

Results from the State of the Meat Processing Industry Survey

Prepared for

*The Concerned Abattoir & Stand Alone Meat
Operators of Ontario*

by

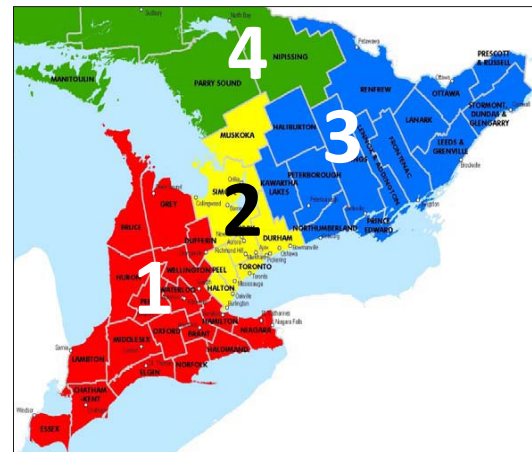
The Ontario Federation of Agriculture

Survey Results Overview

- A total of 546 surveys were sent to all licensed Abattoirs and Freestanding Meat Processors in Ontario
 - A list of Licensed Abattoirs was accessed from: http://www.omafra.gov.on.ca/english/food/inspection/meatinsp/prod_type/abattoirs_all_name.htm
 - A list of Provincially Licensed Freestanding Meat Processors was accessed from: <http://www.omafra.gov.on.ca/english/food/inspection/meatinsp/fsmf/fsmp.htm>
- A total of 135 surveys were returned indicating a 25 percent response rate.

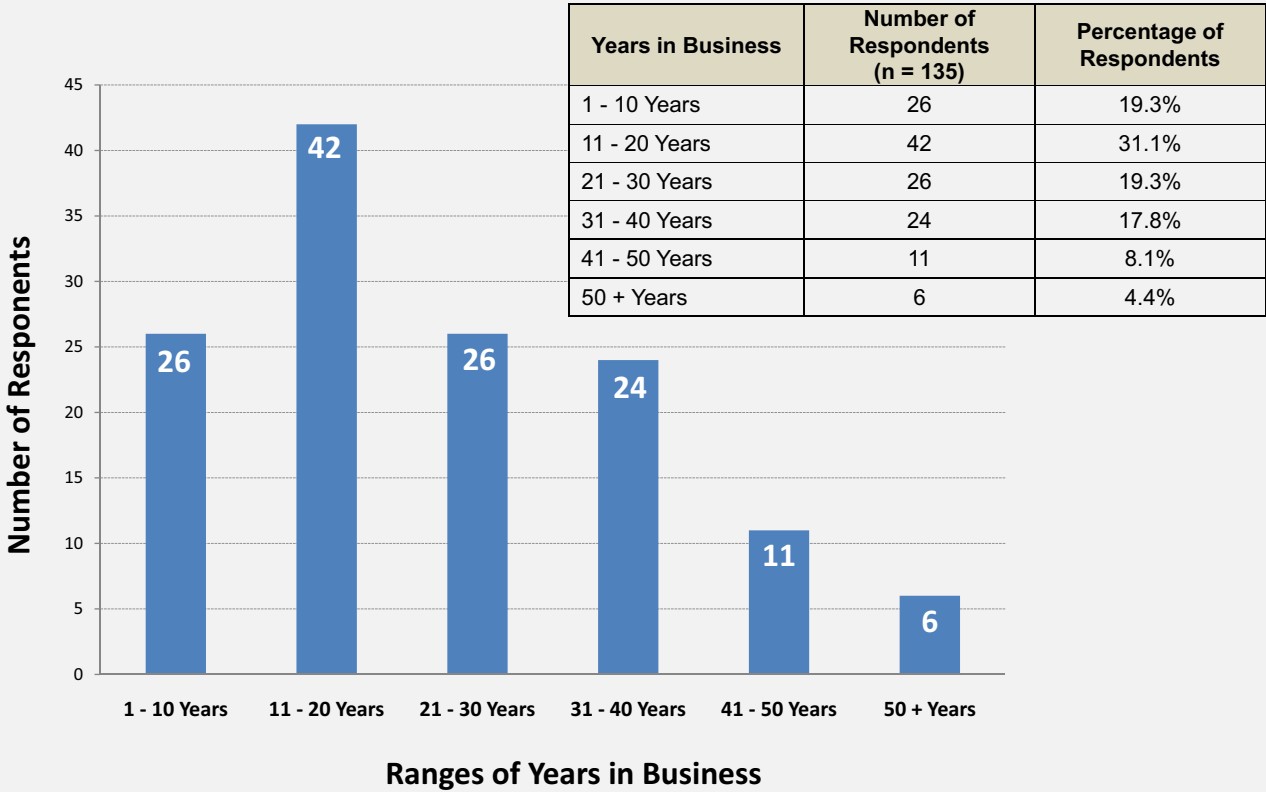
- Responses were received from across the province:

Number of Surveys	Region of Ontario
54	(1) Southern Ontario
32	(2) Central Ontario
20	(3) Eastern Ontario
14	(4) Northern Ontario
15	No Address Provided

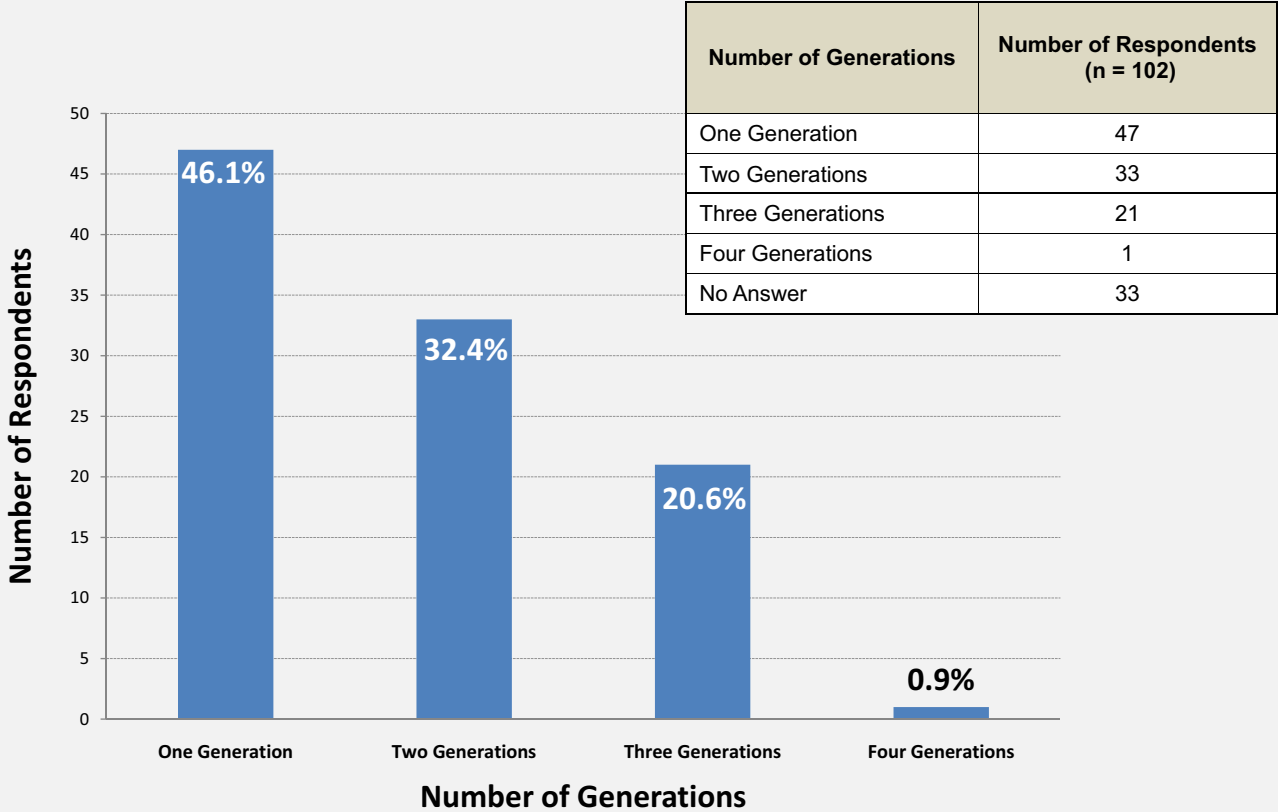


- A survey question was given a ‘No Answer’ when the respondent circled both *Yes* and *No*, provided a written answer with no discernable *Yes* or *No* response, or failed to provide any answer; The ‘No Answer’ responses have not been added to the number of respondents (*n*), thus the response count changes with each question.
- The following document provides selected results from the survey data.

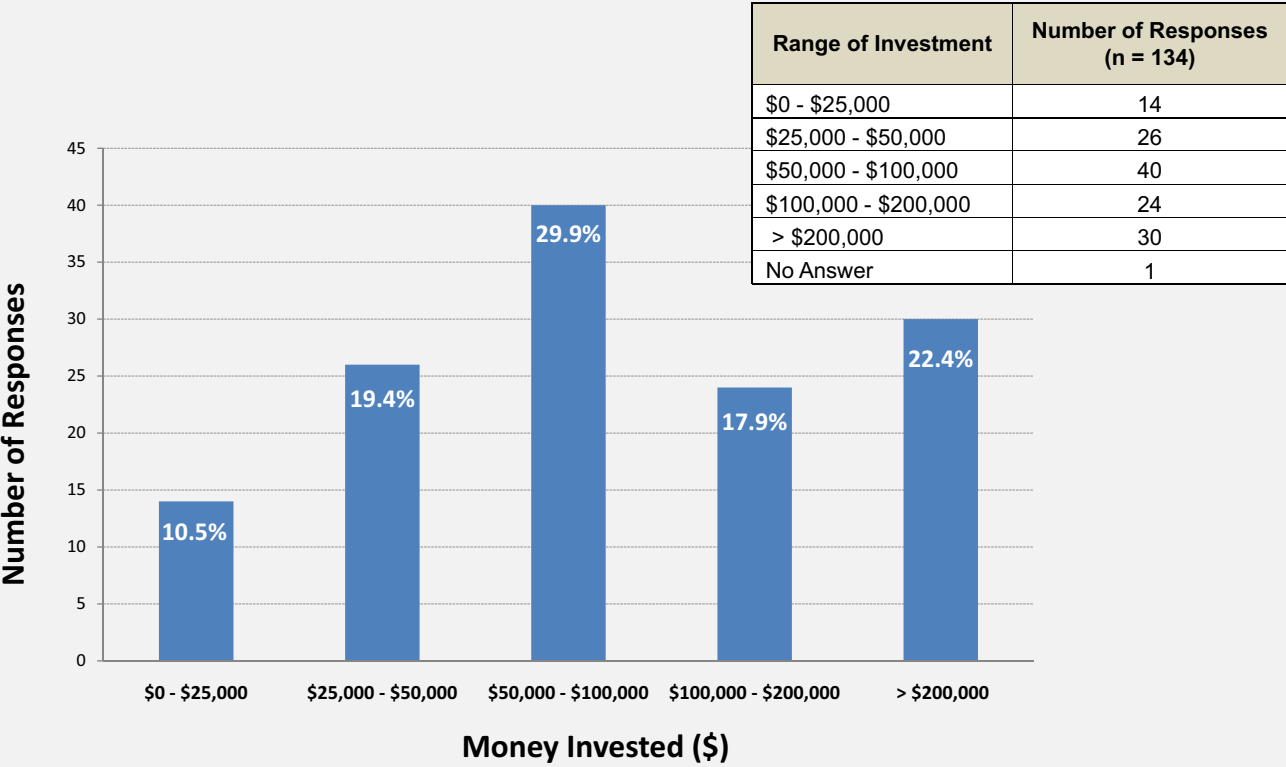
Ownership: How long (in years) have you been in business?



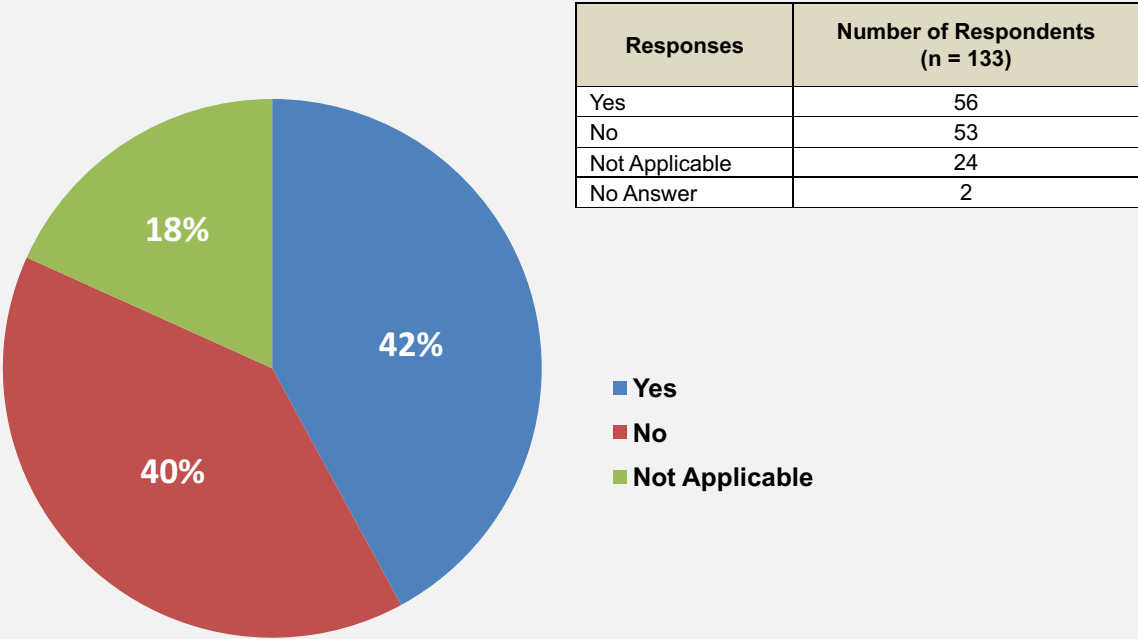
Ownership: How many generations has your business been in your family?



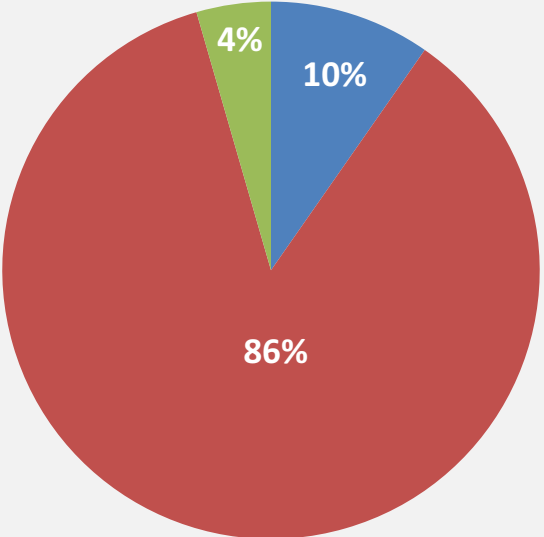
Financial Investment: How much money have you invested over the last 10 years in order to maintain compliance with Ontario’s meat inspection regulations?



Financial Investment: Considering the audits your business has undergone in the last 2 years, have your investments improved the outcome of your audits?



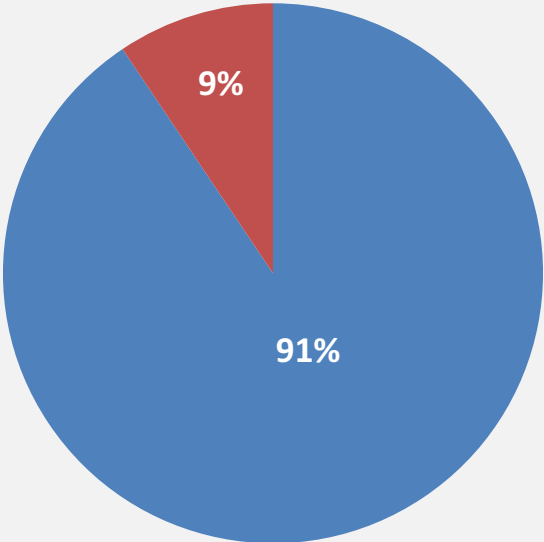
Financial Investment: Do you feel the value of your business has realistically increased according to the upgrades you have been required to make to maintain compliance?



Responses	Number of Respondents (n = 134)
Yes	13
No	115
Not Applicable	6
No Answer	1

- Yes
- No
- Not Applicable

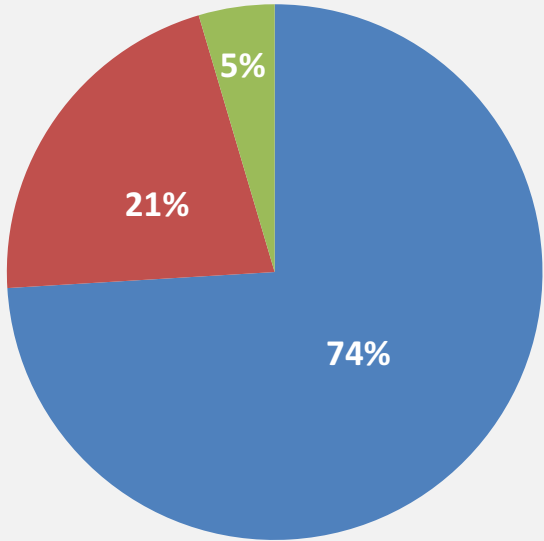
Financial Investment: Do you feel that some regulations require you to put money into cosmetic solutions?



Responses	Number of Respondents (n = 117)
Yes	106
No	11
Not Applicable	0
No Answer	18

- Yes
- No

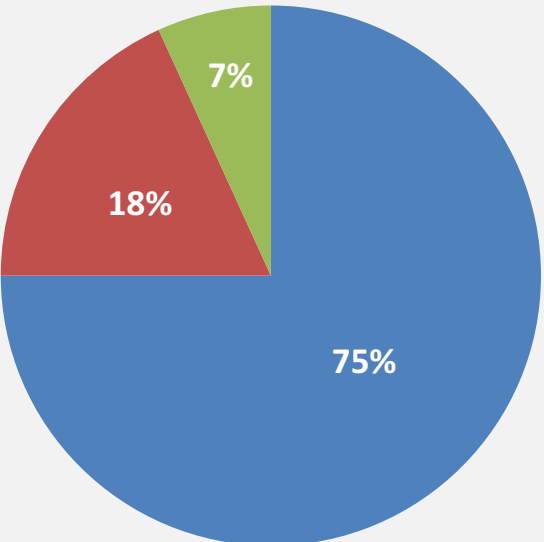
Regulatory Compliance: Do you understand that participating in the Hazard Analysis Critical Control Points (HACCP) is voluntary?



Responses	Number of Respondents (n = 131)
Yes	97
No	28
Not Applicable	6
No Answer	4

- Yes
- No
- Not Applicable

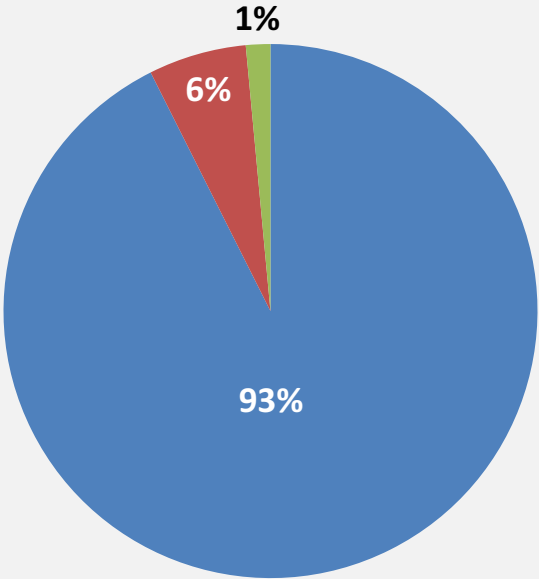
Regulatory Compliance: Do you feel pressure from the audit system to comply with HACCP protocol in order to improve the outcome of audits to your business?



Responses	Number of Respondents (n = 132)
Yes	99
No	24
Not Applicable	9
No Answer	3

- Yes
- No
- Not Applicable

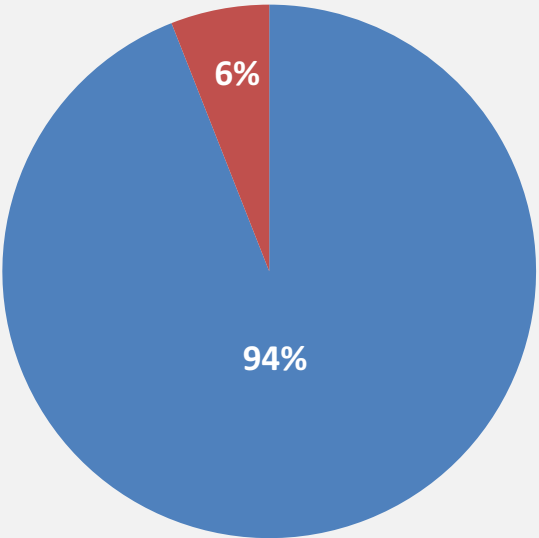
Regulatory Compliance: Do you feel overburdened with the amount of meat inspection paperwork that is required on a daily and weekly basis?



Responses	Number of Respondents (n = 135)
Yes	125
No	8
Not Applicable	2
No Answer	0

- Yes
- No
- Not Applicable

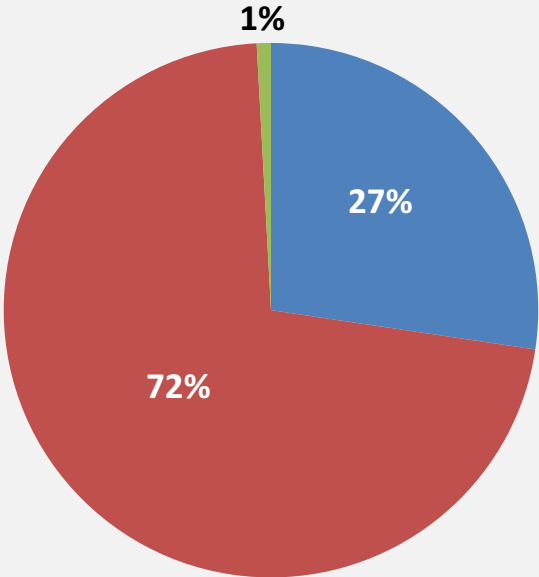
Regulatory Compliance: Do you feel that some of the meat inspection paperwork is unnecessary and repetitive?



Responses	Number of Respondents (n = 134)
Yes	126
No	8
Not Applicable	0
No Answer	1

- Yes
- No

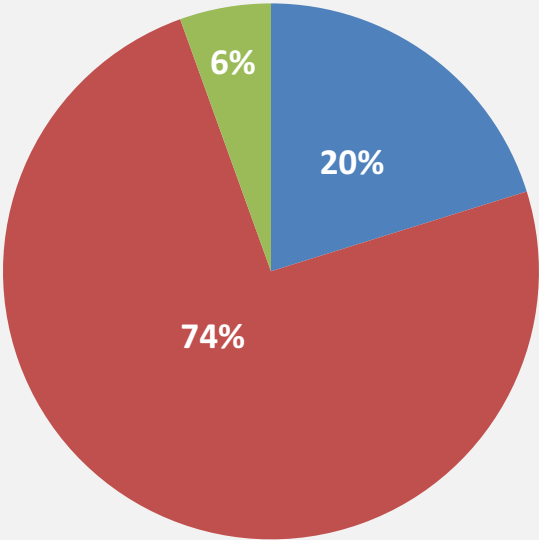
Regulatory Compliance: As a business owner do you feel that food safety regulations are easy to understand?



Responses	Number of Respondents (n = 117)
Yes	32
No	84
Not Applicable	1
No Answer	18

- Yes
- No
- Not Applicable

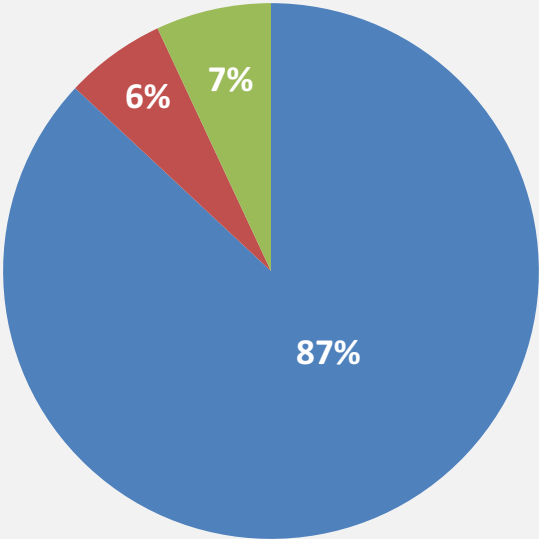
Regulatory Compliance: Do you feel that you generally receive enough time and information about upcoming regulations that you can prepare your business to keep up with the changes required?



Responses	Number of Respondents (n = 109)
Yes	22
No	81
Not Applicable	6
No Answer	26

- Yes
- No
- Not Applicable

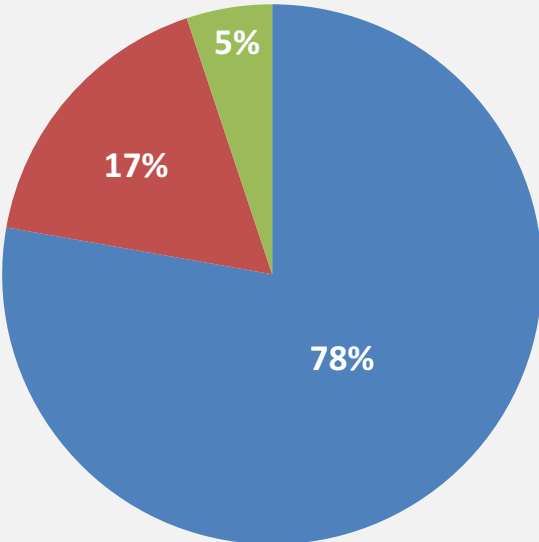
Regulatory Compliance: When changes are required in your operation, would it be helpful to be provided with written and/or photographic examples of the changes?



Responses	Number of Respondents (n = 115)
Yes	100
No	7
Not Applicable	8
No Answer	20

- Yes
- No
- Not Applicable

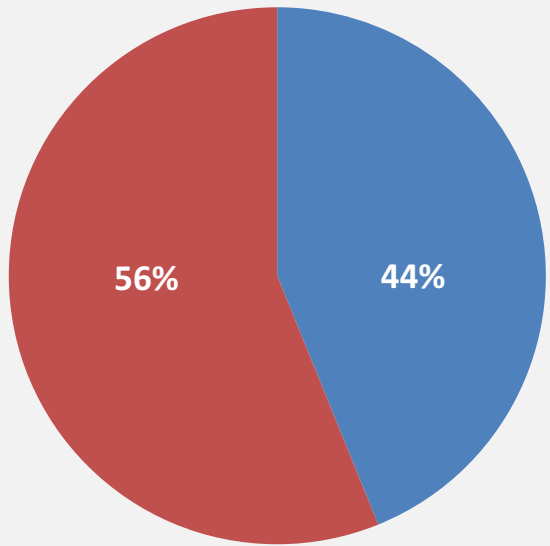
Regulatory Compliance: Do you find that certain regulations do not assist you in providing a high-quality product to your customers?



Responses	Number of Respondents (n = 117)
Yes	91
No	20
Not Applicable	6
No Answer	18

- Yes
- No
- Not Applicable

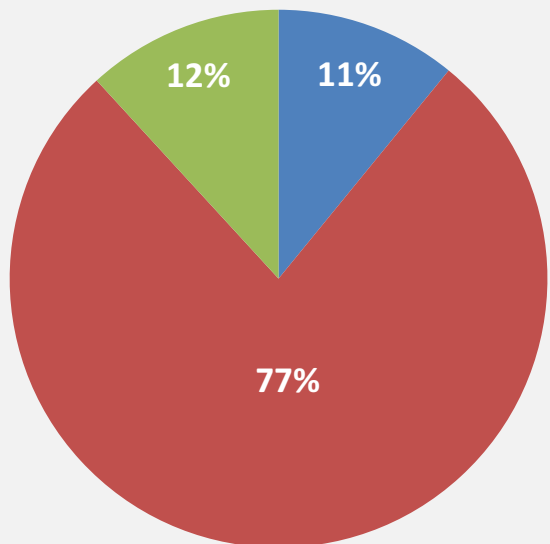
Regulatory Compliance: Do you feel that you can speak out about your concerns without retaliation or intimidation from food safety inspectors?



Responses	Number of Respondents (n = 114)
Yes	50
No	64
Not Applicable	0
No Answer	21

- Yes
- No

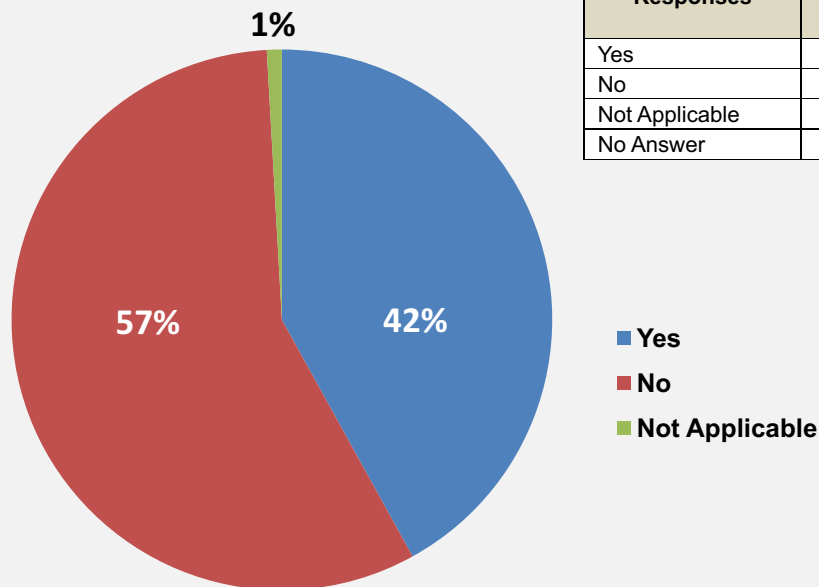
Value of Your Operation: At this time would you be able to sell your operation for an amount that closely compares with your assessed value, according to the Municipal Property Assessment Corporation (MPAC)?



Responses	Number of Respondents (n = 110)
Yes	12
No	85
Not Applicable	13
No Answer	25

- Yes
- No
- Not Applicable

OIMP Membership: Are you a member of the Ontario Independent Meat Processors (OIMP)?



Responses	Number of Respondents (n = 112)
Yes	47
No	64
Not Applicable	1
No Answer	17

- Yes
- No
- Not Applicable

OIMP Membership: If you answered 'No' to #17, why not?

Most frequently cited responses:

- They do not represent small plant owners and processors; Not enough focus on small-scale Operators
- I don't know much about OIMP
- They do not represent my interests and are too closely tied to OMAFRA
- Would consider an application
- Do not feel the need

Other selected responses:

- Cannot consciously belong to an organization who is funded by the same people who write these regulations;
- I was but I feel that the OIMP goes along with OMFRA and anything they say - they forgot about mom and pop stores;
- Don't help my business;
- No visible advantage to belonging - OIMP seems to rubber stamp government regulations - not acting as a voice for meat packers and processors;
- They always side with Ontario government and bureaucrats;
- Just never felt it necessary and from what I understood they backed the regulations.

Conclusions:

- The respondents represent long standing businesses across a significant range of longevity. This suggests new and old businesses in the survey results, with significant industry experience and multi-generation ownership.
- There has been significant capital invested in all of the businesses to maintain compliance. However there appears to be an even split of whether or not the investments have improved compliance. Furthermore, it would appear that the value of the majority of businesses has not improved with the investments.
- This suggests the regulations may be enforced without context and signifying a need for a different role for inspectors to work with operators in a more collaborative way towards compliance.
- One quarter of respondents do not understand role of HACCP. Again, regulations seem to be enforced without context nor understanding. In such cases compliance can only be accidental.
- Paperwork burden emerges as a key issue.
- Repetition of paperwork for no clear reason is major burden that is deemed avoidable. Regulations pre-suppose different workers at different times of day and yields need for repetition and duplication. Small plants often have the same worker from start to finish.
- Operators feel they cannot keep up with the pace of new or changing regulations. Timing of regulatory change may not be compatible with other regulatory requirements also needing compliance (environmental, building permits, etc).
- Current changes for compliance are subject to variable interpretation by different inspectors.
- Over half of respondents are concerned about retaliation by inspectors should they speak of their concerns. Speaks to inspectors' real and perceived role as enforcers rather than as assisting compliance.
- Respondents feel the value of their business is eroded by the regulatory burden

- There is a split on OIMP membership – major reason for non-membership is the feeling that OIMP does not represent the interests of small operators, and their relationship is too close to the regulatory agency (OMAFRA).