*Beyond Fresh and Direct: Specialty Food Manufacturer Ingredient Sourcing Survey*

Q1 Please indicate whether or not your company produced each of the following broad product categories in 2014.

A detailed description of each broad product category follows:

1. **Dairy**: Includes cheese, yogurt, kefir, butter, ice cream, other.

2**. Grain & baked goods**: Includes bread (loaf, ethnic, rolls), specialty flour, chips, pretzels, popcorn, bars, crackers, boxed meals, grains (quinoa, barley), cookies, cake, cereal, granola, baking mixes, pasta, other.

3. **Processed meats**: Includes sausage, ham, jerky, corned beef, salami, chorizo, pates, terrines, confit, crepinettes, smoked meats, and other processed meats.

4. **Processed fruit, vegetables, nuts and herbs**: Includes jam, jelly, preserves, pickles, olives, sauerkraut, beverages, seasoned or roasted nuts, salsa, hummus, fruit or nut candy, nut butters, seasoning mixes, sauces, soups, salad dressing, other.

|  |  |  |
| --- | --- | --- |
|  | Produced in 2014 | Not produced in 2014 |
| Dairy (not including fluid milk) |  |  |
| Grain and/or baked goods |  |  |
| Processed meats |  |  |
| Processed fruit, vegetables, nuts, herbs |  |  |

Q2 How many distinct SKUs, if any, did your company market in 2014 in each of the four broad product categories?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None | 1 - 5 SKUs | 6 - 20 SKUs | 21 or more SKUs |
| Dairy |  |  |  |  |
| Grain and/or baked goods |  |  |  |  |
| Processed meats |  |  |  |  |
| Processed fruit, vegetables, nuts, and herbs |  |  |  |  |

Q3 Please indicate the modes of retail distribution for the product categories you produced in 2014? (Check all that apply)

* Drug stores
* Convenience stores
* Store/shop owned by our company
* Specialty food stores
* Supermarkets
* Farmers market
* Restaurant
* Online
* Other (describe) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Q4 What was the geographical scope of your company's distribution for these product categories in 2014? (If more than one product category, please indicate broadest distribution)

* Smaller than state-wide (local)
* State-wide
* Multiple states (regional)
* National
* International

Q5 What was the total wholesale sales revenue from processed food products for this company in 2014?

* Less than $100,000
* $100,001 - $499,999
* $500,000 - $999,999
* $1,000,000 - $4,999,999
* $5,000,000 - $9,999,999
* $10,000,000 or more

Q6 For each relevant ingredient category, please indicate your company's approximate 2014 purchase quantity (in pounds), purchase expenditure (in dollars), and number of suppliers for the product categories you produced in 2014. If your company supplies some or all of the ingredients from its own production, please count this into the totals.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Milk | Grain/Flour | Meat | Fruit/Veg/Nuts/Herbs |
| Total pounds purchased in 2014: |  |  |  |  |
| Total expenditures in dollars in 2014: |  |  |  |  |
| Total number of suppliers in 2014: |  |  |  |  |

Q7 Among the ingredient categories in Q6 purchased to produce your company&#39;s products, which is the most important ingredient category? This may be the ingredient your company purchases in the greatest quantity, but it could be the ingredient that &quot;defines&quot; your set of products.

* Milk
* Grain/Flour
* Meat
* Fruit/Vegetable/Nuts/Herbs

7a Please refer to the most important ingredient category (as indicated in Q7) for the remaining questions.

Q7a How long has your company been selling products produced with this most important ingredient category?

* 1 year or less
* More than 1 year to 5 years
* More than 5 years to 10 years
* More than 10 years
* Don't know

Q8 For your most important ingredient category, please indicate your 2014 suppliers. (Check all that apply)

* A farm owned by your company
* Direct purchase from farmer(s)
* Farmer cooperative
* Distributor
* Manufacturer
* Co-packer
* Other (describe below) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Q9 In choosing the suppliers for your company&#39;s most important ingredient category, please rate the importance of each of the following factors.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Very Important | Somewhat Important | Slightly Important | Not at all Important | Not Applicable |
| Year-round availability |  |  |  |  |  |
| Price |  |  |  |  |  |
| Quality |  |  |  |  |  |
| Organic certification |  |  |  |  |  |
| Non-GMO certification |  |  |  |  |  |
| Gluten-free certification |  |  |  |  |  |
| Other certification |  |  |  |  |  |
| Food safety practices |  |  |  |  |  |
| Minimum quantity for order |  |  |  |  |  |
| Maximum quantity for order |  |  |  |  |  |
| Convenience of logistics |  |  |  |  |  |
| "Stories" about the ingredients that can be used to market my products |  |  |  |  |  |
| Local or regional sources |  |  |  |  |  |

Q10 Are there any other factors that influence choosing suppliers for your most important ingredient?

Q11 Of those that supply your most important ingredient, which was the principal supplier to your company in 2014?

* A farm owned by your company
* Direct purchase from farmer(s)
* Farmer cooperative
* Distributor
* Manufacturer
* Co-packer
* Other (describe below) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Q12 Which of the following best characterizes the nature of your relationship with your 2014 principal ingredient supplier?

* Our own farm
* Formal contract
* Informal commitment or "booking"
* Other (describe below) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Q13 How many years have you been buying from this supplier?

* 1 year or less
* More than 1 year to 5 years
* More than 5 years to 10 years
* More than 10 years
* Don't know

Q14 In dollar terms, approximately what percentage of your company's most important ingredient category is purchased from this principal supplier?

* 1% - 25%
* 26% - 50%
* 51% - 75%
* 76% - 100%
* Don't know

Q15 Still focusing on the ingredient category you indicated as most important to your business, are you able to identify the farm(s) that produced these ingredients?

* Yes, can identify at least one farm
* No, cannot identify any farms
* Don't know

If No, cannot identify any farms Is Selected, Then Skip To End of BlockIf Don't know Is Selected, Then Skip To End of BlockIf Yes, can identify at least ... Is Not Selected, Then Skip To End of Block

Answer If Still focusing on the ingredient category you indicated as most important to your business, are you able to identify the farm(s) that produced this ingredient category? Yes, at least some of the time Is Selected

Q16 What is the predominant size of the farm(s) that produced your most important ingredient category?

* Small or medium-sized (Annual gross sales of less than $1,000,000)
* Large (Annual gross sales at $1,000,000 or more)
* Don't know

Answer If Still focusing on the ingredient category you indicated as most important to your business, are you able to identify the farm(s) that produced this ingredient category? Yes, at least some of the time Is Selected

Q17 Please indicate whether each of the following is a benefit gained by your company by purchasing ingredients that can be traced back to this (these) farm(s).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | A major benefit | A minor benefit | Not a benefit | Not applicable/Not sure |
| Ease of communication |  |  |  |  |
| Quality assurance |  |  |  |  |
| Flexibility in logistics |  |  |  |  |
| Reliability |  |  |  |  |
| Source of differentiation for our products |  |  |  |  |
| Certifications (e.g., organic or non-GMO) |  |  |  |  |
| Trust |  |  |  |  |
| Traceability |  |  |  |  |
| Stronger marketing message |  |  |  |  |
| Other (describe below) |  |  |  |  |

Answer If Still focusing on the ingredient category you indicated as most important to your business, are you able to identify the farm(s) that produced this ingredient category? Yes, at least some of the time Is Selected

Q18 Please indicate whether each of the following has been an obstacle faced by your company in purchasing ingredients that can be traced back to this (these) farm(s).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | A major obstacle | A minor obstacle | Not an obstacle | Not applicable/Not sure |
| Difficulty of communication |  |  |  |  |
| Poor quality assurance |  |  |  |  |
| Lack of flexibility in logistics |  |  |  |  |
| Unreliable supply |  |  |  |  |
| Lack of certifications (e.g., organic or non-GMO) |  |  |  |  |
| Lack of trust |  |  |  |  |
| Cost |  |  |  |  |
| Liability concerns |  |  |  |  |
| Inability to meet volume requirements |  |  |  |  |
| Inability to provide products year-round |  |  |  |  |
| Inability to meet food safety standards |  |  |  |  |
| Other (describe below) |  |  |  |  |

Answer If Still focusing on the ingredient category you indicated as most important to your business, are y... No, cannot identify any farms Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Don't know Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Yes, can identify at least one farm Is Not Selected

Q19 How interested is your company in sourcing ingredients in this category that can be traced back to a farm or farms you can identify?

* Very interested
* Somewhat interested
* Not too interested
* Not at all intersted

Answer If Still focusing on the ingredient category you indicated as most important to your business, are y... No, cannot identify any farms Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Don't know Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Yes, can identify at least one farm Is Not Selected

Q20 Although you are not able to directly identify the farm or farms that supply your most important ingredient category, please indicate which factors would be of potential benefit to your company by purchasing ingredients that can be traced back to a farm or farms you can identify.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | A potential major benefit | A potential minor benefit | Not a potential benefit | Not applicable/Not sure |
| Ease of communication |  |  |  |  |
| Quality assurance |  |  |  |  |
| Flexibility in logistics |  |  |  |  |
| Reliability |  |  |  |  |
| Source of differentiation for our products |  |  |  |  |
| Certifications (e.g., organic, non-GMO) |  |  |  |  |
| Trust |  |  |  |  |
| Traceability |  |  |  |  |
| Stronger marketing message |  |  |  |  |
| Other (describe below) |  |  |  |  |

Answer If Still focusing on the ingredient category you indicated as most important to your business, are y... No, cannot identify any farms Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Don't know Is Selected Or Still focusing on the ingredient category you indicated as most important to your business, are y... Yes, can identify at least one farm Is Not Selected

Q21 Please indicate which factors are obstacles or expected obstacles to purchasing ingredients that can be traced back to a farm or farms you can identify.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | A major obstacle | A minor obstacle | Not an obstacle | Not applicable/Not sure |
| Ease of communication |  |  |  |  |
| Quality assurance |  |  |  |  |
| Flexibility in logistics |  |  |  |  |
| Reliability |  |  |  |  |
| Source of differentiation for our products |  |  |  |  |
| Certifications (e.g., organic, non-GMO) |  |  |  |  |
| Trust |  |  |  |  |
| Traceability |  |  |  |  |
| Stronger marketing message |  |  |  |  |
| Other (describe below) |  |  |  |  |

Q22 What else would you like to say about purchasing ingredients for your specialty food products or about this questionnaire in general?