

Specialty Food Products in the Northwest Region

- Survey Results to the NW Specialty Food Processors and Food Inspectors

March 5, 2010
Specialty Food Safety Workshop



Purpose of Surveys

- To assess the specialty food industry in the northwest region
- To assess training needs for enhancing food safe in specialty foods production and inspection



Survey Questionnaires

Common questions to processors and inspectors

- Knowledge on the unique characteristics of specialty foods;
- Need, format, and timeframe for food safety training;
- Geographic characteristics of individual respondent.

Questions to SF processors only

- Categories of SF products
- Business size and history
- Distribution channel

Questions to inspectors only

- Background and experience of the inspectors
- Concerns in the food safety of SF production



How the Surveys Were Conducted

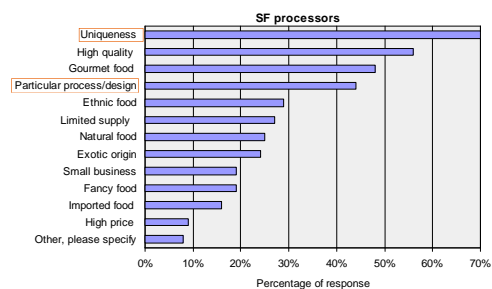
- A 25-question survey for SF processors and 23-question survey for food inspectors were developed, and implemented during June to Oct. 2009
- Survey to food inspectors was implemented online using ["Zoomerang" program](#).
- Survey to SF processors was either mailed to those whom we don't have access to their e-mail address or using online program "Zoomerang"
- Survey sent to 120 state food inspectors, 68 completed the survey - **56.7% response rate**
- Survey reached to 3,355 SF processors, 462 completed - **13.8% response rate**

Results of the Surveys



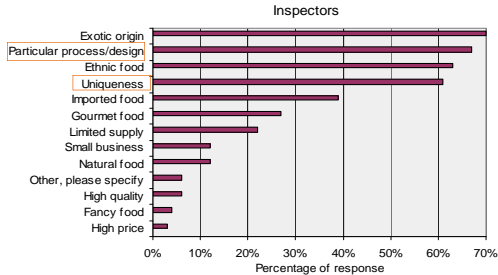
Characteristics of Specialty Foods - SF Processors Response

Q: Please check the top four (4) characteristics, based on your knowledge, that define specialty foods.



Characteristics of Specialty Foods - Food inspectors response

Q: Please check the top four (4) characteristics, based on your knowledge, that define specialty foods.



Special Food Products Manufactured in US NW

Q: Please select from the following categories of specialty foods that are handled by your company's business. Please check all that apply.

Category	Response
Bakery goods (cookies, crackers, breads, and biscuits)	34%
Other, please specify	27%
Confections (chocolate and non-chocolate)	26%
Refrigerated and/or shelf-stable fruit and vegetable products	24%
Condiments	23%
Jams, jellies, conserves, preserves, and nut butter	23%
Nuts, seeds, dried fruits, and trail mixes	21%
Cheese and other dairy products	20%
Refrigerated and/or shelf-stable sauces, salsas, and dips	19%
Refrigerated and/or shelf-stable functional drinks and beverages	17%
Refrigerated and/or shelf-stable meat and poultry products	16%
Refrigerated and/or shelf-stable seafood products	12%
Refrigerated and/or shelf-stable entrées, pizzas, and convenience food	10%

NW Specialty Food Processors

Q: How many different varieties of specialty food products does your company make?	Response
Less than 5	41%
6-25	36%
26-50	9%
51-100	7%
101 or More	6%

Q: How many years has your company been in the specialty food business?	Response
Less than 2 years	8%
2-5 years	19%
6-10 years	16%
11 or more years	57%

NW Specialty Food Processors

Q: Please indicate the number of employees in your company.	Response
Less than 5	44%
5-10	10%
11-20	7%
21-50	10%
51-100	9%
100 or more	21%

Q: What is your company's annual sale of specialty food products?	Response
Under \$250,000	48%
\$251,000-\$500,000	11%
\$501,000-\$1 million	7%
\$1.1 million-\$3 million	11%
\$3.1 million-\$9.9 million	8%
\$10 million or more	14%

NW Specialty Food Processors

Q: Which of the following adjectives best describes most of the ingredients in your specialty food products?	Response
Domestic	53%
Imported	11%
Locally/regionally grown	46%

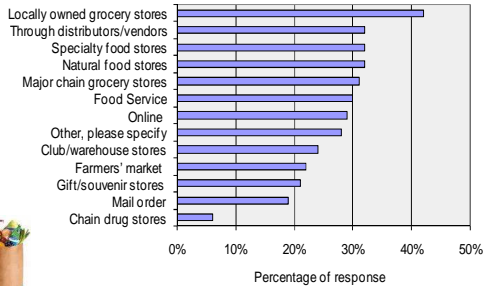
Q: Does your company plan on adding more specialty food products to your product line in the next two years?	Response
Yes	58%
No	42%

NW Specialty Food Processors

Q: What other specialty food products is your company planning to add?	Response
Bakery goods (cookies, crackers, breads, and biscuits)	29%
Other, please specify	22%
Condiments	18%
Refrigerated and/or shelf-stable fruit and vegetable products	16%
Confections (chocolate and non-chocolate)	15%
Jams, jellies, conserves, preserves, and nut butter	14%
Nuts, seeds, dried fruits, and trail mixes	13%
Refrigerated and/or shelf-stable sauces, salsas, and dips	13%
Refrigerated and/or shelf-stable meat and poultry products	13%
Refrigerated and/or shelf-stable functional drinks and beverages	12%
Refrigerated and/or shelf-stable entrées, pizzas, and convenience foods	12%
Refrigerated and/or shelf-stable seafood products	10%
Cheese and other dairy products	9%

Where SF Products are Marketed by the Processors

Q: Where are your specialty food products marketed? Please check all that apply.

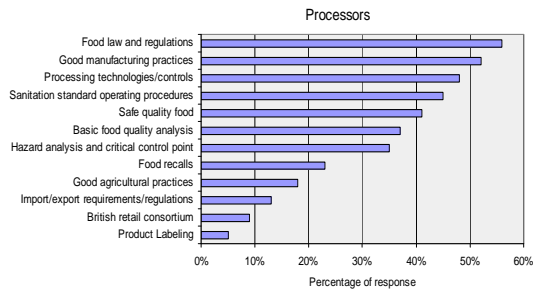


Respond from the State Food Inspectors

Q: How many years have you been a food inspector?	Response
Less than 2 years	18%
2-5 years	24%
6-10 years	15%
11 or more years	43%
Q: How many food processing plants/facilities do you inspect annually?	
Less than 50	55%
51-100	23%
101 or more	23%
Q: What is the average number of employees in the food processing plants you inspect?	
Less than 5	33%
5 to 10	22%
11 to 20	25%
21 to 50	14%
51 to 100	6%

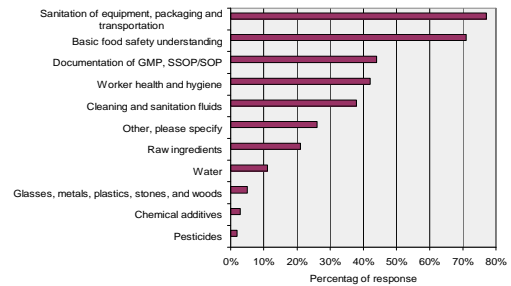
Food Safety Training Topics Identified by SF Processors

Q: Please indicate the topics that would most meet your needs if offered as a 1 day and/or 2-3 day training program. Please check the top five (5).



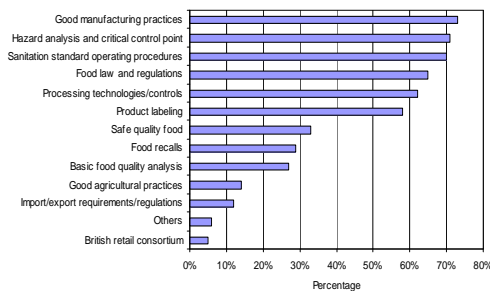
Most Common Food Safety Violations In Processing Plants Encountered By Food Inspectors

Q: When inspecting specialty food plants/facilities, what are the most common violations that you encounter?



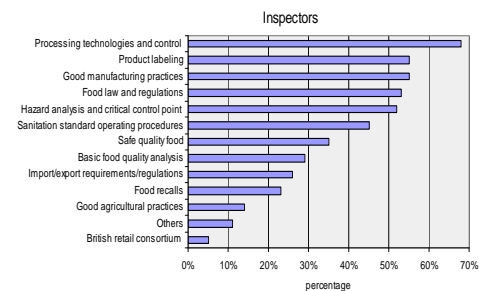
Food Safety Training Topics for SF Processors Recommended by Inspectors

Q: Based on your inspection experience, which of the following educational classes would enhance the food processor's knowledge and practice in food safety?



Food Safety Training Topics Identified by Food Inspectors

Q: Please indicate the topics that would most meet your needs if offered as a 1 day and/or 2-3 day training program. Please check the top five (5).



Food Safety Training Background and Preferred Format

	Processors	Inspectors
Q: Have you participated in any food safety and/or related training in the last two years?		
Yes	60%	86%
No	40%	14%
Q: Which of the following activities would you most likely participate to meet your education and training needs? Please check the top four (4).		
One day program	62%	76%
Online course	53%	54%
Extension publications and bulletins	38%	34%
Information exchange through Internet (website)	38%	27%
CD/video	38%	37%
Two to three day program	29%	63%
Online course plus one-day face-to-face meeting	25%	43%
Others	5%	7%

Funding and Time for Special Food Safety Trainings

Subject related to training program	Processors	Inspectors
Q: Is funding an issue in your state for attending educational training programs?		
Yes	57%	82%
No	43%	18%
Q: What time of the year would you like to see 1 day and/or 2-3 day training programs held? Please check all that apply.		
February	55%	63%
January	48%	57%
March	47%	49%
April	29%	42%
November	21%	42%
October	19%	37%
December	18%	35%
May	18%	25%
September	15%	22%
June	17%	17%
July	14%	14%
August	15%	14%

Language and Travel Distance Desired for Special Food Safety Trainings

Subject related to training program	Processors	Inspectors
Q: In addition to English, what other languages would you prefer to receive educational material?		
Spanish	81%	98%
Chinese	9%	47%
Vietnamese	7%	20%
Others	14%	16%
Russian	9%	8%
Japanese	4%	2%
Q: What distance would you be willing to travel to attend 1 day and/or 2-3 day training programs?		
51-100 miles	47%	38%
It does not matter	15%	32%
Less than 50 miles	47%	17%
101 or more miles	7%	14%

Demographic Characteristics of Survey Respondents

Demographic categories	Processors	Inspectors
Age		
18-24	0%	2%
25-34	11%	20%
35-44	16%	24%
45-54	34%	30%
55-64	27%	18%
65+	9%	5%
Gender		
Male	46%	61%
Female	52%	35%
Education		
College or some college	63%	76%
Post graduate	20%	24%
State		
Idaho	8%	39%
Oregon	76%	27%
Washington	18%	35%
Others	8%	2%

Summary

- The mostly selected characteristics for SF are uniqueness, high quality, particle processing and design, and ethnic foods with exotic origin.
- SF produced in the northwest region cover a broad product categories. Majority (~70%) of specialty food processors are small business, i.e., with less than 50 employee and annual sale below \$1 million.



Summary (cont.)

- SF are sold in multiple channels in the northwest, in which the locally owned grocery stores are most popular.
- Food law and regulation, processing technology and their controls, GMP, and SSOP are among the top lists for both SF processors and food inspectors, while food inspectors are also interested in food labeling and HACCP trainings.

Acknowledgements

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