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International Markets Bureau

MARKET ANALYSIS REPORT | SEPTEMBER 2012

Global Pathfinder Report

Food Intolerance Products

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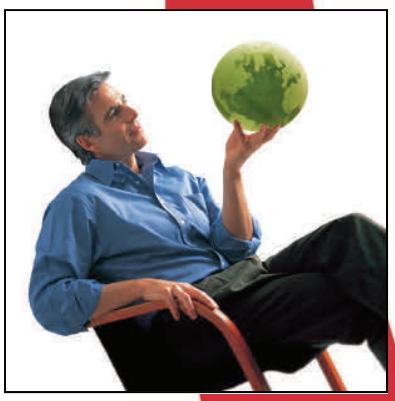


Growing Forward

Canada

EXECUTIVE SUMMARY

Food sensitivities, allergens and intolerances are increasingly at the forefront of consumer awareness. According to Euromonitor, the intolerance food market experienced significant growth in recent years, reaching an estimated value of US$9.1 billion in 2011. This market is expected to continue showing strong momentum, with projections to surpass US$13.2 billion in value by 2015. This expansion is driven by an increasing number of particular digestive conditions, including the growing prevalence of wheat-free and gluten-free diets. Improved labelling regulations and a growing number of good tasting and innovative food intolerance products are paving the way for a highly promising niche market, globally.

The growing consumer base of those interested in food intolerance products is encouraging manufacturers to invest further in 'free-from' foods such as those without gluten, wheat, lactose, dairy, nuts, egg, soya, and various additives. Previously, only a few specialty companies offered gluten-free or other intolerance products, but in recent years the market has expanded to not only a growing number of specialty food manufacturers, but large mainstream companies as well. The industry is also inundated with a rising number of private label gluten-free products, targeting budget-conscious consumers.

According to Health Canada, food allergies are sensitivities caused by a reaction of the body's immune system to specific proteins in food. In individuals with allergies, a food protein is mistakenly identified by the immune system as being harmful. In the most extreme cases, food allergies can be fatal.

In comparison, a food intolerance is a sensitivity characterized by negative physiological reactions to a particular food, ranging from mild to severe. Unlike food allergies, where a small amount of food, or even contact with the food's residue can be harmful, consumption of a more standard portion size is generally required to produce symptoms of food intolerance. In most cases, the reaction originates in the gastrointestinal system, caused by an inability to absorb or digest certain products. Whereas food allergies usually generate an immediate reaction, the symptoms of food intolerance may take more time to manifest after consumption.

This report will begin with an overview of global trends in the food intolerance products market. This will be followed by an analysis of the three most important international regions in terms of food intolerance products (North America, Western Europe and Latin America), and each of their largest national markets. Market size data for other international regions, for which country information is more limited, will be provided in the Annex.

INSIDE THIS ISSUE

GLOBAL OVERVIEW

Food intolerances and sensitivities affect approximately 1-2% of the global population. More specifically, recent studies by the World Health Organization (WHO) also indicate a higher-than-expected international prevalence of celiac disease. The growing incidence of various food intolerances around the world is a major indicator of this niche market's long-term sustainability.

Consumers with a food intolerance cannot afford to make casual decisions about anything they consume and are usually eager for information. For them, there is no such thing as too much detail about product ingredients or production methods, as they need to make strategic food choices on a daily basis. The global market for food intolerance products is unique in that for core consumers, these foods are not an optional "lifestyle" choice (like purchasing organic or low-fat foods, for example), but are a virtual necessity in order to prevent adverse reactions that occur with varying levels of severity.

According to Euromonitor, the primary consumers of food intolerance products are educated members of the global middle-class. This group will likely have access to advanced healthcare systems, and is better able to afford the higher cost of the products that comprise this market. However, for many consumers, diagnosis of these commonly misunderstood conditions is rare. There are millions of potential consumers who suffer from physical ailments, but the connection to the specific foods at fault may never be established. Even after diagnosis, however, the high cost of foods that are free from intolerance ingredients prevents many lower-income individuals from strictly adhering to a specialized diet, making them inconsistent consumers in this market. It is also important to note that food intolerance products are increasingly being sought by non-sufferers, who perceive these products to be generally healthier. This growing trend is also contributing to sales in this market.

Sales of Food Intolerance Products by International Region – Retail Value in US$ millions

Region	2006	2007	2008	2009	2010	2011
World	5,850.8	6,805.8	7,587.1	7,762.5	8,382.1	9,097.4
North America	2,896.2	3,207.3	3,399.3	3,526.9	3,605.1	3,775.6
Western Europe	1,788.7	2,130.2	2,439.5	2,437.3	2,495.6	2,619.1
Latin America	213.5	357.2	467.2	581.8	879.5	1,162.9
Eastern Europe	534.5	635.6	744.7	645.9	742.3	844.9
Asia Pacific	227.8	246.7	273.6	291.6	324.7	345.8
Australasia	119.9	142.6	153.6	152.4	187.4	196.4
Middle East and Africa	70.2	86.1	109.1	126.6	147.6	152.7

Sales of Food Intolerance Products by International Region – Forecast Retail Value in US$ millions

Region	2012	2013	2014	2015
World	9,924.6	10,859.5	11,900.2	13,194.2
North America	3,953.4	4,138.6	4,327.0	4,505.0
Western Europe	2,743.5	2,860.4	2,974.4	3,086.0
Latin America	1,526.5	1,985.0	2,536.3	3,344.8
Eastern Europe	964.7	1,100.4	1,251.5	1,405.8
Asia Pacific	370.7	398.7	429.3	462.7
Australasia	206.0	214.1	222.1	230.5
Middle East and Africa	159.8	162.4	159.6	159.4

Source for both: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

REGIONAL PROFILE: NORTH AMERICA

**Please note that for the purposes of this report, North America refers to only the United States (U.S.) and Canada. Market size information for the Mexican market is included in the section on Latin America (page 14 of this report), in keeping with the regional classifications established by Euromonitor, the source database.*

The North American region is the largest international market for food intolerance products, with retail sales valued at just under US$3.8 billion in 2011, driven predominantly by the United States. The rising incidence of food intolerances in this region is compounded by the already mainstream nature of many specialty health and wellness products, resulting in steady sales growth. Many consumers will opt for food intolerance products over their standard counterparts as a means to maintain a healthy diet, or avoid certain ingredients that they perceive as negative, even if they have not been diagnosed with an intolerance. This growing trend is reflected in sales of lactose-free products (US$1.6 billion), and gluten-free foods (US$1.3 billion), the two largest categories in the market. While diabetic food hold the smallest share of the food intolerance market in this region, sales are expected to surge by 27% between 2011 and 2015. As a whole, food intolerance products are expected to grow by 19% from 2011 to 2015, to reach sales of over US$4.5 billion in North America alone.

Sales of Food Intolerance Products in North America – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	2,896.2	3,207.3	3,399.3	3,526.9	3,605.1	3,775.6	3,953.4	4,138.6	4,327.0	4,505.0
Diabetic Food	221.1	245.1	269.3	291.8	305.5	317.6	332.8	349.9	372.5	403.6
Gluten-Free Food	674.5	810.0	970.9	1,130.3	1,226.2	1,335.4	1,437.1	1,534.2	1,631.0	1,715.3
Lactose-Free Food	1,590.1	1,580.4	1,556.6	1,549.8	1,574.4	1,610.0	1,656.9	1,694.3	1,727.2	1,764.4
Other Special Milk Formula	410.4	571.9	602.5	555.0	498.9	512.6	526.6	560.3	596.2	621.7

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*
Note 2: *As North America is only comprised of two countries, each with their own detailed market size table, sub-category data for the region as a whole will not be presented here.*

United States

- The market for food intolerance products grew by 4.7% in 2011, reaching sales of over US$3.6 billion.
- Lactose-free food was the largest category in this sector at US$1.5 billion, followed by gluten-free food (US$1.3 billion) and diabetic products (US$307 million).
- According to the National Institute of Health, some 30-50 million Americans (or 10-16% of the population) were lactose intolerant in 2010.
- Furthermore, an estimated 3 million people in the United States (less than 1% of the population) have celiac disease, and roughly 40 million (approximately 13% of the population) are non-celiac but gluten intolerant (FoodReactions.org).
- Euromonitor notes that the diabetic food category, although the smallest segment of the food intolerance products market, is very dynamic in response to growing demand. The Centers for Disease Control and Prevention (CDC) reported that nearly 26 million Americans (or over 8% of the population) suffered from diabetes in 2010. Additionally, it estimated that 79 million Americans have pre-diabetes, with blood sugar levels lower than can be diagnosed as diabetes but higher than average. The country's obesity rate also continues to rise, expanding the group of consumers that are at a higher risk of developing diabetes. If current trends continue, the CDC forecasts that over 30% of Americans will be diabetic by the year 2050. As proactive consumers seek more diabetic-friendly foods, this intolerance market will likely see further expansion.

United States (continued)

Sales of Food Intolerance Products in the United States – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	2,774.4	3,069.3	3,254.4	3,385.0	3,443.8	3,605.6	3,774.9	3,951.6	4,131.9	4,302.1
Diabetic Food	213.0	236.1	260.0	282.9	295.6	307.3	322.1	338.8	361.1	391.8
Diabetic Bakery Products	195.5	218.9	242.5	264.1	276.0	286.6	300.5	316.5	337.9	367.6
Diabetic Confectionery	13.9	13.5	13.8	14.8	15.4	16.1	16.7	17.3	17.9	18.6
Chocolate Confectionery	1.4	1.3	1.3	1.3	1.3	1.2	1.2	1.2	1.3	1.3
Sugar Confectionery	12.6	12.2	12.5	13.5	14.1	14.8	15.5	16.0	16.7	17.3
Diabetic Spreads	3.6	3.6	3.8	4.0	4.3	4.6	4.8	5.0	5.2	5.5
Other Diabetic Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Food	659.0	791.3	950.0	1,108.9	1,200.3	1,306.6	1,405.3	1,499.4	1,593.5	1,675.4
Gluten-Free Bakery Products	291.8	353.9	424.7	506.3	544.5	589.9	627.0	664.1	698.8	731.7
Gluten-Free Baby Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Pasta	14.1	17.2	21.1	23.3	24.9	26.6	28.8	31.4	33.9	36.2
Other Gluten-Free Food	353.1	420.2	504.2	579.4	630.9	690.0	749.5	803.9	860.8	907.4
Lactose-Free Food	1,509.2	1,489.8	1,461.9	1,457.8	1,470.7	1,501.6	1,543.9	1,576.8	1,605.4	1,638.4
Lactose-Free Dairy Products	518.4	586.0	620.3	646.4	679.5	717.6	750.2	779.5	805.3	829.2
Lactose-Free Ice Cream	49.4	51.1	55.6	57.6	60.0	63.2	65.9	68.0	69.9	72.1
Lactose-Free Milk Formula	941.3	852.6	786.0	753.8	731.2	720.8	727.8	729.3	730.3	737.0
Other Lactose-Free Food	-	-	-	-	-	-	-	-	-	-
Other Special Milk Formula	393.2	552.1	582.5	535.4	477.2	490.2	503.7	536.6	571.8	596.5

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

Top Five Brands in the American Food Intolerance Products Sector by Company and Market Share (%)

Brand	Company Name	2005	2006	2007	2008	2009	2010
Enfamil	Mead Johnson Nutrition Co.	-	-	-	-	16.6	15.4
Lactaid	Johnson & Johnson Inc	9.7	9.7	10.3	10.2	9.9	10.1
Isomil	Abbott Laboratories Inc	14.1	11.9	9.9	8.7	7.2	6.9
Glutino	Glutino USA	3.9	4.6	5.2	5.5	6.0	6.4
Fifty50	Fifty50 Foods	5.1	5.4	5.6	5.9	6.0	6.2

Source: *Euromonitor, 2012*

Canada

- Sales of food intolerance products grew by 5% in 2011, reaching just under US$170 million.
- While lactose-free products maintain the largest proportion of food intolerance product sales (US$108 million), gluten-free food registered a high retail value growth of 11% over the previous year, reaching US$29 million. Diabetic foods, valued at US$10 million, have shown slow but steady growth.
- An aging population and the growing incidence of food allergies, intolerances and diabetes contribute to the growing sales in this niche market.
- According to the Public Health Agency of Canada (PHAC), nearly 2 million Canadians (or 1 in 17) have been diagnosed with diabetes, with a higher prevalence among older demographics. By the end of 2012, it is projected that almost 2.8 million Canadians will have been diagnosed with the disease, marking a 25% increase since the rate recorded in 2007.

Sales of Food Intolerance Products in Canada
– Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	132.9	142.7	148.8	155.8	161.3	169.6	178.0	186.5	194.6	202.4
Diabetic Food	8.9	9.3	9.5	9.7	9.9	10.3	10.7	11.1	11.4	11.8
Diabetic Bakery Products	2.7	2.8	2.9	3.0	3.1	3.3	3.4	3.6	3.8	4.0
Diabetic Confectionery	4.0	4.1	4.3	4.4	4.5	4.6	4.8	4.9	5.1	5.2
Chocolate Confectionery	3.8	4.0	4.1	4.2	4.3	4.4	4.5	4.7	4.8	4.9
Sugar Confectionery	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.3
Diabetic Spreads	2.2	2.3	2.3	2.4	2.4	2.4	2.5	2.5	2.6	2.6
Other Diabetic Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Food	16.9	19.3	21.5	23.5	25.9	28.8	31.7	34.6	37.3	39.9
Gluten-Free Bakery Products	6.2	7.6	8.8	10.0	11.4	12.9	14.5	16.1	17.7	19.1
Gluten-Free Baby Food	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.9	0.9	0.9
Gluten-Free Pasta	1.2	1.3	1.4	1.4	1.5	1.6	1.7	1.8	1.8	1.9
Other Gluten-Free Food	8.9	9.8	10.6	11.4	12.3	13.5	14.7	15.9	16.9	17.9
Lactose-Free Food	88.4	93.7	97.2	101.0	103.7	108.2	112.7	117.1	121.5	125.7
Lactose-Free Dairy Products	45.9	49.4	51.8	54.7	56.4	59.1	61.9	64.6	67.3	69.9
Lactose-Free Ice Cream	20.7	21.4	21.9	22.3	22.6	23.3	24.0	24.7	25.4	26.0
Lactose-Free Milk Formula	21.7	22.9	23.5	24.1	24.8	25.8	26.8	27.9	28.8	29.7
Other Lactose-Free Food	-	-	-	-	-	-	-	-	-	-
Other Special Milk Formula	18.8	20.5	20.6	21.6	21.8	22.3	22.9	23.6	24.3	25.1

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

Canada (continued)

Top Five Brands in the Canadian Food Intolerance Products Sector by Company and Market Share (%)

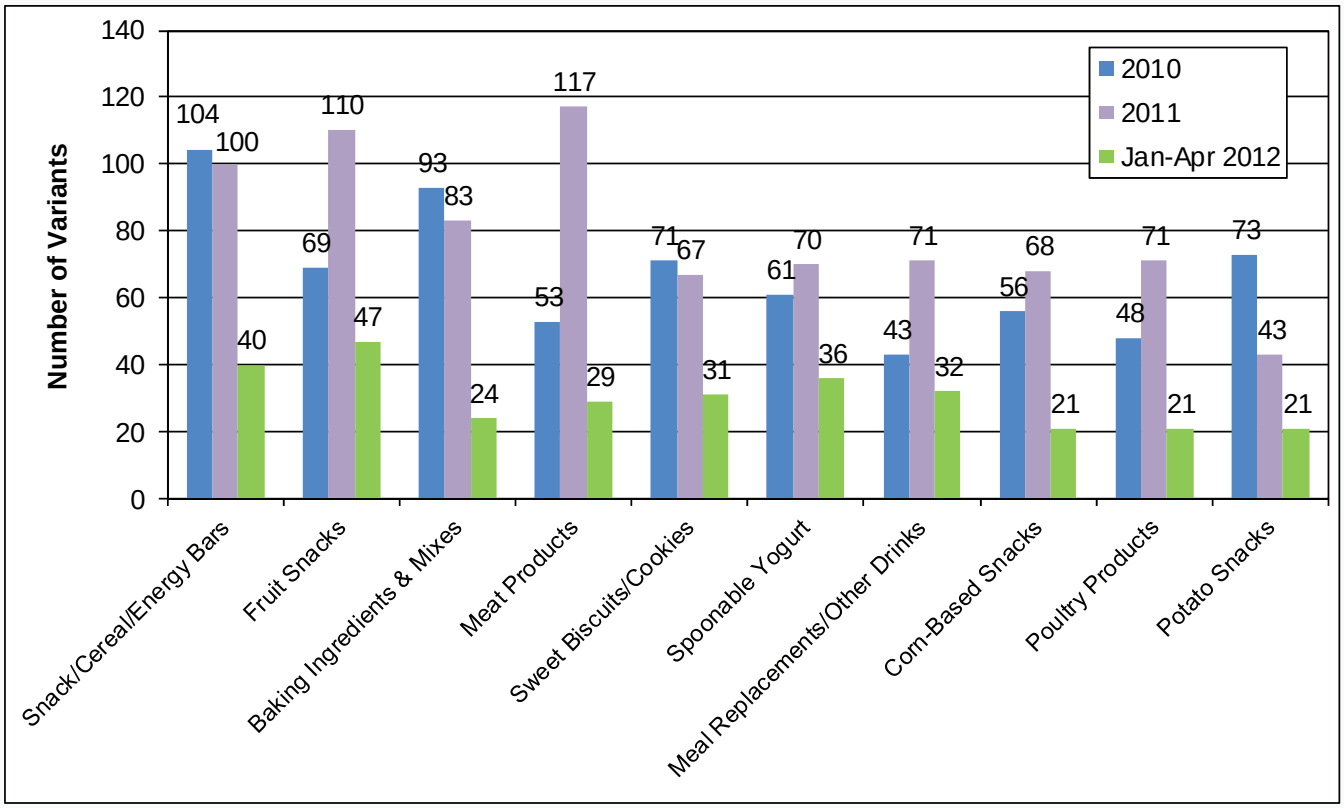
Brand	Company Name	2005	2006	2007	2008	2009	2010
Natrel	Agropur Coopérative Agro-Alimentaire	20.0	20.4	20.5	18.8	13.9	14.0
Chapman's	David Chapman's Ice Cream Ltd	11.4	11.8	11.7	12.2	12.5	12.8
Enfamil	Mead Johnson Nutrition Co	-	-	-	-	10.4	10.1
Neilson	Saputo Inc	-	-	-	5.8	6.2	6.9
Isomil	Abbott Laboratories Inc	6.4	6.2	6.2	6.1	6.0	6.0

Source: *Euromonitor, 2012*

New Product Launches

- According to Mintel, 2,326 new food intolerance products were launched in Canada and the United States in 2010, and this number grew to 2,550 in 2011. Within the first four months of 2012 (January through April), 891 new food intolerance products were already launched on this market.

New Product Launches in the United States and Canada Matching One or More of the Following Intolerance Claims: "Diabetic," "Gluten-Free," and "Low/No/Reduced Lactose" by Top 10 Product Categories



Source: *Mintel, 2012*

REGIONAL PROFILE: WESTERN EUROPE

The aging Western European population presents a large segment of individuals for whom health is a primary concern. As a whole, consumers in this region are already knowledgeable but want to be better informed about the characteristics of their food and beverages. Health and wellness products are no longer viewed as niche commodities, but appeal to a number of consumer groups and enjoy wide distribution through various formats, including discounters. Coupled with the rising incidence of obesity, diabetes, celiac disease, other diagnosed food intolerances, as well as growing consumer awareness of how such conditions may be addressed through dietary changes, this "normalization" trend has expanded the food intolerance products market.

Most food intolerance categories in Western Europe continued to show strong sales growth in 2011, with the total market reaching a value of over US$2.6 billion. As food intolerance products are a necessity rather than a choice for most consumers who buy them, factors like price and marketing activities tend to have little influence on core demand in this region. However, there is a large and growing segment of consumers who purchase food intolerance products, without actually suffering from a related condition. The strong acceptance of health and wellness foods as offering beneficial properties, has contributed to a growing number of Europeans seeking alternative products. Many believe, for example, that gluten-free or non-dairy products are overall healthier options, and will consume these specialized items to reach health goals, such as losing weight.

Economic uncertainty will likely lead some consumers to trade down to cheaper brands and private label products. Coupled with growing consumer interest, this will create opportunities for new products and brands that offer innovative flavour variants, formats, packaging options or additional health properties. Despite the potential for private labels, Euromonitor predicts that larger companies are best prepared to meet these future demands. Compared to smaller producers, the existing market leaders in this region have better resources to conduct research and develop new products, as well as stronger marketing and sales tools.

Sales of Food Intolerance Products in Western Europe
– Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	1,788.7	2,130.2	2,439.5	2,437.3	2,495.6	2,619.1	2,743.5	2,860.4	2,974.4	3,086.0
Diabetic Food	258.6	290.4	315.6	306.3	301.4	303.9	307.1	309.2	313.3	317.2
Diabetic Bakery Products	71.5	79.6	88.6	88.4	89.4	91.5	93.9	96.3	99.1	102.2
Diabetic Confectionery	158.1	177.6	190.3	182.2	177.3	177.4	177.9	177.5	178.7	179.6
Diabetic Spreads	19.8	22.7	25.2	24.5	23.9	24.3	24.5	24.6	24.7	24.6
Other Diabetic Food	9.2	10.6	11.6	11.2	10.8	10.8	10.8	10.8	10.8	10.8
Gluten-Free Food	732.8	875.3	1,004.1	1,023.1	1,069.6	1,138.6	1,203.6	1,265.3	1,326.1	1,385.9
Gluten-Free Bakery Products	398.0	476.5	544.4	553.4	589.9	634.5	675.3	713.6	749.0	784.5
Gluten-Free Baby Food	201.4	231.7	255.9	249.5	247.7	255.1	263.7	272.5	282.6	292.9
Gluten-Free Pasta	104.4	128.9	157.2	166.8	174.6	186.8	197.8	208.4	219.7	230.0
Other Gluten-Free Food	29.0	38.1	46.6	53.4	57.4	62.2	66.9	70.8	74.9	78.4
Lactose-Free Food	658.6	807.7	931.2	927.9	949.5	1,002.0	1,055.8	1,106.6	1,156.1	1,202.1
Lactose-Free Dairy Products	518.4	648.8	759.0	762.3	785.0	833.6	881.3	925.7	967.7	1,006.3
Lactose-Free Ice Cream	48.2	56.4	64.1	60.7	60.6	62.7	65.1	67.6	70.2	73.2
Lactose-Free Milk Formula	83.7	93.3	97.9	92.4	90.3	91.2	93.8	96.7	100.5	104.1
Other Lactose-Free Food	8.3	9.3	10.2	12.5	13.6	14.6	15.6	16.6	17.7	18.6
Other Special Milk Formula	138.7	156.8	188.6	180.0	175.1	174.6	176.9	179.3	178.8	180.9

Source: *Euromonitor 2012*
Note: *2011 figures are estimates based on partial-year data*

REGIONAL PROFILE: WESTERN EUROPE (continued)

The three largest Western European markets, United Kingdom, France and Germany, are also the most developed in terms of food intolerance products.

United Kingdom

- The British market for food intolerance products grew by 4.5% in 2011, reaching a total retail sales value of US$188 million.
- Gluten-free food accounts for a dominant share of food intolerance product sales (US$135 million in 2011), benefiting from the entry of the first major private label intolerance range in 2010, Sainsbury's freefrom.
- Lactose-free food is the second-largest category in the British food intolerance market, valued at just under US$30 million in 2011, followed by diabetic foods (US$19 million).
- According to estimates from Diabetes UK, a charitable organization, 2.8 million people were diagnosed with the disease in 2011, on top of an estimated 850,000 undiagnosed sufferers. Despite this large and growing population, sales growth in the diabetic food category is expected to remain slow.
- Sainsbury's and Asda are expected to compete for the position of leading food intolerance retailer, with both offering an extensive variety of products, following dramatic range expansion in 2010-2011. While Sainsbury's will likely benefit from its new private label range and a wider selection of products overall, Asda is better suited to attract cost-conscious consumers with food intolerances, due to a focus on everyday low prices.

Sales of Food Intolerance Products in the United Kingdom
– Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	125.8	140.3	154.6	167.8	179.7	187.8	194.9	200.5	203.8	205.5
Diabetic Food	18.9	19.2	19.2	19.2	19.3	19.2	19.4	19.7	20.4	21.0
Diabetic Bakery Products	-	-	-	-	-	-	-	-	-	-
Diabetic Confectionery	18.9	19.2	19.2	19.2	19.3	19.2	19.4	19.7	20.4	21.0
Diabetic Spreads	-	-	-	-	-	-	-	-	-	-
Other Diabetic Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Food	80.7	93.2	105.8	117.4	127.9	134.8	140.7	145.2	147.4	148.2
Gluten-Free Bakery Products	64.1	73.7	83.5	92.2	100.1	104.9	109.0	112.3	113.5	113.8
Gluten-Free Baby Food	15.0	17.1	18.9	20.6	22.1	23.2	24.1	24.6	25.0	25.1
Gluten-Free Pasta	1.6	2.4	3.4	4.6	5.7	6.7	7.6	8.3	8.8	9.2
Other Gluten-Free Food	-	-	-	-	-	-	-	-	-	-
Lactose-Free Food	24.9	26.0	26.8	27.9	28.9	29.7	30.6	31.7	33.2	34.5
Lactose-Free Dairy Products	7.9	8.2	8.5	8.8	9.2	9.5	9.8	10.0	10.0	10.0
Lactose-Free Ice Cream	-	-	-	-	-	-	-	-	-	-
Lactose-Free Milk Formula	17.0	17.8	18.4	19.1	19.7	20.1	20.8	21.7	23.2	24.5
Other Lactose-Free Food	-	-	-	-	-	-	-	-	-	-
Other Special Milk Formula	1.3	1.9	2.8	3.3	3.7	4.1	4.2	3.9	2.8	1.8

Source: *Euromonitor 2012*
Note: *2011 figures are estimates based on partial-year data*

United Kingdom (continued)

Top Five Brands in the British Food Intolerance Products Sector by Company and Market Share (%)

Brand	Company Name	2005	2006	2007	2008	2009	2010
Farley's	Heinz Co., HJ	7.6	7.8	7.3	7.1	6.9	6.8
Trufree	Dr Schär GmbH	-	-	6.3	6.6	6.5	6.5
SMA	Pfizer Inc.	-	-	-	-	6.8	6.5
Dietary Specials	Nutrition Point Ltd.	3.5	4.2	4.3	4.7	5.1	5.4
Boots Diabetic	The Boots Co. Plc	6.6	6.2	5.8	5.2	4.7	4.6

Source: *Euromonitor, 2012*

France

- Sales of food intolerance products in France grew by 13.6% in 2011 to reach US$127.2 million.
- Gluten-free food was the most dynamic food intolerance category in 2011, growing by 21% to reach sales of just under US$76 million. This category benefited from rising public awareness of celiac disease as well as the addition of new gluten-free variants to the portfolios of companies across the wider packaged food market.
- Although significantly smaller categories, diabetic foods and lactose-free products both recorded sales growth over the 2006 to 2011 period, reaching values of US$11 million and US$6 million, respectively.
- Improvements in terms of distribution through mainstream retail channels had a positive impact on the performance of food intolerance products in France.
- Leading retailers in France such as Carrefour, Leclerc and Casino, will undoubtedly expand their private label food intolerance ranges to garner sales growth, particularly in categories where private label penetration is currently weak.
- Rising health awareness among French consumers should support further growth amongst private label products in the food intolerance sector. Aside from their affordability as compared to branded alternatives, improvements in quality will also help to make private label products more popular.
- In 2010, following a European Food Safety Authority (EFSA) ruling on Danone's Actimel brand, France introduced tougher legislation on the type of health claims that can be made for health and wellness products. Health claims and ingredients used in these products are now subject to rigorous examination, and must be authorised by the EFSA.

France (continued)

Sales of Food Intolerance Products in France – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	82.3	87.3	92.9	101.2	112.0	127.2	139.8	151.4	162.6	175.5
Diabetic Food	6.6	7.3	8.1	9.0	9.9	11.0	12.0	13.1	14.3	15.7
Diabetic Bakery Products	3.6	3.8	4.1	4.3	4.6	4.9	5.3	5.7	6.1	6.6
Diabetic Confectionery	1.9	2.2	2.4	2.7	3.0	3.3	3.7	4.1	4.7	5.5
Diabetic Spreads	1.1	1.3	1.6	1.9	2.2	2.7	3.0	3.3	3.5	3.6
Other Diabetic Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Food	43.5	45.6	47.6	53.5	62.6	75.7	86.0	95.0	103.5	113.4
Gluten-Free Bakery Products	24.0	25.2	26.2	30.5	36.7	45.8	52.7	58.4	63.5	70.4
Gluten-Free Baby Food	17.5	18.2	18.9	20.2	22.6	25.6	28.1	30.6	33.2	35.5
Gluten-Free Pasta	1.5	1.6	1.7	1.8	2.2	2.7	3.1	3.4	3.7	4.0
Other Gluten-Free Food	0.6	0.7	0.8	1.0	1.2	1.6	2.1	2.6	3.0	3.4
Lactose-Free Food	4.3	4.6	4.7	5.0	5.4	5.9	6.6	7.3	7.9	8.6
Lactose-Free Dairy Products	0.8	0.8	0.9	1.0	1.0	1.1	1.2	1.2	1.3	1.4
Lactose-Free Ice Cream	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lactose-Free Milk Formula	3.5	3.7	3.8	4.0	4.4	4.8	5.4	6.0	6.6	7.2
Other Lactose-Free Food	-	-	-	-	-	-	-	-	-	-
Other Special Milk Formula	27.9	29.8	32.4	33.7	34.1	34.6	35.2	36.1	36.9	37.8

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

Top Five Brands in the French Food Intolerance Products Sector by Company and Market Share (%)

Brand	Company Name	2005	2006	2007	2008	2009	2010
Dr Schär	Dr Schär GmbH	15.6	15.3	14.6	13.8	13.8	14.5
Hipp	Hipp GmbH & Co Vertrieb KG	5.0	5.8	5.7	7.2	8.3	8.3
Babybio	Vitagermine SA	1.1	4.8	5.5	5.7	6.0	6.0
Gerblé	Otsuka Pharmaceutical Co Ltd	-	-	-	-	2.2	3.7
Allegro	Société Valpiform SA	3.0	2.8	2.7	2.6	2.9	3.6

Source: *Euromonitor, 2012*

Germany

- In Germany, the food intolerance products market is valued at US$865 million, and steady growth is expected, with the category projected to reach a value of US$975 million in 2015.
- Lactose-free food is the sector's largest category with sales of US$388 million in 2011, followed by gluten-free food products (US$314 million) and diabetic foods (US$151 million).
- The "reformhäuser," a certified health shop that specializes in organic and food intolerance products, is the primary distribution channel for such items.

Sales of Food Intolerance Products in Germany – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	612.5	680.6	734.5	787.9	828.3	864.5	894.3	918.3	949.0	974.5
Diabetic Food	139.2	144.8	147.7	150.4	151.5	151.4	149.9	146.8	144.8	142.0
Diabetic Bakery Products	20.5	20.9	20.9	20.9	20.8	20.5	20.0	19.2	18.6	17.9
Diabetic Confectionery	95.2	99.2	101.7	104.2	105.2	105.4	104.7	102.7	101.6	99.7
Diabetic Spreads	15.6	16.4	16.7	16.8	16.9	16.9	16.8	16.5	16.4	16.1
Other Diabetic Food	7.9	8.3	8.4	8.5	8.6	8.6	8.5	8.4	8.3	8.2
Gluten-Free Food	184.4	209.2	237.6	268.5	292.9	313.8	331.3	346.3	364.3	380.0
Gluten-Free Bakery Products	54.0	62.8	74.5	88.5	99.3	108.8	116.8	123.8	131.9	138.9
Gluten-Free Baby Food	72.0	76.1	79.6	82.5	84.9	87.1	89.2	91.1	93.5	95.8
Gluten-Free Pasta	34.3	43.1	52.4	61.8	69.3	75.5	80.3	84.3	89.3	93.6
Other Gluten-Free Food	24.0	27.3	31.2	35.7	39.4	42.4	45.0	47.2	49.6	51.7
Lactose-Free Food	277.9	316.2	338.4	358.0	372.8	387.9	401.3	413.2	427.6	440.2
Lactose-Free Dairy Products	253.0	291.9	314.4	334.3	349.0	363.9	377.1	388.7	402.8	414.8
Lactose-Free Ice Cream	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Lactose-Free Milk Formula	16.3	15.5	14.8	14.3	14.1	14.0	14.0	14.1	14.2	14.5
Other Lactose-Free Food	8.5	8.8	9.0	9.3	9.5	9.8	10.0	10.1	10.4	10.6
Other Special Milk Formula	11.0	10.4	10.8	10.9	11.0	11.4	11.8	12.1	12.3	12.3

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

Top Five Brands in the German Food Intolerance Products Sector by Company and Market Share (%)

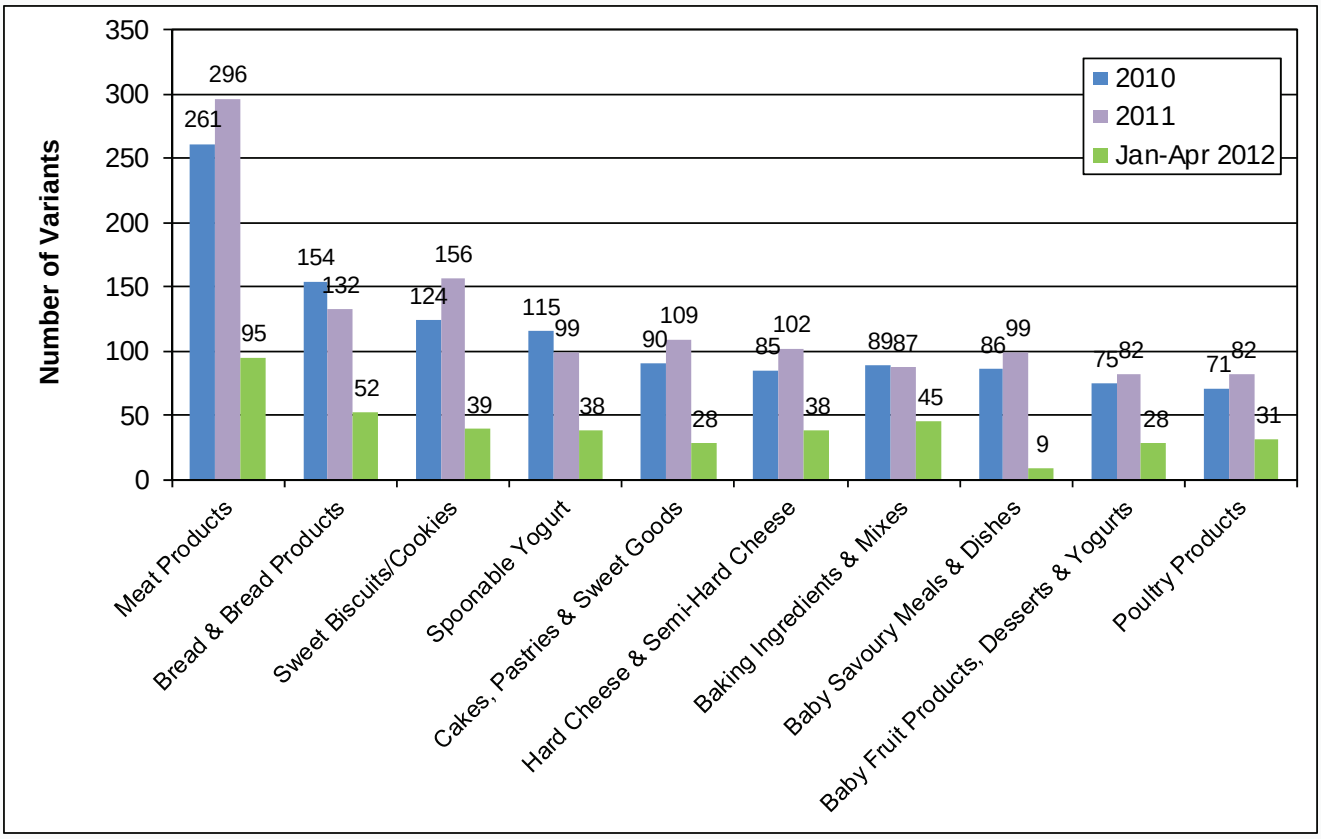
Brand	Company Name	2005	2006	2007	2008	2009	2010
MinusL	OMIRA Oberland-Milchverwertung Ravensburg GmbH	21.2	22.4	22.3	22.0	21.7	21.7
LACtosefrei	Breisgaumilch GmbH	15.2	15.7	17.1	17.2	17.2	17.2
Schneekoppe	Laurens Spethmann Holding AG & Co	7.4	7.2	7.2	7.1	7.1	7.0
Dr Schär	Dr Schär GmbH	4.0	4.9	5.6	5.9	6.4	6.7
Glutano	Dr Schär GmbH	-	3.3	3.2	3.4	3.6	3.7

Source: *Euromonitor, 2012*

New Product Launches

- According to Mintel, 3,359 new food intolerance products were launched in Western Europe in 2010, followed by 3,679 in 2011. Between January and April 2012, 1,540 new food intolerance products were launched on this market.

New Product Launches in Western Europe Matching One or More of the Following Intolerance Claims: "Diabetic," "Gluten-Free," and "Low/No/Reduced Lactose" by Top 10 Product Categories



Source: *Mintel, 2012*

REGIONAL PROFILE: LATIN AMERICA

A new culture of health-consciousness is quickly emerging in Latin America, contributing to sales growth in the food intolerance products sector. Retail sales value amounted to just under US$1.6 billion in 2011 for the region as a whole, which is more than five times the size of the market in 2006. Euromonitor projects that the Latin American food intolerance products market will reach sales of over US$3.5 billion in 2015.

The desire to fight obesity is strong, as a means to both prevent diseases such as diabetes, and maintain body image, the latter trend being particularly evident in Brazil. This has led to more effective weight control measures being adopted by many consumers and, for those who are already diabetic, the regular monitoring of glucose and increased consumption of diabetic food. In contrast, gluten-free remains an underdeveloped product category and is expected to record minimal growth over the forecast period of 2012 to 2015. This may be attributable to the prevalence of corn-based (rather than wheat-based) products in this region, as well as limited awareness, diagnosis and subsequent treatment of gluten intolerances.

As manufacturers focus more of their resources on this dynamic niche, the growing range of products on offer will likely attract more consumers. Specifically, a growing number of consumers are expected to gain awareness of conditions such as lactose and gluten intolerance. This will support stronger sales growth into the future. However, as a whole, the availability of food intolerance products is still largely limited compared to other international regions. Key players in food intolerance products in Latin America are mainly local manufacturers with restricted production capacity, and distribution that's focused on urban areas. Furthermore, the infrastructure required to manufacture food intolerance products, such as contamination-controlled sites and raw materials, pose a challenge to multinationals and small producers. There is a significant level of investment involved in entering these niche, but expanding, markets.

Sales of Food Intolerance Products in Latin America – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	206.0	328.0	427.0	624.0	879.0	1,183.0	1,569.0	2,060.0	2,658.0	3,537.0
Diabetic Food	20.7	29.0	41.7	65.9	118.2	189.2	289.6	447.5	681.6	1,058.6
Diabetic Bakery Products	0.3	0.3	0.3	7.1	13.0	25.9	48.4	87.6	144.4	229.8
Diabetic Confectionery	18.7	25.9	36.7	51.7	87.2	126.0	191.2	298.0	469.8	742.1
Chocolate Confectionery	17.5	24.0	32.9	42.4	53.0	62.9	73.1	85.3	99.4	114.8
Sugar Confectionery	1.2	1.9	3.9	9.2	34.2	63.2	118.0	212.7	370.5	627.3
Diabetic Spreads	1.7	2.8	4.6	7.1	18.0	37.3	49.9	61.9	67.3	86.6
Gluten-Free Food	2.2	2.7	3.2	3.6	4.0	4.3	4.7	5.0	5.3	5.6
Gluten-Free Bakery Products	0.3	0.3	0.4	0.4	0.5	0.5	0.6	0.6	0.6	0.6
Other Gluten-Free Food	2.0	2.3	2.8	3.2	3.5	3.8	4.1	4.4	4.7	5.0

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

While Mexico and Brazil are presently the largest food intolerance markets in the region, opportunities should not be seen as limited to these two countries.

Mexico

- Food intolerance products in Mexico were valued at just under US$870 million, but the market is growing at a rapid pace, with projections to reach sales of almost US$3 billion by 2015.
- Lactose-free food is the largest category (US$649 million), characterized by lactose-free dairy products. The diabetic foods market is small in comparison (US$121 million), but it registered impressive growth from 2010 to 2011, and is expected to grow to more than seven times its current size by 2015.
- Sales in this market reflect the growing number of Mexican consumers that suffer from the symptoms of food intolerance. Many Mexicans previously attributed intestinal discomfort to gastritis or colitis. However, consumers became more observant of their eating habits, with many detecting intolerance to dairy products in particular. Strong sales in the lactose-free category reflect the frequency of self-detection and self-treatment using the appropriate products.
- According to estimates published by the Ministry of Health, the incidence of diabetes will be responsible for the deaths of 100,000 Mexicans in 2012. It is estimated that close to 10% of the population suffers from diabetes and that this number will continue grow. However, unlike lactose-free products, diabetic foods are typically only purchased following the diagnosis and recommendation of a physician.
- Manufacturers such as Estee increased their distribution of diabetic spreads to include leading grocery retailers. Other players, such as Dickinsons and St Dalfour, have also recognized the importance of this niche and expanded their product offering considerably.

Sales of Food Intolerance Products in Mexico
– Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	106.5	202.7	275.2	420.3	616.7	868.9	1,199.0	1,634.5	2,171.2	2,966.2
Diabetic Food	1.4	2.7	5.9	20.0	61.3	120.9	206.6	343.9	548.8	884.5
Diabetic Bakery Products	-	-	-	6.8	12.7	25.5	48.0	87.1	143.9	229.3
Diabetic Confectionery	1.4	2.3	4.9	11.2	36.0	64.0	115.1	201.8	345.0	576.6
Chocolate Confectionery	0.5	0.8	1.4	3.1	5.6	7.8	10.0	12.5	15.4	18.8
Sugar Confectionery	1.0	1.6	3.5	8.1	30.4	56.2	105.1	189.3	329.6	557.8
Diabetic Spreads	-	0.4	1.0	2.0	12.6	31.4	43.5	55.0	59.8	78.5
Lactose-Free Food	49.1	119.4	180.2	312.6	462.5	649.4	888.2	1,180.8	1,506.3	1,960.0
Lactose-Free Dairy Products	44.9	114.6	174.8	306.3	454.9	640.4	877.4	1,167.7	1,490.3	1,940.1
Lactose-Free Milk Formula	4.2	4.7	5.5	6.3	7.5	9.0	10.8	13.1	16.0	19.8
Other Special Milk Formula	56.0	80.6	89.1	87.7	92.9	98.5	104.1	109.8	116.1	121.7

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*
Note 2: *At the time of preparing this report, information on gluten-free products in Mexico was not available*

Mexico (continued)

Top Five Brands in the Mexican Food Intolerance Products Sector by Company and Market Share (%)

Brand	Company Name	2005	2006	2007	2008	2009	2010
Alpura	Ganaderos Productores de Leche Pura SA de CV	-	5.7	15.9	30.6	34.0	34.3
Lala	Industrial Lala SA de CV, Grupo	-	3.0	6.0	13.7	21.5	25.6
Nan	Nestlé SA	53.1	45.6	32.7	24.7	16.9	11.7
Delsy	Mexilac SA de CV	18.3	8.3	5.4	4.4	3.2	3.6
Parmalat	Industrial Lala SA de CV, Grupo	-	1.0	3.5	3.5	2.9	2.4

Source: *Euromonitor, 2012*

Brazil

- Food intolerance products are still regarded as a niche market in Brazil, reflected by the low sales compared to other countries. The Brazilian market was valued at US$84.1 million in 2011.
- Diabetic food is the largest category by far (US$60 million), but lactose-free milk formula is expected to continue showing the highest growth, at 153% from 2011 to 2015.
- According to Datamonitor, food intolerance products are mainly available in the south and southeastern regions of Brazil, and are limited to select supermarkets and hypermarkets.

Sales of Food Intolerance Products in Brazil – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Food Intolerance Products	26.3	34.1	43.6	57.0	71.5	84.1	97.1	111.2	126.5	143.3
Diabetic Food	18.6	25.5	34.8	43.8	51.7	59.5	67.8	77.5	88.7	100.8
Diabetic Confectionery	16.9	23.0	31.2	38.8	46.4	53.6	61.4	70.6	81.2	92.7
Diabetic Spreads	1.7	2.4	3.6	5.0	5.3	5.9	6.4	6.9	7.5	8.1
Lactose-Free Food	5.6	6.4	6.5	7.4	11.0	15.3	19.9	25.4	31.4	38.7
Other Special Milk Formula	2.2	2.3	2.3	5.7	8.7	9.3	9.4	8.2	6.4	3.9

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*
Note 2: *At the time of preparing this report, information on gluten-free products in Brazil was not available*

Top Five Brands in the Brazilian Food Intolerance Products Sector by Company and Market Share (%)

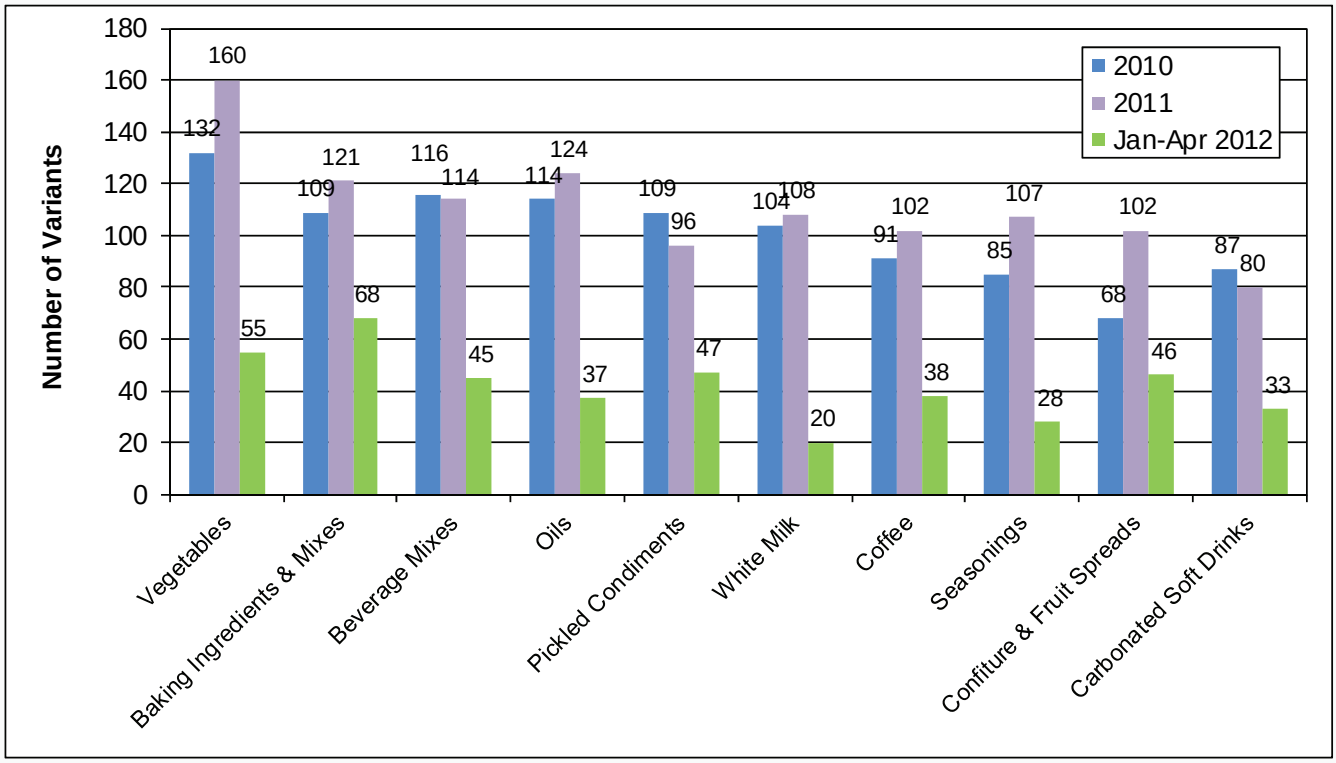
Brand	Company Name	2005	2006	2007	2008	2009	2010
Nestlé	Nestlé SA	33.9	22.5	20.7	22.2	21.6	23.5
Duitt	SPA - Sociedade de Produtos Alimentícios Ltda	25.4	14.0	12.7	13.1	12.1	9.9
Talento	Nestlé SA	-	-	-	8.5	7.6	9.5
Nan	Nestlé SA	-	8.3	6.7	5.2	4.1	7.6
Queensberry	Kiviks Markmav Indústria Alimentícia Ltda	-	5.9	6.7	7.8	8.3	7.1

Source: *Euromonitor, 2012*

New Product Launches

- According to Mintel, 3,786 new food intolerance products were launched in Latin America in 2010, growing slightly to 3,859 in 2011. In 2012, this region saw 1,459 new food intolerance product launches from January through April.

New Product Launches in Latin America Matching One or More of the Following Intolerance Claims: "Diabetic," "Gluten-Free," and "Low/No/Reduced Lactose" by Top 10 Product Categories



Source: *Mintel, 2012*

New Food Intolerance Product Launches in Latin America by Launch Type, 2011

Launch Type	Total
Completely New Product	2,801
New Packaging	2,076
New Variety/Range Extension	1,843
New Formulation	148
Re-launch	135

Source: *Mintel, 2012*

New Food Intolerance Product Launches in Latin America by Company, 2011

Company	Total
Nestlé	151
Bimbo	86
Dia	84
Unilever	77
Danone	76
Kraft Foods	72
PepsiCo	71
Wal-Mart	67
Coop - Cooperativa de consumo	53
H-E-B	51

Source: *Mintel, 2012*

ANNEX: OTHER REGIONAL DATA

Eastern Europe

Sales of Food Intolerance Products in Eastern Europe and Major Countries – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
EASTERN EUROPE										
Total Food Intolerance Products	499.3	550.5	612.3	671.2	742.3	815.4	890.6	970.8	1,058.6	1,150.2
Diabetic Food	338.6	367.8	399.7	431.2	468.2	505.6	542.5	580.9	622.2	663.5
Gluten-Free Food	75.0	83.7	89.4	94.2	101.9	109.2	116.5	124.2	131.9	140.3
Lactose-Free Food	14.5	16.6	19.3	22.8	26.1	30.2	35.1	40.6	46.6	53.1
Other Special Milk Formula	71.2	82.4	103.8	123.0	146.1	170.6	196.4	225.2	258.0	293.3
RUSSIA										
Total Food Intolerance Products	358.0	393.6	441.6	492.8	550.5	608.8	668.0	730.8	799.0	869.0
Diabetic Food	267.7	290.9	318.9	347.0	380.4	413.5	445.8	479.2	514.9	550.2
Gluten-Free Food	37.1	41.2	42.9	43.6	47.1	50.7	54.3	57.9	61.3	65.0
Lactose-Free Food	6.8	8.2	10.1	12.4	14.9	18.0	21.8	26.1	30.8	36.0
Other Special Milk Formula	46.4	53.3	69.7	89.9	108.1	126.6	146.1	167.8	192.1	217.9
POLAND										
Total Food Intolerance Products	62.5	68.2	74.4	79.6	84.7	89.3	94.1	99.1	104.3	109.7
Diabetic Food	30.1	32.1	34.3	36.2	37.6	38.9	40.2	41.5	42.7	43.8
Gluten-Free Food	24.2	26.9	29.7	32.5	35.5	37.9	40.4	42.9	45.6	48.2
Lactose-Free Food	1.7	1.9	2.1	2.2	2.4	2.5	2.6	2.8	2.9	3.0
Other Special Milk Formula	6.4	7.3	8.2	8.7	9.3	10.0	10.9	11.9	13.2	14.7
HUNGARY										
Total Food Intolerance Products	29.6	35.4	39.6	40.4	42.7	46.2	49.9	54.1	58.9	64.3
Diabetic Food	13.4	16.7	18.8	18.0	18.7	20.2	22.1	24.2	26.6	29.4
Gluten-Free Food	8.7	10.0	10.8	11.3	12.0	12.9	13.8	14.8	16.0	17.3
Lactose-Free Food	3.1	3.5	3.9	4.3	4.6	5.0	5.5	5.9	6.4	6.9
Other Special Milk Formula	4.4	5.2	6.0	6.7	7.3	8.0	8.5	9.2	9.9	10.7
CZECH REPUBLIC										
Total Food Intolerance Products	15.9	16.9	17.5	17.6	18.0	18.3	18.9	19.3	20.0	20.7
Diabetic Food	12.8	13.4	13.7	13.6	13.9	14.1	14.3	14.5	15.0	15.3
Gluten-Free Food	2.5	2.7	3.0	3.1	3.2	3.2	3.4	3.5	3.6	3.9
Lactose-Free Food	0.7	0.7	0.8	0.8	0.9	0.9	1.0	1.0	1.1	1.2
Other Special Milk Formula	-	0.0	0.0	0.1	0.1	0.1	0.2	0.2	0.3	0.4

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

ANNEX: OTHER REGIONAL DATA (continued)

Asia Pacific

Sales of Food Intolerance Products in Asia Pacific and Major Countries – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
ASIA PACIFIC										
Total Food Intolerance Products	256.5	274.3	294.7	311.7	324.7	343.8	365.1	389.1	415.5	445.0
Diabetic Food	97.7	105.4	112.1	118.0	124.7	134.1	145.1	157.9	172.6	189.3
Gluten-Free Food	5.5	6.7	7.0	7.3	6.8	6.4	6.1	5.9	5.8	5.8
Lactose-Free Food	66.5	69.0	71.3	74.4	76.1	78.9	82.4	86.3	90.8	95.7
Other Special Milk Formula	86.9	93.2	104.3	112.0	117.1	124.4	131.6	139.0	146.3	154.3
JAPAN										
Total Food Intolerance Products	135.8	141.1	144.4	146.2	147.4	148.4	150.1	152.7	155.8	159.5
Diabetic Food	74.3	77.5	78.3	79.0	80.0	81.9	84.3	87.4	90.9	94.7
Gluten-Free Food	5.4	6.6	6.9	7.2	6.6	6.2	5.9	5.7	5.6	5.6
Lactose-Free Food	43.7	44.8	45.5	46.2	46.3	47.0	48.1	49.5	51.3	53.3
Other Special Milk Formula	12.5	12.4	13.7	13.8	14.5	13.4	11.7	10.0	8.0	5.9
SOUTH KOREA										
Total Food Intolerance Products	45.2	46.4	48.8	51.0	53.2	55.9	58.7	61.8	65.1	68.8
Diabetic Food	-	-	-	-	-	-	-	-	-	-
Gluten-Free Food	-	-	-	-	-	-	-	-	-	-
Lactose-Free Food	9.9	10.3	10.9	11.4	11.7	12.2	12.7	13.2	13.7	14.1
Other Special Milk Formula	35.4	36.1	37.9	39.6	41.5	43.6	46.0	48.6	51.4	54.6
CHINA										
Total Food Intolerance Products	20.9	25.0	30.1	34.7	40.0	47.2	55.3	64.7	75.5	88.0
Diabetic Food	20.9	25.0	30.1	34.7	40.0	47.2	55.3	64.7	75.5	88.0
Gluten-Free Food	-	-	-	-	-	-	-	-	-	-
Lactose-Free Food	-	-	-	-	-	-	-	-	-	-
Other Special Milk Formula	-	-	-	-	-	-	-	-	-	-
THAILAND										
Total Food Intolerance Products	11.4	12.1	13.1	13.9	14.9	15.8	16.9	18.0	19.2	20.5
Diabetic Food	-	-	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gluten-Free Food	-	-	-	-	-	-	-	-	-	-
Lactose-Free Food	6.9	7.3	7.7	8.1	8.5	8.8	9.2	9.6	10.0	10.5
Other Special Milk Formula	4.5	4.8	5.4	5.8	6.4	7.0	7.7	8.4	9.1	10.0
INDONESIA										
Total Food Intolerance Products	6.5	7.7	9.0	10.1	11.4	12.6	13.7	14.9	16.0	17.2
Diabetic Food	1.6	2.1	2.6	3.0	3.3	3.5	3.6	3.8	3.9	4.0
Gluten-Free Food	-	-	-	-	-	-	-	-	-	-
Lactose-Free Food	0.1	0.1	0.2	0.2	0.3	0.3	0.3	0.3	0.4	0.4
Other Special Milk Formula	4.8	5.5	6.2	6.9	7.8	8.8	9.8	10.8	11.7	12.8

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

ANNEX: OTHER REGIONAL DATA (continued)

Australasia

Sales of Food Intolerance Products in Australasia and Major Countries – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
AUSTRALASIA										
Total Food Intolerance Products	144.7	154.9	166.4	177.6	187.4	200.3	212.9	226.2	239.8	253.6
Diabetic Food	18.3	19.3	19.9	20.5	21.6	22.8	24.0	25.3	26.7	28.2
Gluten-Free Food	32.6	38.5	44.1	49.7	55.4	61.4	67.5	74.1	80.9	88.0
Lactose-Free Food	73.2	74.9	77.7	81.9	84.3	88.8	93.0	97.5	102.0	106.6
Other Special Milk Formula	20.6	22.2	24.8	25.6	26.2	27.4	28.4	29.4	30.2	30.9
AUSTRALIA										
Total Food Intolerance Products	130.5	140.9	152.2	162.2	173.4	185.6	197.5	210.0	223.0	236.1
Diabetic Food	18.3	19.3	19.9	20.5	21.6	22.8	24.0	25.3	26.7	28.2
Gluten-Free Food	31.9	37.8	43.4	48.8	54.5	60.4	66.4	72.8	79.6	86.6
Lactose-Free Food	62.2	64.6	67.4	70.4	73.9	77.9	81.6	85.6	89.6	93.6
Other Special Milk Formula	18.1	19.2	21.6	22.6	23.5	24.6	25.5	26.4	27.1	27.8

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*

Middle East and Africa

Sales of Food Intolerance Products in the Middle East and Africa – Historic/Forecast Retail Value in US$ millions

Category	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
MIDDLE EAST AND AFRICA										
Total Food Intolerance Products	78.4	87.0	102.9	126.8	147.6	154.9	164.3	169.1	168.2	169.7
Diabetic Food	0.9	1.0	1.0	1.1	1.2	1.2	1.3	1.3	1.4	1.5
Gluten-Free Food	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Lactose-Free Food	3.8	5.8	8.0	9.5	12.5	17.3	22.8	29.3	36.6	45.4
Other Special Milk Formula	73.7	80.2	93.9	116.2	133.9	136.4	140.2	138.4	130.2	122.8

Source: *Euromonitor, 2012*
Note: *2011 figures are estimates based on partial-year data*
Note 2: *Market size information for food intolerance products is not available by country for this particular region*

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

Global Pathfinder Report: Food Intolerance Products

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ISSN 1920-6615
AAFC No. **11814E**

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