



## CO-PACKER EVALUATION CHECKLIST

These lists allow a Client to check if the Co-packer has suitable facilities, production capacity, and food safety standards.

This list may not cover all Co-packing scenarios or requirements.

Before approaching any Co-packers, the Client should discuss their plans with their accountant and lawyer to determine other requirements.

### A Client should ask

- Are they making a similar product?
- Do they have extra capacity? Is this capacity temporary or ongoing?
- Do they have the equipment needed? Is it food grade?
- Is their production automated or manual?
- Does their facility meet government requirements?
- What services do they offer?
- Do they co-pack for other clients? How do they assess risk and inform their Clients?
- What programs do they utilize for food safety and or certification(e.g. Global Food Safety Initiative (GFSI)) or quality (Organic, Halal, Kosher)?
- Are they GFSI certified? If not, are they working towards compliance or certification?
- Do they use a written Good Manufacturing Program (GMP) program and have written records?
- Are Critical Control Points (CCPs) in their process identified and monitored?
- Is the facility allergen-free, or will it allow allergens? Is there an allergen control plan?
- Is there any subcontracting of services or storage? If yes, how is this controlled?
- Has the company had a product recall in the last five years?
- Does the company have comprehensive Commercial General Liability (CGL) insurance including contractual and product liability? Is it \$5M?
- How far is the facility from the Client's target market?
- Does the Co-packer have cash flow to keep it stable? Has the company been sued?
- Where would they source raw materials: domestically or offshore? What proof of quality do they ask for?
- Are there any water quality issues?
- What lab testing is done by the company? Are there any pathogens of concern in the facility?
- If refrigeration is needed, what cold-chain monitoring do they do?
- How and where do they ship products? Whose trucks are used? Is delivery Free on Board (FOB) Co-packer or Client?
- Are references of past customers available?
- Why is the space available?



## Co-packing Client Evaluation

The following are questions a co-packer should ask a prospective client:

- These questions allow a Co-packer to decide if the Client and product are a good fit.
- They also allow the Co-packer to determine services and pricing offered.

### A Co-packer should ask

- Is the product already being made or is a new product needed?
- What production steps would the Client like help with?
- Does the product require research and development or scale-up?
- Does the product require special ingredients, processing, or packaging?
- Will new or special equipment be needed?
- What packaging and shipping options are needed?
- Does the formulation have allergens or high-risk ingredients, like Raw Food of Animal Origin?
- Are there unique ingredients? Will the Client object to ingredient substitutions?
- Are there 'unique allergens'? What kind of precautionary labelling is being planned?
- Does the Client require food safety or quality audits or certifications, such as GFSI or Organic?
- If GFSI Certification is required, which standard is needed? ( e.g. British Retail Consortium (BRC) , Safe Quality Food (SGF)

- What government regulations must the product meet?
- What product testing will be needed?
- Does the Client have artwork for labels and packaging?
- Where will raw materials and finished products be stored?
- How will inventory be tracked for ordering and recall purposes?
- How much product is needed? Is it a one-time contract or ongoing? What size batches?
- What is the Client's experience in the food industry? Do they have adequate financing?
- Does the Client have product liability insurance? What other insurance is needed?
- Does the Client's business plan include accurate pricing?

### Co-packer On-site Checklist

Visits allow a Client to double-check claims made by the Co-packer, including:

- the condition and cleanliness of the facility
- the quality of staff training,
- and efforts taken to control food safety

Inspections can also reveal hazards undeclared or unnoticed by the Co-packer. The visit will almost always give the Client an accurate impression.

### Facility inspections quickly confirm suitability

- Are the grounds tidy? Are they free of clutter and debris?
- Do the neighbours pose a risk?

- How well maintained is the facility?
- How are pests or unauthorized persons kept out?
- Do storage practices prevent contamination?
- Are all materials stored off the ground and away from the wall?
- If there is refrigeration, is it monitored? Are records kept?
- How are non-food chemicals stored? Are all containers and materials well labelled?
- Are equipment and food contact surfaces food grade?
- Is there preventative maintenance and calibration of equipment?
- Is there a cleaning schedule? How clean is the facility and the equipment?
- Are staff well trained, tidy and efficient?
- Are training records available?
- Are activities done using Standard Operating Procedures (SOPs)?
- Are batch records, inventory records, and other documents complete?
- Are specifications and test results on file for all ingredients and finished products?
- Are government inspection and third-party audit reports available?
- Is there evidence CCPs are monitored? Are thermometers, pH meters or other instruments available?
- Are any other unusual activities going on in the facility?