



Onderzoeksresultaten:
Food onderzoek PP4C
‘Risicoreductie door
Medium/Highcare ruimtes’

Eindrapportage:
november 2017

Onderzoek:
Food 2017

Opdrachtgever:
**PP4C (professional partners for
cleanrooms)**

PP4C has market research carried out in Holland and Flanders within the food industry.

Summary:

Of course, food safety has been an extremely important topic in the food industry for many decades already. In principle, the food business operator itself bears full responsibility for safe and hygienic process control. If the Netherlands Food and Consumer Product Safety Authority (NVWA), in its capacity as the monitoring and enforcement authority in the Netherlands, identifies problems in your production process as a result of an interim inspection or a problem identified by third parties, you will be held accountable. Each country has its own authority taking care of food safety issues. So in this White Paper we are using the marketing report, based on research in Holland and Flanders. Be aware that not only in Holland, but in any other country penalties for incorrect handling, or product recalls, create major economic consequences.

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Introduction

Most partners within the PP4CE organisation are active in the food market. We are also regularly asked for advice on the various components of the Hygienic Building Concept. Together, we have a very large frame of reference in this sector.

The PP4CE organisation is a member of the European Hygienic Engineering and Design Group (EHEDG). This internationally operating body keeps its members informed of developments in the hygienic production of food, develops and publishes guidelines, advises legislators and regulators, and provides training courses in the field of food safety in the broadest possible sense. Of particular relevance to the PP4CE organisation are EHEDG guidelines 44 and 47.

Our PP4CE partners are increasingly being asked for the development of Hygienic Building Concepts or the delivery of products or services within this context.

Many developments are currently taking place with regard to standards and guidelines. Fortunately, uniformity is increasing, but the requirements are developing proportionally. In short, an increasing amount of knowledge and discipline is required from the manufacturer, so that food safety can be guaranteed.

Where do we all stand?

In the course of 2017, we were active with several PP4C partners in a large Dutch project, at MJN (Mead Johnson Nutrition) in Nijmegen. During a joint meeting for this project, a discussion arose as to whether the Hygienic Building Concept in accordance with the EHEDG guidelines was sufficiently well known in the Netherlands and Belgium. Would it make sense for us as PP4C(E) organisation to do more with this in the form of seminars or something similar? When the marketing agency 'Wolting Marketing Support' launched a food market study towards the end of the year, we immediately became involved in order to have a number of questions answered. To advise and serve the market well, you must of course also dare to invest in order to learn what's going on in the market...

The study was carried out in the Netherlands and Flanders.

Wolting Marketing Support works with regular contacts in the market, who are employed by companies that are registered at the Chamber of Commerce. Most of these contacts occupy a managerial position within their organisation and are often part of the facility management Decision-Making Unit (DMU).

For this study, our questions were submitted to about 1.000 production companies in the Netherlands. Just over 500 companies responded. Wholesalers, retailers and specific packers were excluded. Approximately 320 companies in Flanders also cooperated with the study. Considering the large number of surveyed companies and the response rate of approximately 50%, the outcomes of this marketing study can be said to provide a representative picture of the market.

The key question

In order to determine whether the market representatives surveyed were familiar with the risk-reducing measure of using Medium and High Care areas, we asked them straight out. This led to the following outcomes:

NETHERLANDS	Response	
Yes	242	48%
No	257	51%
N/A	4	1%
	503	100%

FLANDERS	Response	
Yes	80	25%
No	237	74%
N/A	2	1%
	319	100%

As the instructing party, we naturally asked more questions and noted, among other things, that more than 40 of the companies surveyed expected investments in their production areas, mainly in the context of optimising hygiene and/or food safety. The interest in seminars on this subject has also given us more insight into the information needs of the market.

It should come as no surprise that larger national and international companies in particular are more familiar with risk reduction through the application of the Hygienic Building Concept and the use of Medium and High Care facilities. Nevertheless, we found that even at companies with greater numbers of employees, the above question was sometimes answered with a 'No'.

Did we ask the right people? A further study, with some more insider information on the part of Wolting Marketing Support, showed that 82% of the employees surveyed had a say in investment policy in this area.

A few more details

The following sectors are generally the most familiar with Controlled Environments:

- Slaughterhouses and meat processing
- Manufacture of dairy products
- Manufacture of ready meals and snacks

The following sectors are generally the least familiar with Controlled Environments:

- Manufacture of bread, pastry and dough
- Processing of cocoa and manufacture of sugar confectionery
- Manufacture of animal feed

Representation of companies most familiar with Controlled Environments in certain regions:

- Slaughterhouses and meat processing
Significantly represented in The Hague, East Brabant, Achterhoek and Overijssel

Average number of employees:

- | | |
|---|---------------|
| • Companies familiar with Controlled Environments | 116 employees |
| • Companies not familiar with Controlled Environments | 73 employees |

Distribution of number of employees across companies familiar with zoning:

- Slaughterhouses and meat processing:

o 1-25 employees	21%
o 26-50 employees	25%
o >200 employees	21%
- Manufacture of dairy products:

o 1-25 employees	30%
o 76-100 employees	19%
o >200 employees	19%
- Manufacture of ready meals and snacks:

o 26-50 employees	18%
o 51-75 employees	18%
o 76-100 employees	18%
o >200 employees	24%.

What we will do with the information we obtained?

In the short term:

We will of course try to approach those companies in Holland that intend to invest in zoning of their production or in a higher food safety design concept in general as quickly as possible and ask whether we might be able to provide them with advice. We will seek to approach them through PP4C partners who are familiar with the company in question based on previous activities at the company.

First contact will be made by phone and will then be followed up, if necessary, by a personal visit and possibly also a relevant presentation on the area of application.

The year 2018 and subsequent years:

It is important that the companies that are currently lagging behind a bit with knowledge and experience in the field in question receive extra attention. We know that branch organisations and other relevant parties have been investing a great deal of energy for years in increasing the level of knowledge in the market where necessary. We do not expect the PP4CE organisation to be able to produce a major change of course. However, we also know that any contribution, no matter how small, can be important in ensuring optimum food safety within this market area.

That is why the PP4CE organisation will undertake the following activities:

- Each month, we will try to make a new white paper available on our PP4C(E) websites with information that may be of interest to your food organisation. The topics will be different in nature and will reflect all areas of expertise within our organisation.
- The publication of each new white paper will always be announced in a number of small advertisements in trade journals, on our LinkedIn page and on the various websites of PP4CE partners.
- Where possible, we will publish editorials (both electronic and printed) on food safety in general and hygienic construction in particular.
- The PP4CE organisation will seek opportunities to present an introduction on food safety and hygienic construction at various conferences and seminars.
- We are looking to work with branch organisations to raise awareness of this important issue in every easily accessible way, for both larger companies and SMEs.
- PP4CE will support the EHEDG World Congress as a Gold Sponsor on 21 and 22 November and will also raise this issue there.

Conclusion

Our market research within the food industry in the Netherlands and Flanders, carried out by Wolting Marketing Support at the end of 2017 on behalf of PP4C, showed that approximately 50% of the >500 respondents in the Netherlands, and as much as 75% in Flanders, respectively, were not familiar with the terms Medium and High Care risk and/or facilities. The large number of surveyed companies active in food production and the participation of more than 50% of the surveyed managers guaranteed a truly realistic picture of this market segment.

The outcomes of this report confirmed the PP4C(E) partners' suspicions. Despite the considerable efforts of many major players in our field, people's knowledge of Hygienic Building Concepts in general, and 'risk based zoning' in particular, is clearly lacking here and there. Greater awareness of contamination, particularly by ambient indoor air, and the origin of such contamination as a risk factor in Medium and High Risk areas is clearly needed. PP4CE sees it as its task to make a contribution to informing the food industry, particularly SMEs, about food safety requirements and supply-chain responsibility, which is expected of companies active in this market segment on a daily basis.

The food sector should take all available risk-reducing measures. Any economic and social damage caused by a local or even international food poisoning issue can lead not only to continuity problems for the company itself, but also to a damaged image of the country itself, with all ensuing economic consequences.

BACKGROUND

PP4CE (Professional Partners for Controlled Environment) is a strategic alliance between a number of specialist international companies. They are active in the design, construction and maintenance of clean rooms and laboratories in a wide range of market segments. PP4CE is also active in Medium and High Care areas in the food industry.

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Geerd set up the PP4CE organisation and is the General Manager of Brecon International B.V., in which capacity he is strategically involved in the PP4CE alliance. For more information, please visit www.pp4ce.com

References:

- Report by Wolting Marketing Support, dated 21 November 2017: Risicoreductie voedsel (Food risk reduction), commissioned by PP4C
- EHEDG guideline 44: Hygienic Design Principles for Food Factories
- EHEDG guideline 47: Guidelines on Air Handling Systems in the Food Industry – Air Quality Control for Building Ventilation