

# **Special Report**

June 2018

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# Transparency:

What It Is and Why We Need It

by Jade Sterling

# **Transparency:** What It Is and Why We Need It





#### It's very hard to build trust; it's very easy to lose it.

Transparency has been discussed and debated for years; you'd think with all the global regulations related to marketing communications, business practices and labelling, we'd already have a fully transparent industry supply chain.

A handful of high-profile scandals have coincided with consumers' expanding appetites for more information, and they are demanding more transparency, voting with their wallets. People around the world have many concerns to contend with: food poisoning, lack of traceability, adulterated ingredients, cross-contamination, misleading labels, undeclared allergens, genetically modified organisms (GMO), fraudulent claims, pesticides, chemical contaminants, counterfeit products, product recalls...

This makes the global natural products industry an intriguing juxtaposition of trust and deceit; it also creates a minefield for consumers trying to determine which brands to trust and which product among the many on the shelf they should purchase.



There's been this growing interest in transparency we've seen across consumer packaged goods and food. If anything, the vitamin and dietary supplement industry has been late to the party.

Chris Schmidt, analyst, Euromonitor

#### Definition

What is transparency? The word is often used by different people to mean different things, and before industry can hold itself fully accountable, a consensus on the definition of transparency is required.



Transparency ideally encompasses supply chain and all corporate relationships, but is also manifest in culture, ethics and mission.

Len Monheit, Managing Partner, Trust Transparency Center

'A lack of hidden agendas or conditions, accompanied by the availability of full information required for collaboration, cooperation, and collective decision making.'1

'The full, accurate and timely disclosure of information.'2

The minimum degree of disclosure to which agreements, dealings, practices and transactions are open to all for verification.'3

'Transparency is 'easy to see through' by definition. It implies access to accurate information about the product purchased, its manufacturing and constitution.'

'An essential condition for a free and open exchange whereby the rules and reasons behind regulatory measures are fair and clear to all participants.'4

Vitafoods Insights believes transparency refers to being open about how and why something is done, covering everything from ingredient origin to consumer education. Transparency is more than simple honesty; it is assurance that a company is truly the kind of business it wants people to think it is.

It doesn't help that in recent years, the word 'transparency' has been used as little more than a buzzword, a marketing opportunity. Transparency is no longer an added bonus—there is a huge movement around farm-to-table, non-GMO, and sustainably grown ingredients. The ability to track food from farm to fork allows all entities to closely monitor production, mitigating risk and improving quality. Transparency is assurance, and a business delivering a product or service of real value to consumers and industry in an ethical manner should have little difficulty being truly transparent.



At the end of the day, transparency should mean honest and open, easy to see through and easy to understand.

Peggy Jackson, Vice President Sales and Marketing, Ingredientsonline.com

#### Why are we talking about it?



Consumer demand for transparency comes from the desire to keep themselves and their families safe; it is an innately emotional demand from consumers taking products on faith. They have an expectation that the product they have paid for will do what it says; they expect safety and efficacy and industry needs to meet this.

In 2015, the office of New York State Attorney General Eric T Schneiderman revealed the results of an investigation into US botanical supplement ingredients. DNA barcoding of products sold at four major retailers in the United States revealed that not only did some contain little of the ingredients listed, they also contained contaminants. Nearly four in every five herbal supplements didn't contain the ingredients stated on the label and more than a third contained contaminants such as rice, beans and asparagus. While the testing methodologies were questionable, particularly for botanical extracts (more on that later...), the outcry in the media raised major concerns among consumers.



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This contributed to more doubt and speculation about the quality and supply chain serving the health products space, making it clear the desire for transparency stems from a lack of trust in the industry. Consider weight management supplements: consumers have been led to expect a magic bullet solution to their weight concerns and are (rightfully) disappointed when the products don't do what they claim to. Another example is sports nutrition protein powders. Some companies will use maltodextrin or other cheap flours and bulking agents to 'stuff' their formulas to occupy more space – the more filler they can use, the less active ingredient they need, meaning higher profit margins.

Consumption of nutritionally enhanced products is largely a practice based on trust; consumers may never know the actual effects of the product they're taking, due to the inherently preventative nature of supplementation; yet, they trust the science and the messaging from the brand and their health advisors. When one company breaks that trust, the whole industry suffers.



Len Monheit, Managing Partner, Trust Transparency Center

It makes business sense to be transparent, highlighted in the push for non-GMO in the United States. When GMO ingredients were initially introduced to the US market, they were generally not labelled and education was lacking; this ultimately fuelled consumer distrust and gave rise to certified non-GMO claims. It has also driven continued initiatives to serve the supply chain. For example, in 2015, the Coalition for Supplement Sustainability was formed to help food companies source certified non-GMO vitamins, rather than eliminate those ingredients from their products due to a lack of transparency around sourcing. Bethany Davis, spokeswoman for the Coalition, said food manufacturers 'may have difficulty getting enough supply of vitamins to make non-GMO claims because the supply chains are very complex and it's not the industry standard to have full transparency.'

The primary reason for the lack of change in the industry does not lie with the individuals or the desire to deceive; rather, there is no general appetite to undertake the effort and expense of a successful effort to deliver a transparent industry. This applies—to varying degrees—to companies, associations, governments and regulatory authorities. It is reflected in the unwillingness to follow up on suspicions and information, a reluctance to share information or reveal 'proprietary' suppliers, and a hesitation to commit the necessary informed intelligence, effective actions and other resources to the fight for transparency.



The days of hiding the factory are gone.

Peggy Jackson, Vice President Sales and Marketings, Ingredientsonline.com

Take vitamins and mineral supplements as an example: users begin to feel better and perceive their supplements as positive, often leading them to think that if a small amount is so amazing, a larger amount must be better. This is compounded by their (limited) understanding of bioavailability—'not all of what I take gets absorbed, so I should probably

take more'—and it's hardly within a business' interest to refute this. Not only does the unwillingness to correct this assumption continue to promote the idea that more is better, a chasm appears in the information available to consumers—which is promptly filled by unregulated and misinformed opinions. There are many players in industry perfectly happy about this; the only thing they need to say about their raspberry ketone capsule is that it contains raspberry ketones. Let the internet do the rest!

But this is where the inherent problem lies: they'll hurt you if they think you've lied.



Why would you ruin your reputation by making a promise, not fulfilling it, and seeing your reputation trashed on social media?

Dr Sirku Eckel, Senior External Communications Manager Nutrition, DSM

#### **Sports Nutrition**

Under rules from the World Anti-Doping Agency (WADA) and the International Olympic Committee (IOC), ignorance about a substance being banned or a lack of awareness as to how a banned substance entered the body—referred to as 'inadvertent use'—are not valid excuses. Athletes are responsible for any banned substance they ingest, regardless of the means—this is strict liability. Athletes including Tyson Gay and Michael Kopech have been suspended from their sports after testing positive for oxilofrine—a stimulant found in their dietary supplements,.

Recent studies have revealed the majority of elite athletes consume dietary supplements<sup>5-10</sup>, making supplement safety and risk management strategies for those athletes vital. One of the most effective methods is to only use products that have been certified by a third-party to be free of banned substances. As John Travis, Research Scientist at NSF International, says: 'While the vast majority of manufacturers are committed to quality and safety, a small number continue to develop and market products that contain potentially harmful ingredients.' This is known as 'spiking' where manufacturers add ingredients to boost a product's effectiveness, without listing them

on the label. 'This presents a great opportunity for reputable companies that want to showcase their products' safety and quality,' continues Travis. 'Independent third-party certification of dietary and sports supplements helps supplement makers differentiate their products in the marketplace. When consumers see the NSF International certification mark on a package, they can be sure those vitamins and supplements have been independently tested for harmful levels of specific contaminants like lead and arsenic. NSF certification also means the product has been tested to be sure the ingredients listed on the package are actually in the product.'



Even then, transparency in third party certification for banned substances in sports is essential to understanding the underlying protection offered. To be transparent, a certification provider should clearly describe the fundamental aspects of certification; the drugs included in the testing menu; detection or reporting levels or other thresholds used; and a list of batch numbers that have been certified.

#### Supply chain

Consumers widely assume supply chains are perfectly linear: farm to factory to shelf. But like any global supply chain, the nutrition and food industry has many, many stops along the way. Consider the issues around wild-crafted botanicals. Chris Oesterheld, executive vice president, Jiaherb Inc., offers this take: 'Rhodiola rosea root grows wild in China, with self-employed pickers involved in its harvest. Then, a local broker gathers from the pickers and sells to a manufacturer of botanicals. It's easy to trace crude materials from a specific farm, but wildcrafted materials present a true challenge.'

Knowing the source of each ingredient is beneficial, not least because you can then communicate this to your discerning consumers. Millennials in particular demand ethical treatment of labour and sustainable practices and this information can only be available if the origin of every ingredient is clearly identifiable.

Contract manufacturing presents another challenge. Most consumers likely assume the brand name on the product has a full production facility behind it. While they are correct that there's a full production facility, it's often not owned by the brand holder, but an organization that has leveraged economies of scale to ensure brands can deliver goods to market at reasonable costs and with production oversight. Brands tend to believe consumers don't need to know about contract manufacturers, but the tide is changing. Consider how Amazon Elements supplements note on the label that they're manufactured by Arizona Nutritional Supplements, allowing consumers a look into the supply chain. That's transparency at work.

#### **Testing**

In the Schneiderman investigation in New York, the US Council for Responsible Nutrition (CRN) claimed the tests used were not fit-for-purpose, while GNC, one of the retailers cited, said its own testing—along with independent third-party testing— 'confirms in no uncertain terms that our products are safe, pure, properly labelled and in full compliance with all regulatory requirements.'

Testing is a huge issue in the drive for transparency as different companies use different methods and sensitivity thresholds. DNA testing, the method used in the Schneiderman investigation, is still relatively new but has the potential to become an important tool in identity testing. However, like any test method, in the hands of a technician who does not have a working knowledge of the materials used, the results have the potential to be inaccurate. There are said to be limitations in barcode testing due to DNA damage during

the extraction process and that method's inherent inability to reveal quantities indicates it would be inappropriate to use as a stand-alone method. 11 Try explaining that to consumers; it's quite complicated and a clear explanation may be challenging.

That doesn't mean we shouldn't. Companies can no longer afford to just say their products are tested; now they should really reveal where, by what methods, and why they were tested.<sup>11</sup> After all, even the Attorney General's office did not disclose details of testing methods; rather against the spirit of transparency.

#### **Consumer Lifestyle Trends**

The clean label movement stems from the desire to know what ingredients a product comprises; consumers distrust long 'science-y' ingredient names, have a real aversion to GMO and have heard bad things about gluten and dairy.

SmartyPants Vitamins, a line of free-from gummy vitamins, has raised \$19.5 million from investors since it began sales in 2010; Ritual, a clean label multivitamin, attracted more than \$1 million in financing from angel investors.12

Consumers want complete transparency so they can find out how animals were treated (animal welfare), where their food was produced (local sourcing), farming practices (certified organic), and myriad other personal reasons tying into their beliefs. Millennials, in particular, make purchasing decisions based on their ethical leanings, so those companies that can show this level of traceability will have the advantage with the generation with the largest purchasing power.

The evolution of the internet and access to new technology has changed how we obtain information, and these changes will continue. Information at the click of the button, and the empowerment of consumers to 'make their own choices' correlates with a general mistrust of iconic brands, and movements such as clean label, sustainability, personalisation and self-care.

Len Monheit, Managing Partner, **Trust Transparency Center** 

## **Genetically Modified** - Blaming Monsanto

Genetic engineering has the support of all major scientific bodies around the world for its benefits in bringing safe, nutritious food to consumers and high-yield crops to farmers, making the anti-GMO movement's ubiquity in food labels and marketing confusing. Heather Granato, vice president of content at Informa (parent company of Vitafoods Insights), explains: 'The anti-GMO sentiment comes from a lack of transparency; if Monsanto had been transparent in the first place and educated consumers about GMO, we wouldn't be seeing this antisentiment now.' Monsanto is a great example of the dangers of a lack of transparency: commonly considered 'the face of corporate evil' (#monsantoevil is the last hashtag a company could want), consumers around the globe have heard of Monsanto, and not in a good way. Numerous experts point to the 'bungled launch' of GMO seeds in Europe and the 'vicious war of disinformation' as the reason for this. In fact, now Bayer has acquired them, 'Monsanto will no longer be a company name,' according to a statement released by Bayer.



#### What can we do?

The idea of exposing the internal operations, structures and culture of a company can be a scary thing. But businesses are realising the benefits of having visibility into their supply chains. Consumers are choosing companies that embrace transparency as a strategic business opportunity and are gravitating towards those that include this information in their marketing through labelling, advertising, digital platforms and the media. Implementing transparency is an opportunity to increase value for customers, partners and consumers, yielding increased profitability and sustainability.



As the industry continues to evolve, it's our responsibility to be transparent with our customers (B2B and B2C) and provide them with honest, open access to information online or in person. From touring ingredient factories of origin to full access to documentation, let's work together as an industry to elevate and communicate transparency. While doing this, we will discover questionable matters and it's our responsibility as an industry to challenge those matters, make them "transparent" and find corrective solutions.

Peggy Jackson, Vice President Sales and Marketing, Ingredientsonline.com

Yes, consumers are demanding transparency and are choosing brands and products accordingly. But there's a limit to consumer responsibility for choosing transparent companies; for a consumer to discern whether an ingredient is sourced naturally or is a synthetic, they need to spend time and effort researching and following the supply chain. Industry could make a shift to make this easier for consumers: provide this information and make it easily accessible. At the same time, the industry has the opportunity to lobby for a standard definition of the term 'natural'. Various interpretations could be given to this term: unprocessed, organic, without chemical ingredients... As there is no harmonised concept of 'natural' under European food law, unscrupulous businesses can take advantage of differing regulation to claim their products are natural. Consumers don't know which brands to trust, which is ultimately damaging to the industry's reputation.



There was a time when brands were the only ones held accountable for good manufacturing practices. Today, supplement players from all parts of the supply chain are stepping up; the time is now, as even retailers and consumers demand more from the ingredients that end up in their products.

Scott Steinford, Managing Partner and Founder, Trust Transparency Center

It's no longer enough to only be concerned about the supply chain step behind you and the step in front of you. Whole-chain, end-to-end traceability offers optimum safety and transparency and seeing the complete picture means a business can quickly verify the safety practices of their suppliers, the origin and authenticity of the ingredients and the quality control chain surrounding their product. Take responsibility for your product's safety and efficacy by caring about the whole supply chain; by knowing everything about your product's past and future, you can communicate this transparently to your business partners and end consumer.







Chobani Yoghurt in the US and Nakd Snack Bars in the UK are excellent examples of how transparency has been used to position products and challenge the megacompetition. Chobani ticks the boxes in several areas that score highly as consumer transparency must-haves, such as local milk sourcing, transparency about ingredients and ensuring the farmers they source from do not use hormones on their animals. Meanwhile, Nakd partners with WeForest to offset their carbon emissions and help regenerate forest in Burkina Faso and Brazil.

#### Self-regulation and policing



People who take supplements expect them to be safe and contain quality ingredients; they expect what's on the label to be in the product. Dietary supplement manufacturers must ensure these legitimate expectations are consistently met—batch after batch.

Dr Bob Pietrowski, Vice President Global Health Sciences, NSF International

Authorities around the world tend to lack knowledge of specific sectors and struggle to exercise their authority, often preferring a spot-check method once a concern has been raised with them. The industry has a responsibility to collaborate and hold each other to a common standard. Pricing disparity should be a red flag; don't choose a supplier based on price, choose suppliers that are willing to be open about their practices and business. The easiest way for every business and player in this industry to become more transparent is to demand transparency from each other—as consumers vote with their wallets, do the same with your budgets.



There is a disconnect between wanting transparency and traceability, and buying by price. Buyers dictate the level of ingredient traceability required and the investments suppliers will make. Sound agriculture, cultivation and harvesting practices require additional financial investments, and brand marketers need to recognise the value of this stewardship in providing botanical ingredient quality to consumers. When companies focus only on price, suppliers have to cut corners somewhere—most commonly in quality control.

Shaheen Majeed, President, Sabinsa Worldwide

#### Third-party testing

Don't rely on suppliers for testing. Brands have a regulatory obligation to ensure they test all incoming materials; this can be done in-house or performed by a reputable facility not affiliated with the supplier.

### **Testing for Label Claims: K2 Case Study**

Vitamin K2 (menaquinone [MK]-7) can be unstable in certain formulations, and with more K2 products on the market, the chances that consumers may purchase supplements that don't deliver is increased. In 2016 and 2017, Kappa Bioscience tested over 200 vitamin K2 products for quality and label claim. The testing results found half of K2-plus-calcium or -magnesium

products missed label claim by 50 percent or more. In addition,

50 percent of the K2 products that did not contain minerals performed poorly, with one in three measuring no vitamin K2 content. 'How can manufacturers protect brands, retailers and consumers while ensuring the healthy growth of the K2 market? A market needs healthy competition to develop and back-biting on quality concerns serves

no-one and is fundamentally counter-productive to growth,' attests Jim Beakey, marketing director at Kappa Bioscience. 'Our answer is testing, testing and more testing. Ingredient and product manufacturers can frequently spot test their own finished products, using independent labs, to identify and solve quality issues. Quality permeates the full value chain of a product—from ingredient manufacturer to consumer—and all parties share responsibility. Meeting label claim is a simple promise,

but as the example of K2 shows, sometimes it takes an industry to accomplish this.' Why would Kappa continue to invest in a study that highlights such poor results for their industry? In a word: transparency. By addressing quality in an open forum with readily replicable data, progress can be made.

#### Communication

Implementing transparency can pose challenges, particularly regarding how to manage the information released to consumers. For companies planning traceability, the way in which information will be disseminated is paramount.

Access to information can both help and hinder; brands have nowhere to hide if they fall short on their commitments, but it also offers a much wider audience when they are doing the right thing. Recalls, for example, may seem more prevalent, but that is due to increased visibility. Consumers have greater access to the news through multiple channels, while the industry itself is more proactive and accountable, with companies conducting voluntary recalls.

The promotion of transparency is frequently a short-term measure such as "we're now telling you this, aren't we great", rather than a fully-engaged transformative path. That is not to say that a company cannot decide to disclose previously closely held information, but to label this as suddenly 'transparent' will probably backfire.

Len Monheit, Managing Partner, Trust Transparency Center

Transparency is more than just saying you have documentation available; you need to provide it. Provide the information as standard—create a document you openly share with customers on your website and include:

- The country of origin for ingredients
- Method of species identification
- Testing methods and results
- Harvest information
- Chemistry content for the material
- Production methods

For ingredient suppliers, this ensures product quality and consistency as manufacturers can test using the same lab methods.



Why shouldn't buyers have access to downloadable quality assurance or quality control documentation 24/7? Think about how much time this would save. QA/QC documents should not be a mystery, and having these documents readily available has become mandatory. When the production manager, research and development or marketing teams are working on production planning or product development strategies, it should be easy to answer questions about ingredient mesh size, colour, testing methods etc.

Don't forget: it's one thing to provide the information, it's another thing to make it easily accessible. Dedicate an area of your website to information about each batch of ingredients and each batch of finished product; make the information easy to understand and digestible (don't hide behind scientific jargon or technical terms explain them!); and make it clear your business can be contacted if consumers have questions. Make your communications open and honest and keep them open.

Peggy Jackson, Vice President Sales and Marketing, Ingredientsonline.com



#### **Technology**

Don't underestimate the role technology and social media can play in improving the transparency reputation of a business. MegaFood is a great example of this; live stream footage of their facilities is available 24/7 on the company's website. 13 This is unprecedented access for consumers and goes a long way in building trust in operations.

Tech startup Cibus has developed CIBUS Trace, blockchain technology which will enable consumers to scan food products using their phones to verify its quality and authenticity. 14

With enhanced traceability technology, ingredients can be traced back to their point of origin in moments. This is vital to finished product manufacturers: if quality is compromised, technology makes it possible to initiate an investigation, notify suppliers and locate related product immediately, meaning better response times and reduced risk.<sup>15</sup>

Companies that make the best use of technology to optimise the supply chain and ensure transparency through to their customers will be best positioned to scale their businesses in the future.

Peggy Jackson, Vice President Sales and Marketing, Ingredientsonline.com



Blockchain is a shared database, validated by a wider community rather than a central authority. It's a collection of records that a crowd oversees and maintains and each block represents a number of transactional records, and the chain links them all together. As records are created, they are confirmed by a distributed network of computers and paired up with the previous entry in the chain, creating a chain of blocks. The entire blockchain is retained on this network, making it a public ledger that cannot be easily tampered with, as no one person can go back and change things. 16 This level of transparency is one of the main advantages of blockchain.

#### **Packaging**

The latest addition to the successful mums-to-mums Happy Family range is Clearly Crafted with transparency linked to a benefit ('the goodness you can see')—even their packaging is transparent!

Many brands in the United States have signed up to SmartLabel™. Information through SmartLabel is available instantaneously, whether a consumer is in the shop, at work, or at home, and regardless of the device they use. This offers an opportunity for brands to provide one complete source of information about their products to consumers.

QR (quick response) codes, while considered passé, show the potential for scanning apps to provide more information immediately. Modern consumers are used to shopping with their phones, standing at shelves to find information on the internet to inform their purchases. QR codes were the start of interactive packaging, and newer smart packaging technology offers the opportunity to share more information with the consumer at the point of sale. Augmented reality (AR) shows promise as consumers can scan an icon or image which then opens a video or other interactive content for information about the product. Brands offering this information about their supply chains and manufacturing processes, for example, will find this a way to stand out on the shelf.

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#### **Associations**

Trade associations such as the Global Organization for EPA and DHA Omega-3s (GOED) and the European Specialist Sports Nutrition Alliance (ESSNA) are essential resources and voices for the industry. They play a crucial role as the face of the industry and occupy a unique space in transparency; they advocate for transparency to protect their members, their organisation and the broader industry. Trade associations lead the way in policing their sectors and echo the importance of shared responsibility.

At their heart, trade associations are all about collaboration, and there are plenty out there: 2018 saw the launch of a vitamin K2 trade association which can provide a uniform, science-based voice for K2, and will launch an independent quality testing program; the Natural Algae Astaxanthin Association focuses on protecting the category and consolidating the voice for this sector; the International Probiotics Association is the very well-known voice for the probiotics industry.

#### TALK TO EACH OTHER

It's understandable that businesses are nervous about implementing transparency; it's one more thing to comply with. It's therefore imperative to make connections in pursuit of a common goal. Talk to your customers, your consumers, your partners. Make transparency an integral part of your dialogue when negotiating contracts; when discussing business strategy; and when pitching to retailers.

Move from an accusatory dialogue to a supportive one; make it clear to your suppliers you will only do business with them if they can show transparency and encourage them to implement better practices.

The easiest way to improve transparency in the industry—start talking! Put transparency into every conversation.

If transparency is negotiated with authenticity, with a focus on the journey rather than the short-term gain, fad or trend, and a deeper engagement with all supply chain partners, up and down, in unprecedented relationships, the long-term victory will go to the organisations who use transparency to build trust.

Len Monheit, Managing Partner, Trust Transparency Center

Thankfully, the healthy products industry is moving towards greater transparency. The goal is to create a self-regulated, industry-led movement towards greater transparency and accountability. After all, transparency drives better, sustainable business.

Attention is often diverted from the need to implement transparency to bickering about the degree of effort required by stakeholders across the industry. What is now required is a communal, collaborative effort to improve the situation.

Don't expect consumer demand for transparency to subside; instantly-accessible information and growing concerns for quality and responsibility will see businesses that fail to implement transparency fall behind.

It's time to share information and collaborate towards a shared goal. Transparency and traceability requires having all parties aligned with best practices meaning we need to agree what these constitute. The Vitafoods Transparency Initiative offers the following as the new industry standard working definition for transparency:

Transparency is open and honest communication, accompanied by the complete availability of information about the ingredients, supply chain, manufacturing processes and business policies, including mission and ethics.

#### How to get involved

What does transparency mean to your business? What are you doing to implement transparency? Do you agree with the Vitafoods definition? In the interest of collaboration, we encourage all our readers to get in touch and share their thoughts. We encourage industry players to contribute blog posts to Vitafoods Insights to keep the topic of transparency as prominent as possible—for more information, contact Jade Sterling. In the meantime, keep transparency at the forefront of your conversations with

businesses and consumers and keep proving our industry can become transparent.



Transparency empowers consumers to make informed choices. It is also a chance for ingredients to shine, to show the body of research and consistency behind a brand. This approach is a win-win on both sides: the manufacturer can justify their price point and capitalise on investments into quality, integrity and compliance, and the consumer can discriminate between products to make wise decisions.'

Dominik Mattern, Associate Director Business Development, Lonza

#### **Acknowledgements:**

Vitafoods Insights would like to thank the members of the Transparency Working Group Roundtable, held inaugurally at Vitafoods Europe 2018 for their input and assistance in opening the discussion on transparency: Heather Granato, Jorg Buttinghaus, Dr Markus Zell, Ellen Schutt, Suzane Leser, Dominik Mattern, Peggy Jackson, Shaheen Majeed, Len Monheit, Egil Greve and Dr Sirku Eckel.

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