors can extract data from your PDF readable labels for a fee.

**Extraction from ODS/DSLD:**
Please [Click Here](#) to request verification form.

**Electronic Transfer**
API Connection or CSV file:
Please refer to [IT_Field_Layout.pdf](#).
YOUR CONTACT AT UL:

**Erik Eberhart**, Global Business Development will explain how to get started with the *Supplement OWL*.

Reach out to Erik at **Erik.Eberhart@ul.com** or 913-304-7841
Will a product registry build trust?

• Demonstrates pro-active self-regulation by industry.

• Strengthens the industry’s relationship with the FDA, by providing FDA with relevant information about supplements and improving its ability to obtain product, ingredient and manufacturer information.

• Counters the perception (sometimes perpetuated by FDA itself) that the agency does not know, and cannot determine, the size and breadth of the industry—so we will change the landscape.

• Establishes an industry-run, voluntary registry that *could* serve as a model for a mandatory program if it should ever be imposed in the future. (NOTE: We are not proposing, recommending or supporting a mandatory registry.)
Will a product registry build trust?  **YES!**

- Assists retailers to more easily evaluate dietary supplements and select quality products for their customers;
- Ultimately, allows consumers to identify, examine and evaluate dietary supplements based on labeling, contents and indicia of quality, to more wisely “navigate the aisle”;
- Improves the perception of all stakeholders in the industry (elected officials, regulators, retailers, consumers, healthcare practitioners, media) by demonstrating increased transparency and accountability.
It’s **THIS EASY** to be in the **Supplement OWL™**

*before April 10:*

Take these three easy steps:

1. Contact UL: [OVP.SalesSupport@ul.com](mailto:OVP.SalesSupport@ul.com) for a service agreement
2. Sign and return Service Order Form (SOF)
3. Get Started uploading your labels!

All information available at: [www.SupplementOWL.org](http://www.SupplementOWL.org)
Thanks for listening!

Steve Mister
Council for Responsible Nutrition
smister@crnusa.org