

THE DRY COLOSTRUM MARKET

MARKET

Technical & Competitive Scanning – Regulations

Manufacturers

Update 2008

1 Report

185 Pages

MAIN ISSUES And POTENTIALITIES A Strategic Review

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THE DRY COLOSTRUM MARKET

IGG

IG from colostrum have two main applications: animal feed for calves and human functional food or drug. Colostrum has a very large potential market. Main potential applications are:

- Oral hygiene
- Gastro-intestinal functions
- Growth-factors (food supplements and OTC)
- Infant formula
- Specific drugs
- Senior people with auto-immune disease, rheumatoid arthritis, multiple sclerosis
- Cosmetics

The first two quoted applications being also the one where the research is in a most advanced stage. Besides that, the most promising area of development seems to be to develop specific antibodies from specific antigens. It is also a way to standardize the production and assure the right dosages, essential for an industrial production.

Treatment of cryptosporidic for people with aids in terminal phase, used as a palliative treatment in hospital against diarrhea is less employed today due to tritherapy. It used to carries the IG that this population was missing.

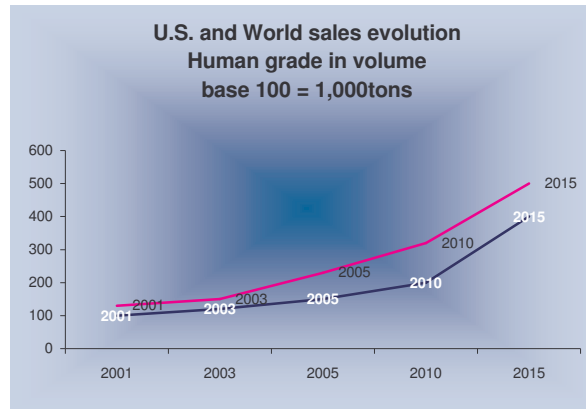
As a food supplement, IG derived from colostrum only have a passive action on the body; so one can claim that they reinforce the immune system, but not that they stimulate the immune system. In the US, colostrum food supplement producers are facing some difficulties with the FDA, which make them more cautious.

The future of Colostrum in the long term is directly linked with scientific data. In cosmetic products, BSE affaires may prove to limit expansion.

In animal feed, because of the high unit cost, the dosages incorporated are considered by some experts to be too low to be really efficient. As a result, livestock farmers may be disappointed. Thus, the market is expanding.

In Baby food, usages are still restricted to Asia for the moment.

Scenario 2 Opening of the regulation in Japan and Europe for functional foods



Process

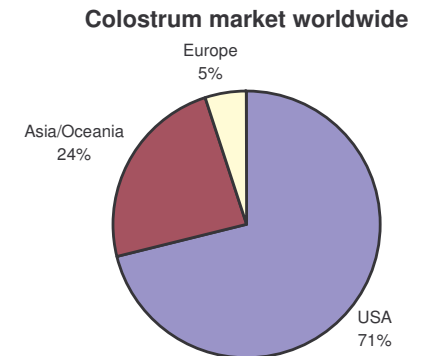
The isolation process is delicate and complex. The collected raw material must be frozen. Similarly, due to bacteria cultures, it is difficult to stabilize the product, which cannot be heat-treated without destroying its biological value. To solve this issue, current production is by way of ultra-filtration, which is difficult to handle.

The product's economic return is open to question. The collection of the raw material is difficult and expensive. As the scale is totally different, it requires a different collection channel than that used for regular milk. Thus, it tends to be more successfully exploited by smaller independent firms, working in collaboration with larger dairy companies.

Market

Potential production is much larger than the existing market. In France, for example, with a national herd of some 4 million cows, there could theoretically be a collection of 8 million liters of colostrum. This, at 20% of dry matter, gives a potential production of 1,600 tons/year.

The colostrum market worldwide is split as following:



GROWTH FACTORS

Growth factors are proteins that play an important role in the regulation of cell division and tissue proliferation.

By binding to receptors on the cell surface, they activate (or inhibit) cellular proliferation and(or) differentiation. They are secreted by all kind of tissue and comprise a lot of different molecules as cytokines, chemokines, interleukines....

Growth factors such as IGF-1 and IGF2, TGF-A and TGF-B are present in bovine colostrum.

Supplementing Human Growth Factors (HGH) supposed to slow the aging process. A successful HGH supplementation requires the preparation of the body for the increased presence of this substance. The selected ingredients in this unique formula could address the health of four major areas:

- The brain
- The nervous system
- The energy systems (Adrenals and cellular ATP)
- The body's drainage system

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OBJECTIVES

SUPPLY

- ❑ Key Suppliers, market share, production & capacity, grades and prices main researches conducted
- ❑ Upcoming players

DEMAND

Volumes of Colostrum sold in the United States and Asia

- ❑ Volumes and values, 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
- ❑ Modes of promotion

PROSPECTIVE

- ❑ **Prospective vision** of the market for the next 5 years, highlighting threats and opportunities, strategic moves and market future.

GENERAL APPROACH

General synopsis

The main information data will result from interviews with the main players in the business in order to obtain an in-depth understanding of the forces that will drive the future market.

STEP 1: Experts interviews

UBIC will gather information relative to the scientific background relative to each application and researchers opinion.

STEP 2: Interviews of suppliers

UBIC will gather information relative to producers acting on the market:

- ⊗ Revenues and production volumes
- ⊗ Products & specifications
- ⊗ Prices
- ⊗ Process
- ⊗ Main domain of research

This second part of the research will describe the strategies of the major participants.

STEP 3: Interviews of Food Supplements Companies and Retailers

UBIC will analyse the following aspect of the demand:

- ⊗ Large buyers consumption and growth perspective
- ⊗ Product expectations
- ⊗ Buying patterns
- ⊗ Consumer pattern
- ⊗ Health relations
- ⊗ Mode of promotion
- ⊗ Trends

Some Retail distributors interviews will complement this review to give a better understanding of the consumer perception.

Particularly, UBIC will gather the information regarding the promoting and inhibiting factors in the development of the demand.

Prospective

UBIC will set up a prospective of the market, indicating:

- ⊗ Volumes and market value
- ⊗ Price trends
- ⊗ Most promising applications
- ⊗ New investment in capacities
- ⊗ Competitive strengths of new entrants on that market
- ⊗ Market forecasts 2001-2005

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Methodology

Market Study

The methodology used in this project will be the following:

- ❑ Desk research
- ❑ Interviews with suppliers
- ❑ Interviews with experts
- ❑ Interviews with Food Supplement
- ❑ Interviews with retail Companies

Interviews of Suppliers

- ❑ Interviews with producers to collect information on their product range, production and capacities, sales and market trends. This will detail their opinion of the sector's evolution, and new market applications.

Interviews of Experts

- ❑ Interviews with experts to collect their opinion on applications and their scientific background.

Interviews of Food Supplement / Retail companies

- ❑ Ubic will identify a sample of large industrial users to obtain the product usage and trends.

Company profiles will be detailed for each player

- ❑ Some retailers will be approached to improve the knowledge of consumer pattern

Sample: Major Colostrum Suppliers

U.S.A.

- ADVANCE INGREDIENTS
- BIOMED
- DMV NUTRITIONALS
- GALAGEN (LAND O'LAKES)
- HUMANETICS
- IMMUNO DYNAMICS
- LABELLE
- STERLING TECHNOLOGY
- STOLLE MILK BIOLOGICS
- SYMBIOTICS

EUROPE

- ARMOR PROTEINES (F)
- BIO-SERAE (F)
- CENTRE DU COLOSTRUM (B)
 - COLOSTRUM TECHNOLOGY (G)
 - GLANBIA (IRL)
 - INGREDIA (F)
 - NOVATREAT (FIN)
 - VALIO (FIN)

OCEANIA

- GROPEP (AU)
- NELSON LABORATORIES (AU)
- TATUA COOP / NZDB (NZ)
- WESTLAND (NZ)

Sample: Experts

U.S.A.

- UC DAVIS
- ACTU (STANFORD UNIVERSITY)

EC

- INRA
- INSTITUTE OF DENTISTRY UNIVERSITY OF TURKU
- AGRICULTURAL RESEARCH CENTER OF FINLAND

OCEANIA

- MILK & HEALTH RESEARCH CENTRE (MHRC) (NZ)
- MILK & HEALTH RESEARCH CENTRE (MHRC) (NZ)

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Sample: Major Food Supplement Companies

USA

- JOE WEIDER NUTRITION
- LEINER HEALTH PRODUCTS
- PHARMAVITE
- MEAD JOHNSON NUTRITIONALS
- ROSS PRODUCTS
- TRIMEDICA
- TWINLAB

EUROPE

- NUMICO (NL)
- NOVARTIS (CH)

ASIA/OCEANIA

- CALPIS
- MEIJI SEIKA
- MORINAGA
- NEW LIFE FOODS_(NZ)
- OTSUKA
- YAKULT
- YAMANOUCHI

Sample: Major Cosmetic and Pharmaceutical Companies

USA

- COLGATE
- ELIDA GIBBS FABERGE
- GILLETTE - ORAL B
- PFIZER - WARNER LAMBERT

EUROPE

- NOVARTIS (CH)

ASIA/OCEANIA

- OTSUKA
- YAMANOUCHI

Sample: Major US Retailers

Food supplements retailers

- CVS PHARMACY
- DRUG EMPORIUM
- GNC
- NATURE'S BEST
- RITE AID
- SUPERNUTRITION
- THRIFT DRUG
- WACO
- LONG'S DRUG STORE
- WALGREENS
- TRADER JOE'S

E-business

- MOTHERNATURE.COM
- GREENMARKETPLACE.COM
- ALLHERB.COM
- PEAKHEALTH.COM
- DRUGSTORE.COM
- PLANETE.COM
- JOE WEIDER
- ASHLAND
- 4LIFE

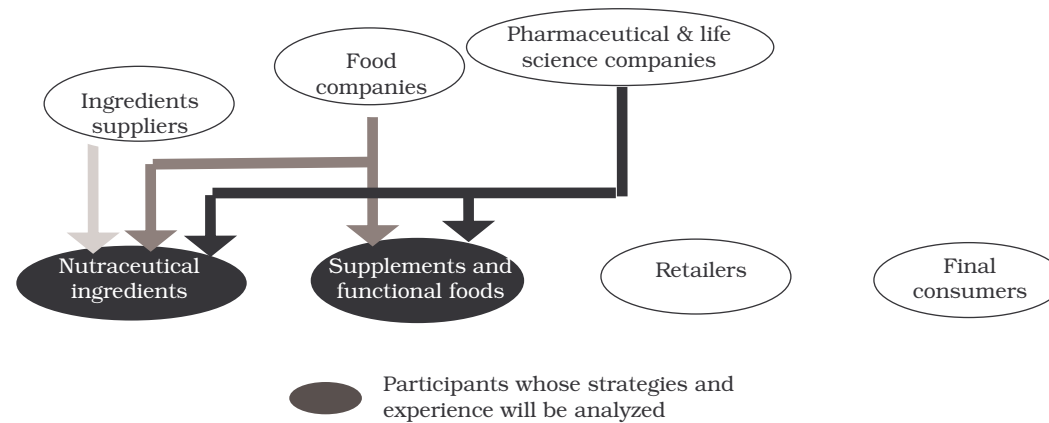
Mass Market

- WAL-MART
- K-MART
- VONS
- RALPHS
- STATER BROS
- ALBERTSON'S
- COSTCO
- SAFEWAY
- BJ'S WHOLESALE
- SAM'S CLUB

THE DRY COLOSTRUM MARKET

Interviews of Colostrum suppliers, with a detailed profile for the main actors:

- ☒ Company description
- ☒ Revenues
- ☒ Type of colostrum produced (specifications) and grades
- ☒ Market position
- ☒ Production capacities
- ☒ Market and applications targeted
- ☒ General opinion regarding the development of the colostrum market
- ☒ New possible applications



Profiles of the major Food supplements companies will provide:

➤ The company's share of the Colostrum business :

- ☒ Major applications of colostrum
- ☒ Health functions targeted
- ☒ Volumes of colostrum used and grades
- ☒ Prices and trends (supplying and retail prices)
- ☒ Consumer expectations (positive and inhibiting factors in the use of colostrum)
- ☒ Trends

➤ e-business

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COMPANY

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 _____ **Date** _____ **Signature:** _____

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