

FOOD SAFETY  
**A GLOBAL VIEW**  
2015







# Contents

Introduction	4
Food and Drink Categories	5
Food safety. A Global View.	6
<b>Category</b>	
<b>1</b> Raw red meat	8
<b>2</b> Raw poultry	10
<b>3</b> Raw prepared products	12
<b>4</b> Raw fish	14
<b>5</b> Fruit, vegetables and nuts	16
<b>6</b> Prepared fruit, vegetables and nuts	18
<b>7</b> Dairy, liquid egg	20
<b>8</b> Cooked meat and fish	22
<b>9</b> Raw cured and/or fermented meat and fish	24
<b>10</b> Ready-to-eat meals	26
<b>11</b> Cans and jars	28
<b>12</b> Beverages	30
<b>13</b> Alcoholic drinks	32
<b>14</b> Bakery	34
<b>15</b> Dried goods	36
<b>16</b> Confectionery	38
<b>17</b> Cereals and nuts	40
<b>18</b> Oils and fats	42
Glossary – Top 10 non-conformities	44
Key Phrases	46





# Introduction

## The Global Standard for Food Safety

The BRC Global Standard for Food Safety is all about the measurement, review and assessment of the factors that influence food safety. It provides a robust framework to help manufacturers produce safe food, manage product quality and meet customers' needs and expectations.

The Standard was developed to establish key criteria, enabling manufacturers to satisfy obligations relating to legal compliance and consumer protection. Crucially, the format and content of the Standard also allow for companies' premises, systems and procedures to be audited against BRC requirements. Here's how it works:

- Sites are audited using BRC criteria across a range of areas – for example, management commitment, house-keeping and hygiene, and HACCP.
- Following a site audit, companies are notified of any non-conformities that have been identified.
- These non-conformities then have to be corrected before certification can be awarded.

At the heart of the programme is a commitment to share best practice to help improve food safety, with data made available to provide a consistent global picture of manufacturing performance. And BRC is in a unique position to achieve this – with the richest data among its competitors and the widest audit base by regional spread, the Global Standard provides unprecedented depth of insight for the industry.

Through its international reach and rigorous auditing process, the Standard is both a benchmark for suppliers and a beacon of quality and trust. In fact, international retailers and food service companies are increasingly looking for BRC certification when assessing suppliers' credentials and capabilities.

## Global view, sector insight

Each year, BRC collects a vast amount of data and information during the Global Food Safety Standards audits. In 2014, 17,113 sites in 120 countries were assessed and analysed to identify vital trends and developments. This year, we adopted a new approach to the Global Standard, categorising the data by food group rather than by country.

It is the first time such an analysis has been conducted, and to such magnitude. This means that suppliers and retailers will now be able to benchmark sector performance on a global scale, accessing richer information on the specific trends and performance levels within their particular food and drink categories.

Using material collated and assessed in the first half of 2014, this report sets out key findings and analysis, providing a global view of food safety information and performance data across all 18 of our food categories – from bakery goods to raw red meat. The report also brings to light local trends within these categories, mapping areas of strength and weakness, and showcasing growth markets. In this way, it highlights important learnings on food safety issues that affect manufacturers, retailers and consumers the world over.

But that's not all. Drawing on our extensive audit knowledge bank, this report is part of an ongoing process of global improvement. Indeed, with challenges come solutions.

The corrected non-conformities and findings described in these pages will continue to inform future policies and practices, enhancing the already rigorous safety regime which BRC promotes on behalf of food retailing. Our aim is to use this report – and specifically the experiences of different sites in different sectors – to share knowledge and enable progress. In this way, the Global Standard for Food Safety will continue to deliver the very highest and most consistent standards of auditory measurement, review and guidance.



## More than 270 clauses

### Data divided and analysed by category

### For the first time, suppliers and retailers can benchmark category performance on a global scale

## Methodology


To compile this report we analysed results from 17,113 food manufacturing sites across the world, with our core data broken down into food and drink categories. We then looked at non-conformities individually and in groupings and also isolated ABC grades and anomalous regional performance.

With a total of more than 270 clauses, we analysed performance across 18 categories. Our aim in conducting this research was to highlight commonalities, pinpoint areas of strength and weakness, share best practice, identify challenges and suggest next steps.

The Global Standards Directory was our source of information. It is worth noting that, like any piece of research, this report provides a snapshot in time. Audits were undertaken at BRC-certified sites and results are therefore not necessarily reflective of the total food manufacturing base in that sector or country.

# Food and drink categories assessed by BRC's Global Standard for Food Safety

This year we analysed our sample data by global food and drink categories. The 18 categories that make up the Global Standard for Food Safety are:

- 
- 1 Raw red meat**  
Beef, veal, pork, lamb, venison, offal and other red meats.
  - 2 Raw poultry**  
Chicken, turkey, duck, goose, quail, shell eggs, and farmed and wild game.
  - 3 Raw prepared products**  
Bacon, comminuted meat products, meat puddings, ready-to-cook meals, ready-prepared meat products, pizzas, vegetable prepared meals, steamer meals and comminuted fish products.
  - 4 Raw fish**  
Wet fish, molluscs, crustacea, cold smoked fish and ready-prepared fish products.
  - 5 Fruit, vegetables and nuts**  
Fruit, vegetables, salads, herbs and unroasted nuts.
  - 6 Prepared fruit, vegetables and nuts**  
Semi-processed or prepared foods, including fruit, vegetables, salads, coleslaws, chips, frozen vegetables, pie fillings, fruit fillings as well as sweet bean, chilli and fermented soy sauces.
  - 7 Dairy, liquid egg**  
Milk and milk drinks, yoghurt, butter, cheese, cream, liquid egg, ice cream, dried dairy and egg products, fermented milk-based products, custard, fruit juices, smoothies and certain non-dairy products, such as soya milk.
  - 8 Cooked meat and fish products**  
Ham, meat pâté, fish pâté, hot smoked fish, poached salmon, and ready-to-eat molluscs and crustaceans, as well as the preparation of ready-to-cook raw beef and poultry, and frozen raw and cooked shell-on lobster.
  - 9 Raw cured and/or fermented meat and fish**  
Parma ham, cold smoked salmon, air-dried meats and salamis, ready-to-eat smoked fish, fermented meats and dried fish.
  - 10 Ready-to-eat meals**  
Frozen, chilled, baked and unbaked foods, such as soups, wraps, pizzas, pies, pastries and sauces.
  - 11 Cans and jars**  
Canned products, such as beans, soups, meals, fruit, tuna and pet food, as well as products packed in glass, including sauces, jams, pickled vegetables and condiments.
  - 12 Beverages**  
Non-alcoholic drinks, such as water, flavoured water, isotonic, concentrates, squashes, cordials, minerals, herbal drinks, food drinks and ice.
  - 13 Alcoholic drinks**  
Alcoholic, fermented and brewed products as well as non-alcoholic drinks, including beer, wine, spirits, vinegar, alcopops, energy drinks, and carbonated and non-carbonated non-alcoholic beverages.
  - 14 Bakery**  
Breads, pancakes, crumpets, pastries, biscuits, cakes, tarts and breadcrumbs.
  - 15 Dried foods**  
Dried soups, sauces, gravies, spices, stocks, herbs, seasonings and stuffings as well as tea, coffee, pasta, pulses, legumes, rice, noodles, nut preparations, fruit preparations, dried pet food, vitamins, salt, additives, gelatine, glacé fruit, home baking, syrups, sugar and flour.
  - 16 Confectionery**  
Jellies, gums, hard candies, chew candies, pops, filled and hollow chocolate, and diverse sweets.
  - 17 Cereal and nuts**  
Porridge oats, muesli, breakfast cereals, roasted nuts, popcorn, crisps and poppadoms.
  - 18 Oils and fats**  
Cooking oils, margarine, shortening, spreads, suet, ghee, salad dressings, mayonnaise and vinaigrettes.

# Food Safety. A Global View.

## Executive Summary

Our analysis of audit data, sampled from 17,113 sites, has enabled us to identify vital trends and developments relating to food safety and hygiene worldwide.

Across the sites assessed in the 2014 audits, consistent patterns of non-conformity emerged. With a few exceptions, the most dominant Non-conformities were concerned with Housekeeping and Hygiene (Section 4.11), Product Contamination Control (Section 4.9), Building Fabric (Section 4.4) and Equipment (Section 4.6). In particular, Section 4.11 presented the most problematic set of criteria; across all categories sites needed to improve the maintenance of their housekeeping and cleaning systems.

Documenting Cleaning Procedures (Clause 4.11.1) emerged as the most frequent non-conformity globally, with 18.3% prevalence across all sites. Following this were Door Maintenance (Clause 4.4.9) and Chemical Control Processes (Clause 4.9.1.1) which occurred in 14.1% and 12.5% of sites globally.

While there was little divergence from the global non-conformity trends, some categories did reveal anomalies. Among dried foods sites, Documentation Control (Clause 3.2.1) was the second most common non-conformity, despite typically appearing in 8th place. Similarly, Product Storage Procedures (Clause 4.14.1) was the third most prevalent non-conformity among beverages producers, compared to 10th across all categories.

In terms of overall performance, raw poultry producers emerged as the global leaders of BRC food safety standards, with 86.3% of sampled sites receiving an A-grade rating. Raw prepared products foods sites achieved the second highest score globally with 84.2% of A-grades, followed by raw red meat, cereal and nuts, and ready-to-eat meals.

At country-level, the UK achieved the highest A-grade rating across all categories, with an average score of 92.8%. The USA, a huge growth area for global food exports, recorded the second-highest score of 87.8%, followed closely by the Netherlands and Italy. China, however, performed worst in terms of A-grade ratings, where only 29.7% of sites were graded A across all categories. Spain, too, attained weak scores, recording the lowest rating for Europe and third-lowest globally, at 67.5%.

On a global scale, sites typically received 5 Minors per audit and 78.85% of producers achieved an A-grade rating overall. While only 56.3% of sites new to the standard were graded A, this rose to an average of 81.4% for renewal sites (those assessed more than once). This progress is typical across the board and demonstrates the improved performance that BRC audits instigate.

Since collating and analysing the data from the 2014 sample audits, we have integrated it into conference presentations, training packages, guideline documents and webinar programmes. Equipped with this new insight and material, we aim to provide an accurate global picture of food safety issues.

We hope you enjoy this report.

**Mark Proctor**



In terms of overall performance, raw poultry producers emerged as the global leaders of BRC food safety standards, with 86.3% of sampled sites receiving an A-grade rating.”

## The top ten non-conformities across all sample sites

All categories, all regions top 10	Saturation % across all sites
4.11.1	18.3
4.4.9	14.1
4.9.1.1	12.5
4.6.1	12.4
4.9.3.2	12.1
3.9.1	11.0
4.4.1	10.9
3.2.1	10.7
4.4.5	9.9
4.14.1	9.5

Saturation %: the prevalence of specific non-conformities across sites



Total sites:  
17113

Number of sites sampled by category including percentage of A grade sites

Category	Total sites: 17113	Sampled sites A grade %
1 Raw red meat	817	83.7
2 Raw poultry	709	86.3
3 Raw prepared products	1453	84.2
4 Raw fish	1263	68.7
5 Fruit, vegetables and nuts	2679	80.7
6 Prepared fruit, vegetables and nuts	1351	74.1
7 Dairy, liquid egg	1565	80.2
8 Cooked meat and fish	1459	76.8
9 Raw cured and/or fermented meat and fish	611	77
10 Ready-to-eat meals	999	82.1
11 Cans and jars	1650	68.6
12 Beverages	464	80.6
13 Alcoholic drinks	869	80.9
14 Bakery	1786	81.4
15 Dried foods	2948	76.7
16 Confectionery	826	73.3
17 Cereal and nuts	484	83.1
18 Oils and fats	573	80.9

Category  
Number of sites sampled  
Sampled sites A grade %

Sites typically gained 5 minors per audit

78.9% of producers were graded A

HACCP saturation was 40% overall



Category 1

## Raw red meat

Whether it's ribs, joints, mince, steaks or chops, red meat is a culinary staple all around the world. From **British** roast beef to **Middle Eastern** kebabs, American hamburgers, **Japanese** Kobe steaks and **New Zealand** lamb, red meat is celebrated and consumed in a multitude of ways.

And this even extends to uncooked red meat, with delicacies like the **French** steak tartare and filet américain remaining ever popular. Indeed, with global appetite and demand still high, the import and export market for raw red meat continues to thrive.

The raw red meat category includes beef, veal, pork, lamb, venison, offal and other red meats.

Sample size:

**817 sites**

A grade:

**83.7%**

Highest Grade-A achiever:

**New Zealand**

“

The import and export market for raw red meat continues to thrive.”





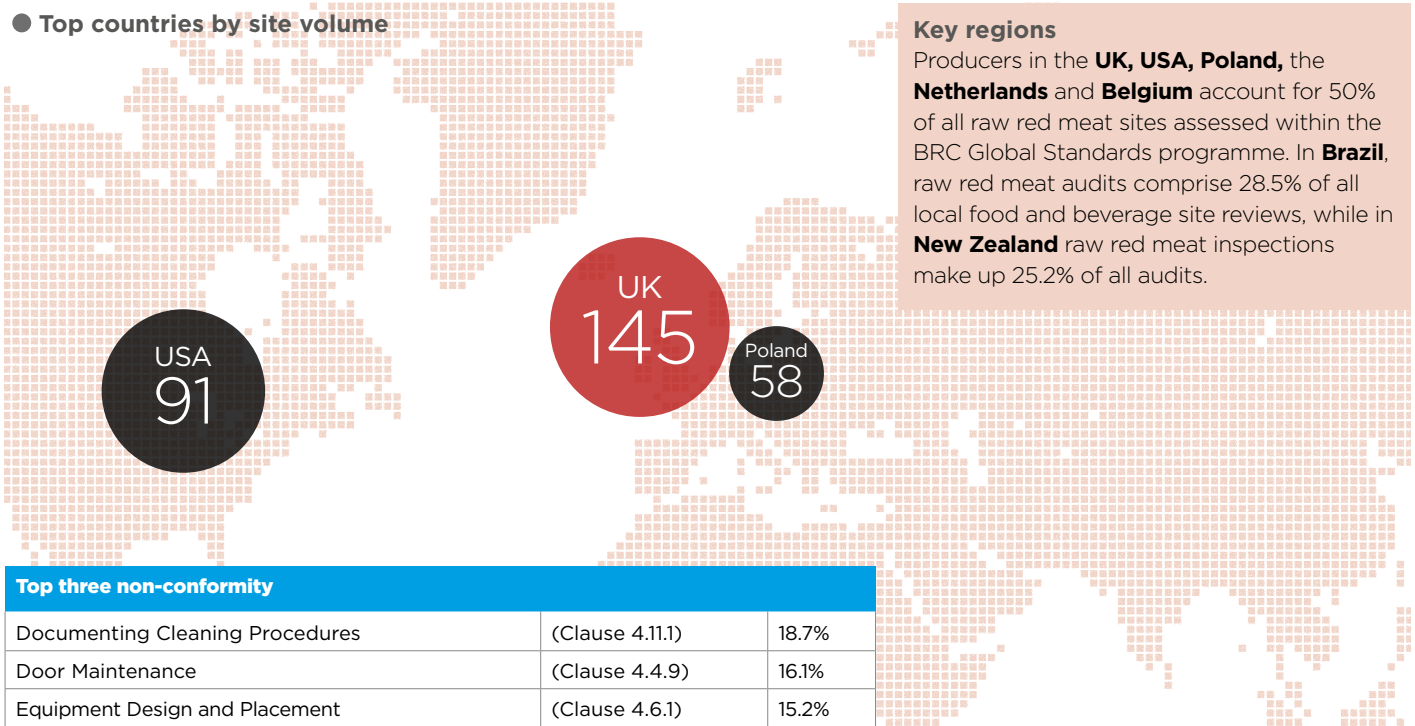
**BRC audit scope and performance**

Globally, 66% of new sites and 85.7% of renewal sites achieved the coveted A-grade – which is 12% and 4.4% above the all-category average respectively. At country level, New Zealand achieved the highest A-grade percentage, with 98% of all sites graded A, 20% above the global average. At the other end of the spectrum was Spain, in which only 42.2% of sites received an A-grade.

Sites in Belgium had a number of anomalously high non-conformities:

- **Product Packaging Storage** (Clause 5.4.2) 21.4%.
- **Process Flow Diagrams** (Clause 2.5.1) 16.7%.
- **Raw Materials and Packaging Specifications** (Clause 3.6.1) over three times more prevalent than in other categories.

● **Top countries by site volume**



**Key regions**  
Producers in the **UK, USA, Poland, the Netherlands** and **Belgium** account for 50% of all raw red meat sites assessed within the BRC Global Standards programme. In **Brazil**, raw red meat audits comprise 28.5% of all local food and beverage site reviews, while in **New Zealand** raw red meat inspections make up 25.2% of all audits.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	18.7%
Door Maintenance	(Clause 4.4.9)	16.1%
Equipment Design and Placement	(Clause 4.6.1)	15.2%

**4 typical Minor non-conformities**

**98% of New Zealand sites achieved Grade-A**

**UK, USA, Poland, the Netherlands and Belgium comprise 50% of all sites Second highest A-grade percentage on new audits**

**Non-conformity trends**

Non-conformities in raw red meat sites were concerned in the main with Housekeeping and Hygiene (Section 4.11), Building Fabric (Section 4.4) and Equipment (Section 4.6). The number of typical Minors per audit was notably lower than typical for all categories, with four Minors usually awarded. For new sites, however, this rose to eight Minors, while for renewal sites it reduced to four.

**Typical Minors per audit**

Overall **XXXX**  
 New sites **XXXXXXXXXX**  
 Renewal sites **XXXX**

**Country with most typical Minors**

Belgium **XXXXXXXX**

Overall, the prevalence of HACCP non-conformities among raw red meat sites was 36.8%, which is better than the global average.

Within this, the HACCP saturation in new sites was 58%, which is 8% higher than typical, but in renewal sites it was 34% – 5% lower than average. This variance constituted the third best improvement of new to renewal sites across all categories.

**Strengths and weaknesses**

Following the site audits, Documenting Cleaning Procedures (Clause 4.11.1) emerged as the most common non-conformity across all sites, fractionally above average at 18.7%. Second to this was Door Maintenance (Clause 4.4.9), followed by Equipment Design and Placement (Clause 4.6.1), which both occurred above the typical global incidence.

However, raw red meat demonstrated better than average performance in Product Maintenance (Clause 4.7.4), Identification of Raw Materials (Clause 3.9.1) and Testing Traceability Systems (Clause 3.9.2).





Category 2

## Raw poultry

A staple feature of Thanksgiving, Christmas and Sunday roasts, poultry is one of the most widely consumed meats in the world. In the **UK**, 46% of the average person's protein intake comes from chicken, while in the **USA**, this humble bird is eaten 150 times more than it was 80 years ago. Today, this growth phenomenon has extended across the planet, with an estimated 17 billion domestic chickens worldwide.

Raw poultry production standards recently came under scrutiny in 2014, after a study revealed two-thirds of fresh chicken sold in the **UK** contained the bacteria campylobacter. The UK's raw poultry industry has since sought new measures to overcome this challenge.

The raw poultry category includes chicken, turkey, duck, goose, quail, shell eggs, and farmed and wild game.

Sample size:

**709 sites**

A grade:

**86.3%**

**Highest A-grade  
of all renewal sites**

“

46% of the average person's protein intake comes from chicken.”

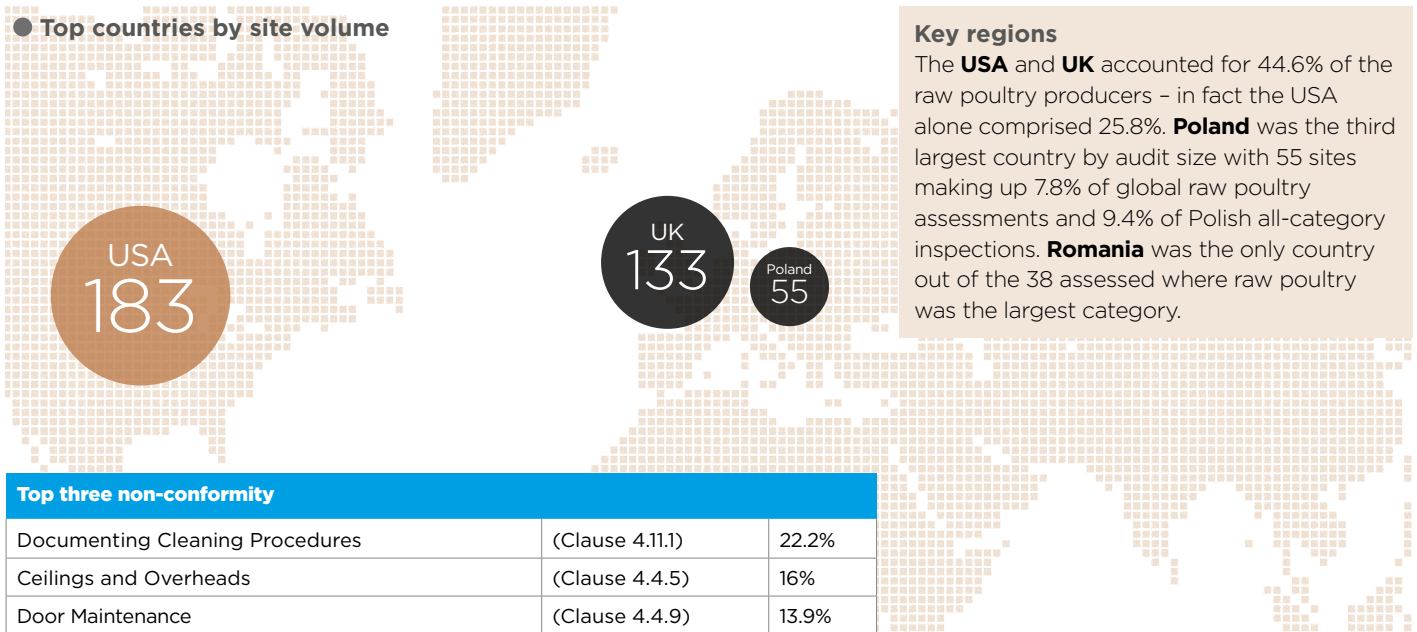


**BRC audit scope and performance**

Among all poultry producers, 86.3% were graded A, 5.5% above the global all-category average. Within this strong performance, 57.6% of new sites and 89.3% of renewal sites achieved an A grade – the highest renewal percentage across all categories. Performance was bolstered by strong contributions from the USA and UK, where 95.6% of USA sites and 90.2% of UK sites achieved an A-grade. Contrastingly, Canadian producers were awarded an average A-grade of 68.8%.



● **Top countries by site volume**



**Key regions**

The **USA** and **UK** accounted for 44.6% of the raw poultry producers – in fact the USA alone comprised 25.8%. **Poland** was the third largest country by audit size with 55 sites making up 7.8% of global raw poultry assessments and 9.4% of Polish all-category inspections. **Romania** was the only country out of the 38 assessed where raw poultry was the largest category.

**Top three non-conformity**

Documenting Cleaning Procedures	(Clause 4.11.1)	22.2%
Ceilings and Overheads	(Clause 4.4.5)	16%
Door Maintenance	(Clause 4.4.9)	13.9%

**6 typical Minor non-conformities**

**Lowest HACCP saturation for new and overall audits**

**Highest percentage of A-grades among renewal sites**

**Non-conformity trends**

Housekeeping and Hygiene (Section 4.11), Building Fabric (section 4.4) and Product Contamination Control (Section 4.9) were the most common non-conformities among raw poultry producers. New sites typically received seven Minors per audit, higher than the norm for all categories. However, renewal sites tended to receive four Minors, which is the joint best score across all categories. While producers in the USA typically gained two Minors, which is better than normal, producers in neighbouring Canada received eight Minors.

**Typical Minors per audit**

Overall                    **xxxxxxx**  
 New sites                **xxxxxxx**  
 Renewal sites          **xxxxx**

**Country with most typical Minors**

Canada                    **xxxxxxxxx**

Raw poultry sites demonstrated strong performance in HACCP non-conformities. With 31.3% saturation overall, this was the best

performance across all categories. Similarly, 40.7% saturation in new sites achieved a joint best score with the beverages category.

**Strengths and weaknesses**

Ceilings and Overheads (Clause 4.4.5), was the second most common non-conformity among raw poultry sites, 6.1% higher than the global all-category average. Other irregularities included Hand Washing Facilities (Clause 4.8.6), Temporary Repairs (Clause 4.7.3) and Floors (Clause 4.4.2), which all featured in the top ten non-conformities, whereas typically, they occur in twenty-third, twentieth and seventeenth position respectively.

At country-level, the top three non-conformities in the USA, UK and Poland showed divergent results. Among USA sites, Door Maintenance (Clause 4.4.9) occurred 10.5% above average for raw poultry sites, while UK producers had a 5.8% higher incidence of Documenting Cleaning Procedures (Clause 4.11.1). In Poland, the prevalence of issues relating to Corrective Action (Clause 3.7.1) was 9.9% higher than the category average.



## Category 3

# Raw prepared products

The scope of the raw prepared products category is broad, encompassing meat, fish and vegetarian ingredients that are sliced, diced and trimmed to perfection. The raw prepared products sector plays a key role in the food industry, as people increasingly seek out the convenience of prepared meals and ingredients to simplify hectic modern lifestyles. Indeed, research shows that home meals today take an average of under 30 minutes to prepare, compared to 150 minutes in the 1940s.

Foods within the raw prepared products category include bacon, comminuted meat products, meat puddings, ready-to-cook meals, ready-prepared meat products, pizzas, vegetable prepared meals, steamer meals and comminuted fish products.

Sample size:

**1,453 sites**

A grade:

**84.2%**

**Largest category  
in six countries**

“

Home meals today take an average of under 30 minutes to prepare, compared to 150 minutes in the 1940s.”



**BRC audit scope and performance**

Worldwide, 84.2% of raw prepared products sites achieved an A-grade, 5.4% higher than the all-category average.

This was underpinned by strong performance in Brazil, the UK and USA where 92.9%, 92.6% and 90.7% of producers achieved this top rating respectively. However, Spain hindered performance with only 52.5% of sites being awarded an A-grade. Among new sites, the grade A mark was 60.4%, impacted by Italy's low score of 30.8%. Renewal sites, however, achieved a grade A rating of 86.1% on average.



● **Top countries by site volume**



**Key regions**

Raw prepared products was the largest category in six of the countries involved in BRC's Global Standards programme. It accounted for 30% of all audits in **Brazil**, 20% of audits in **Ireland** and 19.1% in **Hungary**. Combined, the **UK, USA** and Italy comprised 52.5% of all raw prepared products sites assessed globally. Within this, the UK alone accounted for 25% of the category. With 364 assessments, this also made up 14.5% of all category audits within the UK.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	19.4%
Equipment Design and Placement	(Clause 4.6.1)	15.7%
Door Maintenance	(Clause 4.4.9)	14.9%

**4 typical Minor non-conformities**

**Joint lowest Minors per audit on renewal sites**

**The UK, USA and Italy comprised 52.5% of audits**

**Non-conformity trends**

Non-conformities centred primarily on Housekeeping and Hygiene (Section 4.11), Equipment (Section 4.6) and Building Fabric (Section 4.4). Marking a better than average performance for all categories, sites generally received four Minors per audit. For new sites this rose to eight Minors, but dropped again to four for renewal sites. However, the Netherlands and the UK amassed more Minors than usual, at eight and six respectively.

The category performed well regarding HACCP non-conformities, with an overall saturation level of 34.6%, 5.4% better than average.

**Typical Minors per audit**

Overall	XXXX
New sites	XXXXXXXXXX
Renewal sites	XXXX

**Country with most typical Minors**

Netherlands	XXXXXXXXXX
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**Strengths and weaknesses**

The most prevalent non-conformity among raw prepared product sites was Documenting Cleaning Procedures (Clause 4.11.1) at 19.4%, slightly above the average occurrence. Equipment Design and Placement (Clause 4.6.1) was 3.3% more prevalent than normal, while Door Maintenance (Clause 4.4.9) was in line with typical all-category levels.

- Italy had higher than average levels of non-conformity in Protective Clothing (Clauses 7.4.2 and 7.4.3), Hand Washing Facilities (Clause 4.8.6) and Process Flow (Clause 4.3.4).
- USA demonstrated high levels of Door Maintenance non-conformity (Clause 4.4.9).
- UK showed issues relating to Metal Detector and X-ray Equipment (Clause 4.10.3.3).



## Category 4 Raw fish

Fish are a lean, low-calorie protein source, enriched with healthy oils and fats. Around the world, fish is consumed both raw and cooked, with stringent conditions needed to ensure freshness. Global fish consumption has reached a record high of 17 kg per person each year. In fact, people now eat four times as much fish as they did in 1950, on average. This increase is taking its toll on fish populations; king salmon in **Alaska** and cod in the **UK** and **Scandinavia** are just two species that have been particularly affected. With this in mind, sustainable fishing is becoming ever-more important.

The raw fish category includes chilled and frozen wet fish, molluscs, crustacea, cold smoked fish and ready-prepared fish products.

Sample size:  
**1,263 sites**

A grade:  
**68.7%**

Grade-A rating:  
**10% lower than  
global average**



People now eat four times as much fish as they did in 1950, on average."







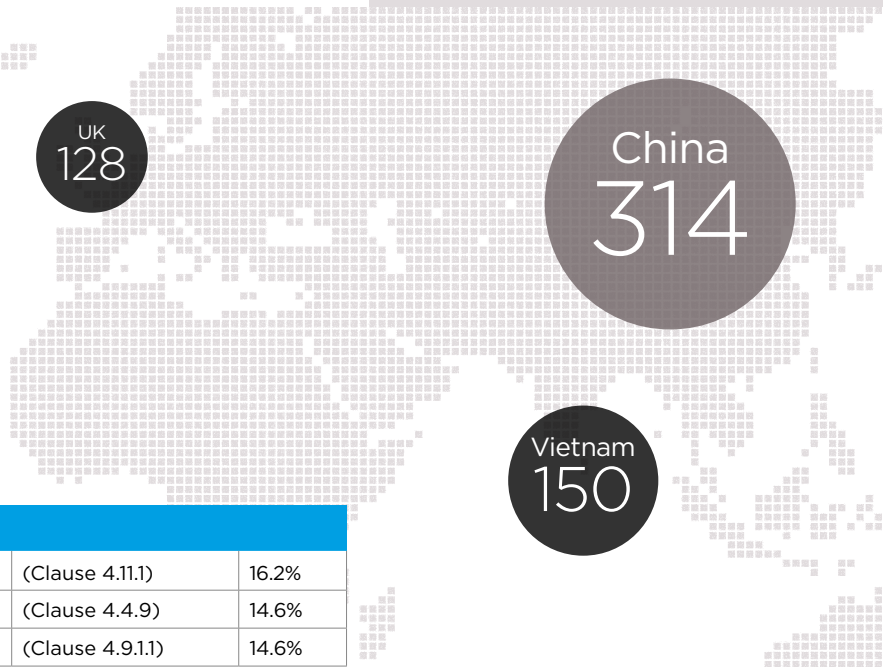
### BRC audit scope and performance

Our raw fish audit sample comprised 1,263 sites globally, with the largest number of sites located in China, Vietnam and the UK. Globally, 68.7% of sites achieved an A-grade rating, the joint lowest result among all categories and 10% lower than the global all-category average. Within this, 50.5% of new sites received grade-A, compared to 71.9% of renewal sites. Both figures are below average. The UK had the highest percentage of A-grades, at 88.9% for new sites and 93.3% for renewal sites. In contrast, only 12.5% of new Chinese raw fish sites and 39.3% of renewal sites achieved A-grades, both of which are considerably below average.

### Key regions

Out of 120 countries reviewed in BRC's Global Standards programme, raw fish production was the largest food category for 15% of these countries. In **China**, 314 raw fish producers were assessed, which represented both a quarter of BRC raw fish inspections globally and a quarter of BRC all-category audits in China. In **Vietnam**, the 150 raw fish sites reviewed comprised three-quarters of all food assessments in the country and 11.9% of the global raw fish category. Raw fish production accounted for 97% of all food audits in **Bangladesh**, 52% in **Indonesia** and 32.1% in India.

### Top countries by site volume



### Top three non-conformity

Documenting Cleaning Procedures	(Clause 4.11.1)	16.2%
Door Maintenance	(Clause 4.4.9)	14.6%
Chemical Control Processes	(Clause 4.9.1.1)	14.6%

**Joint lowest A-grade %, impacted by China**

**6.8% fewer HACCP non-conformities in new sites compared to all-category global average**

**Raw fish production was the largest food category for 15% of the 122 countries audited by BRC**

### Non-conformity trends

The most common areas for non-conformity in raw fish production sites were Housekeeping and Hygiene (Section 4.11), Building Fabric (Section 4.4) and Product Contamination Control (Section 4.9), which largely reflected the global picture.

Raw fish delivered positive results in the volume of HACCP non-conformities, where results equalled or were below the global average. In new sites, HACCP prevalence was 6.8% better than the all-category global average.

### Typical Minors per audit

Overall	xxxxxx
New sites	xxxxxxxxxx
Renewal sites	xxxxxx

### Country with most typical Minors

India	xxxxxxxxxx
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### Strengths and weaknesses

Non-conformity in Chemical Control Processes (Clause 4.9.1.1) was an issue in almost a quarter of all Chinese audits, where Identification of Raw Materials (Clause 3.9.1) and Testing Traceability Systems (Clause 3.9.2) was also significantly above average incidence. In Vietnam, Ceilings non-conformities (Clause 4.4.5) were prominent, while in the UK, Doors non-conformities (Clause 4.4.9) occurred frequently.

On the whole, however, the raw fish category demonstrated better than average performance in non-conformities relating to Documenting Brittle Material Handling Procedures (Clause 4.9.3.2), Documenting Cleaning Procedures (Clause 4.11.1) and Corrective Action (Clause 3.7.1).



## Category 5

# Fruit, vegetables and nuts

Fruit and vegetables are globally recognised as key components of a nutritious diet. In fact, the US Department of Agriculture recommends that half of each meal comprises fruit and vegetables. The global nature of trade today means consumers are enjoying more culinary flexibility than ever as non-seasonal fruit, vegetables and nuts become accessible all year-round. In Europe, **the Netherlands** acts as an important trade hub for fresh produce exported from developing countries and destined for European markets. Indeed, within Europe, **the Netherlands, Germany, the UK and France** are the largest importers of fresh fruit, vegetables and nuts from developing countries.

The fruit, vegetables and nuts category includes a diverse range of fruits, vegetables, salads, herbs and unroasted nuts.

Sample size:

**2,679 sites**

A grade:

**80.7%**

**Largest category  
for 29 countries**



In Europe, the Netherlands acts as an important trade hub for fresh produce exported from developing countries.”



**BRC audit scope and performance**

Fruit, vegetables and nuts was the largest category by volume in Spain, the UK, the Netherlands as well as 26 other countries. Consequently, it was the most prevalent food group in more countries than any other category. Across these countries, however, sites demonstrated contrasting performance.

**A grade:**

Overall: 80.7%  
 New sites: 61.8% (7.8% above average)  
 Renewal sites: 83.3% (2% above average)

● **Top countries by site volume**



**Key regions**

Spanish fruit, vegetables and nuts site reviews comprised 18.9% of audits for this category globally, and 38.5% of all-category audits with **Spain**. In **South Africa, Israel and Egypt**, fruit, vegetables and nuts assessments represented over 50% of all audits for these countries.



Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	14.2%
Door Maintenance	(Clause 4.4.9)	13.5%
Chemical Control Processes	(Clause 4.9.1.1)	13%

**4 typical Minor non-conformities**

**Joint lowest typical Minor non-conformities for new and renewal sites**

**Fruit, vegetables and nuts category has fourth highest A-Grade % for new sites**

**Spain, the UK, Italy and the Netherlands accounted for 52% of all audits**

**Only one-quarter of new French audits received an A-grade**

**Non-conformity trends**

The number of typical Minors per audit was notably lower among fruit, vegetables and nuts producers compared to other categories. Overall and in renewal audits, sites tended to receive four Minors, while new sites received five. This was the joint lowest number of Minors for new and renewal sites across all categories worldwide. However, overall, HACCP non-conformities among fruit, vegetables and nuts were higher than the global average at 41.1%.

**Typical Minors per audit**

Overall                    **XXXXXX**  
 New sites                **XXXXXX**  
 Renewal sites         **XXXX**

**Country with most typical Minors**

France                    **XXXXXXXXXX**

**Strengths and weaknesses**

Documenting Cleaning Procedures (Clause 4.11.1) was the most dominant non-conformity across all sites but still occurred 4% below the global all-category average. In new sites, Identification of Raw Materials (Clause 3.9.1) was most prevalent, but only 1% above average. However, across all sites, non-conformities relating to Process Flow Diagrams (Clause 2.5.1) were higher than normal.

Non-conformities differed considerably by country. Among the top five non-conformities in Spain, the UK and the Netherlands, the same non-conformity only occurred once across two countries. For example, the saturation of Documenting Cleaning Procedures non-conformities (Clause 4.11.1) was very low in the UK at 5.6%, while in Spain and the Netherlands it was over 21%. Conversely, in the Netherlands Door Maintenance non-conformities (Clause 4.4.9) were only 5.8% compared to the category average of 13.5%.





## Category 6

# Prepared fruit, vegetables and nuts

The global processed fruit and vegetables industry grew steadily in the five years to 2014. This was driven by increasing demand from developing markets, where economic growth created an expanding middle class with a tendency to opt for more expensive processed fruits and vegetables over locally sourced, cheaper equivalents.

This trend is expected to continue, with a projected annual industry revenue growth of 2.7%, reaching \$217.1 billion by 2019. The tree nut industry also experienced increased demand over the last five years, and market demographics are shifting as **China**, the largest export market, has begun to impact **US** exports of pecan nuts.

The prepared fruit, vegetables and nuts category comprises semi-processed or prepared foods, including fruit, vegetables, salads, coleslaws, chips, frozen vegetables, pie fillings, fruit fillings as well as sweet bean, chilli and fermented soy sauces.

Sample size:

**1,351 sites**

A grade:

**74.1%**

**Largest category  
in five countries**



A projected annual industry revenue growth of 2.7%, reaching \$217.1 billion by 2019.”

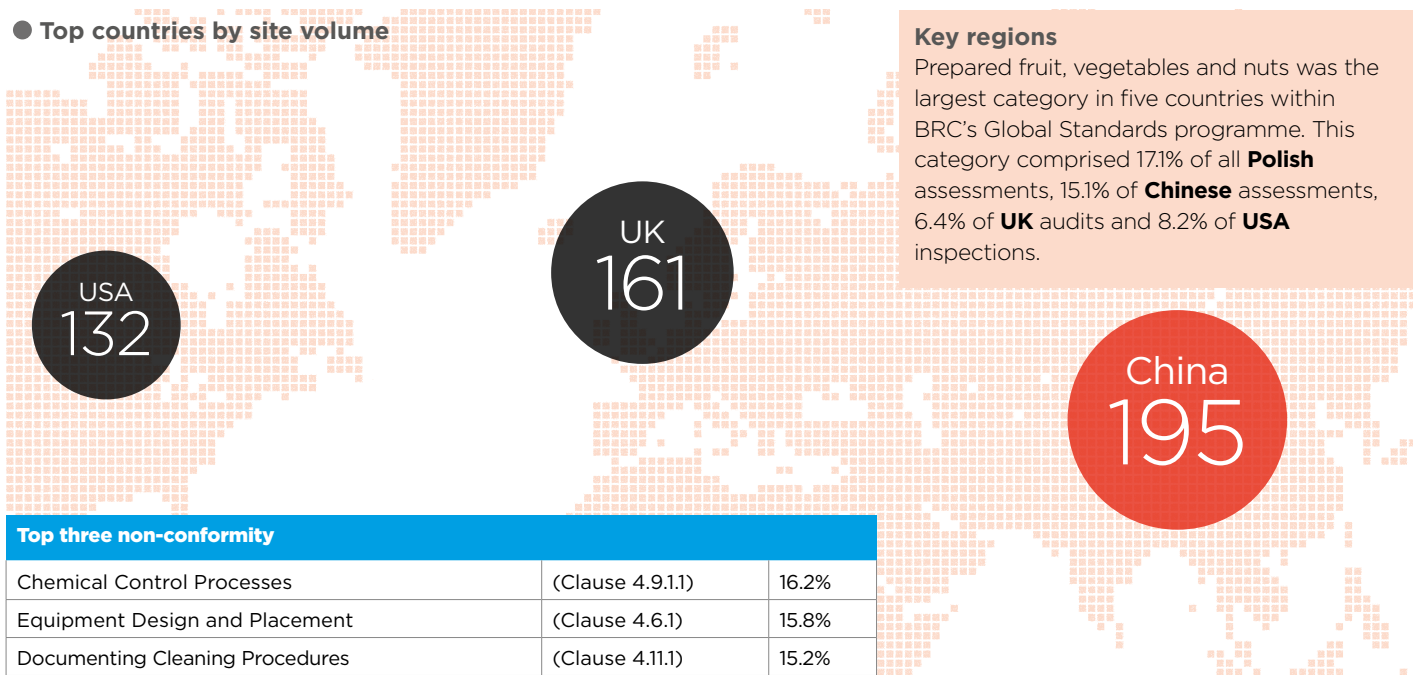


**BRC audit scope and performance**

In total, 74.1% of prepared fruit, vegetables and nuts sites were graded A, including 44.5% of new sites and 77.9% of renewal sites. These below average results were partly impacted by Chinese sites, which comprised 14.5% of the category. Only 24.6% of producers in China achieved an A-grade overall, of which only 12.1% of new sites reached this top ranking. This is reflective of China’s low scores across all categories. Conversely, in the UK, 96.9% of producers overall and 97.4% of renewal sites were graded A, with both results significantly above the global average.



● **Top countries by site volume**



**Key regions**

Prepared fruit, vegetables and nuts was the largest category in five countries within BRC’s Global Standards programme. This category comprised 17.1% of all **Polish** assessments, 15.1% of **Chinese** assessments, 6.4% of **UK** audits and 8.2% of **USA** inspections.

**Top three non-conformity**

Chemical Control Processes	(Clause 4.9.1.1)	16.2%
Equipment Design and Placement	(Clause 4.6.1)	15.8%
Documenting Cleaning Procedures	(Clause 4.11.1)	15.2%

**6 typical Minor non-conformities**

**Second lowest A-grade% for new site audits**

**Chinese sites made up 15% of the category, UK sites comprised 11.9%**

**Non-conformity trends**

Across fruit, vegetables and nuts sites, the most common non-conformities emerged within the categories of Product Contamination Control (Section 4.9), Equipment (Section 4.6) and Housekeeping and Hygiene (Section 4.11), which reflects the dominant trend across BRC’s study.

Overall, sites had an average HACCP non-conformity saturation level of 43% (3% higher than usual). While renewal sites typically showed 42.5% HACCP saturation versus the normal rate of 38.7%, new sites demonstrated better than average performance of 46.4%, compared to the all-category norm of 52.3%.

**Typical Minors per audit**

Overall	XXXXXXXXXX
New sites	XXXXXXXXXXXX
Renewal sites	XXXXXXXXXX

**Country with most typical Minors**

Poland	XXXXXXXXXXXX
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**Strengths and weaknesses**

While non-conformities in Chemical Control Processes (Clause 4.9.1.1) and Equipment Design and Placement (Clause 4.6.1) occurred more commonly than in other categories, performance in Documenting Cleaning Procedures (Clause 4.11.1) and Door Maintenance (Clause 4.4.9) was positive. In new sites, Documentation Control (Clause 3.2.1) was the number one issue, occurring 10.5% more than average. It typically ranks in 15th place among new sites globally.

At country-level, the top non-conformities between China, the UK and USA were relatively divergent. Ceilings and Overheads (Clause 4.4.5) was disproportionately high among USA producers, occurring at double the rate of other prepared fruit, vegetables and nuts sites. In China, Chemical Control Processes (Clause 4.9.1.1) was 12.9% higher and Hand Washing Facilities (Clause 4.8.6) was 14.7% higher than usual for the category.



## Category 7

# Dairy, liquid egg

Milk, whether produced by cows, goats, sheep, buffalo or other animals, is the source of all dairy products. This versatile substance is created by journeying through the four-chambered stomach of ruminants – mammals named from the Latin *ruminare*, meaning ‘to chew the cud’. Milk can be enjoyed as it is, or separated into cream, fermented into yoghurt, churned to butter or frozen as ice cream. A staple of **Western, Middle Eastern** and Indian diets, dairy is traditionally less common in the **Far East** – although dairy imports to **China** are now a growing and significant market.

The dairy and liquid egg category includes milk and milk drinks, yoghurt, butter, cheese, cream, liquid egg, ice cream, dried dairy and egg products, fermented milk-based products, custard, fruit juices, smoothies and certain non-dairy products, such as soya milk.

Sample size:

**1,565 sites**

A grade:

**80.2%**

**95.1% of UK sites  
graded A**



Dairy is traditionally less common in the Far East – although dairy imports to China are now a growing and significant market.”



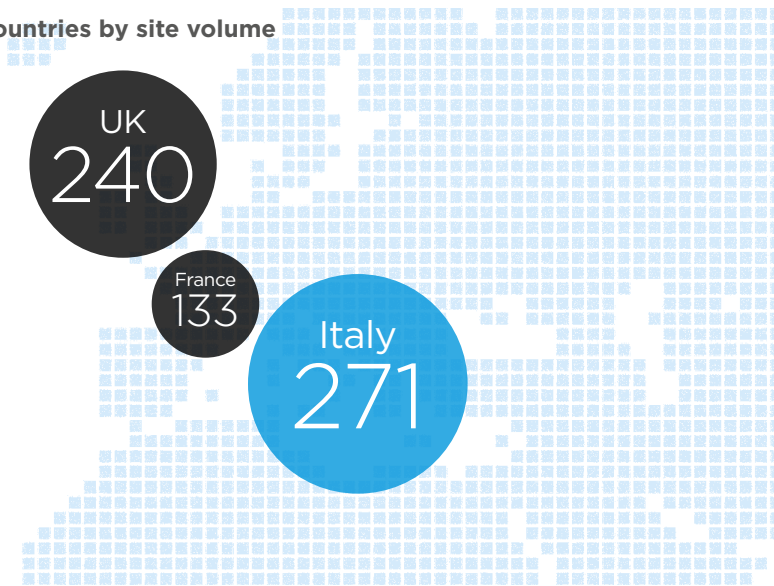


**BRC audit scope and performance**

Among dairy and liquid egg producers, 61.2% of new sites and 82.4% of renewal sites were graded A, resulting in an overall site average of 80.2%. The UK had a significant volume of A-grade sites, at 95.1%. France and the Netherlands also performed well, with 76.5% and 76.1% of sites graded A, while Spanish producers received a lower A-grade of 63.8%



● **Top countries by site volume**



**Key regions**

**Italian** site assessments represented 17% of dairy audits globally and 14% of all-category assessments in **Italy**, while **UK** audits comprised 15.2% of dairy site reviews worldwide and 9.5% of all-category inspections in the UK. Although **France** represents only 8.5% of global dairy audits, it is in fact the largest food category within **France**, comprising 18% of all **French** audits. Similarly, dairy is also the largest audit category in **Austria** (26.7% of all local audits) and **Australia** (19.1% of all local assessments). Perhaps unsurprisingly, by region, dairy production was highest in **Europe** and the **USA**.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	16.5%
Chemical Control Processes	(Clause 4.9.1.1)	15.4%
Documenting Brittle Material Handling Procedures	(Clause 4.9.3.2)	15.1%

**5 typical Minor non-conformities (9 in the Netherlands)**

**43.7% incidence of HACCP non-conformities - second highest across all categories**

**Dairy is most audited category in France, Austria and Australia**

**Non-conformity trends**

The most common areas of non-conformity emerged as Product Contamination Control (Section 4.9) and Housekeeping and Hygiene (Section 4.11). New sites typically received nine Minors per audit, while renewal sites received five Minors.

The incidence of HACCP non-conformities in dairy sites was 43.7%. For new sites, this rose to 55.1%, while for renewal audits this figure was 42.5%. These overall and renewal site HACCP saturations are the second highest among all categories globally.

**Typical Minors per audit**

Overall                    **XXXXXX**  
 New sites                **XXXXXXXXXX**  
 Renewal sites          **XXXXXX**

**Country with most typical Minors**

Netherlands            **XXXXXXXXXX**

**Strengths and weaknesses**

Dairy sites demonstrated above-average performance in Documentation Control Procedures (Clause 3.2.1) and Door Maintenance (Clause 4.4.9). In new sites, however, the most common non-conformity was Testing Traceability Systems (Clause 3.9.2) which, at 20%, was almost double the prevalence of the all-category average.

In Italy, Product Storage Procedures (Clause 4.14.1) and Staff Facilities (Clause 4.8.4) non-conformities were higher than the global average for dairy sites. In France, non-conformities concerning Documenting Brittle Material Handling Procedures (Clause 4.9.3.2) were 10.4% higher than the category norm, while Corrective Action (Clause 3.7.1) and Internal Audit Programme (Clause 3.4.1) were 10.2% and 11.8% higher than typical respectively.

## Category 8

# Cooked meat and fish

Cooked meats and fish are a filling of choice for sandwiches the world over. And with approximately 49% of **Americans** aged over 20 eating a sandwich a day, this category is a profitable industry. Cooked meats and fish are also a star attraction in picnics and buffets, including spreads like the renowned **Scandinavian** smorgasbord.

The cooked meat and fish category includes ham, meat pâté, fish pâté, hot smoked fish, poached salmon, and ready-to-eat molluscs and crustaceans. It also includes preparation of ready-to-cook raw beef and poultry, and frozen raw and cooked shell-on lobster.

Sample size:

**1,459 sites**

A grade:

**76.8%**

**Largest food group  
for five countries**



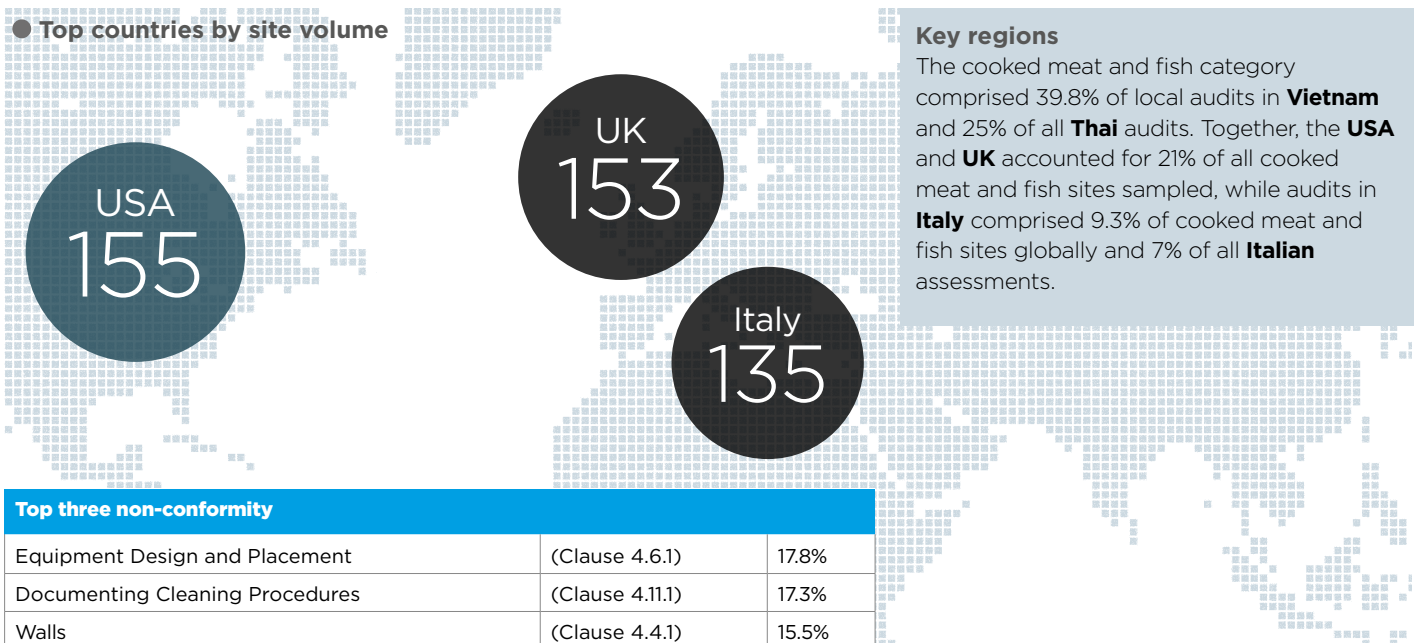
With approximately 49% of Americans aged over 20 eating a sandwich a day.”





**BRC audit scope and performance**

A total of 76.8% of cooked meat and fish sites were graded A worldwide – slightly below the global all-category average. Within this, 56.8% of new sites and 79% of renewal sites achieved an A-grade. Despite strong performance from the UK, USA and Italy, a low score of 30.2% in China negatively impacted the category rating, although low A-grade ratings are typical across all Chinese category audits. Italy was notable for its low percentage of A-grades among new sites; at 37.5% this was 18.8% below the all-category global average.



**6 typical Minor non-conformities**

**Largest food group for five countries**

**Comprised 39.8% of Vietnamese and 25% of Thai audits**

**Non-conformity trends**

In general, cooked meat and fish producers received six Minors per audit both overall and in renewal sites, falling to five Minors for new sites. This contradicts the normal trend, where sites typically demonstrate improvement from new to renewal inspections. Globally, non-conformities were most predominant around Equipment (Section 4.6), Housekeeping and Hygiene (Section 4.11) and Building Fabric (Section 4.4).

The incidence of HACCP non-conformities aligned with the global picture, producing average or better-than-average performance. Sites demonstrated 39.7% HACCP saturation overall, with 51.9% saturation in new sites and 38.7% in renewal sites.

**Typical Minors per audit**

Overall **xxxxxxx**  
 New sites **xxxxxx**  
 Renewal sites **xxxxxxx**

**Country with most typical Minors**

Poland **xxxxxxxxxx**

**Strengths and weaknesses**

At country-level, the most dominant non-conformity differed between the USA, UK and Italy. While Door Maintenance (Clause 4.4.9) was the main issue in the USA, in the UK it was Ceilings and Overheads (Clause 4.4.5) and in Italy Protective Clothing non-conformities (Clause 7.4.2) were most prevalent.

Surprisingly, the largest non-conformity across all new sites related to High-Risk Areas (Clause 4.8.5). This had a 21.2% saturation level, in stark contrast to the typical 1.7% of saturation across all categories.





Category 9

## Raw cured and/or fermented meat and fish

Cured or fermented foods have offered a reliable and safe source of nutrition throughout the ages, and were an essential way of storing food before the development of canning or refrigeration.

Humans traditionally preserved raw meats such as sausages during the winter months, to make use of the relatively low temperatures required for fermentation, drying and ripening. Similar techniques have been used to preserve fish and prevent the delicate flesh from spoiling. The longstanding methods of curing and fermentation are still used today in cuisines across the world – from **Inuit** walrus dishes, to basking shark delicacies in **Iceland** and fermented skate in **Korea**.

The raw cured or fermented meat and fish category includes parma ham, cold smoked salmon, air-dried meats and salamis, ready-to-eat smoked fish, fermented meats and dried fish.

Sample size:

**611 sites**

A grade:

**77%**

**Typical Minors**

**Per Audit: 9**



The longstanding methods of curing and fermentation are still used today in cuisines across the world.”

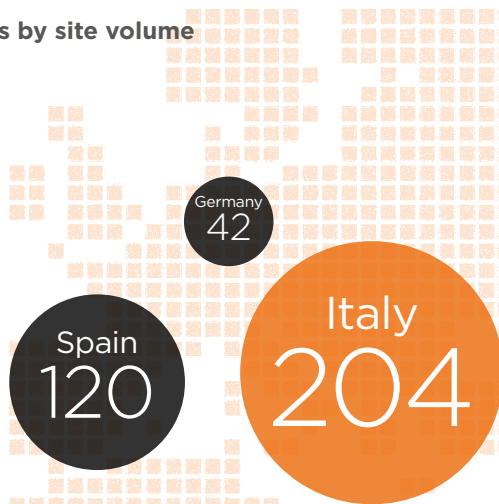


**BRC audit scope and performance**

Raw cured and fermented meat and fish producers achieved a marginally below average A grade of 77%. This was impacted by Spain and Germany, which received low ratings of 59% and 57.1% respectively. Across the category as a whole, new sites were awarded an average 41.2% and renewal sites an average 80.2% A-grade score. While this was the lowest rating for new sites across all categories, it was also the most improved ratio for renewal sites.



● **Top countries by site volume**



**Key regions**

**Italian** sites accounted for 33% of the category’s global audits and 10.6% of all Italian inspections. As the second largest producer, **Spanish** sites represented 19.6% of global audits and 9.1% of all inspections in **Spain**. Combined, **Italy** and **Spain** accounted for 53% of audits across the whole category. **Germany**, as the third largest country by audit size, made up 10.7% of all local assessments and 6.8% of the raw cured or fermented meat and fish category audits.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	22.1%
Walls	(Clause 4.4.1)	18.5%
Equipment Design and Placement	(Clause 4.6.1)	16.6%

**UK and Italy gained four Minors per site**

**Lowest A-grade for new sites, most improved ratio for renewal sites**

**Italy and Spain accounted for 53% of audits**

**Non-conformity trends**

Sites generally received nine Minors per audit, which is considerably above the typical grade of five. While slightly lower in new sites, at seven Minors, this figure rose again for renewal sites with nine typical Minors. This is a reverse of the global trend which normally demonstrates improvement from new to renewal sites. However, results were distorted by the relatively low number of new sites assessed.

**Typical Minors per audit**

Overall                   XXXXXXXXXX  
 New sites                XXXXXXXXXX  
 Renewal sites           XXXXXXXXXX

**Country with most typical Minors**

Germany                XXXXXXXXXX

At country level, Germany, Spain and Poland performed significantly worse than normal, with

sites receiving ten, nine and nine Minors respectively. However, UK and Italian producers received better than usual scores of four Minors per site.

The category fared better in HACCP non-conformities, with an overall saturation level of 42.4% this was only 2.4% below average.

**Strengths and weaknesses**

Overall, Documenting Cleaning Procedures non-conformities (Clause 4.11.1) occurred 3.8% more than the global all-category average. In new sites however, along with Process Flow Diagrams (Clause 2.5.1), this increased to more than two times the all-category average incidence. However, overall, sites demonstrated better than average performance in Door Maintenance (Clause 4.4.9) and Chemical Control Processes (Clause 4.9.1.1).



Category 10

## Ready-to eat-meals

Ready-to-eat meals, also known as 'TV dinners', originated in 1950s **America**. Easing the burden of domestic duties, they were widely perceived to be a luxury of the modern age. The advent of freezers and microwaves, combined with longer work hours and shifting domestic values, led to a boom in their popularity. In the **UK** alone, the ready-to-eat meals market is now valued at £2.6 billion - where Italian, English and Indian food are the most popular choices. In Europe, ready-to-eat meals are a growing market, forecast to increase 12% to a value of 40 billion by 2016, with **Germany**, the **UK** and **France** currently dominating ready-to-eat meals expenditure.

The ready-to-eat meals category includes frozen, chilled, baked and unbaked foods, such as soups, sandwiches, wraps, pizzas, pies, pastries, sauces and ready-to-eat desserts.

Sample size:

**999 sites**

A grade:

**82.1%**

Highest Grade-A achiever:

**United Kingdom**



The market is now valued at £2.6 billion - where Italian, English and Indian food are the most popular choices.”





**BRC audit scope and performance**

On average, 82.1% of ready-to-eat meals producers received a grade-A rating. Although only 50% of new sites received a grade-A rating (4% lower than the global all-category average) this jumped to 84.6% for renewal sites – a significant 34% improvement.



**Top countries by site volume**



**Key regions**

The **UK** accounted for 29.8% of global ready-to-eat meals audits and, as the fifth most audited food category in the **UK**, made up 12% of all local audits. In Italy, ready-to-eat meals comprised 7.8% of all **Italian** audits. Globally, the highest volume of sites were located in **Europe**, the **US** and **China**, before broadening out worldwide.

Top three non-conformity		
Equipment Design and Placement	(Clause 4.6.1)	21%
Documenting Cleaning Procedures	(Clause 4.11.1)	19.1%
Documenting Brittle Material Handling Procedures	(Clause 4.9.3.2)	13.8%

**4 typical Minor non-conformities**

**39.2% incidence of HACCP non-conformities**

**Equipment Design and Placement non-conformities were 9% higher than the average**

**UK was the highest grade-A achieving country (92.7%), Spain was the lowest (56.8%)**

**Non-conformity trends**

Non-conformities among ready-to-eat meals producers were concerned mainly with Equipment Management (Section 4.6), Housekeeping and Hygiene (Section 4.11) and Product Contamination Control (Section 4.9). Globally, new sites typically received seven Minors per audit, while renewal sites received four. In Italy, however, Minors were significantly higher, with new and renewal sites typically obtaining 10 Minors per audit.

The incidence of HACCP non-conformities was 39.2%, on average. For new sites, this rose to 54.8%, 4.8% higher than average, while for renewal audits this figure was in line with the average, at 38%.

**Typical Minors per audit**

Overall **XXXXXXX**  
 New sites **XXXXXXXX**  
 Renewal sites **XXXX**

**Country with most typical Minors**

Italy **XXXXXXXXXX**

**Strengths and weaknesses**

The most dominant non-conformity across all sites was Equipment Design and Placement (Clause 4.6.1), which was 9% higher than the all-category average. For new sites, Procedures for Handling Brittle Materials (Clause 4.9.3.2) occurred most often, with double the rate of average incidence. Equipment Design and Placement (Clause 4.6.1) non-conformity was also prevalent in new sites, as was the Identification and Management of Food Safety Hazards (Section 2, HACCP) and Process Flow Diagrams (Clause 2.5.1).

Conversely, performance relating to Ceilings and Overheads (Clause 4.4.5), Risk and Security Assessment (4.2.1) and Chemical Control Processes (Clause 4.9.1.1) was better than the all-category average.



Category 11

## Cans and jars

During the Napoleonic wars, the **French** government offered a considerable prize to anyone who could invent a safer way to preserve food. **French** confectioner Nicolas Appert won the prize with his sealed glass jar invention, which paved the way for modern canning and jar storage. Canning provides food with a shelf life of between one to five years and today, billions of cans are sold annually across the world. The global canning industry's estimated worth in 2014 was valued at \$80 billion.

The cans and jars category includes canned products, such as beans, soups, meals, fruit, tuna and pet food, as well as products packed in glass, including sauces, jams, pickled vegetables and condiments.

Sample size:

**1,565 sites**

A grade:

**68.6%**

**Lowest  
A-grade % of  
all-categories**



The global canning industry's estimated worth in 2014 was valued at \$80 billion."







**BRC audit scope and performance**

68.6% of cans and jars sites were graded A, which was the lowest score across all categories. Within this, renewal sites also attained the lowest A-grade percentage, at 71.2%. New sites fared a little better, ranking third lowest at 49.2%. These grades were negatively impacted by China, which received only 14.6% of A-grades for new sites and 32.5% for renewal sites. Thailand also attained significantly below average A-grades, at 52.7% overall. Conversely, sites in the UK, USA and Italy all performed well, with upwards of 85.5% producers graded A.

**Key regions**

Cans and jars producers comprised nearly 10% of all audits conducted by BRC and was the largest category in 12 countries. **China** accounted for 15% of all cans and jars site inspections and 19.1% of local **Chinese** audits. This category also made up 11.5% of all local Italian food assessments, 33.7% of local audits in **Thailand** and 24.2% of inspections in **Greece**.

● **Top countries by site volume**



**Top three non-conformity**

Documenting Cleaning Procedures	(Clause 4.11.1)	21%
Chemical Control Processes	(Clause 4.9.1.1)	15.8%
Ceilings and Overheads	(Clause 4.4.5)	14.4%



**8 average Minor non-conformity**

**Lowest A-grade % of all-categories**

**Largest category in Thailand and Greece**

**Non-conformity trends**

Non-conformities among cans and jars producers were fairly consistent with global trends, where Housekeeping and Hygiene (Section 4.11) and Product Contamination Control (Section 4.9) emerged as the two most common areas. Overall, and in new and renewal sites, producers usually received eight Minors per audit, which is higher than the global norm. However, sites in Italy and the USA demonstrated strong performance in this area.

The prevalence of HACCP non-conformities among cans and jars producers was also high, both overall and in new and renewal sites. The HACCP saturation rate was 42.9% overall, while for new and renewal sites it was 56.2% and 40.8% respectively.

**Strengths and weaknesses**

In line with the global all-category picture, the top five non-conformities in China, Italy and the USA were country-specific – only Documenting Chemical Control Processes (Clause 4.9.1.1) appeared as a common issue across two of the three countries.

In China, prevalence of this non-conformity was 19.4% higher than among other cans and jars producers. Similarly, the occurrence of Documenting Cleaning Procedures non-conformities (Clause 4.11.1) was 7.7% higher than the category average. In Italy, the most noticeable anomaly concerned Documented Inspections non-conformities (Clause 3.4.4), which occurred three times more frequently than among other cans and jars sites.

**Typical Minors per audit**

Overall            **XXXXXXXXXX**  
 New sites        **XXXXXXXXXX**  
 Renewal sites   **XXXXXXXXXX**

**Country with most typical Minors**

Thailand           **XXXXXXXXXX**



Category 12

## Beverages

The first recorded commercial soft drink was a mixture of lemon, water and honey, served to thirsty 17th Century Parisians by street vendors who dispensed lemonade from tanks on their backs. Today's beverages industry is far more diverse, ranging in scope from water and ice to hot drinks, energy drinks, squashes and sodas.

As the developed markets beverage industry becomes more saturated, brands are progressively expanding into emerging markets where increasing populations and a rising middle class offer greater growth potential. By 2020, the global beverage market is expected to reach a value of \$1,937.73 billion. While **North America** is the largest beverage market globally, it is closely followed by **Asia Pacific**.

The beverages category includes non-alcoholic drinks, such as water, flavoured water, isotonics, concentrates, squashes, cordials, minerals, herbal drinks, food drinks and ice.

Sample size:

**464 sites**

A grade:

**80.6%**

**HACCP Saturation:**

**41.5%**



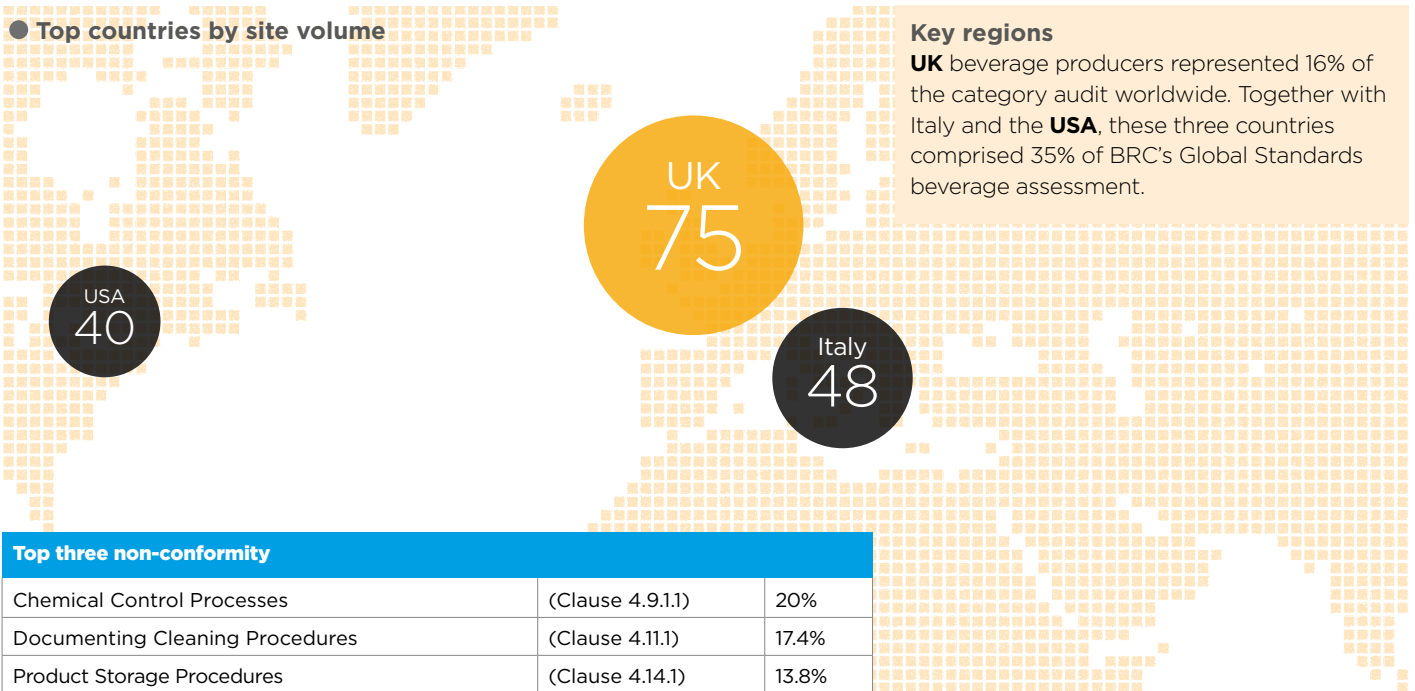
By 2020, the global beverage market is expected to reach a value of \$1,937.73 billion.”





**BRC audit scope and performance**

Across all countries, the average A-grade percentage of beverage producers was 80.6%, which is better than the all-category norm. Within this, new sites achieved 69.9% while renewal sites attained 82.5%, continuing the above-average trend. At country-level, Italy achieved a particularly high A-grade, with a score of 91.8%, while Thailand conversely brought down the overall category average with an A-grade result of 56%.



**4 typical Minor non-conformities**

**UK, Italy and the USA comprise 35% of all sites**

**Chemical Control Processes (Clause 4.9.1.1) and Documentation Control (Clause 3.2.1) non-conformities occur in almost 28% of USA sites**

**Non-conformity trends**

Non-conformities across global beverage sites remained relatively in line with the global picture, focussing chiefly on Product Contamination Control (Section 4.9) and Housekeeping and Hygiene (Section 4.11). However, Storage Facilities (Section 4.14) was the third most frequent non-conformity, marking a stark contrast to the global all-category average, where it is typically tenth. Beverage sites generally received four Minors per audit for overall and renewal sites and eight Minors for new sites. However, Thailand, Spain and the USA obtained significantly more Minors than other countries, with nine, eight and eight Minors, typically.

**Typical Minors per audit**

Overall            XXXXX  
 New sites        XXXXXXXXXX  
 Renewal sites    XXXXX

**Country with most typical Minors**

Thailand           XXXXXXXXXX

HACCP non-conformities among beverage sites were slightly higher than the global all-category average, however, for new and renewal sites HACCP saturation was better than the global average.

**Strengths and weaknesses**

Surprisingly, the third most frequent non-conformity was Product Storage Procedures (Clause 4.14.1); while this only occurred in 13.8% of audits, it usually occupies tenth place among all-category non-conformities. The beverage category demonstrated strong performance in Documenting Brittle Material Handling Procedures (Clause 4.9.3.2), occurring 4.9% less than the global all-category average, and Metal Control (Clause 4.9.2.1), occurring 6% less than average.

At country-level, Product Storage Procedures (Clause 4.14.1) in Italy had a 10% higher saturation than usual for the beverage category, while Chemical Control Processes (Clause 4.9.1.1) and Documentation Control (Clause 3.2.1) issues occurred in almost 28% of USA sites.



## Category 13

# Alcoholic drinks

Since the Neolithic era, humans have been finding creative ways to make alcohol. Whether crafted with fermented grapes, potatoes, rice, grains, apples, plants or other ingredients, the breadth of alcoholic beverages is vast. Many early cultures considered alcohol a gift from the gods, and in Greek and Roman mythology, wine and winemaking even has its very own deity – known as Dionysus or Bacchus. Today, each variety of alcohol has its own distinct cultural associations: **France** has champagne, **Italy** has grappa, **Ireland** has stout, **Scotland** has whisky, **Brazil** has cachaça, **Japan** has sake and **Russia** has vodka, to name just a few. In 2015, the global beer market alone is projected to be worth \$630 billion, while the global spirits market is expected to exceed \$306 billion.

The alcoholic drinks category comprises alcoholic, fermented and brewed products as well as non-alcoholic drinks. It includes beer, wine, spirits, vinegar, alcopops, energy drinks, and carbonated and non-carbonated non-alcoholic beverages.

Sample size:

**869 sites**

A grade:

**80.9%**

Highest Grade-A achiever:

**Italy**



In 2015, the global beer market alone is projected to be worth \$630 billion, while the global spirits market is expected to exceed \$306 billion.”

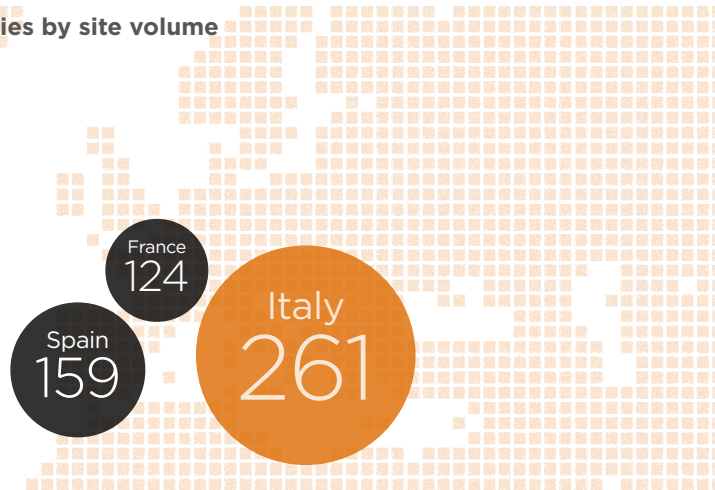


**BRC audit scope and performance**

The alcoholic drinks category displayed above average performance in A-grades. Globally, 80.9% of sites achieved an A-grade, of which 63.8% of new and 82.6% of renewal sites were graded A. Spain, South Africa and France, however, all received below average A-grade ratings.



● **Top countries by site volume**



**Key regions**

**Italian** producers accounted for 30% of the alcoholic drinks sites assessed globally, but only 13.5% of all **Italian** sites audited. Combined, **Spain** and **France** comprised 33% of global audits. Collectively, these three countries represent 63% of the alcoholic drinks producers assessed, while the remaining 37 countries made up 37% of global sites.

**Top three non-conformity**

Door Maintenance	(Clause 4.4.9)	17%
Documenting Cleaning Procedures	(Clause 4.11.1)	15.9%
Chemical Control Processes	(Clause 4.9.1.1)	15.2%

**5 typical Minor non-conformities**

**Italy, Spain and France comprise 63% of all sites**

**Highest incidence of HACCP non-conformities overall and in renewal sites versus all-category sites globally.**

**Non-conformity trends**

The most dominant areas of non-conformities emerged as Building Fabric (Section 4.4), Housekeeping and Hygiene (Section 4.11) and Product Contamination Control (Section 4.9). Overall, sites typically received five Minors per audit, rising to six Minors for new sites. However, in France and the UK, sites generally obtaining nine and eight Minors respectively.

The prevalence of HACCP non-conformities among alcoholic drinks manufacturers was not very positive. Compared to all-category sites globally, alcoholic drinks producers showed the highest incidence of HACCP non-conformities, both overall and in renewal sites, and ranked second highest among new sites.

**Typical Minors per audit**

Overall	XXXXXX
New sites	XXXXXX
Renewal sites	XXXXXX

**Country with most typical Minors**

France	XXXXXXXXXX
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**Strengths and weaknesses**

The most prevalent non-conformity was Door Maintenance (Clause 4.4.9), with 17% saturation. While this was only 3% above the global all-category average, in new sites this rose to 29.7%, 13% above average. Process Flow Diagrams (Clause 2.5.1) was also 3.5% higher than normal, but conversely, Documentation Control non-conformities (Clause 3.2.1) occurred 4.5% less than the global average.

France, Italy and Spain all experienced different challenges. Reflecting this, only Door Maintenance (Clause 4.4.9) and Chemical Control Processes (Clause 4.9.1.1) occurred in two countries' list of top five faults, while the remaining top five non-conformities showed little similarity. French alcoholic drinks producers demonstrated triple the average incidence of Risk and Security Assessment (4.2.1) and more than double the incidence of Monitoring Supplier Services non-conformities (Clause 3.5.3.1). Spain, however, had more than five times the average all-category prevalence of Water Management non-conformities (Clause 4.5.1).





Category 14

## Bakery

Archaeological discoveries of starch grain on grinding stones reveal that Palaeolithic Europeans were making bread at least 30,000 years ago. Since then, its journey around the world has produced a variety of bread forms, from pita to challah to chapatti, to name a few, making up a crucial part of meals and celebrations in cultures across the globe. And that's not to mention bread's sweeter siblings; the pastries, cakes, tarts and biscuit family.

Combined, the global baked goods industry is estimated to be worth \$417 billion. Confirming its status as a cornerstone of the **British** diet, almost 11 million bread loaves are sold every day in the **UK** alone, while **France**, home of the baguette, has an estimated 26,000 boulangeries.

The bakery category includes bread, pancakes, crumpets, pastries, biscuits, cakes, tarts and breadcrumbs.

Sample size:

**1,786 sites**

A grade:

**81.4%**

Grade-A rating:

**Over 60% of new sites in UK, USA and Italy were graded A**

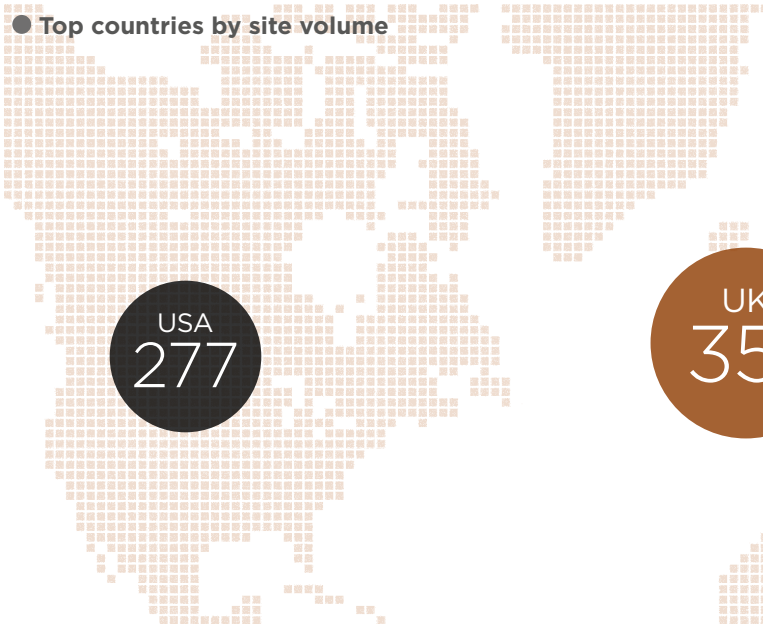


“Almost 11 million bread loaves are sold every day in the UK alone, while France, home of the baguette, has an estimated 26,000 boulangeries.”



**BRC audit scope and performance**

New sites in the UK, USA and Italy exceeded the global average for A grades, with sites typically receiving scores higher than 60%. Across all countries, 52.4% of all new sites were graded A, compared to 84.3% of renewal sites. This improvement ratio of 31.9% is 7% above the all-category global average.



**Key regions**

Bakery sites was the largest audited category in **Canada** and **Sweden**, comprising a quarter of all assessments in each country. It also made up 17.1% of local **USA** site inspections and 14% of all UK food audits.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	27.2%
Equipment Design and Placement	(Clause 4.6.1)	19.1%
Door Maintenance	(Clause 4.4.9)	14.6%

**Bakery sites had the joint highest number of new site Minors per audit**

**Corrective Action (Clause 3.7.1) non-conformities in Italy was exceptionally low at 2.2%, versus 11.7% average**

**Over 60% of new sites in UK, USA and Italy were graded A**

**Non-conformity trends**

Bakery sites showed most non-conformity in Housekeeping and Hygiene (Section 4.11), Equipment (Section 4.6) and Building Fabric (Section 4.4). Overall, sites typically received five Minors each; however, in Italy, the Netherlands and France this rose to nine. Renewal sites received five Minors in general, while new sites received the joint highest number of Minors among all categories, at nine.

**Typical Minors per audit**

Overall                    XXXXXX  
 New sites                XXXXXXXXXX  
 Renewal sites            XXXXXX

**Countries with most typical Minors**

Italy                        XXXXXXXXXX  
 Netherlands            XXXXXXXXXX  
 France                    XXXXXXXXXX

Bakery producers displayed better-than-average performance in the prevalence of HACCP non-conformities, both overall and in renewal sites. However, in new sites HACCP non-conformities occurrence was 7% above average.

**Strengths and weaknesses**

The bakery category performed well in Supplier and Raw Material Approval Monitoring (Clause 3.5.1.2) and Chemical Control Processes (4.9.1.1). In Italy, the prevalence of non-conformities related to Corrective Action (Clause 3.7.1) was exceptionally low at 2.2%, compared to the typical average of 11.7%. Additionally, bakery sites in the USA performed strongly regarding Walls (Clause: 4.4.1), where non-conformities occurred in 5.5% of cases, compared to the average of 11.4%.



## Category 15

# Dried goods

Before electricity, foods were most often dehydrated through exposure to sun, smoke or wind. Drying food has been a method of preservation in **Middle Eastern** and **Oriental** cultures since 12,000 BC, while evidence also shows the Incas used extreme mountain temperatures to freeze-dry goods. Today, dried foods play a central role in the survival of modern-day explorers, the military – and even astronauts, and traditional dehydration methods have been replaced in the main by electric techniques.

The dried foods category includes dried soups, sauces, gravies, spices, stocks, herbs, seasonings and stuffings as well as tea, coffee, pasta, pulses, legumes, rice, noodles, nut preparations, fruit preparations, dried pet food, vitamins, salt, additives, gelatine, glacé fruit, home baking, syrups, sugar and flour.

Sample size:

**2,948 sites**

A grade:

**76.7%**

**Most number of sites across all categories**



Drying food has been a method of preservation in Middle Eastern and Oriental cultures since 12,000 BC.”







**BRC audit scope and performance**

Dried goods was the largest category assessed across BRC’s Global Standards programme, with 2,948 sites audited in 79 countries. Across all dried foods producers, 76.7% received an A-grade while 54.5% of new and 80.2% of renewal sites were graded A. Despite strong performance from the UK, Italy, USA and Turkey, a low overall score of 33.9% in China negatively impacted the category rating. This fell further to 18.1% for new Chinese sites. However, this low rating is typical across all category audits in China.



● **Top countries by site volume**



**Key regions**

The dried foods category was the largest food group for 22 countries within BRC’s Global Standards programme. It comprised 31.5% of all audits in **China**, 24.5% of assessments in the **USA** and 15.6% of inspections in **Italy**. In the UK it was the second most audited category and made up 15.7% of all **UK** assessments..

**Top three non-conformity**

Documenting Cleaning Procedures	(Clause 4.11.1)	17.7%
Documentation Control	(Clause 3.2.1)	13%
Identification of Raw Materials	(Clause 3.9.1)	12.4%

**5 typical Minor non-conformities**

**Dried foods comprised 17.2% of all audits**

**UK achieved 91.8% A-grade**

**Non-conformity trends**

The dried foods category demonstrated most non-conformities within Housekeeping and Hygiene (Section 4.11), Documentation Control (Section 3.2) and Traceability (Section 3.9). While sites generally received five Minors per audit, in the USA only two Minors were typically given per site. In contrast, Italian dried goods producers tended to receive eight Minors.

**Typical Minors per audit**

Overall **XXXXXX**  
 New sites **XXXXXX**  
 Renewal sites **XXXXXX**

**Country with most typical Minors**

Italy **XXXXXXXXXX**

The prevalence of HACCP non-conformities mirrored the global all-category picture, producing a 41.4% saturation level across all

sites, 52.9% saturation in new sites and 39.6% saturation in renewal sites.

**Strengths and weaknesses**

Documenting Cleaning Procedures (Clause 4.11.1) emerged as the most frequent non-conformity among dried foods producers, occurring in 17.7% of all sites – slightly below the typical incidence. Similarly, Chemical Control Processes (4.9.1.1) issues were fractionally better than average, while Documentation Control (Clause 3.2.1) and Identification of Raw Materials (Clause 3.9.1) occurred a little more than usual.

At country-level, Chinese sites demonstrated a high level of non-conformity, for example, Identification of Raw Materials (Clause 3.9.1) was 18% above average for dried foods sites globally. The USA, meanwhile, showed a 13.4% higher incidence of Documentation Control (Clause 3.2.1) issues than normal for the category.





Category 16

## Confectionery

From chocolate to taffy, popping candy to chewing gum, the confectionery market has had a long-standing hold on the planet's sweet tooth. In 2014, the global confectionery market was worth almost \$200 billion dollars with an annual growth rate of 2% over the past five years. But market sales dominance is shifting, as traditional markets are replaced by relative newcomers. While **Western Europe** is still expected to remain the dominant market, sales in **Asia Pacific** are expected to outpace **North America** thanks to **China** and **India** who are set to become the fastest growth markets.

The confectionery category includes jellies, gums, hard candies, chew candies, pops, and chocolate.

Sample size:

**826 sites**

A grade:

**73.3%**

**10.3% of Chinese sites achieved A-grade**



In 2014, the global confectionery market was worth almost \$200 billion dollars with an annual growth rate of 2%.”

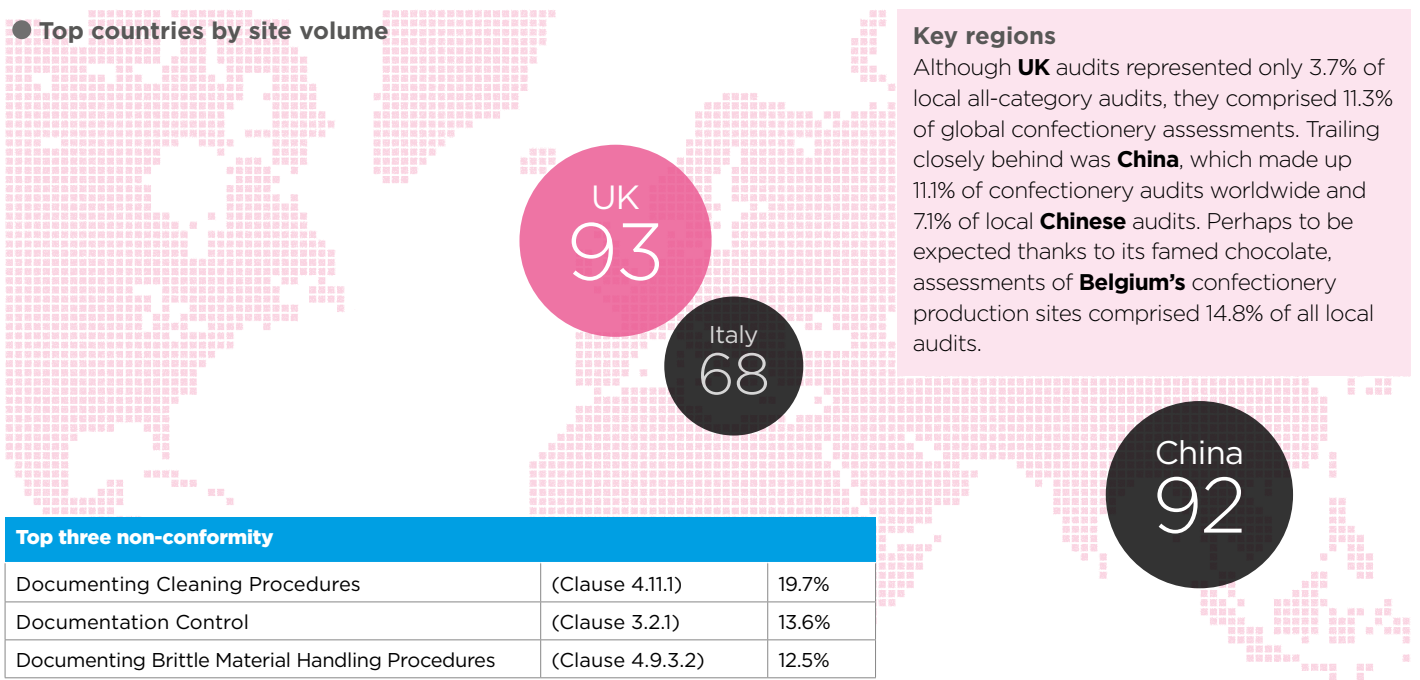


**BRC audit scope and performance**

BRC's Global Standards programme assessed 826 confectionery sites across 60 countries. Globally, 55.5% of new sites and 75.3% of renewal sites were graded A. This figure was below the global all-category average but was strongly impacted by China's poor performance; overall, only 10.3% of Chinese sites achieved an A-grade, within which no new sites and only 13% of renewal sites were graded A. Conversely, the Netherlands attained a notably high A-grade percentage among confectionery producers, with 91.9% of sites accomplishing this top grade.



● **Top countries by site volume**



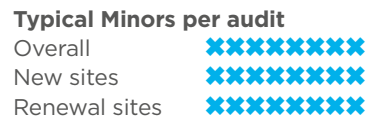
**Key regions**

Although **UK** audits represented only 3.7% of local all-category audits, they comprised 11.3% of global confectionery assessments. Trailing closely behind was **China**, which made up 11.1% of confectionery audits worldwide and 7.1% of local **Chinese** audits. Perhaps to be expected thanks to its famed chocolate, assessments of **Belgium's** confectionery production sites comprised 14.8% of all local audits.

Top three non-conformity		
Documenting Cleaning Procedures	(Clause 4.11.1)	19.7%
Documentation Control	(Clause 3.2.1)	13.6%
Documenting Brittle Material Handling Procedures	(Clause 4.9.3.2)	12.5%

- 8 typical Minor non-conformities**
- Only 13% of renewal sites achieved on A-grade in China**
- 89.8% of renewal sites in Italy were graded-A**

**Non-conformity trends**  
 Confectionery sites typically received eight Minors per audit, which is notably higher than the all-category norm of five. The overall saturation of HACCP non-conformities was in line with the global standard. However, in new sites it was notably higher than average, at 64.2%. Renewal sites demonstrated a HACCP level of 40.8%, representing a significant improvement rate.



**Country-specific non-conformity anomalies**  
**UK:** Documentation Control (Clause 3.2.1) occurred in 21.1% of sites, versus category average of 13.6%.  
**China:** Protective Clothing (Clause 7.4.2) prevalent in 22.9% of sites, versus category average of 8.1%.

**Strengths and weaknesses**  
 While Documenting Cleaning Procedures (Clause 4.11.1) was the most common non-conformity across all sites, other non-conformities did not reflect the global pattern. Unusually, Documentation Control (Clause 3.2.1) was the second most dominant non-conformity, while across all categories it was eighth most common. Similarly, Temporary Repairs (Clause 4.7.3) was the fourth most common non-conformity, yet on average it occurred in twentieth place across all other categories.



Category 17

## Cereal and nuts

Breakfast cereals and cereal-based snacks are a popular feature of global diets. From the Swiss muesli to the American potato chip to the Indian poppadom, cereals provide a staple breakfast and snack food for millions. The global breakfast cereal market was valued at US \$32.5 billion in 2012. By 2019 it is expected to reach a value of US \$43.2 billion. **North America**, led by the **USA**, accounts for the largest share of the breakfast cereals market, but a declining outlook for this region is encouraging producers to expand their presence in emerging markets. By 2019, **Asia Pacific** is projected to comprise approximately 13% of the total breakfast cereals market.

The cereal and nuts food group includes porridge oats, muesli, breakfast cereals, roasted nuts, popcorn, crisps and poppadoms.

Sample size:

**484 sites**

A grade:

**83.1%**

Grade-A rating:

**4% higher than  
global average**



By 2019, Asia Pacific is projected to comprise approximately 13% of the total breakfast cereals market.”





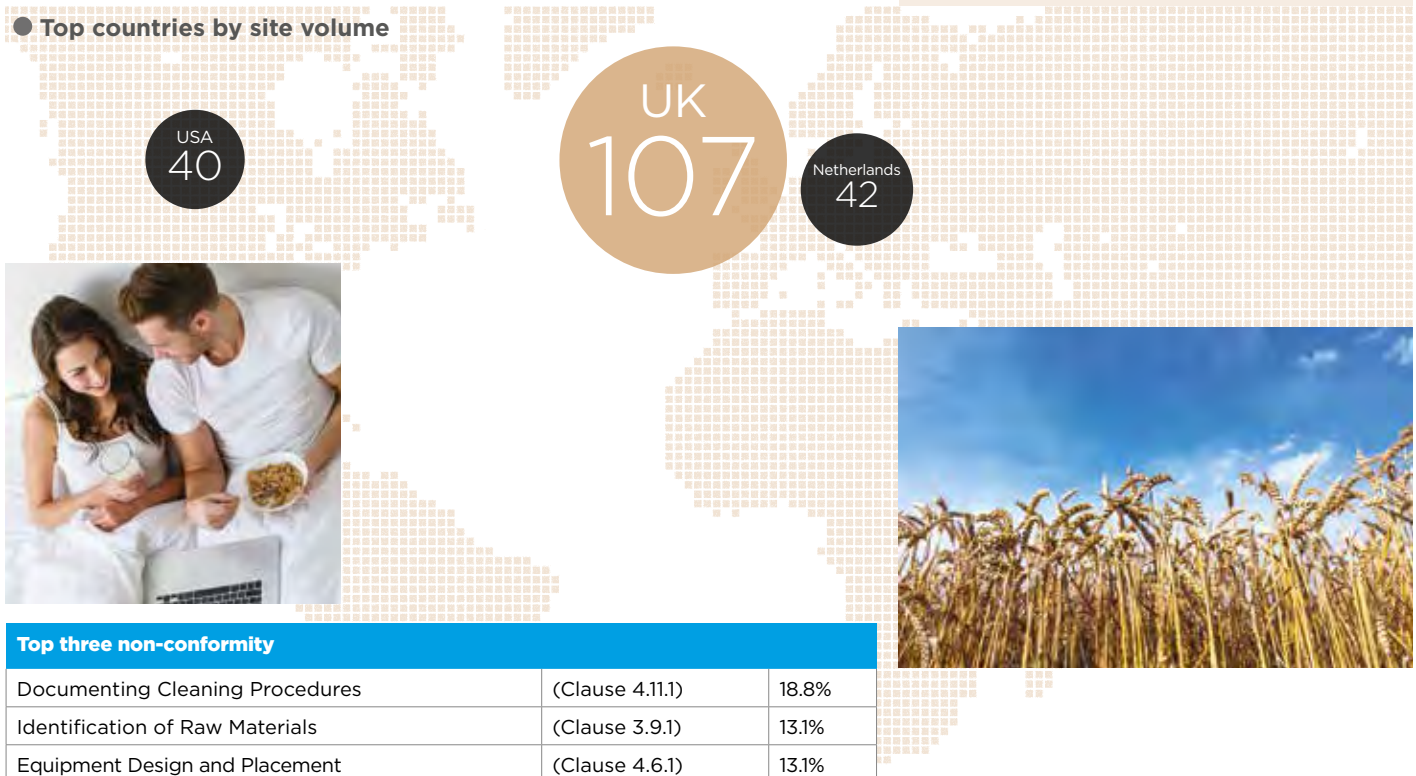
**BRC audit scope and performance**

A total of 484 cereal and nuts manufacturers were audited as part of the Global Standards programme. Across all sites, 83.1% of these achieved an A-grade, which is above the global average. While 61.5% of new sites were graded A, this rose to 84.9% for renewal sites – also both above average.

**Key regions**

22.1% of the cereal and nuts sites audited globally were in the UK, which made up 4.3% of its local food and drink assessments. After the **Netherlands** and the **USA, Italy** and **China** were the fourth largest countries by site assessment size, reflecting **China's** growing role in the cereal and nuts market.

● **Top countries by site volume**



**Top three non-conformity**

Documenting Cleaning Procedures	(Clause 4.11.1)	18.8%
Identification of Raw Materials	(Clause 3.9.1)	13.1%
Equipment Design and Placement	(Clause 4.6.1)	13.1%

**4 typical Minor non-conformities**

**UK comprises 22.1% of cereal and nuts sites globally**

**Door Maintenance non-conformities (Clause 4.4.9) were 5.7% better than global all-category average**

**Non-conformity trends**

Cereal and nuts producers performed slightly better than average in HACCP non-conformities, which had a 39% prevalence. In new sites, this changed to 43.5%, but fell to 38.4% in renewal sites.

The largest volume of non-conformities emerged in Housekeeping and Hygiene (Section 4.11), Traceability (Section 3.9) and Equipment (Section 4.6). Sites typically received four Minors per audit, which is better than the all-category figure. Ordinarily, new sites tended to receive seven Minors, while renewal sites received four. However, the UK and the Netherlands had a slightly higher incidence of Minors, averaging six per audit.

**Strengths and weaknesses**

Documenting Cleaning Procedures (Clause 4.11.1) was the most dominant non-conformity within this category, occurring in 18.8% of sites globally – on par with the all-category audit average. However, in new sites, non-conformities relating to Supplier and Raw Material Approval Monitoring (Clause 3.5.1.2) had the highest level of incidence; at 30.4%, this was double the prevalence rate across all categories.

However, cereal and nuts sites demonstrated above average performance in non-conformities relating to Ceilings and Overheads (Clause: 4.4.5) and Door Maintenance (Clause 4.4.9).

**Typical Minors per audit**

Overall **XXXX**  
 New sites **XXXXXXXX**  
 Renewal sites **XXXX**

**Countries with most typical Minors**

UK **XXXXXXXX**  
 Netherlands **XXXXXXXX**



Category 18

## Oils and fats

Oils and fats are not only a core ingredient in cooking and food production, but are also used in many non-food related industries, such as pharmaceuticals, cosmetics, soap products and even biodiesel. Reflecting this diverse scope, global production of oils and fats in 2015 is projected at 207.5 million tonnes, a 2.7% increase on the previous year.

In cooking, oils have been a staple of the human diet for many centuries. In fact, archaeological evidence shows that humans have been pressing olives into oil for 8,000 years. Olive oil remains a popular export as the health benefits of the **Mediterranean** diet continue to be recognised globally. The **USA** is the biggest importer of olive oil and, for the first time in history, **Spain** has overtaken Italy as the **USA's** largest olive oil provider.

The oils and fats category includes cooking oils, margarine, shortening, spreads, suet, ghee, salad dressings, mayonnaise and vinaigrettes.

Sample size:

**573 sites**

A grade:

**80.9%**

USA:

**Only 2 typical non-conformities per site**

“

For the first time in history, Spain has overtaken Italy as the USA's largest olive oil provider.”

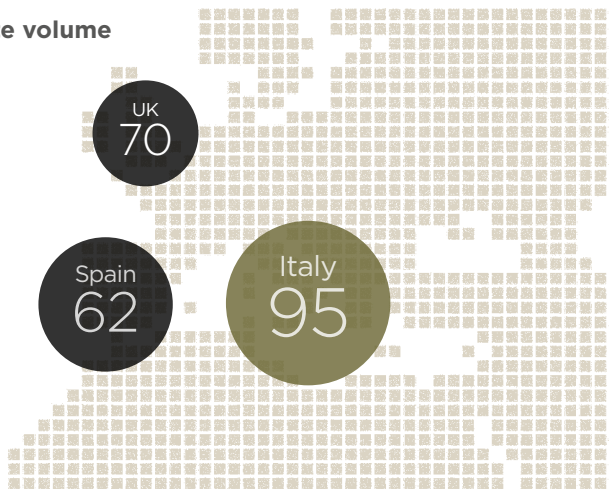


**BRC audit scope and performance**

On average, 80.9% of all sites were graded-A during BRC’s Global Standards programme, which is above the global all-category average. Within this, 58.2% of new sites received an A-grade compared to 83.9% of renewal sites – both also above average. The Netherlands had a particularly high grade A rating, with 90.5% of sites achieving this grade. Conversely, Spain’s grade was relatively low, with only 69.4% of sites attaining the top A rating.



● **Top countries by site volume**



**Key regions**

Three countries – **Italy**, the **UK** and the **USA** – accounted for 39.6% of all oils and fats sites assessed within the BRC Global Standards programme. As expected from the home of olive oil, Italy had the largest number of producers globally. This comprised 16.6% of global oils and fats sites, but only 4.9% of all category assessments in **Italy**. The **UK** represented 12.2% of oils and fats sites assessed globally, yet this only represented 2.8% of the country’s audits. **Spain’s** contribution comprised 10.8% of global sites and 4.7% of all **Spanish** food and drink audits.

Top three non-conformity		
Documenting Brittle Material Handling Procedures	(Clause 4.9.3.2)	15.3%
Chemical Control Processes	(Clause 4.9.1.1)	14.5%
Documenting Cleaning Procedures	(Clause 4.11.1)	14.1%

**7 typical Minor non-conformities**

**41% incidence of HACCP non-conformities**

**In Italy, Product Packaging Suitability non-conformities 9% higher than the average**

**Non-conformity trends**

Worldwide, new oils and fats production sites typically received seven Minors per audit while renewal sites received five Minors. The USA, however, had significantly fewer Minors per audit – with sites usually receiving two. Italy was similarly impressive with three typical Minors per audit.

Overall, the prevalence of HACCP non-conformities among oils and fats manufacturers was 41%, which is in line with the global average. For new sites, this rose to 47.8%, while for renewal sites it improved slightly to 40.3%.

**Typical Minors per audit**

Overall            **XXXXXXXX**  
 New sites        **XXXXXXXX**  
 Renewal sites   **XXXXXX**

**Countries with most typical Minors**

Spain              **XXXXXXXX**  
 Netherlands    **XXXXXXXX**

**Strengths and weaknesses**

In new sites, non-conformities in the Identification of Raw Materials (Clause 3.9.1) occurred most often, but this was only 2% above average, while Risk and Security Assessment (4.2.1) had a 3% higher saturation than the global average.

Conversely, across all sites, oils and fats producers demonstrated better than average performance within Documenting Cleaning Procedures (Clause 4.11.1). Although this was the third most common non-conformity, it still occurred 4.2% less often than the global, all-category average.



# Glossary

## Top-10 non-conformities in 2014

These were the top 10 non-conformities within the sites assessed in 2014 by the BRC Global Standard for Food Safety:

### 1. Clause 4.11.1 – Documenting Cleaning Procedures

Sites must be maintained at a suitable level of cleanliness and with a planned schedule of cleaning, demonstrated through documented procedures and monitored records. These cleaning procedures should specify the item or area to be cleaned, responsibility for cleanliness, the method and frequency of cleaning, the chemicals and materials used and cleaning records for verification purposes.

### 2. Clause 4.4.9 – Door Maintenance

Site doors must be maintained in good condition and external doors and dock levelers need to be close fitting or adequately proofed. External doors to open product areas shall not be opened during production periods except in emergencies. Where external doors to enclosed product areas are opened, suitable precautions shall be taken to prevent pests from entering.

### 3. Clause 4.9.1.1 – Chemical Control Processes

Processes should be in place to manage the use, storage and handling of non-food chemicals to prevent chemical contamination, and these processes should be managed by trained personnel only. Sites must possess an approved list of chemicals

for purchase, with confirmation of their suitability for use. They should also have material safety data sheets and specifications available, labelled chemical containers, and segregated and secure storage with restricted access.

### 4. Clause 4.6.1 – Equipment Design and Placement

All food processing equipment shall be suitable for its intended purpose and used to minimise the risk of product contamination. This equipment must be constructed of appropriate materials, and its design and placement should ensure it can be effectively cleaned and maintained.

### 5. Clause 4.9.3.2 – Documenting Brittle Material Handling Procedures

Documented procedures for handling glass and other brittle materials must be in place to ensure necessary precautions are taken. These procedures should include a list of brittle items, detailing their location, number, type and condition. Recorded checks should also be carried out at a specified frequency to review the condition of these items. And information should be available on cleaning or replacing these items to minimise potential for product contamination.





### 6. Clause 3.9.1 – Identification of Raw Materials

All material product lots should be traceable through all stages of processing and dispatch. To ensure this traceability, there should be adequate identification of raw materials, including primary and non-primary packaging and processing aids, intermediate or semi-processed products, part-used materials, finished products and materials pending investigation.

### 7. Clause 4.4.1 – Walls

Walls shall be constructed, finished and maintained to prevent the accumulation of dirt, minimise condensation and mould growth, and facilitate cleaning.

### 8. Clause 3.2.1 – Documentation Control

Effective document control systems must be in place to ensure that correct versions of documents, including recording forms, are available and in use. This shall include a list of all controlled documents indicating the latest version number, a method for

identifying and authorising controlled documents, recorded reasoning behind any document changes, and a system for introducing updated documents.

### 9. Clause 4.4.5 – Ceilings and Overheads

Ceilings and overheads shall be constructed, finished and maintained to prevent the risk of product contamination.

### 10. Clause 4.14.1 – Product Storage Procedures

Sites should develop documented procedures to maintain product safety and quality during storage, in line with risk assessments. These procedures should be understood by relevant staff and implemented accordingly. And they should include the management of chilled and frozen product transfer, product segregation to avoid cross-contamination, storage of materials off floors and away from walls, and specific handling or stacking requirements to prevent product damage.





## Key words and phrases

Here we provide explanations of some of the key phrases used in this report.

### Clause

Within each Section, a 'Clause' refers to a specific performance issue. For example, within Section 3, Clause 3.2.1 is concerned with Documentation Control.

### Directory

The Global Standards Directory hosts all of the BRC audit reports. The public area of the Directory is a fully searchable source of all BRC-certificated sites. In a password-protected area, certificated sites can share their audit reports with their customers. Retailers and specifiers use the Directory as part of their supply chain management.

### Major non-conformity

A 'Major non-conformity' refers to a scenario in which there is a substantial failure to meet the requirements of a 'statement of intent' or any clause within a specified Standard. It can also refer to a situation which would, on the basis of available objective evidence, raise significant doubt as to the conformity of the product being supplied.

### Minor non-conformity

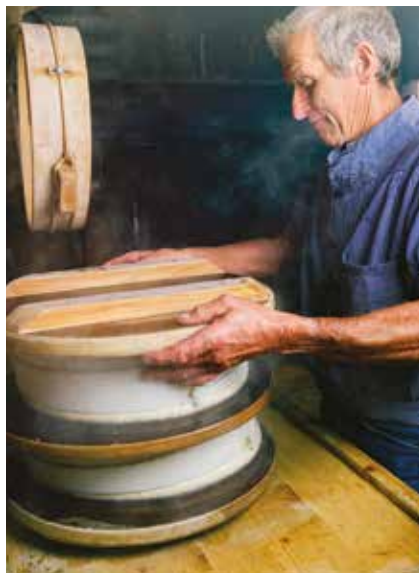
A 'Minor non-conformity' refers to where a clause in the Standard has not been fully met but, on the basis of objective evidence, the conformity of the product is not in doubt.

### Section

A 'Section' refers to an overall area of the BRC Global Standards programme, for example Section 2: HACCP - or The Food Safety Plan - which covers the identification and management of food safety hazards.

### Saturation

The percentage level of sites demonstrating non-conformity of a specific clause or HACCP.









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