

The logo for Wakefield, featuring a red horizontal bar to the left of the word "WAKEFIELD" in a bold, red, sans-serif font.

# The State of Food & Beverage Manufacturing: **Industry Benchmark Report**

Industry Challenges | Urgent Needs | Technology Trends

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# RESEARCH OBJECTIVES AND METHODOLOGY

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## What We Did

SafetyChain partnered with Wakefield Research on custom quantitative research to:

- Capture the challenges and obstacles these audiences face in their day-to-day role
- Understand how companies use data currently and what challenges they face with it
- Examine their maturity in digitization and incorporating AI into facility operations and their future plans for it

## How We Did It

The SafetyChain Survey was conducted by Wakefield Research ([www.wakefieldresearch.com](http://www.wakefieldresearch.com)) among 600 respondents across North American food & beverage companies and supporting businesses, with 120 respondents in each of the following segments: Equipment Operators, Food Safety and Quality Insurance, Plant Management, Supplier/Vendor Management, Executives, between September 17th and September 27th, 2024, using an email invitation and an online survey.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 4 percentage points for the total sample, 8.9 percentage points in each specific audience group from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample



# KEY FINDINGS



## KEY FINDINGS

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**Data-related challenges are preventing companies from efficiently responding to urgent challenges and new opportunities.**

Struggles with data access and quality and an inability to capture data in real-time have around three-quarters of staff across departments citing lagging technology and equipment as a hindrance to their company's ability to respond to urgent challenges and take advantage of new opportunities. Nearly half of executives (47%) and even more of those in key operational roles like equipment operators (56%) and those in plant management (53%) and supplier/vendor management (53%) report at least half of the decision-making in their department is based on gut instinct rather than data.

While technology and equipment can automatically capture key operational data and processes in real-time and even adjust goals accordingly, few in this industry are using it. In fact, 70% of equipment operators indicate their plant does not have the ability to monitor plant operations in real time – something that 68% of those in plant management echo. Even in the critical role of food safety and quality assurance, just 40% can monitor plant processes in real time. Instead, about a quarter of the plants' day-to-day data, outputs and processes, on average, are being recorded on paper.

## KEY FINDINGS

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**Collaboration across departments is a common challenge, often hindered by data siloes that could be improved by investing in consolidated technology solutions.**

While collaboration and data sharing are key to efficient plant operations, many in this industry struggle to do so effectively. Nearly three-quarters of executives (73%) and around two-thirds of those in other roles view data silos as a moderate to significant challenge at their company.

In addition, key departments like maintenance, quality assurance, and supply chain/logistics/procurement are commonly reported as a challenge to collaborate with on shared initiatives. Notably, these are also among the departments most commonly viewed as being most in need of greater reliance on data to make better decisions.

Technology and equipment upgrades that could address these are severely needed, yet few anticipate their plant's operations will be fully digitized within less than a year, providing those willing to make the investment now with a key opportunity to get ahead of the competition.

## KEY FINDINGS

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**With few poised to address their technology deficiencies swiftly, companies that are able to effectively invest in digitization and AI have a key opportunity to get ahead.**

Staff at these organizations are using 7 to 9 different systems or solutions each in their day-to-day work, yet more than half in food safety and quality assurance (56%) and around two-fifths of those in other roles indicate their facility is most likely to focus their tech investments on expanding how they use their current systems rather than the potentially more beneficial solution of consolidating to a single platform.

AI solutions offer additional opportunities to support the facilities' operations, and top use cases for AI focus on areas identified as having difficulty with data and collaboration like quality control and inspection and on increased optimization or even autonomous production. However, while nearly all have plans to incorporate an AI solution, most are still in the research, exploration or piloting phase of this.

# DETAILED RESEARCH FINDINGS





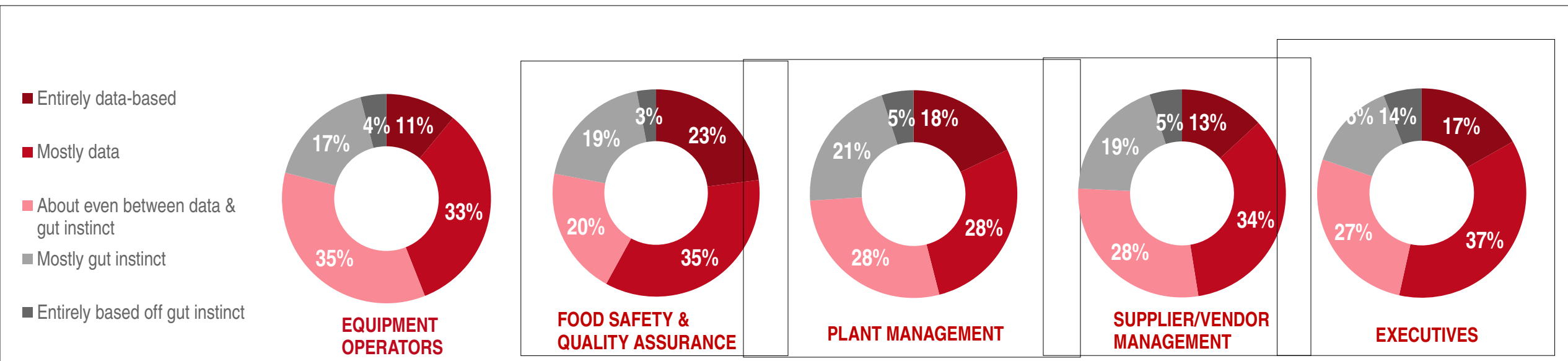
# LACK OF REAL-TIME DATA HINDERS DECISION-MAKING



# DECISION-MAKING BASED ON GUT INSTINCT HAS BECOME THE NORM

For more than half of equipment operators (56%) and those in plant management (53%) and supplier/vendor management (53%) at least half of their department's decision-making is based on gut instinct instead of data. Even more concerning, nearly as many executives (47%) and 43% of those in food safety and quality assurance are also basing at least half of their decisions on gut instinct.

## BASIS OF DECISION-MAKING IN THE DEPARTMENT



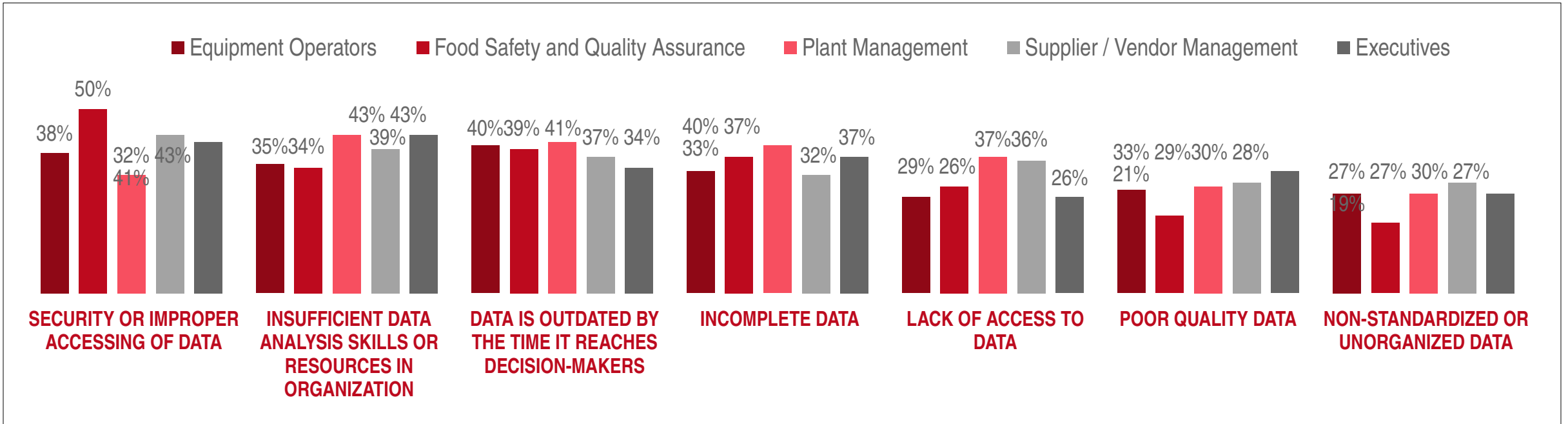
5. Inside your department, how much is decision-making based on data compared to gut instinct?

Sample Size = 600

# SECURITY ISSUES, LACK OF SKILLS, AND OUTDATED DATA ARE COMMON

While decision-making based primarily on gut instinct is not ideal, a look at the data challenges companies are facing may suggest why it is nonetheless a common occurrence. For example, half of those in food safety and quality assurance struggle with security or improper accessing of data, while 41% of those in plant management and 40% of equipment operators note data is outdated before reaching decision-makers.

## MOST COMMON DATA ISSUES



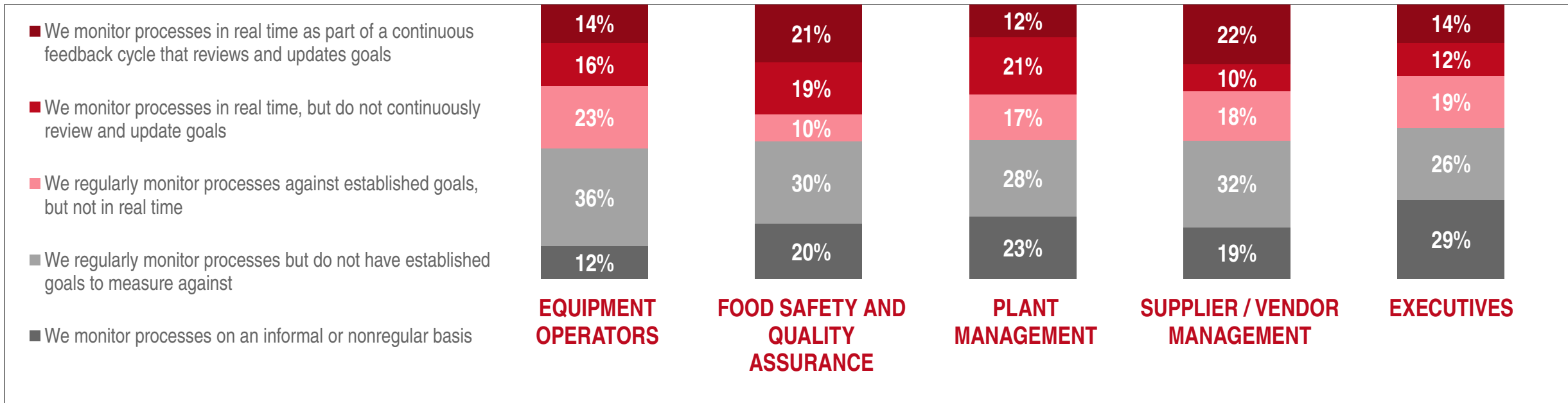
8. What data issues do you most frequently face? Select all that apply.

Sample Size = 600

# REAL-TIME MONITORING IS NOT WIDESPREAD IN THIS INDUSTRY

Companies cannot efficiently respond to operational challenges if they can't identify them, yet few are currently able to monitor and measure plant operational process in real-time. Even when real-time monitoring is possible, just 12% to 22% of these audiences are able to both monitor in real time and review and update goals on a continuous feedback cycle.

## HOW THE COMPANY MONITORS AND MEASURES OPERATIONAL PROCESSES AT THE PLANT



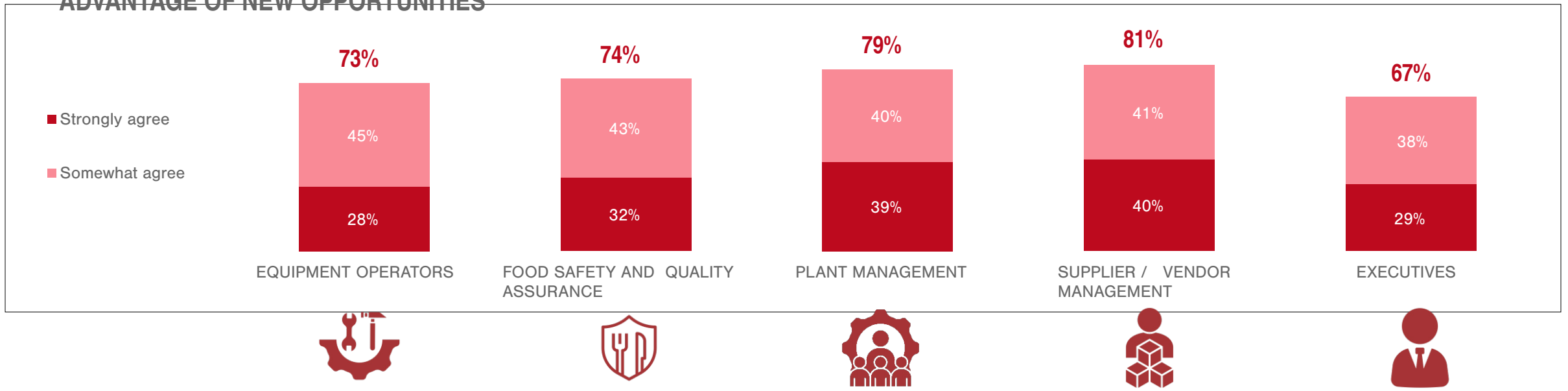
12. What best describes your plant's ability to monitor and measure operational processes?

Sample Size = 600

# LAGGING TECHNOLOGY IS HOLDING COMPANIES BACK

The result is clear – lagging technology and equipment are holding companies back from responding to urgent challenges or taking advantage of new opportunities. This is felt most strongly by those in supplier/vendor management (81%) and plant management (79%), though 67% of executives admit this as well.

## COMPANY TECHNOLOGY AND EQUIPMENT NEGATIVELY IMPACT ABILITY TO RESPOND TO URGENT CHALLENGES OR TAKE ADVANTAGE OF NEW OPPORTUNITIES



Sample Size = 600

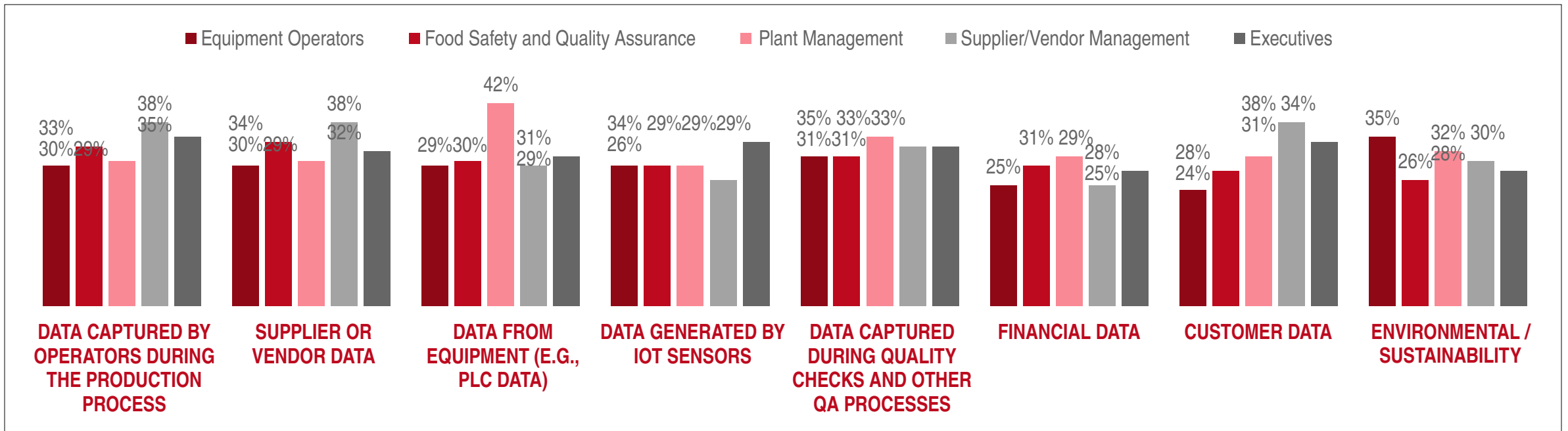
4. How strongly do you agree or disagree with the following statement: Our company's technology and equipment negatively impact our ability to respond to urgent challenges or take advantage of new opportunities.



# DATA CAPTURED BY HAND AND BY EQUIPMENT BOTH POSE CHALLENGES

Companies' data challenges aren't centralized to a single source either. More than two-fifths of those in plant management (42%), for example, commonly have issues with data from equipment. For equipment operators, the most common source of data with issues is environmental/sustainability data (35%), while more than a third of executives have issues with data captured by operators (35%) or IOT sensors (34%).

## DATA SOURCES THAT PEOPLE MOST COMMONLY HAVE ISSUES WITH



9. What data sources do you most commonly have issues with? Select all that apply.

Sample Size = 596

# A QUARTER OF PLANT DATA IS STILL BEING RECORDED ON PAPER

Without the ability to monitor and measure operational processes in real-time, many are instead having to record plant data, outputs, and processes on paper. More than a quarter of the data and outputs in food safety and quality assurance (29%), supplier/vendor management (28%), and equipment operators (26%) is recorded on paper, with executives and those in plant management reporting a similar figure (24%).

## PERCENTAGE OF PLANT'S DAY-TO-DAY DATA, OUTPUTS OR PROCESSES THAT ARE RECORDED ON PAPER



10. What percentage of your plant's day-to-day data, outputs, or processes are recorded on paper? Your best guess is fine.

Sample Size = 600

# DATA SILOS PREVENT COLLABORATION ACROSS DEPARTMENTS

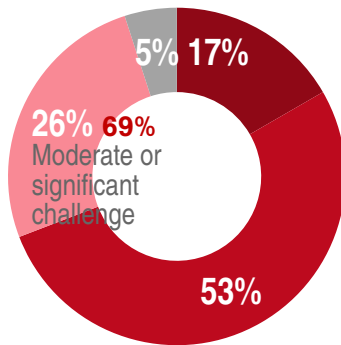


# DATA SILOS POSE A SIGNIFICANT CHALLENGE TO COLLABORATION

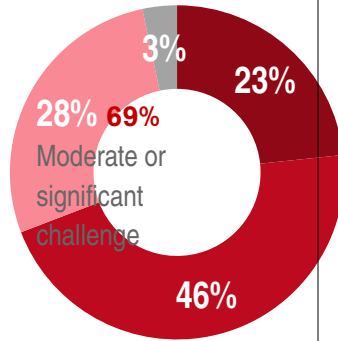
Data sharing is oftentimes part of collaboration initiatives, yet many companies struggle with data silos. Nearly three-quarters of executives (73%) and two-thirds of more of equipment operators (69%) and those in food safety and quality assurance (69%) and plant management (66%) cite data silos as posing a moderate to significant challenge at their organization.

## CHALLENGE CREATED BY DATA SILOS AT THE COMPANY

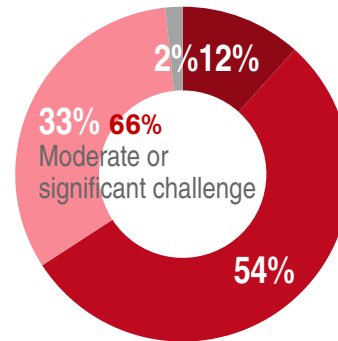
- A significant challenge
- A moderate challenge
- A small challenge
- Not a challenge at all



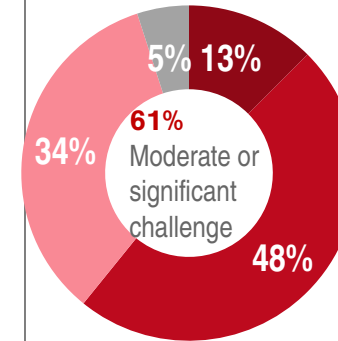
**EQUIPMENT OPERATORS**



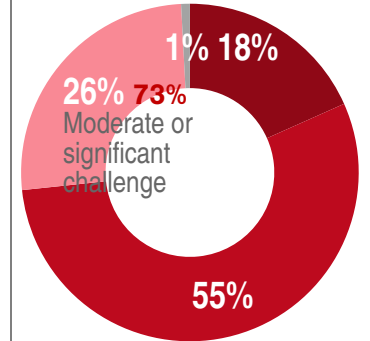
**FOOD SAFETY & QUALITY ASSURANCE**



**PLANT MANAGEMENT**



**SUPPLIER/VENDOR MANAGEMENT**



**EXECUTIVES**

7. How much of a challenge are data silos at your company? By data silos, we are referring to an inability to access and use data/information that is collected by other teams within your company.

Sample Size = 600

# COLLABORATION WITH KEY DEPARTMENTS IS OFTEN A CHALLENGE

Efficient operations require different departments within the company to work together, yet many face challenges working on shared initiatives with key departments like maintenance (40% of equipment operators and those in plant management and 43% of those in supplier/vendor management struggle with this department) and quality assurance (including 43% of those in food safety and quality assurance).

## DEPARTMENTS THAT ARE MOST CHALLENGING TO COLLABORATE WITH ON SHARED INITIATIVES

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER / VENDOR MANAGEMENT	EXECUTIVES
Maintenance	40%	33%	40%	43%	38%
Quality Assurance	31%	43%	33%	33%	29%
Supply Chain / Logistics / Procurement	23%	30%	34%	35%	35%
Production	30%	31%	33%	28%	25%
Safety	23%	21%	28%	28%	29%
Shipping or Receiving	23%	22%	29%	24%	21%
Process Controls and Continuous Improvement	21%	24%	23%	20%	28%
Pre-Operations and Sanitation	23%	20%	22%	24%	16%

3. Which of the following departments do you have challenges in collaborating with on shared initiatives?

Sample Size = 600



# THE NEED FOR MORE RELIANCE ON DATA IS SEEN ACROSS DEPARTMENTS

When asked which departments they suspect need to be relying on data more to make better decisions, no clear “worst offenders” emerge, suggesting that this is a widespread issue. For those in plant management, for example, maintenance (32%) and production (30%) rise to the top. Executives most commonly cite quality assurance (29%), while those in supplier/vendor management pinpoint supply chain/logistics (28%).

## DEPARTMENTS THAT NEED TO BE RELYING ON DATA MORE TO MAKE BETTER DECISIONS

TOP TWO

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER / VENDOR MANAGEMENT	EXECUTIVES
Maintenance	23%	26%	32%	25%	25%
Quality Assurance	28%	31%	20%	23%	29%
Production	24%	20%	30%	18%	28%
Supply Chain / Logistics	17%	22%	20%	28%	25%
Process Controls and Continuous Improvement	24%	21%	19%	24%	15%
Safety	13%	28%	24%	13%	15%
Finance	15%	15%	13%	17%	19%
Shipping or Receiving	20%	17%	13%	15%	13%

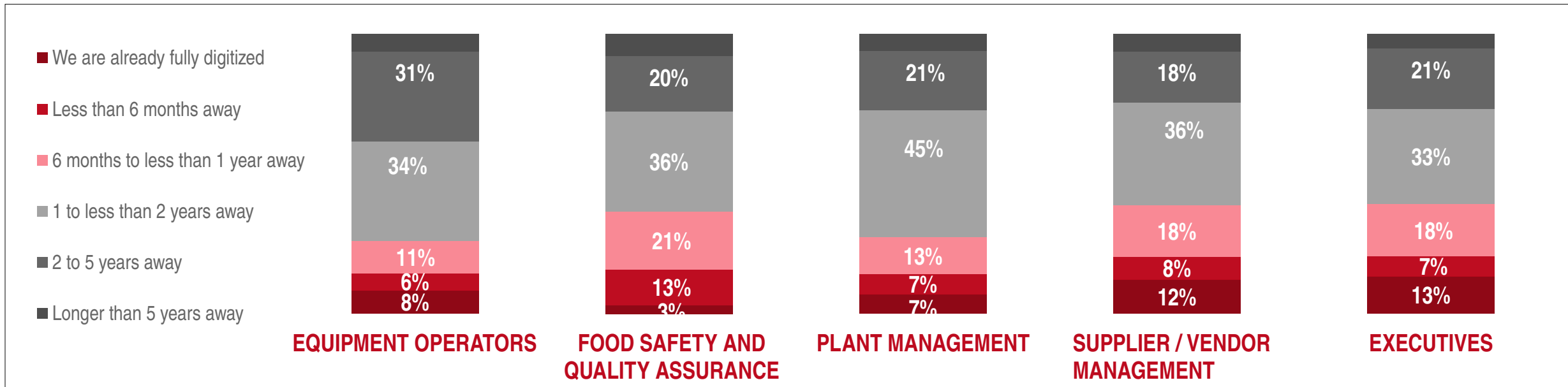
6. Looking across your company, which departments do you suspect need to be relying on data more to make better decisions than they are doing now? Select up to 2.

Sample Size = 600

# FEW WILL BE FULLY DIGITIZED WITHIN THE NEXT 12 MONTHS

Having plant operations fully digitized would make collaboration and data collection easier, yet few are there now, and many anticipate a year or longer before they get there. Three-quarters of equipment operators (75%) and nearly as many in plant management (74%) anticipate a year or more for their plant to be fully digitized, as do 63% of executives and those in food safety and quality assurance or supplier/vendor management.

## TIMING FOR PLANT OPERATIONS TO BE FULLY DIGITIZED



11. How far away are your plants' operations from being fully digitized?

Sample Size = 600

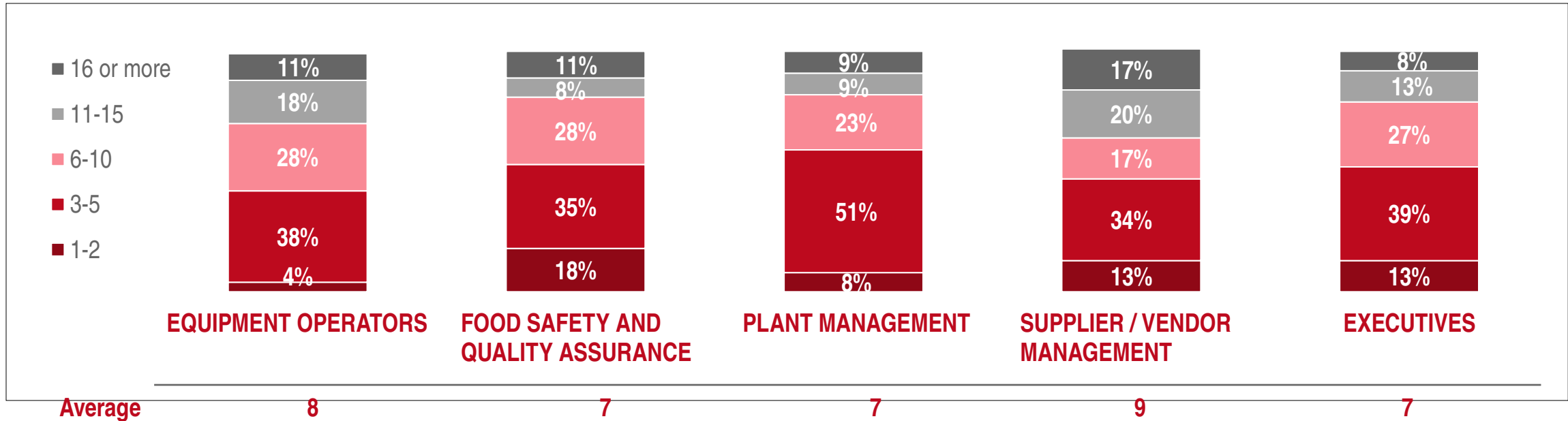
# TECH SOLUTIONS ABOUND, YET FEW PLAN TO CONSOLIDATE



# STAFF REGULARLY USE 7 TO 9 DIFFERENT SYSTEMS, ON AVERAGE

Part of the challenge of collaboration may be the sheer number of different systems each department is using in their daily operations. On average, executives and those in food safety and quality assurance or plant management use 7 different systems, while equipment operators use 8 and those in supplier/vendor management use 9.

## NUMBER OF DIFFERENT SYSTEMS OR SOFTWARE SOLUTIONS BEING USED IN DAY-TO-DAY WORK



15. How many different systems or software solutions do you use in your day-to-day work. Your best guess is fine.

Sample Size = 600

# COMPANIES USE A VARIETY OF SYSTEMS TO MANAGE PLANTS

Across roles, around 2 in 5 say their organization commonly uses a quality management system (QMS) to manage plant activities. In addition, more than 2 in 5 in plant management (43%) use supply chain management (SCM) and nearly as many in supplier/vendor management (38%) use product lifecycle management (PLM). Beyond these few systems, there is great variety in what each plant is using.

## SYSTEMS CURRENTLY BEING USED TO MANAGE PLANT ACTIVITIES

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER/VENDOR MANAGEMENT	EXECUTIVES
Quality Management System (QMS)	38%	40%	38%	41%	40%
Supply Chain Management (SCM)	32%	34%	43%	33%	31%
Environmental, Health, & Safety (EHS)	30%	27%	33%	32%	32%
Manufacturing Execution System (MES)	33%	27%	35%	25%	30%
Product Lifecycle Management (PLM)	25%	20%	35%	38%	31%
Warehouse Management System (WMS)	23%	26%	33%	32%	28%
Supervisory Control and Data Acquisition (SCADA)	24%	30%	25%	20%	28%
Enterprise Resource Planning (ERP)	25%	23%	23%	26%	28%
Maintenance Software (CMMS)	27%	19%	26%	23%	26%
Laboratory Information Management (LIMS)	18%	18%	24%	25%	33%
Internet of Things (IoT) (e.g., sensors, smart devices, etc.)	18%	21%	18%	26%	26%

13. Which of the following systems do you commonly use to manage activities in your plant(s)? Select all that apply.

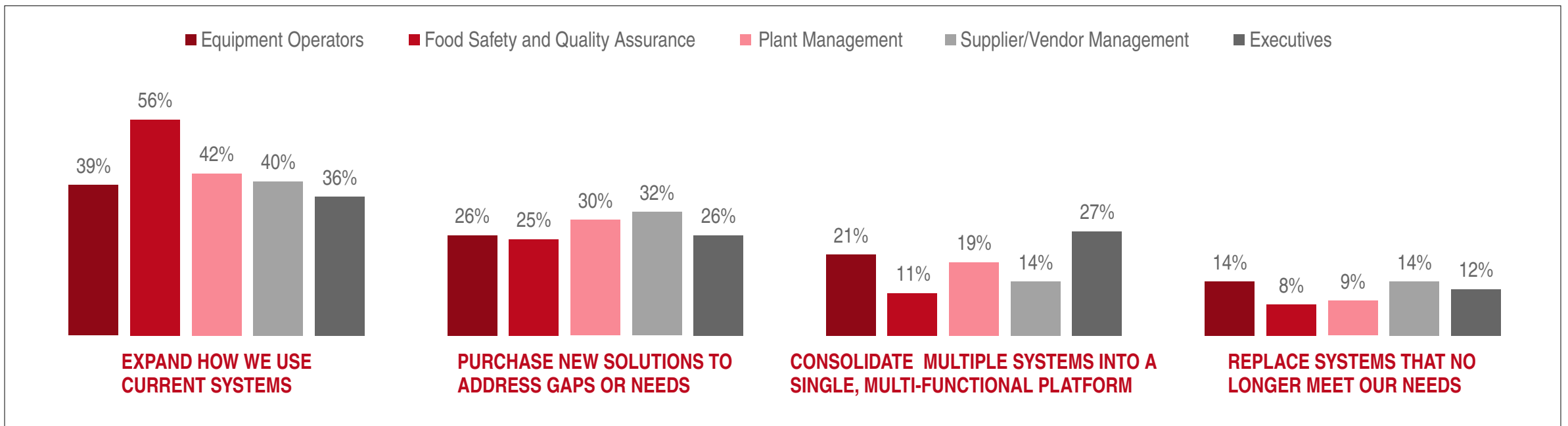
Sample Size = 600



# MOST PLAN TO EXPAND OR ADD TO TECH RATHER THAN CONSOLIDATE

Despite the average person using around 7 to 9 different solutions right now to manage their day-to-day activities, consolidating multiple systems into a single platform is the route that few equipment operators (21%) and even fewer in plant management (19%), supplier/ vendor management (14%) or food safety and quality assurance (11%) anticipate their company will take in their tech investments. This figure rises slightly among executives (27%), though it is still less common than expanding how they use current systems, which 36% of executives believe is most likely.

## MOST LIKELY APPROACH THE FACILITY WILL TAKE WHEN INVESTING IN TECHNOLOGY



17. Over the next 12 months, which of the following approaches is your facility most likely to take when investing in technology?

Sample Size = 600

# THROUGHPUT AND REVENUE ARE TOP MEASURES OF TECH SUCCESS

In evaluating new tech solutions, companies are more commonly looking for increases in throughput, revenue per employee and labor efficiencies over factors like less downtime, operator buy-in, and fewer compliance or quality issues – which may be why consolidation is not a top choice.

## METRICS OR CRITERIA USED TO EVALUATE EFFECTIVENESS OF NEW TECHNOLOGY OR SYSTEMS TO MANAGE PLANT OPERATIONS

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER/VENDOR MANAGEMENT	EXECUTIVES
Increase in throughput	31%	43%	35%	38%	30%
Revenue per employee	31%	31%	25%	30%	32%
Labor efficiency	30%	21%	32%	33%	30%
Time to realize a positive ROI	32%	25%	24%	28%	35%
Overall Equipment Effectiveness (OEE)	30%	28%	29%	21%	34%
Lower production costs	25%	24%	28%	32%	27%
Mean time to issue resolution	19%	25%	33%	29%	28%
Faster cycle time	28%	22%	31%	28%	23%
Fewer compliance / quality issues	14%	22%	31%	24%	29%
Makes my job easier / Operator buy-in	31%	18%	21%	23%	22%
Less downtime	13%	19%	22%	25%	20%

14. When evaluating a new technology or system to manage plant floor operations, what metrics or criteria do you use to evaluate its effectiveness? Select all that apply.

Sample Size = 600

# MAINTENANCE, PRODUCTION MOST LIKELY TO GET FUNDING FOR TECH

The departments most commonly seen as needing to increase their use of data for better decision making – maintenance, production, and quality assurance, are also commonly reported as among the departments most likely to get budget approval for new technology systems or software solutions in the next 12 months.

## DEPARTMENTS THAT ARE MOST LIKELY TO GET BUDGET APPROVAL FOR NEW TECHNOLOGY SYSTEMS OR SOFTWARE SOLUTIONS IN THE NEXT 12 MONTHS

TOP TWO

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER / VENDOR MANAGEMENT	EXECUTIVES
Maintenance	40%	28%	32%	28%	27%
Production	26%	22%	28%	24%	24%
Quality Assurance	27%	31%	23%	17%	25%
Supply Chain / Logistics	19%	18%	16%	33%	28%
Process Controls and Continuous Improvement	18%	20%	21%	20%	17%
Safety	15%	21%	29%	15%	15%
Pre-Operations and Sanitation	18%	19%	15%	15%	9%
Shipping or Receiving	13%	13%	13%	14%	21%

16. Looking across your company, which departments are the most likely to get budget approval for new technology systems or software solutions within the next 12 months? Select up to 2.

Sample Size = 600

# THE INCORPORATION OF AI SOLUTIONS IS AN ONGOING PROCESS

While more than half of those in plant management (53%) report they have fully implemented an AI solution at their facility, fewer than two-fifths of those in other roles report this. Many are instead in the phases of exploring specific solutions, piloting, or building a wider execution for AI solutions at their facility.

## MATURITY IN INCORPORATING AI SOLUTIONS INTO THE FACILITY

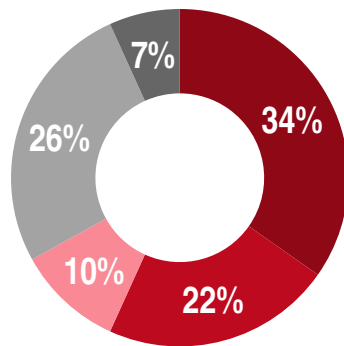
■ Fully implemented

■ Building a wider execution

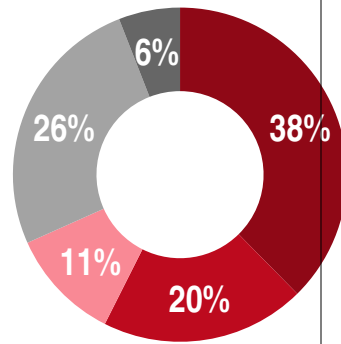
■ Piloting

■ Exploring specific solutions

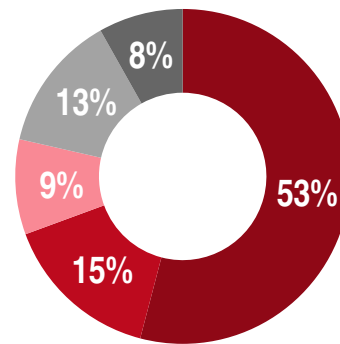
■ Researching



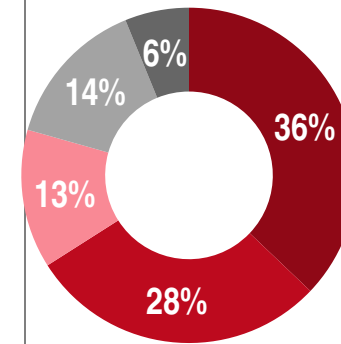
**EQUIPMENT OPERATORS**



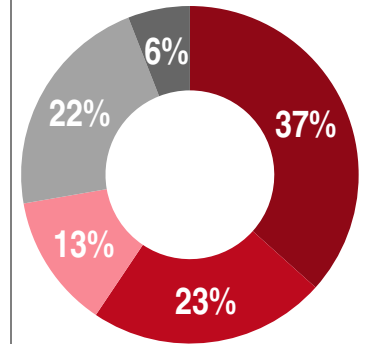
**FOOD SAFETY & QUALITY ASSURANCE**



**PLANT MANAGEMENT**



**SUPPLIER/VENDOR MANAGEMENT**



**EXECUTIVES**

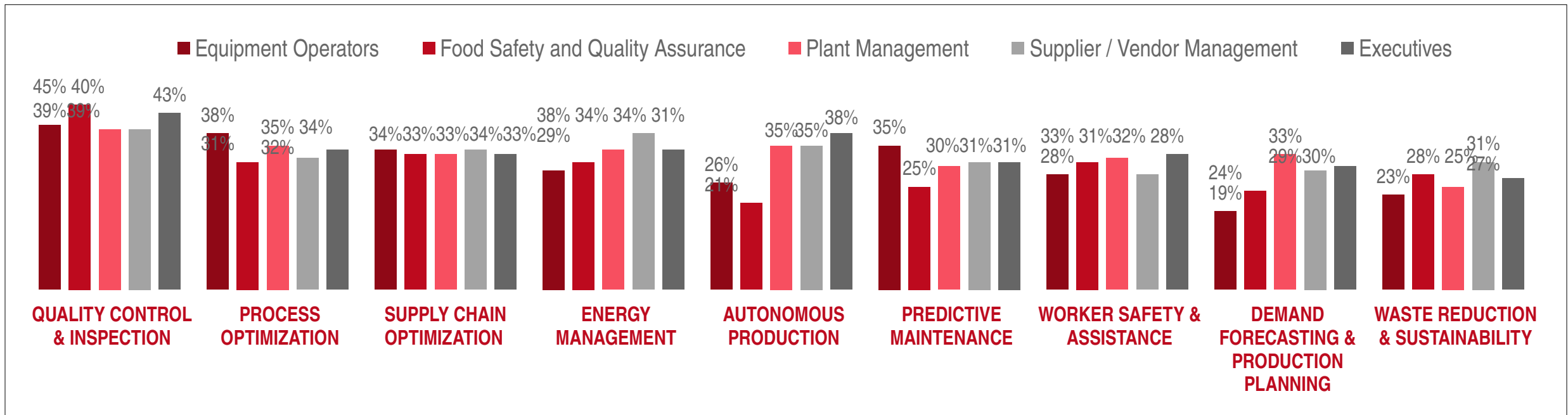
19. How far along is your facility in incorporating an AI solution?

Sample Size = 600

# QUALITY CONTROL AND OPTIMIZATION ARE TOP AI USE CASES

For companies struggling with data and collaboration, AI offers potential to provide much-desired support. Staff across roles see the benefit of AI for quality control and inspection as well as for optimizing processes and supply chain. In addition, nearly 2 in 5 executives (38%) believe AI could benefit them through autonomous production, as do 35% of those in plant management and supplier/vendor management.

## AI USE CASES THAT WOULD MOST BENEFIT THEIR MANUFACTURING PROCESSES



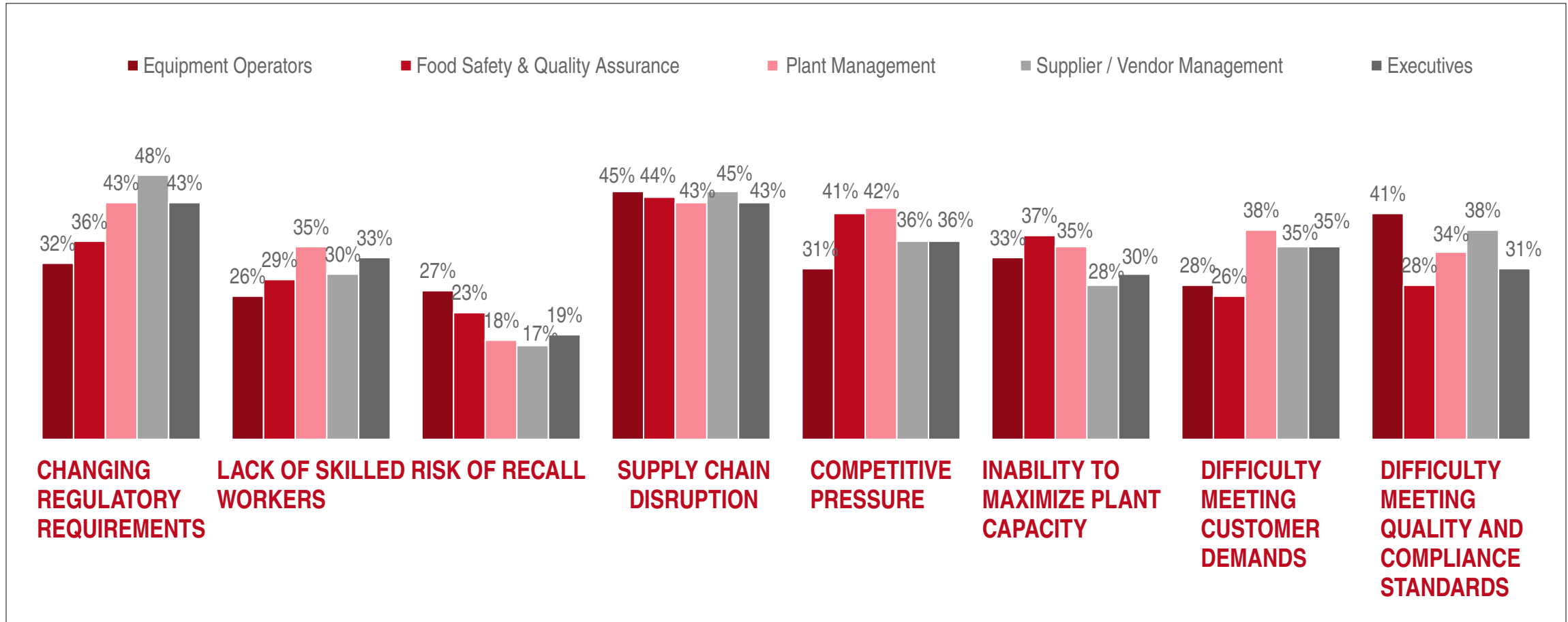
20. Which of the following AI use cases would benefit your manufacturing processes the most? Select all that apply.

Sample Size = 600

# APPENDIX



# RISKS TO THE BUSINESS



1. Which of the following are risks to the growth of your business? Please select all that apply.

Sample Size = 600



# TOP DAY-TO-DAY OBSTACLES IN ROLE / DEPARTMENT

	EQUIPMENT OPERATORS	FSQA	PLANT MANAGEMENT	SUPPLIER / VENDOR MANAGEMENT	EXECUTIVES
High volume of vendor or partner-related activities & communications	36%	35%	46%	32%	27%
Production challenges (poor quality, delays, waste, re-work, etc.)	25%	24%	38%	28%	30%
Security threats and managing risk	26%	33%	26%	31%	30%
Keeping up with regulatory, compliance or safety requirements	21%	30%	28%	35%	29%
Lack of visibility into other parts of the company	24%	29%	31%	27%	30%
Outdated equipment, processes, or systems that slow things down	19%	33%	33%	23%	32%
Lack of support for improvement initiatives	30%	23%	28%	28%	28%
Pressure from leadership, supervisors, Board of Directors, Investors, and/or Shareholders	26%	23%	25%	30%	32%
Changing customer and market demands	23%	25%	28%	28%	24%
Being understaffed or the need for new training	29%	12%	28%	23%	31%
Poor working conditions / workplace	23%	19%	20%	23%	14%

2. Thinking specifically about your role and department, what are the top day-to-day obstacles you face? Please select all that apply.

Sample Size = 600

# BENEFITS OF MOST LIKELY APPROACH TO INVESTING IN TECHNOLOGY

	EXPAND HOW WE USE OUR CURRENT SYSTEMS	PURCHASE NEW SOLUTIONS TO ADDRESS GAPS OR NEEDS	CONSOLIDATE MULTIPLE SYSTEMS INTO A SINGLE, MULTI-FUNCTIONAL	REPLACE SYSTEMS THAT NO LONGER MEET OUR NEEDS
Increased interoperability / systems work together better	38%	46%	36%	32%
Easier to grow and add new capabilities	40%	32%	32%	39%
Move on from legacy processes and skillsets	29%	39%	35%	38%
Enables more data access and use	34%	40%	23%	33%
Cost savings	32%	37%	30%	33%
Help overcome day-to-day obstacles	33%	35%	33%	29%
Fewer security risks	25%	27%	26%	30%
One source for support needs	31%		31%	30%
Don't have to learn how to use so many different systems	14%		17%	

18. What are the top benefits of the approach you just answered that your facility is most likely to take when investing in technology? Select all that apply.

Sample Size = 600

## COUNTRY, REGION (U.S.), REGION (CANADA), AGE, GENDER

COUNTRY	TOTAL N=600	REGION CANADA	TOTAL n=100	AGE	TOTAL N=600
Canada	17%	Newfoundland and Labrador	1%	30 or younger	3%
United States	83%	Nova Scotia	3%	31-40	43%
		New Brunswick	3%	41-50	50%
		Quebec	21%	51 or older	4%
		Ontario	53%		
		Manitoba	4%		
		Saskatchewan	3%		
		Alberta	1%		
		British Columbia	11%		
REGION U.S.	TOTAL n=500			GENDER	TOTAL N=600
Northeast	14%			Male	84%
South	39%			Female	16%
Midwest	13%			Non-binary	-
West	34%				

In which of the following do you live currently? // What state is your company headquartered in? / What province or territories is your company headquartered in? / What is your age? / What is your gender please? /

## EDUCATION (U.S.), EDUCATION (CANADA)

<b>EDUCATION U.S.</b>	<b>TOTAL n=500</b>	<b>EDUCATION CANADA</b>	<b>TOTAL n=100</b>
Grade school	-	No formal schooling (Preschool or Kindergarten)	-
Some high school	-	Completed elementary school (Grade 6)	-
Graduated from high school or equivalent	0%	Some junior high school (Grade 7)	-
Some college	1%	Completed junior high school (Grade 8)	-
Associate degree	8%	Some senior high school or vocational secondary school (Grade 9-10 in Quebec/ Grade 9-11 in the rest of Canada)	1%
Bachelor's degree	65%	Completed secondary school or vocational secondary school (secondary school diploma) (Grade 11 in Quebec/Grade 12 in rest of Canada)	2%
Graduate or post-graduate work	26%	Trade certificate/upgrading certificate	-
		Undergraduate qualifying program/University Transfer Program (CEGEP in Quebec)	8%
		Technical diploma/community college diploma or certificate	18%
		Four-year college or university degree/Bachelor's degree (e.g., BS, BA, AB)	58%
		Postgraduate or professional degree, including master's degree (e.g., MA, MS, PhD, MD, DESS, graduate school)	13%

What is the highest level of formal education you have completed?

# INDUSTRY, RETAIL, MANUFACTURING, FOODBEV

<b>INDUSTRY</b>	<b>TOTAL N=600</b>	<b>RETAIL AMONG THOSE IN THE RETAIL INDUSTRY</b>	<b>TOTAL n=31*</b>	<b>MANUFACTURING AMONG THOSE IN THE MANUFACTURING INDUSTRY</b>	<b>TOTAL n=57*</b>
Agriculture	15%	Operating retail stores	16%	Industrial equipment manufacturing	-
Food and Beverage	52%	E-commerce	16%	Consumer goods manufacturing	68%
Manufacturing	10%	Wholesaling	10%	Packaging materials manufacturing	12%
Packaging	18%	Distributor of consumable goods	55%	Raw materials processing	12%
Retail and Wholesale	5%	Distributor of non-consumable goods	23%	Ingredients-based production (e.g., food, pharmaceuticals)	7%
<b>FOODBEV</b>	<b>TOTAL N=600</b>	Production of consumable goods	100%		
Dairy	21%	Production of non-consumable goods	3%		
Poultry/Meats	14%				
Fruits & Vegetable	28%				
Beverages	35%				
Confectionary	3%				

Which of the following best describes the area in which your company operates? / Which of these best describes the role your company plays in retail? / Which of the following best describes the type of manufacturing in which your company operates? / Which best describes the food & beverage sector in which your company operates?

# LEVEL, DEPARTMENT1, C-LEVEL

<b>LEVEL</b>	<b>TOTAL N=600</b>
C-Level Executive (CEO, CIO, CFO, CTO, Partner, Owner, etc.)	8%
High-Level Executive (Senior Vice President, Executive Vice President, etc.)	17%
Mid-Level (Director, Manager, Supervisor, etc.)	50%
Non-Management (Operator, Analyst, etc.)	25%

<b>DEPARTMENT1 AMONG HIGH-LEVEL EXECUTIVES</b>	<b>TOTAL n=104</b>
Production	4%
Quality Assurance, Food Safety, and/or Compliance	59%
Supply Chain/Logistics	32%
Finance	4%
Maintenance	2%

<b>C-LEVEL AMONG C-LEVEL EXECUTIVES</b>	<b>TOTAL n=49*</b>
CEO	47%
CFO	12%
CIO	16%
CTO	8%
COO	12%
CMO	4%

How would you describe your current level or title at your company? / Which of these departments do you work in? Which of the following best describes your current title? / Which of these departments do you work in?

# DEPARTMENT2, DEPARTMENT3, EMPLOYEES, YEARS IN BUSINESS, YEARS AT COMPANY

<b>DEPARTMENT2 AMONG MID-LEVEL EXECUTIVES</b>	<b>TOTAL n=299</b>	<b>DEPARTMENT3 AMONG NON-MANAGEMENT</b>	<b>TOTAL n=148</b>	<b>COMPANY YEARS IN BUSINESS</b>	<b>TOTAL N=600</b>
Compliance or risk	3%	Equipment Operator / Machinist	60%	15 years or less	60%
FSQA (Food, Safety, and Quality Assurance)	32%	Packaging Operator	7%	16-25 years	30%
Floor Supervisor	4%	Production worker	6%	26-35 years	6%
Operations management	7%	Safety & Quality Control	11%	More than 35 years	4%
Plant management	21%	Warehouse, Shipping, and Receiving	16%		
Production management	4%			<b>YEARS AT COMPANY</b>	<b>TOTAL N=600</b>
Supplier / Vendor management	29%	<b>EMPLOYEES</b>	<b>TOTAL N=600</b>	0-5 years	21%
		1-500	52%	6-10 years	62%
		501-1,000	32%	11-15 years	15%
		1,001 or more	16%	16+ years	2%

Which best describes your role in your company? / How many employees does your company have? / For how many years has your current company been in business? / How many years have you been with your current company?



# CANADA REVENUE, EMPLOYEES, YEARS AT COMPANY, YEARS IN BUSINESS

<b>U.S. REVENUE</b>	<b>TOTAL n=500</b>
\$1 million to less than \$10 million	2%
\$10 million to less than \$50 million	7%
\$50 million to less than \$100 million	18%
\$100 million to less than \$200 million	22%
\$200 million to less than \$500 million	26%
\$500 million to less than \$1 billion	20%
\$1 billion to less than \$10 billion	5%
\$10 billion or more	0%

<b>CAN REVENUE</b>	<b>TOTAL n=100</b>
CA\$1.3 million to less than CA\$13 million	1%
CA\$13 million to less than CA\$67 million	9%
CA\$67 million to less than CA\$135 million	11%
CA\$135 million to less than CA\$272 million	33%
CA\$272 million to less than CA\$674 million	31%
CA\$674 million to less than CA\$1.3 billion	13%
CA\$1.3 billion to less than CA\$13 billion	1%
CA\$13 billion or more	1%

Which of the following categories includes your company's annual sales revenue? / Which of the following categories includes your company's annual sales revenue?



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