



INVENTORY OF FREE-STANDING MEAT PROCESSORS IN ONTARIO

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Introduction

- Drivers for data collection
 - Implementation of new National Meat and Poultry Regulation and Code
 - Potential transfer of regulatory responsibility for meat manufacturing operations to OMAF from MOHLTC
 - Need to develop an accurate, comprehensive inventory of existing operations to determine scope of transfer

Key Differences Between Current and National Regulations

Current Meat Inspection Regulation

vs.

National Meat and Poultry Regulations and Code

Not covered

Free-standing meat processors

Covered

Not required

Food Handler Training

Mandatory

Not required

Process Controls

Mandatory for further processing

Not required

Microbial performance standards

Mandatory

Not required

Written sanitation, pest control and maintenance programs

Required

Inter-agency Committee (IAC)

- Members from OMAF, MOHLTC, PHUs
 - represented agencies' interests
 - developed definition of FSMP
 - governed inventory process
 - made decisions on individual plants based on definition

Inventory - Methods

- Phase I - Tombstone data and production details
 - Development of preliminary database from several sources(1700 businesses)
 - Telephone interview - detailed questionnaire
 - Decision-making wrt definition
- Phase II - Structure and Processes
 - On-site visit and evaluation
 - Only those businesses matching definition

Inventory Data Collection

- Processes, processing volume & distribution
- Food safety controls
- Information collected to aid in decision-making and resource planning
- Detailed information on volumes and processes for designing baseline microbiological/chemical studies and designing programs

Definition of Free-Standing Meat Processor

- Manufacturing facility in Ontario that:

conducts any of the following processes: cutting, boning, breaking, comminution, fabrication, cooking and repackaging of meat products, and distributes some portion of its products through any wholesale or retail outlet not physically connected to the processing plant, ...

Definition (cont'd)

Or...

*conducts any of the following processes:
by-product dressing for human consumption,
curing, smoking, fermenting or canning of
meat products or vacuum packaging of high
risk meat products,
and
is not a federally registered establishment
or a provincially licensed abattoir*

Data Analysis

- Business profile, production and distribution analysis (Phase I data).
- Process control assessment and risk identification (Phase II data).
- Geographical demographics.
- Comparison with licensed plants

Phase II Completed

FSMP Phase II Status

(Last Update OCT 02 02)

FSMP	681
Non-FSMP	233
Provisional (Non-FSMP)	17
N.A.	755
Refusal Pending	46
Info/decision Pending	9
Total Plants	1741

Risk Score Definitions : Low Risk



primals & subprimals



ground/comminuted



boned products



fresh processed

Risk Score Definitions : Medium Risk



processes by-products



uncooked smoked meats



cured only products



cured & low temp
smoked products



fully cooked products



vaccuum packs RTE, cured ¹²
or fermented product

Risk Score Definitions : High Risk



dry cured and/or fermented product



cured and/or dried whole muscle meats



canned/bottled products

Risk Score Analysis

Risk Category	Total	% (of 681)
Low Risk Total	681	100.0%
Medium Risk Total	401	58.9%
High Risk Total	109	16.0%
Low Risk Only	264	38.8%
Low + Medium Only	308	45.2%
Low + High Only	16	2.3%
Low + Medium + High	93	13.7%

Distribution Profile

	Number	% (of 681)
Onsite Distribution	564	82.8%
Onsite Distribution Only	138	20.3%
Farmers Market	61	9.0%
Farmers Market Only	8	1.2%
Chain Stores	176	25.8%
Chain Stores Only	16	2.3%
Institutional	80	11.7%
Institutional Only	1	0.1%
Hotels & Restaurants	368	54.0%
Hotels & Restaurants Only	12	1.8%
Wholesale	89	13.1%
Wholesale Only	2	0.3%
Other	113	16.6%
Other Only	30	4.4%

Production Volume

	Total Low Risk Product Production	Total Medium Risk Product Production	Total High Risk Product Production
Total Plants	681	401	109
Total Amount (kg/annum)	268,337,239	16,172,262	1,361,391
Average (kg/annum)	394,034	40,330	12,490
Minimum (kg/annum)	60	10	5
Max (kg/annum)	60,039,789	4,700,408	260,000
Max/Total	22.4%	29.1%	19.1%

Meat Industry: Contribution to Ontario's Economy

- Value of shipments of meat products in 2001 was \$5.9 billion, up by \$1.4 billion compared to 1999
- Industry employed 18,500 in 2001
- Estimated size of sectors based on number of employees:

	Share to total (%)	Econ. Contribution
Provincially licensed	7.7	\$0.5 billion
Free-standing processors	24.3	\$1.4 billion
Federally-registered	68.0	\$4.0 billion

Business Size Analysis

Business Size Category	Total	%Meat Processing				
		100%	51-99%	11-50%	1-10%	Unknown
Very Small (1-10 FTE)	569	176	178	139	60	16
Small (11-20 FTE)	62	12	15	25	7	3
Medium (21-50 FTE)	32	5	3	18	5	1
Large (50+ FTE)	7	1	2	3	1	0
Unknown Size	11	1	4	2	0	4
Total	681	195	202	187	73	24
		397 (58%)		260 (38%)		

Assessment of Control Programs

Subject	Yes	%*
Written Sanitation Program	46	6.8
Staff Training Program	45	6.6
Pest Control	284	41.7
Process Controls	20	2.9
Processing Area <10°C	165	24.2
Freezer <-18°C	475	69.8
Cooler <4°C	653	95.9
Facilities Adequate	486	71.4
Drainage & Waste Risk	71	10.4
Packing & Labelling	455	66.8
Shipping Procedures	352	51.7

* of 681 FSMP plants

Ontario Free-Standing Meat Processors vs. Licensed Plants

	FSMP (%)	Provincially Licensed (%)
Municipal Water	82.2	21.1
Well Water with Treatment Systems	37	93
Sanitation Programs	6.8	75
Staff Training Programs	6.6	48

Summary

- Mostly Very Small operations
 - >80% have 10 or less FTEs
- Food safety knowledge is low
 - many requests for information
- Need government direction
- Industry taking active role - OIMP developing Food Handler Training course for food manufacturers

Next Steps

- Continuous updating of database
- Development of new meat inspection regulation based on National Code
- Consultation on modernized meat inspection regulation
- Final drafting of regulation
- Implementation