

Food Industry Needs Assessment Survey

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**Overview:** A needs assessment survey was conducted to identify the needs of the US food industry in mitigating the impact of the COVID-19 in their facilities and operations and to assess the ongoing adoption of COVID-19 mitigation strategies in the work environment. This document provides a brief description of the major preliminary findings.

**Survey instrument:** An electronic survey was developed consisting of 43 questions about COVID-19 impacts on the food industry. Anonymous and confidential responses were collected via the Qualtrics survey platform between January 19 and April 6, 2021. Individuals affiliated with a produce farm operation or with a produce, dairy, beef/pork, poultry, or other food processing facility in the US were eligible to participate. The survey was successfully administered via 13 professional/trade food industry organizations as well as via social media, targeting management at food companies with facilities in the United States. Survey responses were aggregated and analyzed statistically for reporting. The study was approved by the Cornell University’s Institutional Review Board (approval #2006009660).

**Survey results:**

**Participant characteristics:** Out of 79 survey participants, 38 (48%) were from the dairy industry, 17 (22%) from produce industry, and 24 (30%) from a mixture of other industry sectors. In terms of employee numbers, 33 (42%) facilities were from medium-sized facilities (50-249 employees), 25 (32%) from small-sized facilities (1-49 employees), and 16 (20%) were large-sized facilities (>250 employees), while 5 (6%) did not specify the number of employees.

**COVID-19: Industry needs and success indicators:**

- Regarding the control of COVID-19 in their industry sector, survey participants considered *Labor availability* and *Complex ever-changing government regulations* as most concerning (Figure 1).
- Survey participants indicated that *Easier to understand regulations* was the most important need to successfully mitigate COVID-19 in their industry sector.
- Availability of a modeling tool, that is able to predict which COVID-19 strategy would most likely be successful in a particular food facility, was considered as very important.
- A number of indicators of a successful response to COVID-19 in the survey participant’s food industry sector were considered as very important, including *Workforce related contingency plans to minimize COVID-19 related business interruptions*, *Investment made into technologies that reduce vulnerability to a future COVID-19 pandemic* (such as due to a new COVID-19 variant) or *similar system-wide disruption*, *Established effective risk communication plan*, and *Workforce trained about COVID-19 risk and mitigation*.
- Regarding potential sources of COVID-19 infection in the facility/operation, survey participants were particularly concerned about *Activities in the local community*.

**COVID-19: Self-reported implementation of mitigation strategies since the start of the COVID-19 pandemic:**

- Among social distancing measures, medium and large-sized facilities more commonly implemented the *Installation of physical barriers*, *Staggered break times*, *Staggered arrival/departure times*, *Adjusted sick policy*, and *Spacing workers >6 ft* compared to small facilities.
- In terms of biosafety measures, *Enhanced handwashing*, *Alcohol-based hand rubs*, and *Face mask, face shields, goggles* were the most commonly adopted measures, while the least adopted measure was *Increased ventilation rates*. While not a common measure, *Air cleaning/ filtering* was adopted more among medium-sized facilities compared to small facilities.
- Regarding surveillance measures, *Contact tracing and quarantine*, *Return to work post recovery policy*, and *Temperature screening and quarantine* were commonly adopted, particularly by large and medium-sized facilities. *Contact tracing and quarantine* were most commonly implemented in the dairy industry.

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