

A photograph of a large industrial facility, likely a food or beverage manufacturing plant, during sunset. The sky is a mix of orange, yellow, and blue. In the foreground, there is a lush green field. The facility consists of several large, cylindrical silos with conical roofs, connected by a complex network of metal walkways and pipes. A tall, thin tower is visible on the left side of the building.

The 3rd Annual

FOOD & BEVERAGE
MANUFACTURING
SURVEY *Results*



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WELCOME TO THE RESULTS OF THE 2023 SURVEY

The 3rd

Annual Food and Beverage Manufacturing Survey, produced by Bristol Associates, Inc., is designed to help the industry attract, retain and motivate its talent. We aim to provide insight into food and beverage professionals' attitudes and preferences towards their workplace and the industry at large.

The authors of this report are David Alford, Erika Castro and Jessa Farber of Bristol Associates, Inc.

METHODOLOGY

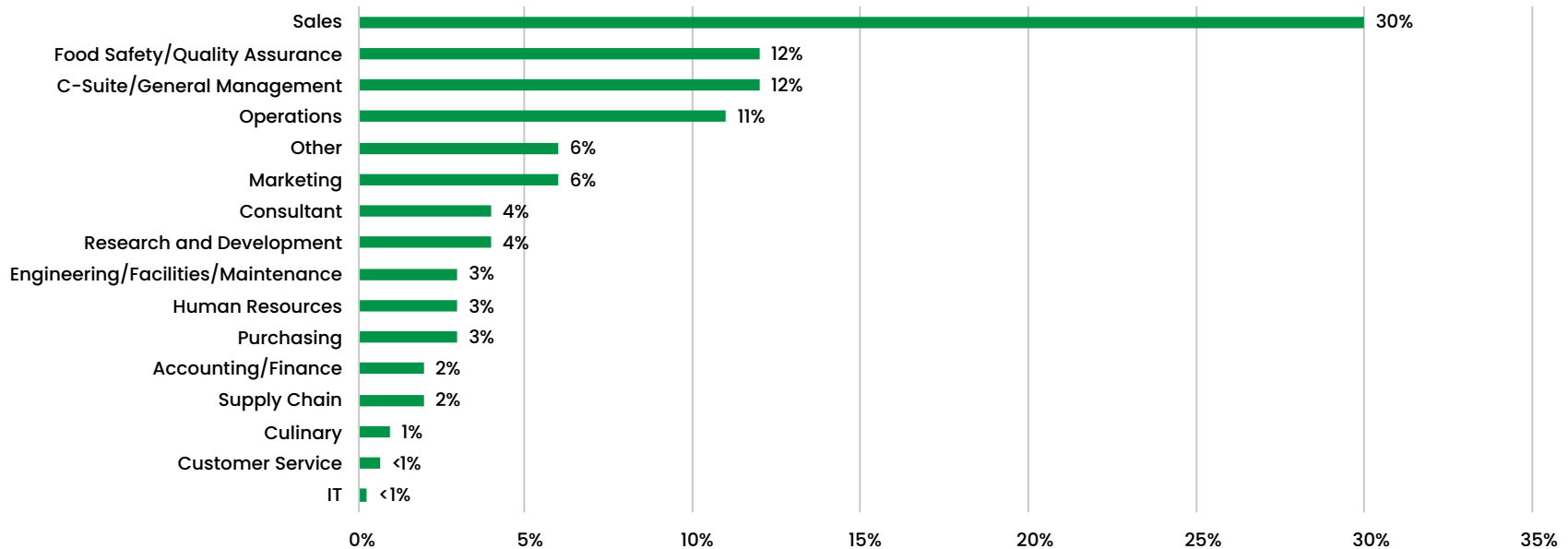
The 3rd Annual Food and Beverage Manufacturing Survey was open from May 2 through May 31, 2023. The survey consisted of 24 multiple-choice branching questions, one checkbox question, one set of 5-point Likert scale questions, one optional open-ended question and two numbered scales. The survey took respondents an average of six minutes to complete. Survey participation was publicized through the following methods: proprietary database, press release, Bristol Newsletter and social media including LinkedIn, Facebook and Twitter.

The survey represents a sampling of food and beverage manufacturing industry professionals. The respondents are diverse in geographic

location, job level and years of experience. The survey design ensured respondents had current or prior experience (within the past five years) working in the food and beverage manufacturing industry, and that no duplicate respondents were recorded.

The survey is not scientific and simply measures the views of those who elected to respond.

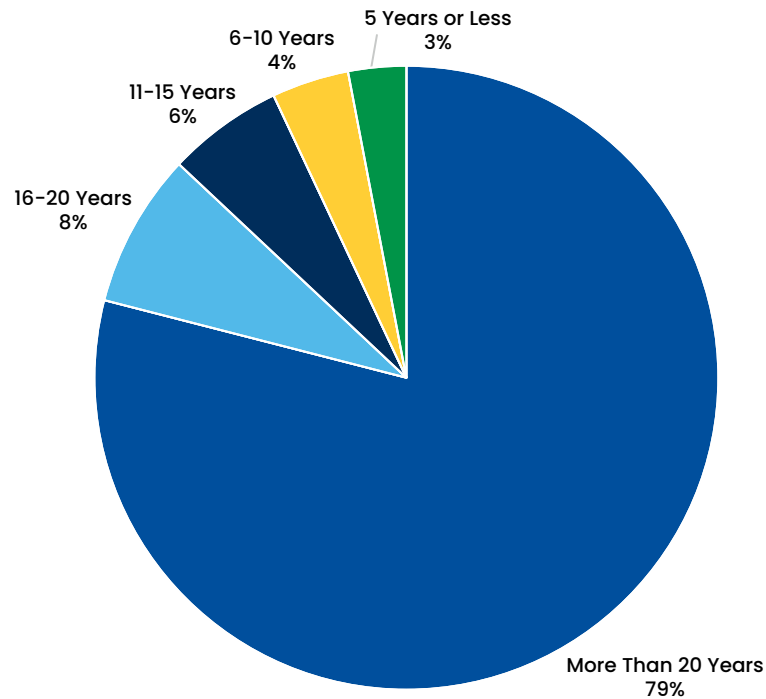
BREAKDOWN OF RESPONDENTS BY DEPARTMENT



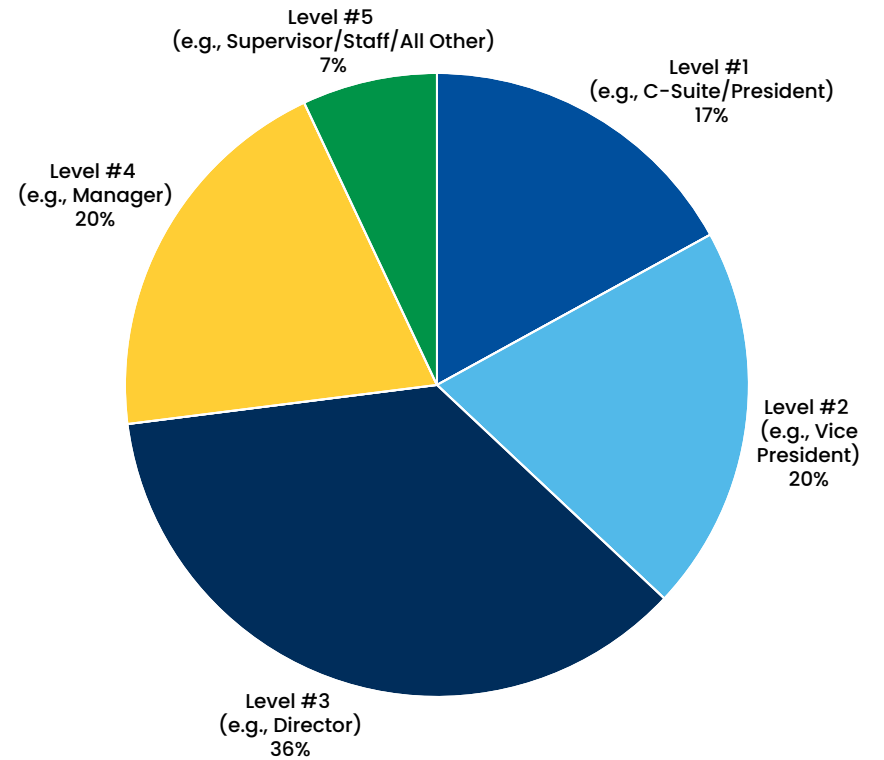
DEMOGRAPHICS

The following demographics provide insight on the survey respondents' years of experience, job level, employment status, location, education and salary.

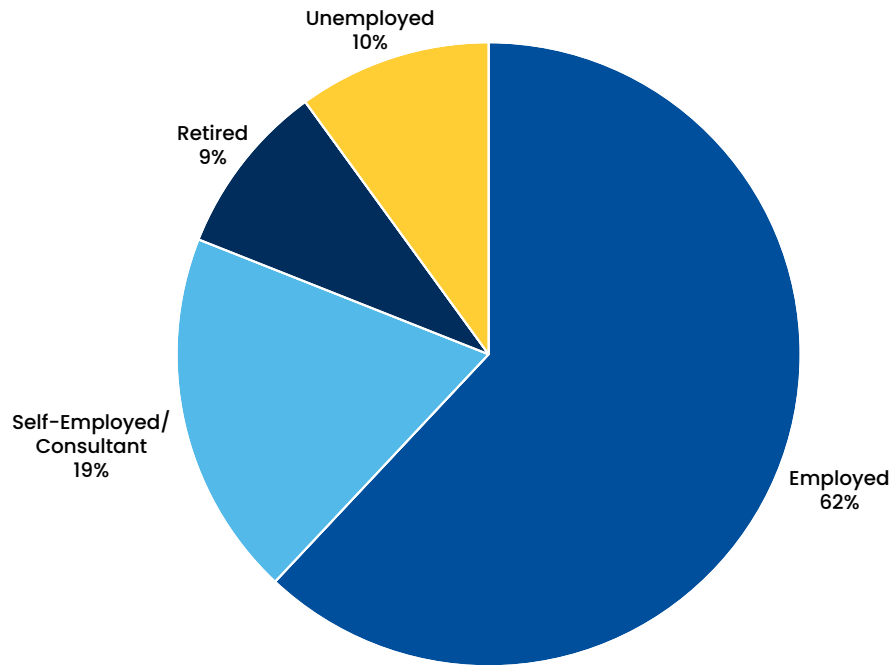
YEARS OF INDUSTRY EXPERIENCE



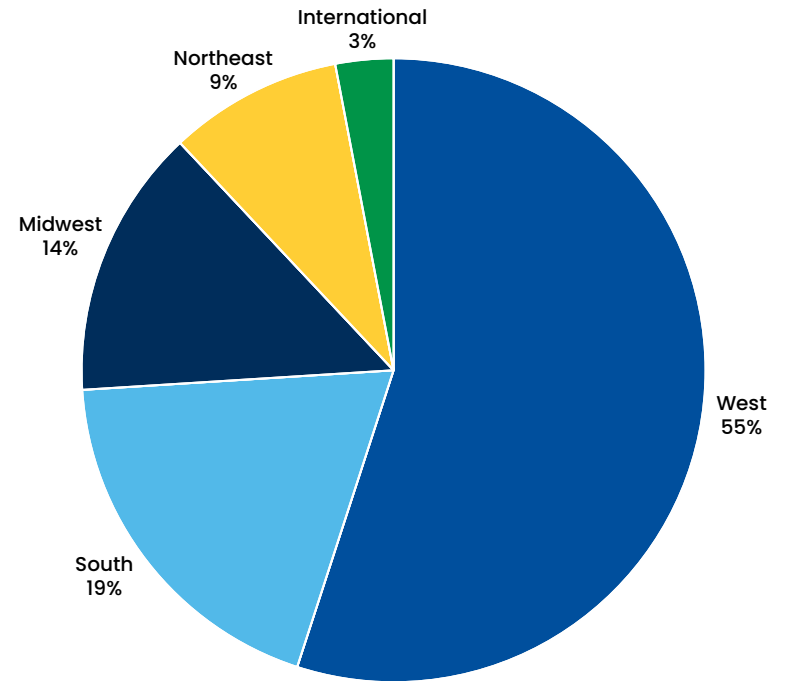
JOB LEVEL



EMPLOYMENT STATUS

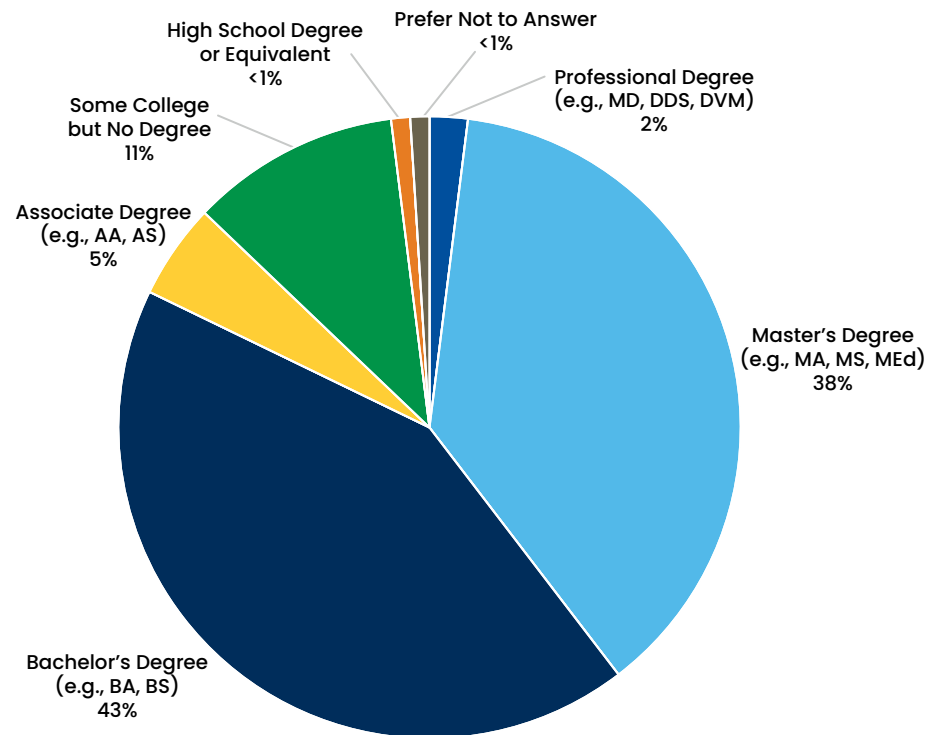


LOCATION

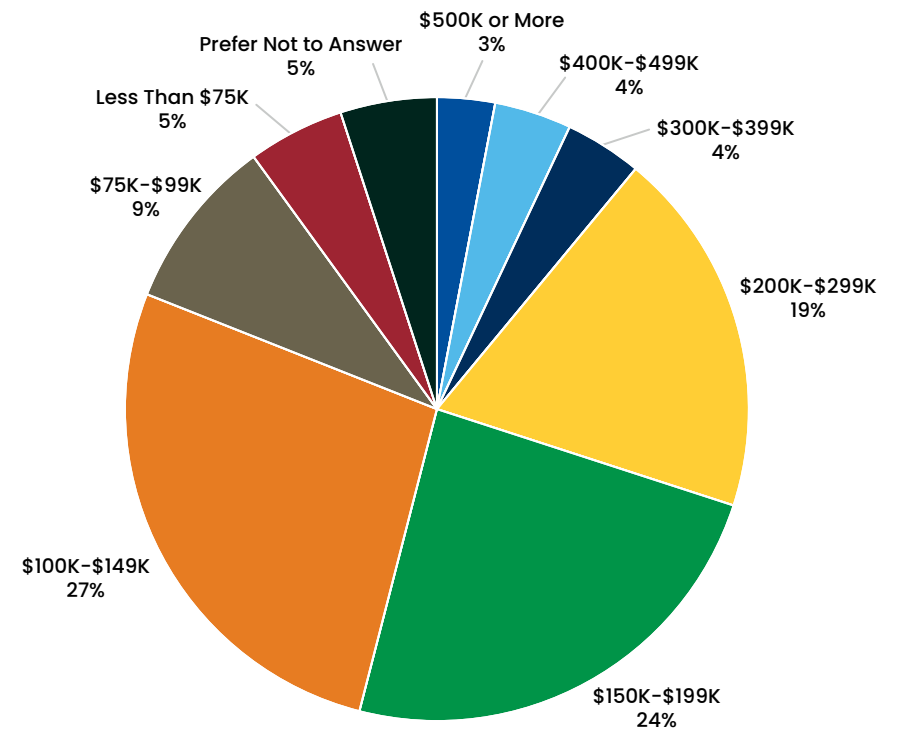


Survey Respondent Demographics

EDUCATION



SALARY



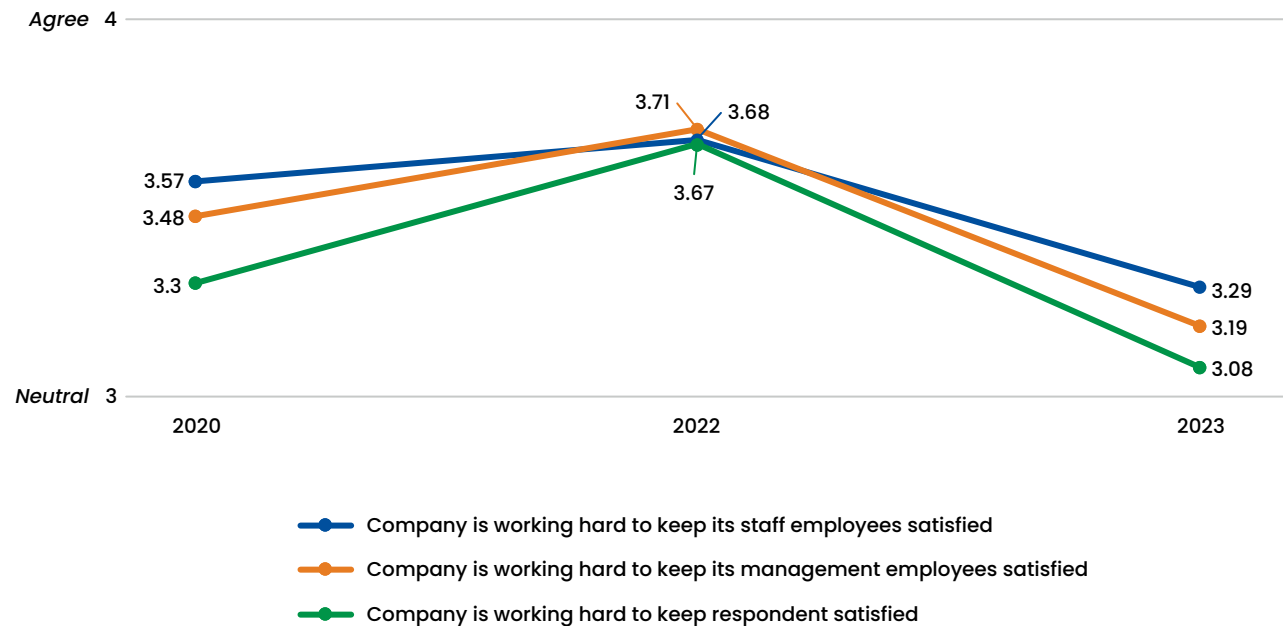


EMPLOYEE SATISFACTION

Over three-quarters of food and beverage professional respondents are optimistic about the future of their careers, a decrease of 12% since 2022 (see chart, p. 9). While professionals with *more than 20 years, 16-20 years, 6-10 years and 5 years or less* industry experience range from 76% to 84% in optimism, only 53% of respondents with *11-15 years* of food and beverage experience are optimistic.

Employed respondents were asked to rate a series of satisfaction statements on a scale of 1 to 5, where 1 indicates *Strongly Disagree* and 5 indicates *Strongly Agree*. The average ratings of all the employee satisfaction statements decreased from 2022, and are also the lowest averages since the survey started. Employed professionals are generally less satisfied in 2023, compared to 2020 and 2022. (see graph, below).

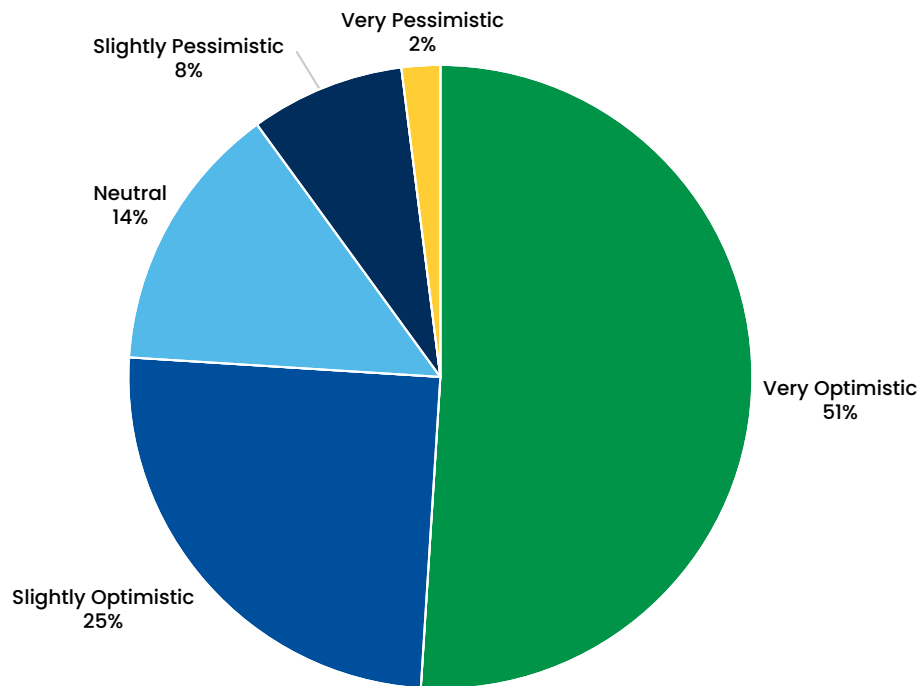
AVERAGE SATISFACTION STATEMENTS



Note: Data comprises of employed respondents only

Optimism

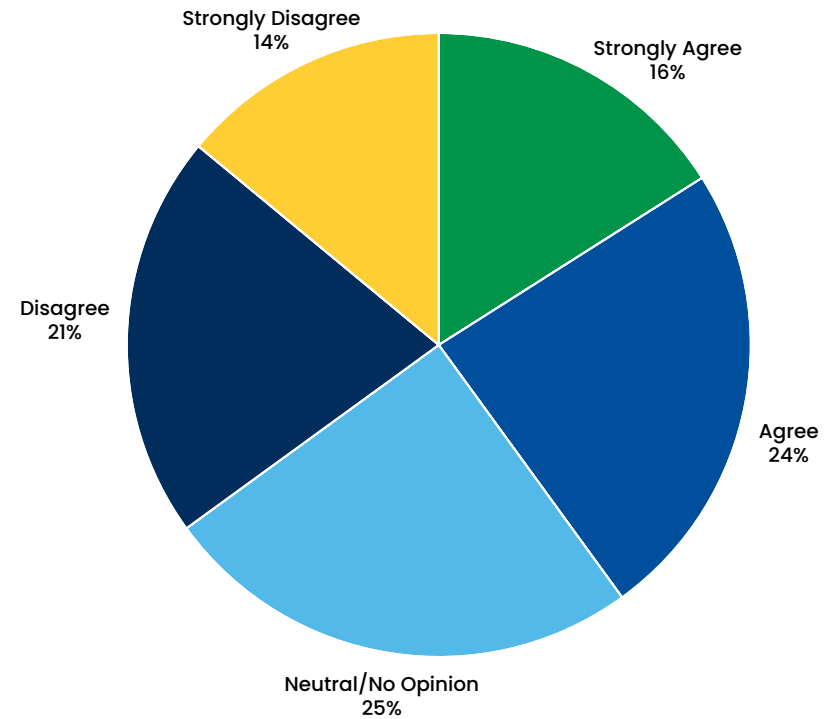
Optimism about future of career



Note: Data excludes retired respondents

Satisfaction

Company is working hard to keep respondent satisfied



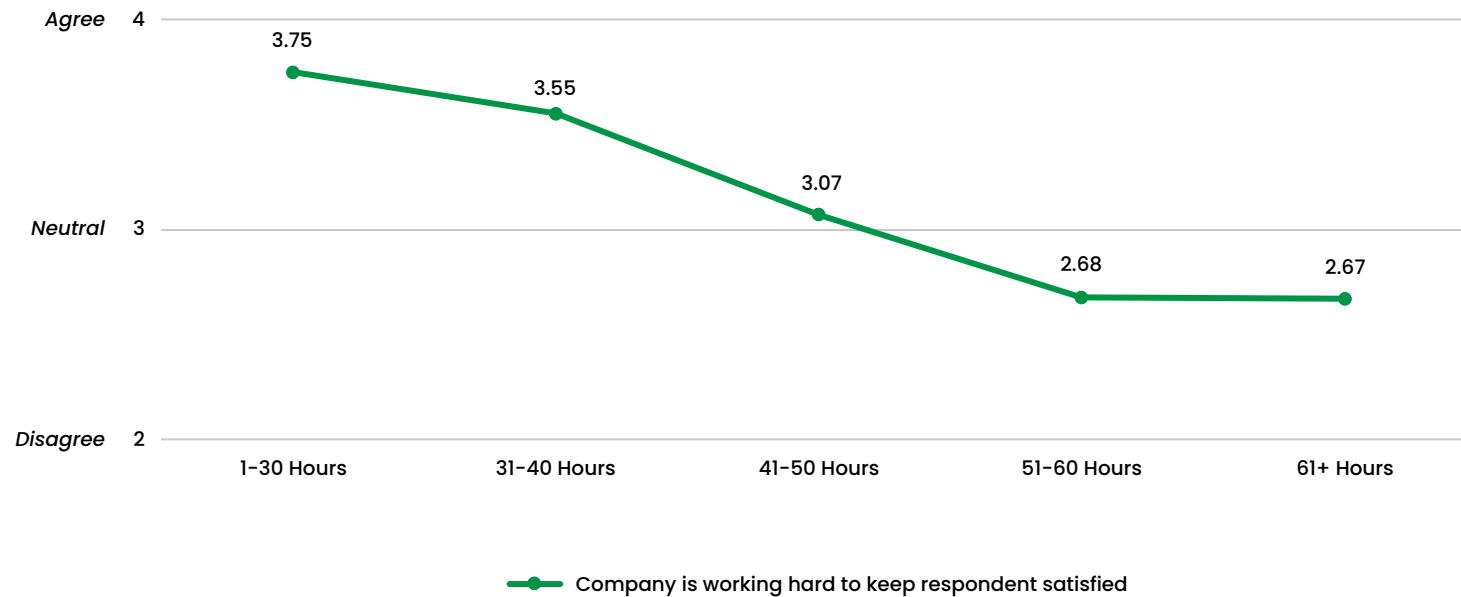
Note: Data comprises of employed respondents only

Overall, 4 out of 10 employed professionals believe that their company is working hard to keep them satisfied, while 35% of respondents disagree with this sentiment (see chart, p. 9). In relation to respondents' level of agreement with the statement, "My company is working hard to keep me satisfied:"

- By department, *Supply Chain* has the highest average satisfaction rate (4.33) while *Human Resources* has the lowest satisfaction rate (2.14)

- By years of experience, professionals with *more than 20 years* of industry experience have the highest average satisfaction rate (3.14) while professionals with *5 years or less* have the lowest average (2.33)
- There is a negative correlation between the number of hours professionals work per week and their employee satisfaction (see graph, below)

HOURS WORKED PER WEEK AND EMPLOYEE SATISFACTION AVERAGE RATING



Note: Data comprises of employed respondents only

In 2022, satisfaction among the different job levels ranged from 48% to 71%. This year, however, all levels reported 50% or less satisfaction. To break it down further:

- *Level #5 (e.g., Supervisor/Staff/All Other)* professionals express the most satisfaction (50% agreeance)
- *Level #2 (e.g., Vice President)* respondents express the least satisfaction (30% agreeance)
- Average statements per job level are decimal points over *neutral* in satisfaction (average score of 3.05–3.42), except for *Level #2* which is slightly below (average of 2.94)
- 4 out of 10 of *Level #4 (e.g., Manager)* respondents do not believe their employer is making an effort to keep them satisfied

Other satisfaction statistics of employed professionals:

- 53% have received adequate training to perform their duties, a 9% decrease from 2022; 17% have not received enough training
- 42% feel supported in their career growth at their current organization, which is a 15% decrease from 2022; one-third of professionals do not feel supported
- 30% do not feel that their company is working hard to keep management employees satisfied
- 28% do not feel that their company is working hard to keep staff employees satisfied



JOB SEARCH AND CAREER PREFERENCES

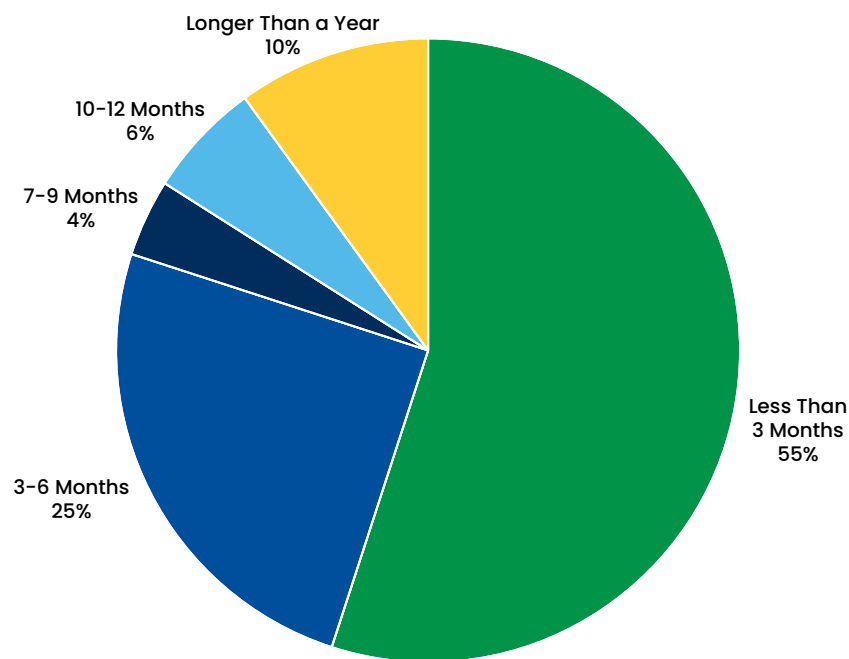
Professionals report working for an average of two employers within the past five years. Overall, 54% of respondents are actively looking for a new career opportunity. Of these job seekers, 8 out of 10 began searching for a new job within six months of taking the survey (see chart, bottom right).

Nearly half of employed professionals are actively looking for a new opportunity, which is an 8% increase over the previous year. The top two reasons for searching are *Company Culture* (24%) and *Growth Opportunities* (24%).

This year, *Company Culture* received the highest percentage of respondent's votes (36%) as a priority when choosing an employer, a 17% increase from 2022's survey. *Compensation* – the former top priority for two straight surveys – decreased by 13%. It is tied with *Work-Life Balance* for second highest priority, which increased by 7% from last year (see graph, p. 13).

Among the job levels, the largest percentage of respondents in *Job Levels 1, 2 and 3* (e.g., *C-Suite/President* through *Director-level*) view

JOB SEARCH LENGTH



Note: Data consists of respondents actively looking for work

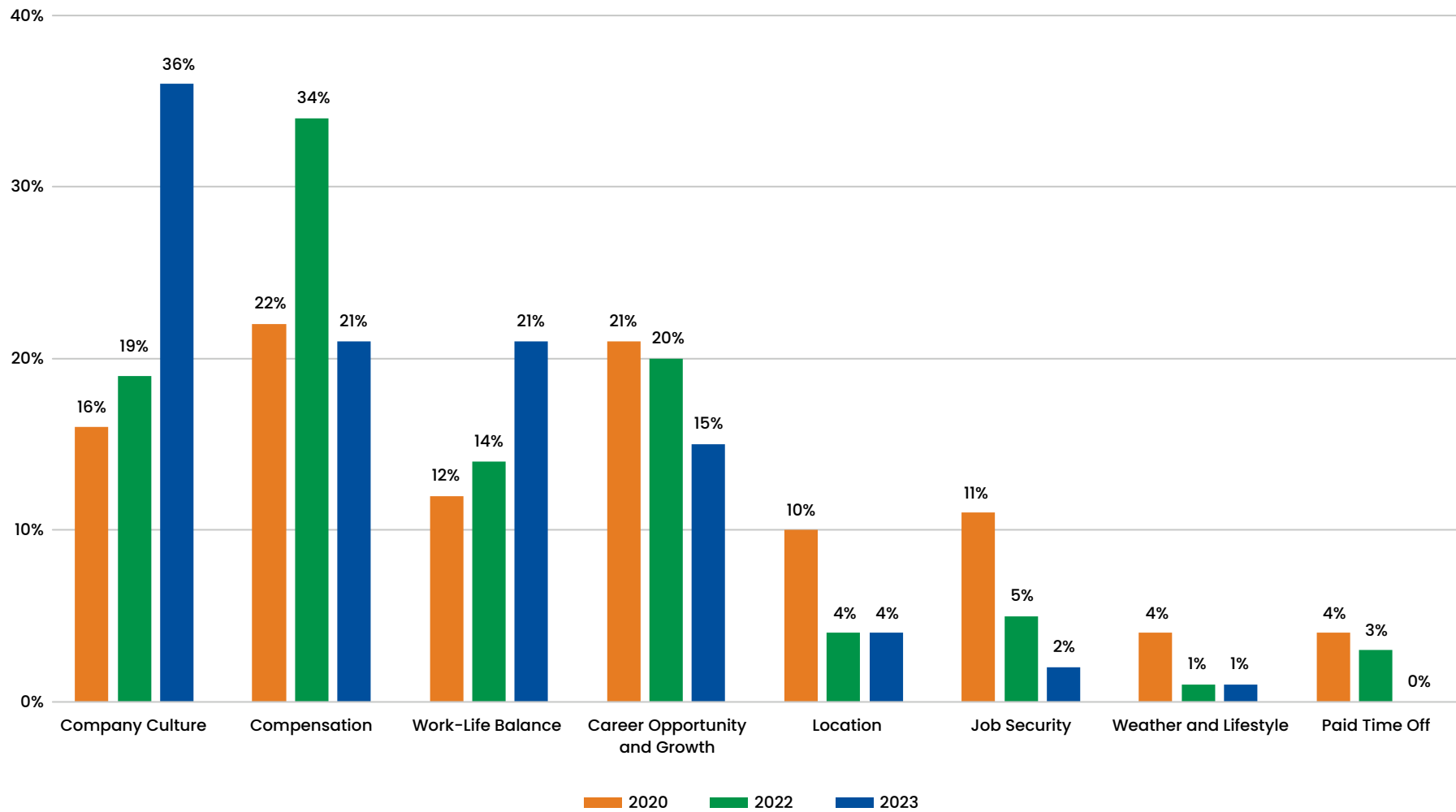
Highest Career Priority

1. Company Culture (36%)
2. Compensation (21%) and Work-Life Balance (21%)
4. Career Opportunity and Growth (15%)
5. Location (4%)
6. Job Security (2%)
7. Weather and Lifestyle (1%)
8. Paid Time Off (0%)

Company Culture as their highest priority, while for Job Levels 4 and 5 (e.g., Manager and Supervisor/Staff/All Other) it is Work-Life Balance when choosing an employer. In 2022, 38% of Manager-level and 33% of

Supervisor/Staff/All Other respondents voted for Compensation. This year, only 14% of Manager-level and 11% of Supervisor/Staff/All Other professionals view Compensation as their top priority.

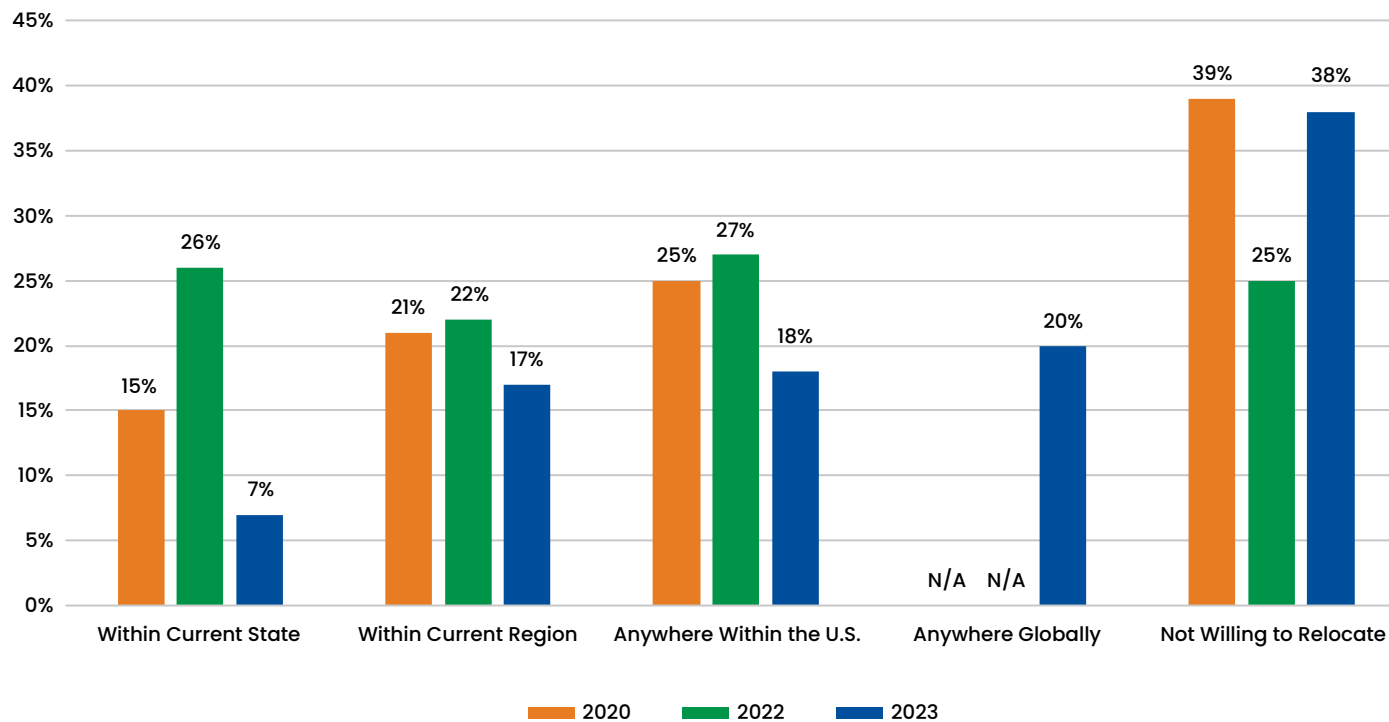
CAREER PRIORITIES BY YEAR



Overall, 38% of food and beverage professionals are not willing to relocate for a career opportunity, which is a 13% increase since 2022 (see graph, below). However, about one-third of *Job Level 1* and *Job Level 2* respondents are willing to relocate *anywhere globally* (30 and 34%, respectively). In terms of location, more than half of respondents in the Midwest are willing to relocate out of their region (*anywhere within the U.S.*, 32%, and *anywhere globally*, 24%), the highest among U.S. regions. Western respondents express the least willingness in relocating for a career out of all other regions (45%) (see graph, p. 15).

College degrees appear to influence compensation within the industry. When comparing education with salary range, only 4% of respondents without a Bachelor's degree or higher make \$200k-\$299k annually, while 18% who have a Bachelor's degree and 25% who have a Master's or Professional degree are in that income bracket. Forty-five percent of professionals who do not have a Bachelor's degree or higher fall within \$100k - \$149k (see table, p. 16).

RELOCATION PREFERENCES BY YEAR



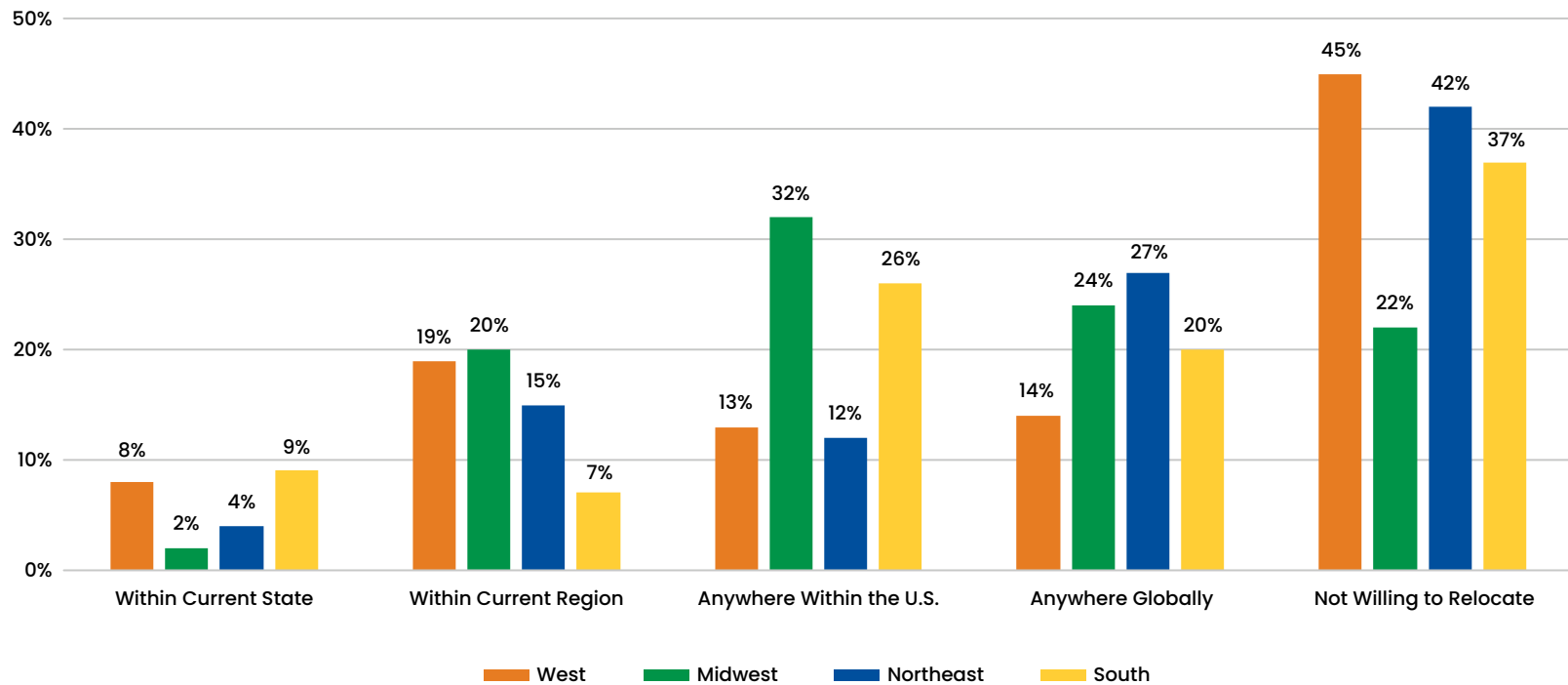
Note: "Anywhere globally" was not an option in the 2020 and 2022 surveys

Respondents in the Midwest and Northeast report higher incomes than those in the Western and Southern regions. Percentages of respondents who earn \$200k or more:

- 41% of those who work in the Midwest
- 40% of those who work in the Northeast
- 25% of those who work in the West
- 23% of those who work in the South



RELOCATION PREFERENCES BY U.S. REGIONS



ANNUAL INCOME – BY EDUCATION

Annual Income (Base and Bonus)	Professional or Master's Degree	Bachelor's Degree	Associate Degree or No College Degree
\$500K or More	6%	2%	2%
\$400K-\$499K	5%	4%	0%
\$300K-\$399K	5%	3%	4%
\$200K-\$299K	25%	18%	4%
\$150K-\$199K	23%	26%	18%
\$100K-\$149K	20%	26%	45%
\$75K-\$99K	6%	10%	14%
Less Than \$75K	4%	6%	6%
Prefer Not to Answer	6%	5%	7%



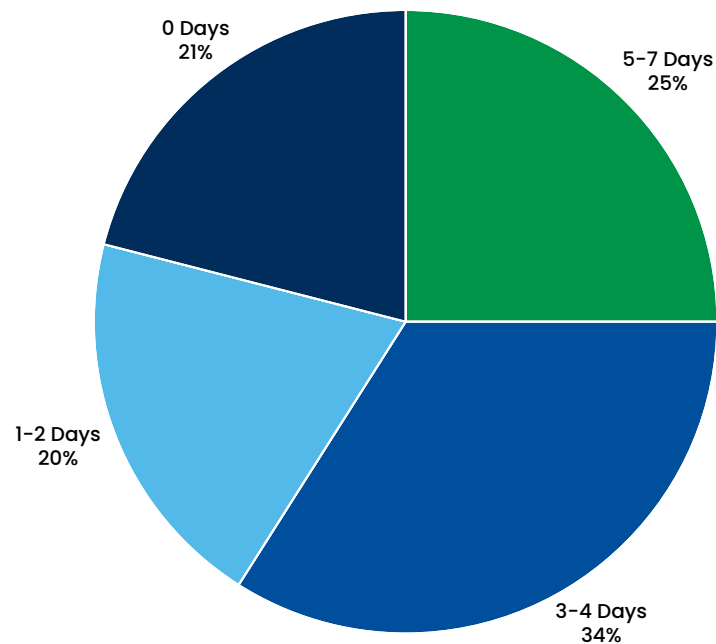
EMPLOYEE WELL-BEING AND WORK-LIFE BALANCE

Professionals who are *employed* and *self-employed/consultants* were asked questions related to their well-being and work-life balance. Full-time employees work an average of 50 hours per week, which is two hours more than in 2022. Director-level professionals (*Job Level 3*) report working the highest number of hours per week (average of 50.87).

Nearly 8 out of 10 food and beverage professionals work overtime – defined as working more than 8 hours in a day – *at least* once per week (see chart, right). Breaking down those who work overtime at least one day a week by job level, it is 78% of C-Suite/President-level, 92% of Vice President-level, 85% of Director-level, 73% of Manager-level and 31% of Supervisor/Staff/All Other-level (see charts, p. 18).

Sixty-four percent of respondents believe they have *just the right amount* of workload, while 29% express having *too much* and 7% *not enough*. Vice President-level respondents have the highest percentage of *too much workload* in comparison to all other job levels (36%).

AVERAGE OVERTIME PER WEEK

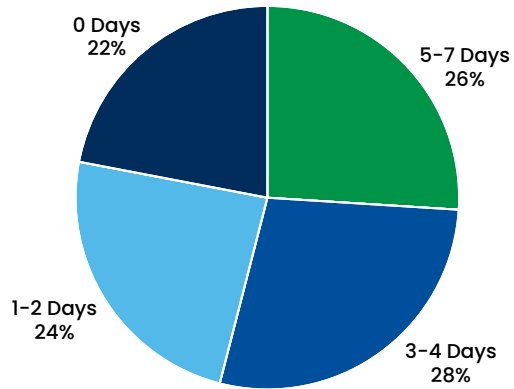


Note: Data consists of employed and self-employed/consultant respondents only

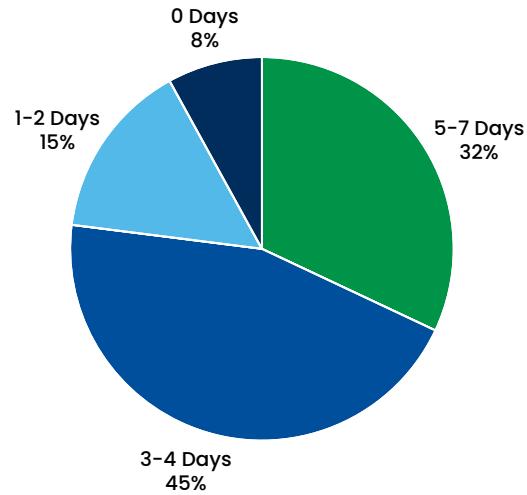


Average Overtime by Job Level

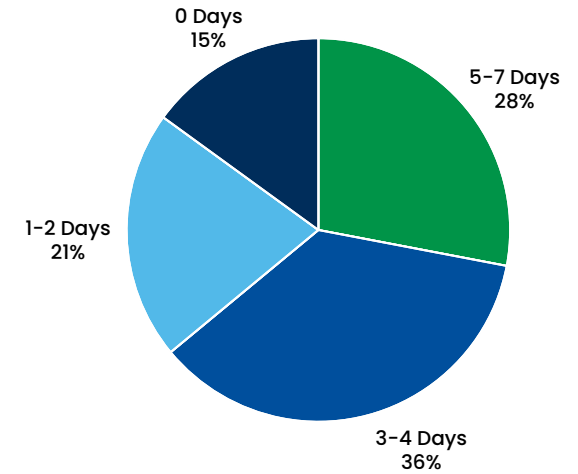
Job Level #1
(e.g., C-Suite/President)



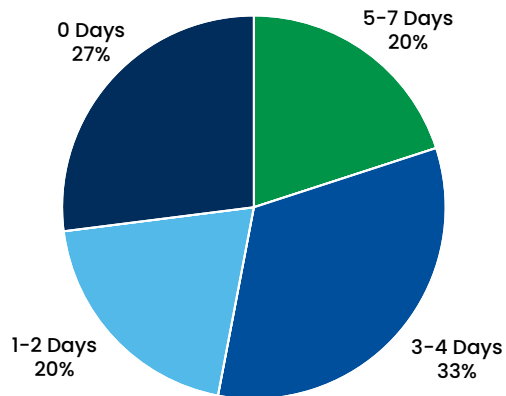
Job Level #2
(e.g., Vice President)



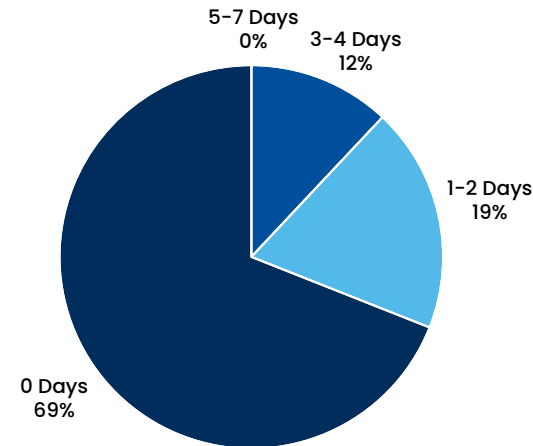
Job Level #3
(e.g., Director)



Job Level #4
(e.g., Manager)



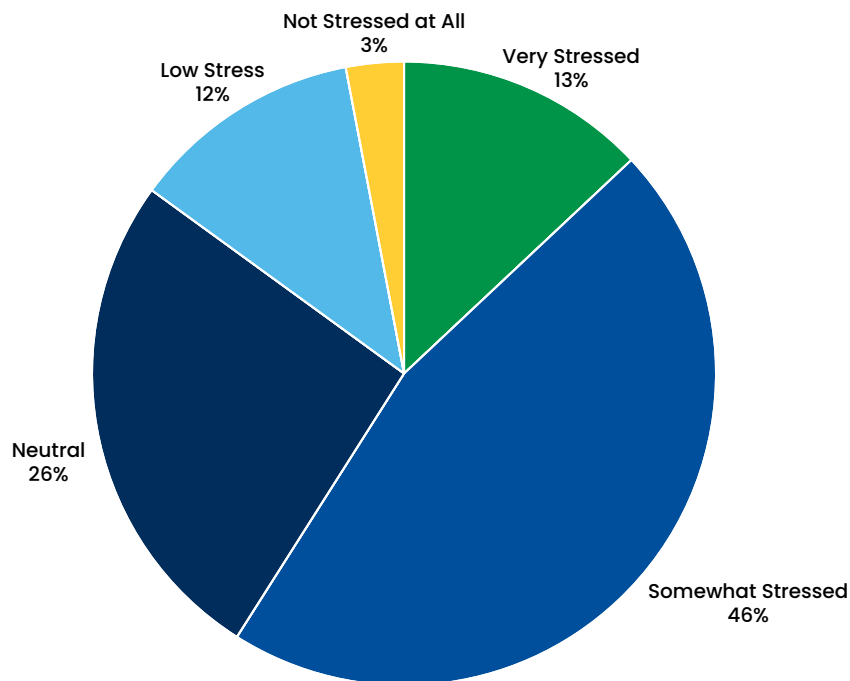
Job Level #5
(e.g., Staff and All Others)



Note: Data consists of employed and self-employed/consultant respondents only

In relation to work, 59% of those who are employed report being *very stressed* or *somewhat stressed* (see chart, below). There is a positive correlation between how often respondents work overtime per week and stress levels. While only 2% of those who do not work overtime are *very stressed*, it jumps to 20% of respondents who regularly clock overtime 5-7 days per week. Vice President-level respondents report the most stress at work (66%), but Director-level professionals have the highest percentage of being *very stressed* (17%).

STRESS LEVELS



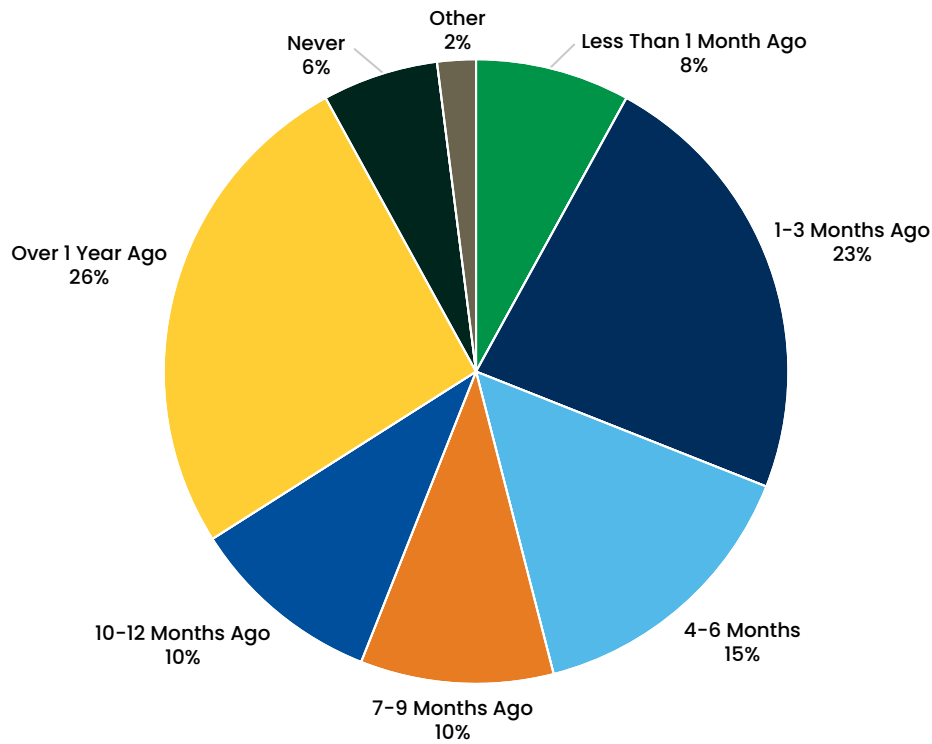
Note: Data consists of employed and self-employed/consultant respondents only



Over a quarter of respondents have not taken a vacation at their current employer – defined as 5 or more consecutive days of paid time off – for more than a year (see chart, bottom left). Only 8% never work, defined as at least checking emails and voicemails, while on vacation (see chart,

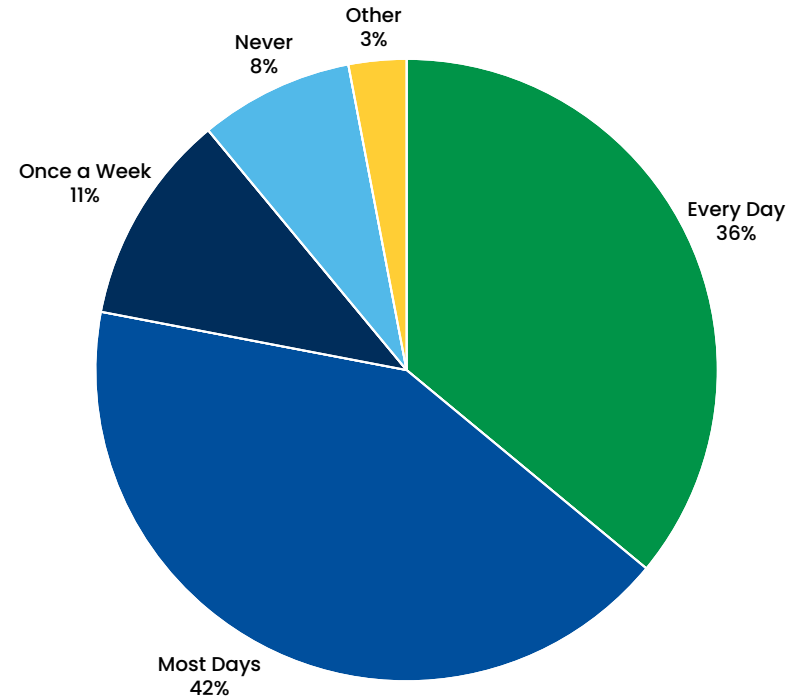
bottom right). Forty-seven percent say that their decision to take time off is affected due to the amount of work they have to make up when they return, an 8% rise since the question was asked in 2020 (see graph, p. 21).

LAST VACATION TAKEN



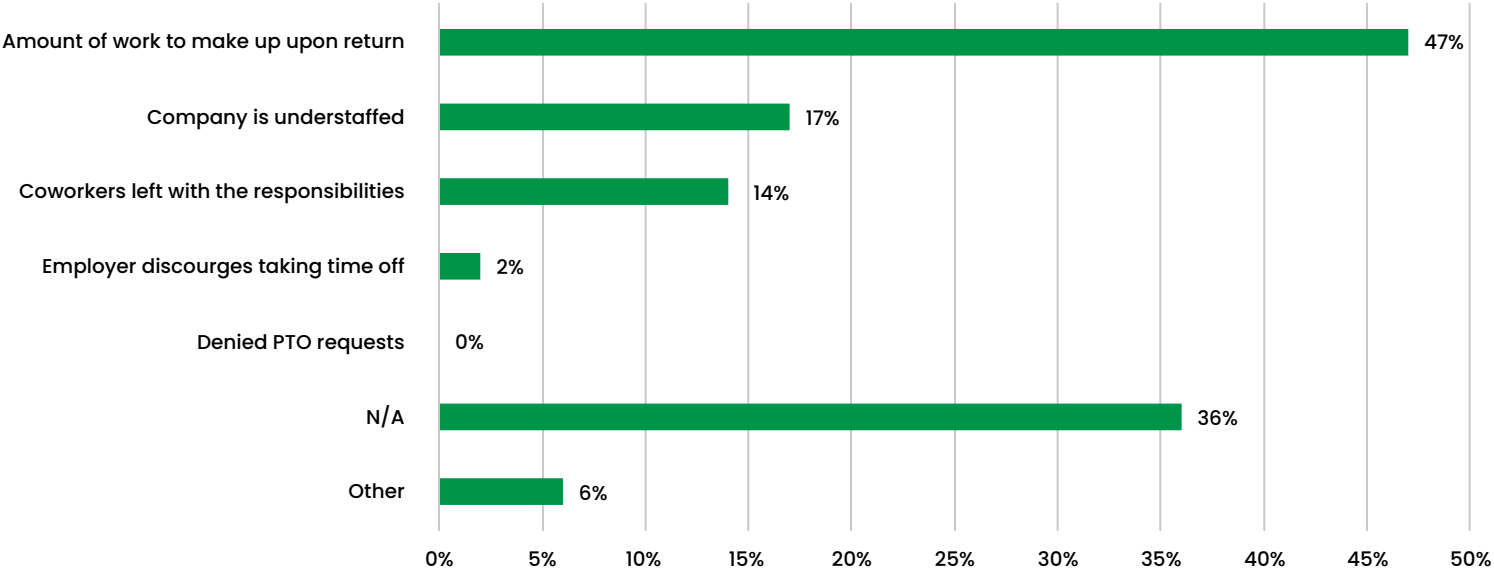
Note: Data consists of employed and self-employed/consultant respondents only

CHECK ON WORK DURING VACATION



Note: Data consists of employed and self-employed/consultant respondents only

REASONS THAT AFFECT USE OF PTO



Note: Data consists of employed and self-employed/consultant respondents only



HIRING CHALLENGES

Forty-eight percent of professionals believe their company needs to increase staffing in the next year, a 22% decrease since 2022.

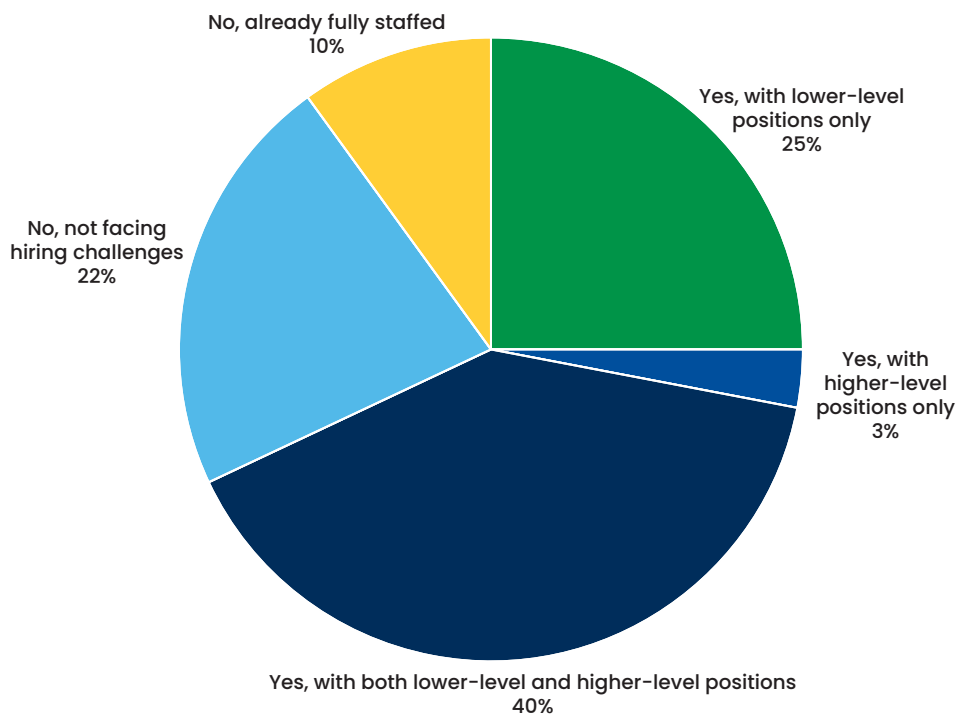
Fifty-four percent of respondents are hiring authorities at their company. Of this group, 54% believe that staffing at their company will need to increase in the next year and 68% report their company facing hiring challenges (see chart, right). Those who are dealing with obstacles are 22% more stressed at work than respondents without hiring issues.

Similar to last year, a majority of hiring authorities report *finding qualified people* as their biggest challenge when obtaining new staff (see chart, p. 23). The top three reasons hiring authorities believe they are having a difficult time with their recruitment efforts are:

1. Not gaining enough applicants or interest in the job opening (38%)
2. The location of the job or company (17%)
3. Candidates losing interest or getting another offer (14%)

A common write-in response for this question this year indicates that hiring authorities are also facing difficulties finding candidates who are willing to work on-site instead of remote.

FACING HIRING CHALLENGES



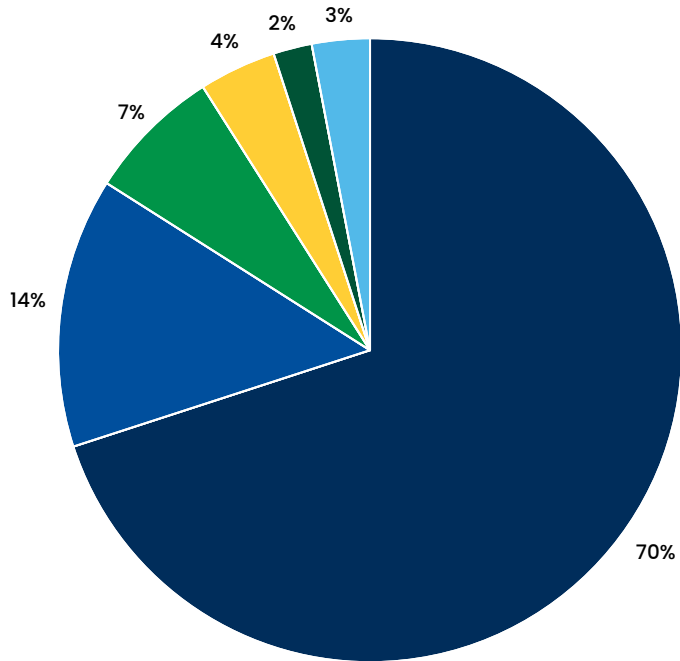
Note: Data comprises of employed hiring authorities only



89%

of hiring authorities who believe
staffing at their company needs to increase
in the next year are
facing hiring challenges

BIGGEST HIRING CHALLENGE



- Finding Qualified People
- Finding People Willing to Work Second/Third Shifts
- Insufficient Hiring Budget
- Relocating People
- Insufficient In-House Recruiting Staff
- Other

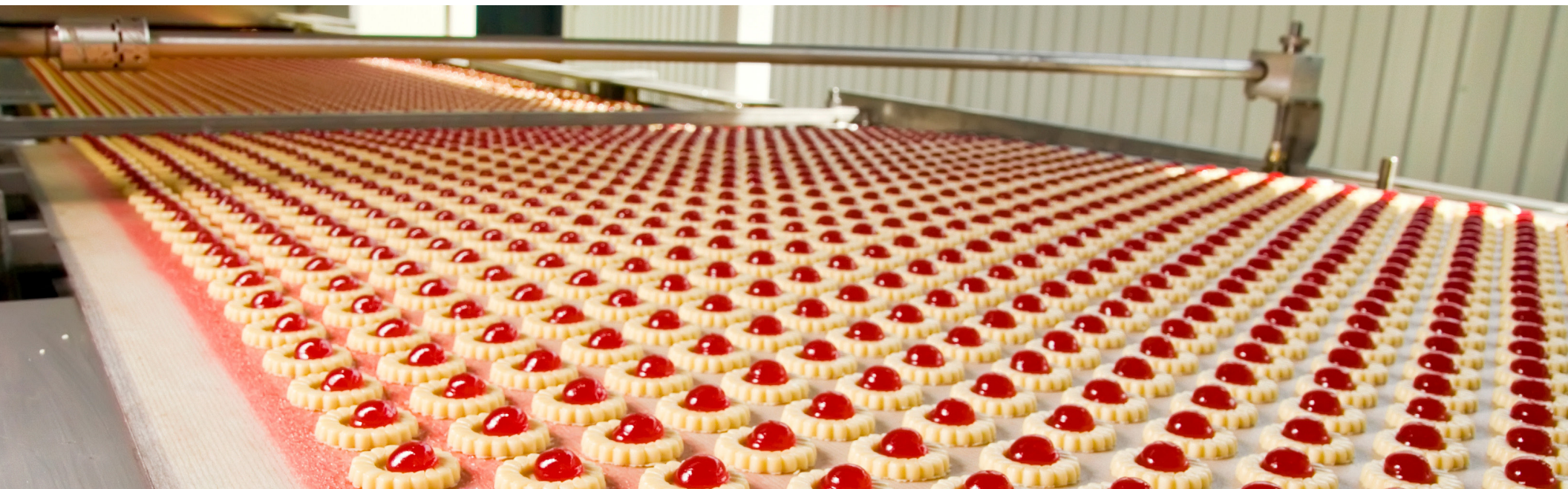
Note: Data comprises of employed hiring authorities only



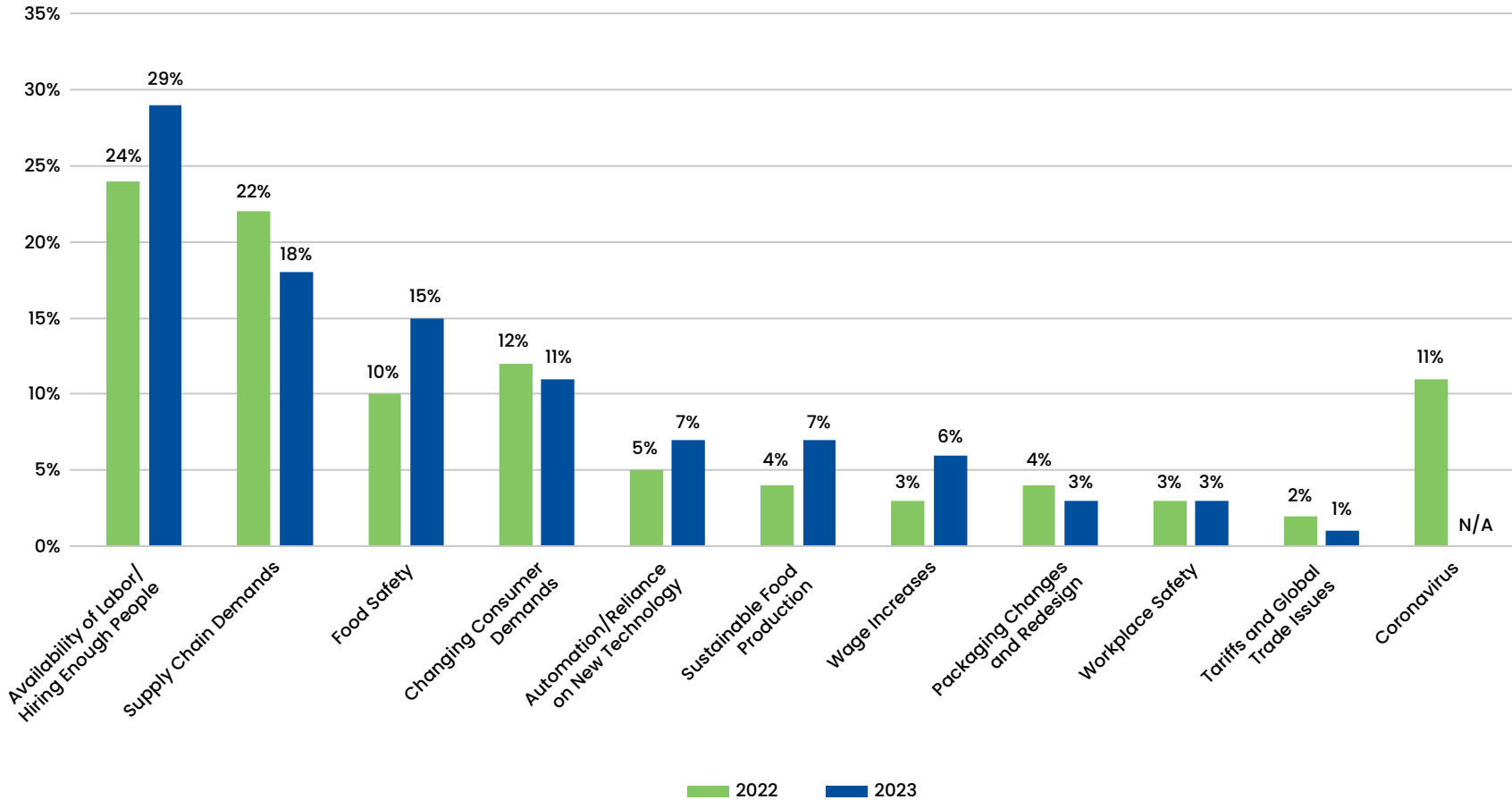
INDUSTRY CONCERNS

Of the 10 given options, the top three industry concerns are: (1) *Availability of Labor/Hiring Enough People*; (2) *Supply Chain Demands*; and (3) *Food Safety*. Since the survey's debut, *Availability of Labor/Hiring Enough People* continues to be the top concern in the industry (see graph, p. 25). The percent increases when looking at just hiring authorities; 4 out of 10 chose *Availability of Labor/Hiring Enough People* as their first choice. Of the hiring authorities who are facing hiring challenges at their company, 50% voted *Availability of Labor/Hiring Enough People* as their top manufacturing concern and 14% selected *Wage Increases*. From employed respondents who believe staffing at their company needs to increase in the next year, only 37% chose *Availability of Labor/Hiring Enough People* as their top concern (though it is still the top concern by percentage for that group).

There are some differences to industry concerns by location. Professionals employed in the West view *Availability of Labor/Hiring Enough People* as their first concern (23% of votes), *Food Safety* as their second-highest industry concern (21% of votes) and *Supply Chain Demands* as third highest (18% of votes). In the South, *Supply Chain Demands* ties with *Availability of Labor/Hiring Enough People* as the top concern (22% of votes), followed by *Wage Increases* (13% of votes). Sixty-one percent of Midwestern professionals chose *Availability of Labor/Hiring Enough People* as their top concern, the highest among all locations. Northeastern respondents marked *Availability of Labor/Hiring Enough People* as their highest concern (35% of votes), *Supply Chain Demands* as second highest (23% of votes) and *Changing Consumer Demands* as their third-highest industry concern (15% of votes).



TOP FOOD MANUFACTURING CONCERNS: 2022 VS 2023



Note: "Coronavirus" was not an option in the 2023 survey

CONCLUSION

Unlike the previous year, the 2023 survey results indicate a decrease in optimism and employee satisfaction in the food and beverage manufacturing industry. Among job levels, Vice President- and Director-level respondents have more on their plate compared to C-Suite/ President-level respondents, due to having a higher amount of work hours, workload, overtime and level of stress.

While compensation remains a priority when considering a new employer, the values of a strong company culture and work-life balance have increased markedly over the previous surveys. Although 38% of professionals are not willing to relocate for an opportunity this year, another 38% of respondents are willing to relocate anywhere within the U.S. or globally.

Despite fewer professionals believing that staffing at their company will need to increase since last year's survey, the need to find available labor continues to still be the top concern for the industry.

Bristol Associates' Vice President David Alford says, "Thank you for your participation in our annual survey. As the challenges engendered by the pandemic recede from our daily life, the food manufacturing industry faces challenges on several fronts. With unemployment at a historically low 3.5%, numerous companies are facing difficulties hiring a sufficient number of employees to fill their open positions. In order to attract new hires, many organizations are finding it necessary to increase wages.

Supply chain issues remain a top concern throughout the industry. There are some indications that these issues are declining, but will probably remain a source of consternation for the foreseeable future.

High levels of employee stress are an issue, with a significant number of employees stating that they do not take paid time off (PTO). Some employers are combating this matter by encouraging employees to take their earned PTO, with some even mandating that it be used.

All in all, the overwhelming majority of the survey's respondents are optimistic about the future of their careers in the food manufacturing industry. Many foresee their companies expanding in the near future and are confident that the aforementioned issues will be overcome.

We look forward to your involvement in our next survey."



ABOUT BRISTOL ASSOCIATES, INC.



Founded in 1967, Bristol Associates, Inc. is an executive search firm specializing in Food and Beverage. We also have well-established, successful recruitment practices in Casino Gaming; CBD; Facility and Concession; Healthcare; Hotel and Resort; Nonprofit; Restaurant and Foodservice; and Travel, Tourism, and Attraction.

Bristol offers highly focused personal service, depth of experience and professional knowledge of the industries in which they work. Our firm was established with a focus on responsiveness, honesty, integrity and strict adherence to ethical standards. Apart from executive recruiting, we also

provide salary survey services for organizations nationwide to ensure that they remain a competitive employer in today's dynamic job market.

Typical searches in the Food and Beverage industry include key executive-level positions within engineering; executive; finance; food technology and product development; marketing; production and operations; quality assurance; sales and supply chain and purchasing. Current searches and examples of completed searches can be found on Bristol's website, listed below. The Food and Beverage executive recruitment efforts are led directly by Vice President David Alford.

For more information visit www.bristolassoc.com.





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