

## LIST OF STUDIES



**UBIC**

C O N S U L T I N G

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# LIST OF MULTICLIENT STUDIES

## INTRODUCTION

This brochure presents the latest UBIC consulting studies.

## COMPANY OVERVIEW

Since 1987, UBIC-consulting has specialized in consulting food, food-ingredients and biotech industries and has always been at the forefront of market activities. Throughout the years, UBIC has obtained a great source of in-house information and a large network of worldwide contacts.

UBIC-consulting has carried out studies, technical scanning and strategic advises for companies all over the world and has developed a specific approach for each of these domains. Implemented by consultants with practical experience, UBIC-consulting can assist adequately in finding solutions for company's current and future matters.

With offices in the USA and Europe, and partners in Asia and Latin America, UBIC-consulting is capable to assist in a large array of countries and in the best possible way.

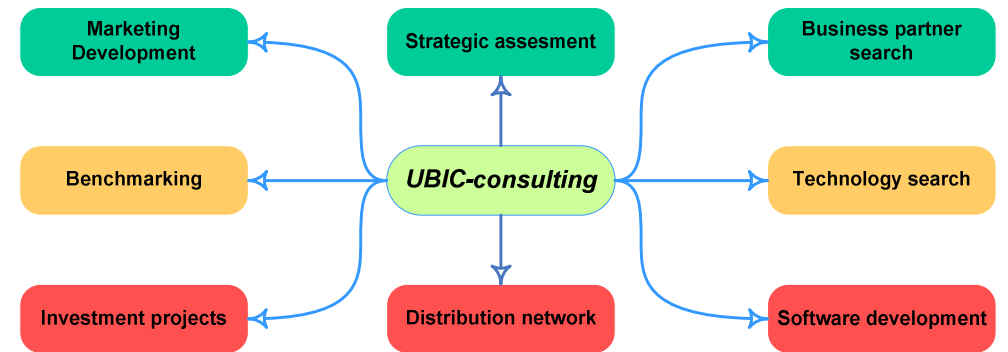


## GOALS

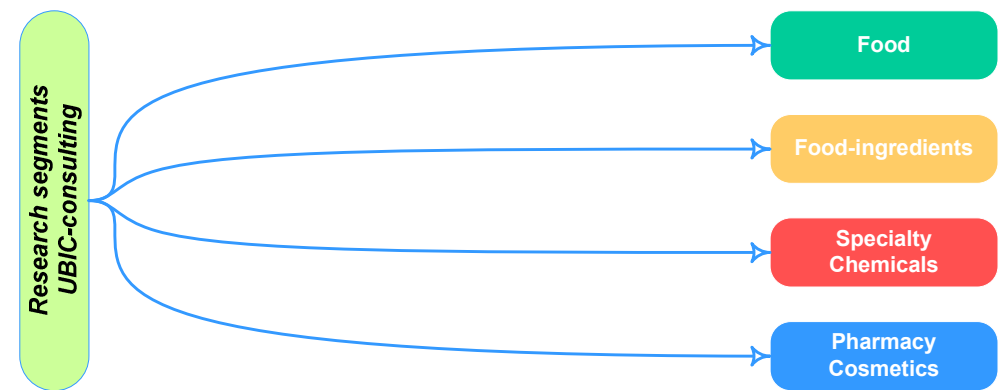
In its work, UBIC-consulting is always determined to deliver high quality and to provide its customers with optimized business advice and solutions. In this way, UBIC-consulting tries to create a clear market view for its customers by testing its products with potential customers and help them to achieve better results and a stronger market position.

## METHODOLOGY

UBIC can offer different approaches for different problems.



Research segments



## MARKET STUDIES

### High quality market studies and analyses

One of the goals of UBIC-consulting is to create a clear view on certain markets in the food and bio-industries. With these studies, whether a multi-client or tailor made, UBIC-consulting composes an information package that carries out answers to technological issues, market approach, or competitive positioning.

On the following pages a list of available market studies is published. The scope of these studies is mainly food ingredients with a world geographical area. The market researches of UBIC-consulting intend to be a valuable tool to determine company strategy and facilitate management decisions. It is an investment that will earn itself back, guaranteed.

If your company is in need of information, but one of the studies mentioned does not correspond to your needs exactly, please contact UBIC for the possibility of a tailor-made approach based on your company's request. Also, for all your other questions you can contact our central offices at the addresses below.

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## INDEX OF AVAILABLE MARKET STUDIES

### Reports selected per market

In this index, an overview of UBIC's multient studies is provided. In the following pages, you will find more detailed information, including a short summary, on each study.

<u>Index of studies</u>	
<b>Nutraceuticals</b>	
⇒	<i>Nutrigenomics and Individual nutrition</i>
⇒	<i>Ingredients for the World Clinical Nutrition market</i>
⇒	<i>A business guide to enter the world of Nutraceutical Ingredients Market</i>
⇒	<i>The world Beta Glucan market</i>
⇒	<i>Plants extracts sold as food supplement in the US market</i>
⇒	<i>A benchmarking of the world Nutraceutical Ingredients Market</i>
⇒	<i>Vitamin Minerals Market</i>
⇒	<i>The world Probiotic market</i>
⇒	<i>The world Beta-carotene market</i>
<b>Dairy Nutraceuticals</b>	
⇒	<i>A business guide to enter the world Dairy Nutraceutical Ingredients Market</i>
⇒	<i>The world Probiotic – Synbiotic market</i>
⇒	<i>The world Lactoferrin and Lactoperoxidase market</i>
⇒	<i>The world Caseinopeptide market</i>
<b>Dairy Ingredients</b>	
⇒	<i>Outlook for Dairy Ingredients in the world Food Market</i>
⇒	<i>The world Pharmaceutical Lactose Market</i>
⇒	<i>The world WPC-WPI ingredient market</i>
⇒	<i>Ingredients for the world Infant Formula market</i>
⇒	<i>Casein and Caseinates world market</i>
⇒	<i>The world MPC – TMP ingredient market</i>
⇒	<i>Ingredients used in the Sports food market</i>
<b>Other studies</b>	
⇒	<i>Industrial Enzymes</i>
⇒	<i>New R&amp;D relations between Food Suppliers and Food Processors</i>
⇒	<i>The world market of Natural Coloring Agents</i>
⇒	<i>Leavening Agents; market opportunities in Europe</i>
⇒	<i>The world Food Flavoring market</i>
⇒	<i>Food Texturizing Agents in Europe</i>
⇒	<i>Food Texturizing Agents in North America /South America</i>
⇒	<i>Overview of the Pet Food market</i>
⇒	<i>Analysis of the representations and the roles of liquid and solid nourishment in the lives of seniors</i>

## NUTRIGENOMICS- INDIVIDUAL NUTRITION

<b>Areas:</b>	<i>Scientific scanning, Regulation, Market</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 4.900</i>

Few years ago the food industry began a segmentation of its production in order to reach specific consumer groups, i.e. women, men, children, teen-agers and seniors. This evolution could carry on until the realisation of the nutrigenomics concept, which can be defined as the conception of food products adapted to the specific needs of everybody. After a complete metabolic check-up everyone would have the opportunity to choose, among a large set of recommended products, the foods that are best adapted to his/her personal metabolic profile.

The aim is to develop the science to a marketable food product, which may be marketed soon. Genetic testing is available and rapidly offering more comprehensive results. There are commercial companies offering personalised nutrition services based on testing. Personalised foods are predicted to be launched on the market in 3 to 10 years.

## INGREDIENTS THE WORLD CLINICAL NUTRITION MARKET

<b>Areas:</b>	<i>Market, Clinical nutrition Manufacturers profile</i>
<b>Countries covered:</b>	<i>USA - EU</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>8 months</i>
<b>Price:</b>	<i>€ 4.900</i>
<b>Pages:</b>	<i>385 pages</i>

In 2007, the total market for clinical nutrition is evaluated at around 12 US billion. Clinical nutrition is a vast domain including enteral feeding, surgical trauma, burns, etc. Products are considered as pharmaceuticals and there manufacturing must follow strict conditions.

The present report investigates several domains: oral and wound care (surgical trauma and burns), enteral feeding, gastro intestinal diseases, etc and intends to identify new products and new possibilities for the use of its products. It also evaluates the necessary input to develop these markets.

## INGREDIENTS FOR THE WORLD INFANT FORMULA MARKET

<b>Areas:</b>	<i>Trends and prospective in different geographical areas, usage of ingredients and future high value ingredients, customers</i>
<b>Countries covered:</b>	<i>Global analysis</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Area:</b>	<i>100 countries – 120 Infant Formula manufacturers</i>
<b>Price:</b>	<i>According to sections</i>
<b>Pages:</b>	<i>1500 pages – 7 reports</i>

Infant formula products have dramatically changed in the past 15 years. Producers have created more and more sophisticated products, which come closer each year to mother milk. In the same time, formulas adapted to specific needs (e.g. formula for low weight/pre-term infant, hypoallergenic formulas), segmenting further the market and using new nutraceutical ingredients. Today, the majority of infant formulas are composed either with a predominance of whey proteins (in development) or with a predominance of casein, depending to the country. New formulas based on new peptides, probiotics, pufas, ... are developing rapidly. Asia is now by far the most rapidly growing area.

## DAIRY INGREDIENTS USED IN THE SPORTSFOOD MARKET

<b>Areas:</b>	<i>Market, Sports Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>Europe</i>
<b>Period covered:</b>	<i>2007</i>
<b>Duration of the study:</b>	<i>8 months</i>
<b>Price:</b>	<i>€ 4.490</i>
<b>Pages:</b>	<i>360 pages</i>

The European sports nutrition market offers promising growth potential to manufacturers of sports-product ingredients, with the market forecast to grow by 8.4 per cent between 2002-2009 according to some industry experts. Increased consumer awareness and lifestyle changes have driven this change, and while trends in Europe have largely followed the booming market in the USA, the definition of sports nutrition is constantly changing.

## THE WORLD MPC- TMP MARKET

<b>Areas:</b>	<i>Market, Producers, Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>US, Europe, Asia</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 4.490 (Executive summary: € 1,900)</i>
<b>Pages:</b>	<i>170 pages</i>

Milk protein concentrates (MPC) are used in a wide range of foods from ice cream, nutrition bars, processed cheese products and baked goods. Like SMP, MPC is used as a source of dairy protein in prepared foods because its bland flavor allows other flavors to develop fully. It adds opacity to reduced-fat food formulations; its functional properties include improved viscosity, mouthfeel, emulsification, water binding and a favorable nutritional profile.

## THE WORLD HYDROLYSATE MARKET

<b>Areas:</b>	<i>Market, Production, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>Europe, US</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>5 months</i>
<b>Price:</b>	<i>€ 4.300</i>
<b>Pages:</b>	<i>165 pages</i>

Milk protein hydrolysates are a group of peptides derived from milk proteins. There are two sources of milk protein hydrolysates: whey protein hydrolysates and casein hydrolysates. Peptides may be absorbed slightly better and more quickly than amino acids or whole protein. This is due to the fact that di- and tripeptides can be directly absorbed from the gut by uptake systems that are independent of those used by amino acids.

This report analyses the hydrolysate market particularly in three segments: infant nutrition, sports food and clinical nutrition with very detailed profiles of manufacturers and their needs.

## THE WORLD LACTOFERRIN-LACTOPEROXIDASE MARKET

<b>Areas:</b>	<i>Market, Ingredients and Food &amp; Pharma Manufacturers Profiles</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>9 months</i>
<b>Price:</b>	<i>€ 4.400 (Executive summary: € 1,900)</i>
<b>Pages:</b>	<i>240 pages</i>

Nowadays, the market of lactoferrin and lactoperoxidase is still limited to a few countries like Japan and some Asian countries. In Japan, where the market initially started with infant formula, it is now all dairy products and a large array of food supplements that use lactoferrin (e.g. yogurts), which let envisage a sustainable growth in the next years. In Europe and in the US, the market is just starting, but some big players such as DMV are doing an important effort in terms of marketing and communication on lactoferrin.

## THE WORLD WPC-WPI INGREDIENT MARKET

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>12 months</i>
<b>Price:</b>	<i>€ 3.990 (Executive summary: € 700)</i>
<b>Pages:</b>	<i>295 pages</i>

WPC and WPI find applications in a large array of food products such as: dairy products like yoghurt, cheese, ice cream, dietetic foods and infant formula, sports food, etc. Furthermore, they have nutritional properties that have effect on body's performance, the nervous system, body's defence that open new commercial routes in the functional food sector, the food supplement industry but also other sectors such as clinical nutrition or cosmetics.

## CASEIN & CASEINATES WORLD MARKETS

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 4.900 (Executive summary: € 690)</i>
<b>Pages:</b>	<i>260 pages</i>

Casein is the most found protein in milk and contains 21 amino acids. It makes up approximately 80% of the total milk protein. Because of its healthy aspect, it is one of the most important minerals we need every day for living and of high nutritional value. They are known as carriers of calcium, zinc, copper, iron and phosphate ions in the body. In fact, caseins are the main source of calcium (calcium caseinates), essential to humans in terms of growth and strength of bones, they are unique proteins due to their ability to carry bio-available calcium. Lack of adequate calcium in our diet has been identified as being the reason for considerable number of people suffering from osteoporosis. This study gives an overview of the market of these two important dairy ingredients.

## THE WORLD BETA-GLUCAN MARKET

<b>Areas:</b>	<i>Market, Ingredients and Food &amp; Pharma Manufacturers Profiles</i>
<b>Countries covered:</b>	<i>Europe, US</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>5 months</i>
<b>Price:</b>	<i>€ 4.390 (Executive summary: € 770)</i>
<b>Pages:</b>	<i>230 pages</i>

Beta-glucans (BGs) occurs in the bran of barley, oats, and wheat, and can also be extracted from the cell walls of bakers yeast. BGs consist of linear unbranched polysaccharides of linked  $\beta$ -(1 to 3)- and  $\beta$ -(1 to 4)-D-glucopyranose units. Its use includes frozen desserts, breakfast foods, beverages, meats, non-dairy creamers, and canned soups, especially as fat replacers. In cosmetics,  $\beta$ -glucan's immune functions can help supporting the Langerhans cells immune system's ability declining with age. Pharmaceutical applications are mainly in the field of immune system protection.

## OUTLOOK FOR DAIRY INGREDIENTS

<b>Countries covered:</b>	<i>USA - ASIA</i>
<b>Period covered:</b>	<i>2007-2008</i>
<b>Duration of the study:</b>	<i>11 months</i>
<b>Price:</b>	<i>€ 5.400 for Asia and € 5,250 for the U.S.</i>
<b>Pages:</b>	<i>350 pages and 280 pages</i>

This study has for objective to collect the reactions of industrial customers on their need for ingredient and technical service as well as the determining factors in their purchases.

This report provides the following information:

Evolutions in the food industry and consequences in the use of dairy ingredients, Expectations towards products and services, Supplying criteria and suppliers: evolution of buying methods and relation with suppliers.

## THE WORLD CASEINOPEPTIDE MARKET

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2006</i>
<b>Duration of the study:</b>	<i>3 months</i>
<b>Price:</b>	<i>€ 3,300 (Executive summary: € 690)</i>
<b>Pages:</b>	<i>65 pages</i>

Casein is the main protein found in milk and contains 21 amino acids. It makes up approximately 80 % of the total milk protein.

Milk proteins are source of biologically active peptides. During the digestion of dairy proteins, the gastro-intestinal proteolytic enzymes release some peptides, which are cut out then, by peptidases, in amino acids. The same result is obtained besides at the time of the fermentation of milk by the enzymes of the lactic bacteria. The definite sequences of amino acids are called "functional or active peptides": they are inactive within their proteins of origin, but present particular properties once released by enzymatic action.

Globally, the market of casein fractions is still in infancy but is also offering attractive prospects.

## MILK PROTEIN AND BIOACTIVE DERIVATIVES

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>Update 2008</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 4,900 (Executive summary: € 900)</i>
<b>Pages:</b>	<i>170 pages</i>

### Demand

- Volumes and values of ingredients sold, breakdown by applications
- Major users: specifications, prices, and quality required
- Major countries of use

### Market trends

- Trends and factors that can help developing or limiting the market
- Regulations
- Prospective vision** of the market for the next 5 years, highlighting threats and opportunities, strategic moves and market future.

## PHARMACEUTICAL EXCIPIENTS MARKET

<b>Areas:</b>	<i>Market, Producers, Pharmaceutical Manufacturers profiles with consumption</i>
<b>Countries covered:</b>	<i>USA, Europe</i>
<b>Period covered:</b>	<i>2005</i>
<b>Price:</b>	<i>€ 3,900</i>
<b>Pages:</b>	<i>160 pages</i>

The total market for excipients is estimated at US.5 billion with an average annual growth of 7% to 8% in volume. North America and Europe consume approximately 70% of excipient output. Japan takes another estimated 15% and India, Brazil and China have become major single markets in recent years.

There are currently 1,200 or so excipients on the market and they fulfil the needs of the majority of finished pharmaceutical products. In general, there is an increased recognition of the role of excipients in the drug delivery process coupled with an increased research on the impact of excipients to enhance the bioavailability of active ingredients.

The purpose of this proposed study is to provide a global view of the pharmaceutical excipient sector. It describes the market trends and growth prospects, the supply and level of competition, as well as possible new entrants. On the market, lactose is currently used for tablets, pre-compression, granulation, liquids, caps, and inhalation products.

## THE WORLD MINERAL SALTS INGREDIENT MARKET

<b>Areas:</b>	<i>Market, Producers, Manufacturers profiles with consumption</i>
<b>Countries covered:</b>	<i>USA, Europe</i>
<b>Period covered:</b>	<i>2007 Update</i>
<b>Price:</b>	<i>€ 6,900 (Executive Summary €2,900)</i>
<b>Pages:</b>	<i>310 pages (Executive summary 110 pages)</i>

Minerals are characteristic ingredients in the sense that they are not produced by the body, and as such, must obligatory be supplied either by food or by food supplements. It is well recognized that macronutrients and microminerals are essential for a wide range of cellular, hormonal, muscular and physiological functions. At the same time, minerals, as they carry no sensational health promise, are underappreciated. Also, consumers are not very aware of the importance of minerals to health and the form of mineral to be supplemented. UBIC presents an analysis of the current and potential market for minerals as well as the new trends. The scope of research is worldwide with an emphasis on the Asian market.

## A BUSINESS GUIDE TO ENTER THE WORLD DAIRY NUTRACEUTICAL MARKET

<b>Areas:</b>	<i>Market, Technology, Scientific reviews, Legislation, Health Ingredients, Functional foods</i>
<b>Countries covered:</b>	<i>USA, Europe, Japan</i>
<b>Period covered:</b>	<i>2005</i>
<b>Price:</b>	<i>€ 4,900</i>
<b>Pages:</b>	<i>270 pages</i>

As we have mentioned before in our global Nutraceutical market review, the nutraceutical market is hard to predict because of several barriers. As a company who wants to become a player in this market, you may face problems related to scientific data, product positioning, regulation, consumer awareness and segmentation. Dairy products related to health make a large part of the nutraceutical market. Therefore, in this rapidly expanding market, dairy ingredients are easy to use as nutraceuticals due to their healthy image. This report provides data necessary to enter or position your company on this market.

## THE WORLD PREBIOTIC MARKET

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>Update 2008</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 2,900</i>
<b>Pages:</b>	<i>220 pages</i>

Prebiotic modulates the composition of the *natural* ecosystem by stimulating growth of *indigenous* micro-organisms via direct contact of lactic acid bacteria or bacterial products (cell wall or cytoplasmic components) with immune cells in the intestine, via production of short-chain fatty acids or via changes in mucin production. As with probiotics the global market for prebiotics is showing a healthy growth in demand and there appears to be good scientific evidence to underpin health claims, which should further sustain growth in the future. Prebiotics can also be purchased in supplement form with some prebiotics commanding as much as €700 per kilo of supplement capsules. In food products, prebiotics are mainly associated with breakfast cereals, baked goods, cereal bars and baby foods, as well as some dairy products.

## GASTRIC RETENTION & MUCOADHESION

<b>Areas:</b>	<i>Knowledge guide to improve probiotics and other nutraceuticals assimilation</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2007</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>€ 1,690</i>

The control of drug liberation profile has been the main concern of pharmaceutical industry during the last 25 years. We are facing another challenge which is the close control of the drug course inside the gastrointestinal tract (GIT). Polysaccharides seem to be the best candidates because of their perfect compatibility with the gastro-intestinal mucus (mucopolysaccharides - also responsible for the adhesion of bacteria onto the teeth). Associating some specific polysaccharides to probiotic bacteria could greatly help them survive in the gut flora and colonise the intestine wall.

## THE WORLD BIOTECH FLAVORS MARKET

<b>Areas:</b>	<i>Market, Ingredients &amp; Food Manufacturers Profiles with Consumption</i>
<b>Countries covered:</b>	<i>World</i>
<b>Period covered:</b>	<i>2003</i>
<b>Duration of the study:</b>	<i>6 months</i>
<b>Price:</b>	<i>\$ 3,900</i>
<b>Pages:</b>	<i>160 pages</i>

In recent years, there has been a strong upsurge in the demand for natural products, including natural flavors. This has created a number of opportunities for biocatalysis (use of enzymes) and fermentation to compete with traditional synthetic chemistry for the production of flavors. Biotech flavors could replace some natural flavors, being manufactured within a controlled environment and at a lower cost. They can also replace some Nature Identical flavors, and justify a natural label. To succeed in the biotech flavor market a flavor supplier should control the entire production chain, from raw materials to product protection. Therefore he should also manage the fermentation process to obtain a good yield of the targeted molecule, and he must know the customers trends and the flavors in fashion.

## SENIORS NUTRITION

<b>Areas:</b>	<i>Senior awareness of Food &amp; Health, market segmentation</i>
<b>Period covered:</b>	<i>2002</i>
<b>Duration of the study:</b>	<i>12 months</i>
<b>Price:</b>	<i>€ 3,900</i>
<b>Pages:</b>	<i>198 pages</i>

Today, almost every industrialized country is facing a large group of elderly inhabitants. These people also represent a growing market for food processors. In the future the number of elderly people will continue to increase even more rapidly. Although this group seems an obvious target for sales they are a 'low educated' group about the link between health and food and they are hard to persuade to change their food habits. Companies have to make massive investments in educating their potential clients.

In this study UBIC describes and analyze the perception of food by senior people and the link they make between nutrition and health. It also describes how companies can approach this population, the marketing and type of food product they can successfully develop.

## LIST OF MULTICLIENT STUDIES

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# LIST OF MULTICLIENT STUDIES

## ORDER FORM

### Nutraceuticals

- Nutrigenomics
- Ingredients for the World Clinical Nutrition market
- Gastric retention and muco adhesion: a knowledge guide to formulate new drugs and nutraceuticals
- A business guide to enter the world of Nutraceutical Ingredients Market
- The world Beta-Carotene Market
- A benchmarking of the world Nutraceutical Ingredients Market
- Vitamin Minerals Market
- The World Probiotic Market)

### Dairy Nutraceuticals

- A business guide to enter the world Dairy Nutraceutical Ingredients Market
- The world Probiotic - Synbiotic market
- The world Lactoferrin and Lactoperoxidase market
- Growth factors- IgG- Colostrum

### Dairy Ingredients

- Outlook for Dairy Ingredients in the world Food Market
- 34-80 WPC - WPI ingredient market
- Ingredients for the world Infant Formula market
- Casein and Caseinates world market
- MPC – TMP ingredient market

### Consumer

- Analysis and representation of the role of liquid and solid food in the Senior population

### Other studies

- Industrial Enzymes
- New R&D relations between Food Suppliers and Food Processors
- The world market of Natural Coloring Agents
- Leavening Agents; market opportunities in Europe
- The world Flavoring market
- Food Texturizing Agents in Europe
- The world Citric Acid market

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