

## Objectives

The objective of the survey is to get to know the natural health product industry and their business practices in more detail so that we can better analyse the costs and benefits of the different regulatory approaches.

The outputs need to provide information on:

- the size, value and complexity of the NHP industry
- interfaces with other regulatory regimes
- the balance between domestic and export sales
- where products are exported to
- potential impacts of future developments on the industry

This survey is intended to help us understand:

- the size of the impact of the different regulatory approaches
- their business interfaces so we can consider the best legislative vehicles
- what arrangements we need to make to support exports and the impacts it would have on their business, and
- how to futureproof legislation as much as we can

## Natural health products industry survey

### Purpose

The Ministry of Health and the Ministry for Primary Industries are conducting a survey of the natural health products (NHP) industry. The survey will help us better understand business profiles so that we can minimise the costs and maximise the benefits as far as is practical when developing regulatory approaches, while also protecting consumers.

### Process

If you are part of the natural health products industry, we would be grateful if you could help us by completing the survey via the link below. Precise answers are welcome but not necessary. Indicative answers are also acceptable. We estimate the survey will take approximately **X** minutes to complete.

The survey consists of questions about:

- the size and nature of your business
- other related products your business may be involved in
- exports
- future impacts

We intend to publish the high level results of the survey on the Ministry of Health website but we will not collect information on who has answered the survey so individual results will remain anonymous.

## Survey

### Definition of natural health products

We are still developing a definition of an NHP. For the purposes of this survey, we want to collect information on products where the active ingredients are found in nature (whether sourced from nature or synthesised) and are intended for a health or wellness purpose. Include your product(s) as an NHP if you would like the option of being able to position it under a future NHP regime rather than other regulatory regimes such as the food or medicines regimes.

**1. With regards to NHPs, which of these activities are you involved in? (please tick all that apply):**

importer	
manufacturer of active ingredients under your own brand	
manufacturer of finished products under your own brand	
contract manufacturer of active ingredients (for use under someone else's brand)	
contract manufacturer of finished products (for use under someone else's brand)	
supplier of raw materials and/or ingredients	
marketer	
wholesaler	
distributor	
retailer	
registered health care practitioner	
other practitioner	
exporter	

**2. There are a number of ways in which the size and complexity of a business can be expressed. Please describe your business by ticking all that apply.**

Measure	Range							
Number of NZ full time equivalent employees	0-5	6-19	20-49	50+				
Total number (range) of different products sold*	1-5	5-29	30-99	100+				
Total number of units (of all	0-1.5k	1.5k-9k	10k-14k	15k-49k	50k-149k	150k-499k	500k-1.499m	1.5m+

<b>products combined) sold annually</b>								
<b>Gross annual turnover in New Zealand dollars (NZD)**</b>	1-49k	50-249k	250-499k	500k-1.99m	2-4.99m	5-14.99m	15-49m	50m+

\* Different flavours, pack sizes and product strengths should be counted as the same product.

\*\* Sales includes products and services (eg, practitioners)

**3. What product categories do you work with and approximately how much of your business is made up of each type of product?**

<b>Product type</b>	<b>Tick all that apply</b>	<b>% of your business by volume</b>	<b>% of your business by turnover</b>
General foods			
Supplemented and functional foods			
Dietary supplements			
Medicines			
Medical devices			
General cosmetics (eg make up)			
Cosmetics with a health and wellness purpose			
Other			
		100%	100%

**4. What proportion of your NHP business is:**

	<b>Proportion (%)</b>
Domestic	
Export	

**5. If you are an exporter, please list the five countries to which you sell the most NHPs.**

<b>Ranking by volume</b>	<b>Country</b>
1	

2	
3	
4	
5	

**6.** A regulatory regime needs to be robust and future proof. We can better achieve this for natural health products if you can give us your thoughts on where you think the industry is going.

a. Please name up to three opportunities you foresee impacting on the products you deal in or the services you provide in the next 5 years, for example, in technology, services and/or retail. Please describe these opportunities and the impacts they may have.

b. Likewise, name up to three risks to industry that you perceive and describe the impacts.

Opportunity	Impacts (positive and negative)
Risk	Impacts (positive and negative)

b. Name up to three international markets you see becoming more prominent for your business in the next 5 years?

International markets

- 7.** Do you have any other comments relevant to the purpose of this survey which is to better understand business profiles?

*Questions to ask the individuals testing the survey:*

- a. Is it clear what information is being sought, and how to fill out the survey?*
- b. Is the way we have defined small, medium and large businesses appropriate or is there a better way?*
- c. Do we have the right indicators to help us express how various options might impact on businesses? If not, what other indicators would be useful?*