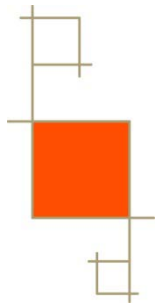


UNDERSTANDING FOOD AND DRINK INDUSTRY NEEDS





The National Skills Academy for Food and Drink Manufacturing

- We hand back to employers the opportunity to shape the training you need to drive the productivity and skills of the industry
 - Understand what you need
 - Establish what is available
 - Develop to fill the gaps
- All development and delivery is undertaken by leading training providers approved by the NSA as high quality food and drink specialists
- Work with employers in either steering groups or individually
- 51 providers offering 672 courses specific to the needs of the industry
- Developed courses in English language for the meat industry, 13 module professional bakery course, Foundation Degree in Dairy Technology, leadership and management programme for small businesses
- Vision 'grow a thriving food and drink industry where employers and learning organisations work together to build value '
- Training needs to be more relevant, accessible and higher quality



National Skills Academy Providers

- **Reaseheath College**
- Tameside College
- Liverpool Community College
- Seafood Training North West

- SAMB

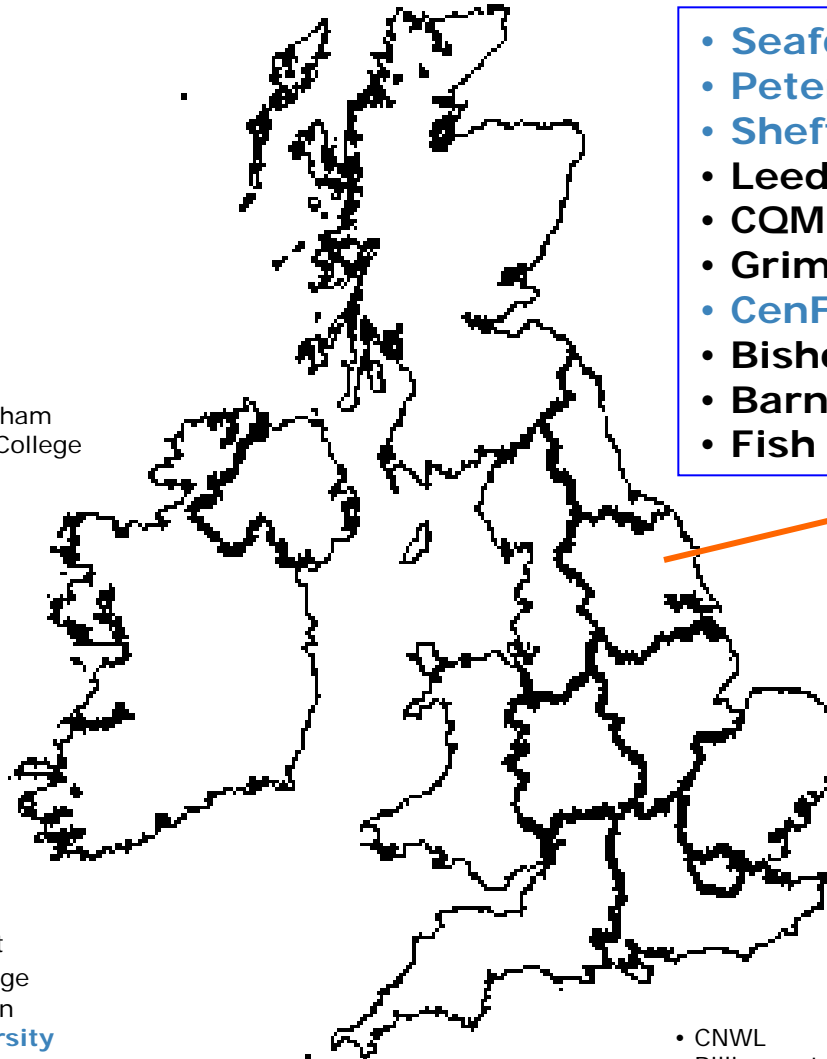
- **Poultec Training**

- University College Birmingham
- Birmingham Metropolitan College
- ACUA
- Industry Forum

- **MCP**
- **CAFRE**
- ADT Training

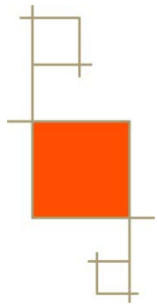
- Duchy College
- Hartpury College
- **Campden BRI**

- City of Sunderland College
- Newcastle University
- Environmental Academy
- **DLC**
- Seafood Training North East
 - Leicester College
 - Brooksby Melton
 - **Lincoln University**
 - Derby College
 - Loughborough College
 - **Melton Partnership**
- Brooklands College



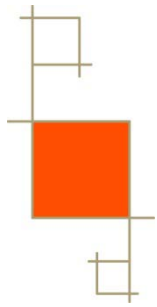
- **Seafood Training Academy**
- **Peter Rowley**
- **Sheffield Hallam University**
- **Leeds Thomas Danby**
- **CQM**
- **Grimsby Institute**
- **CenFRA**
- **Bishop Burton College**
- **Barnsley College**
- **Fish Friars Training School**

- CNWL
- Billingsgate
- Westminster Kingsway
- Barking College



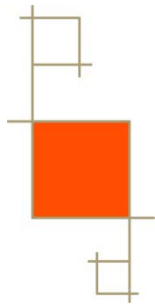
The Food and Drink Industry Recognising ourselves

- Largest manufacturing sector
- Purchase 2/3rds of all UK agricultural output
- 460,000 jobs directly plus up to 2m in supply chain
- Service most sophisticated retail sector
- One of the most regulated sectors in the UK
- Touch the lives of every consumer in the UK
- Innovation at the heart of the industry

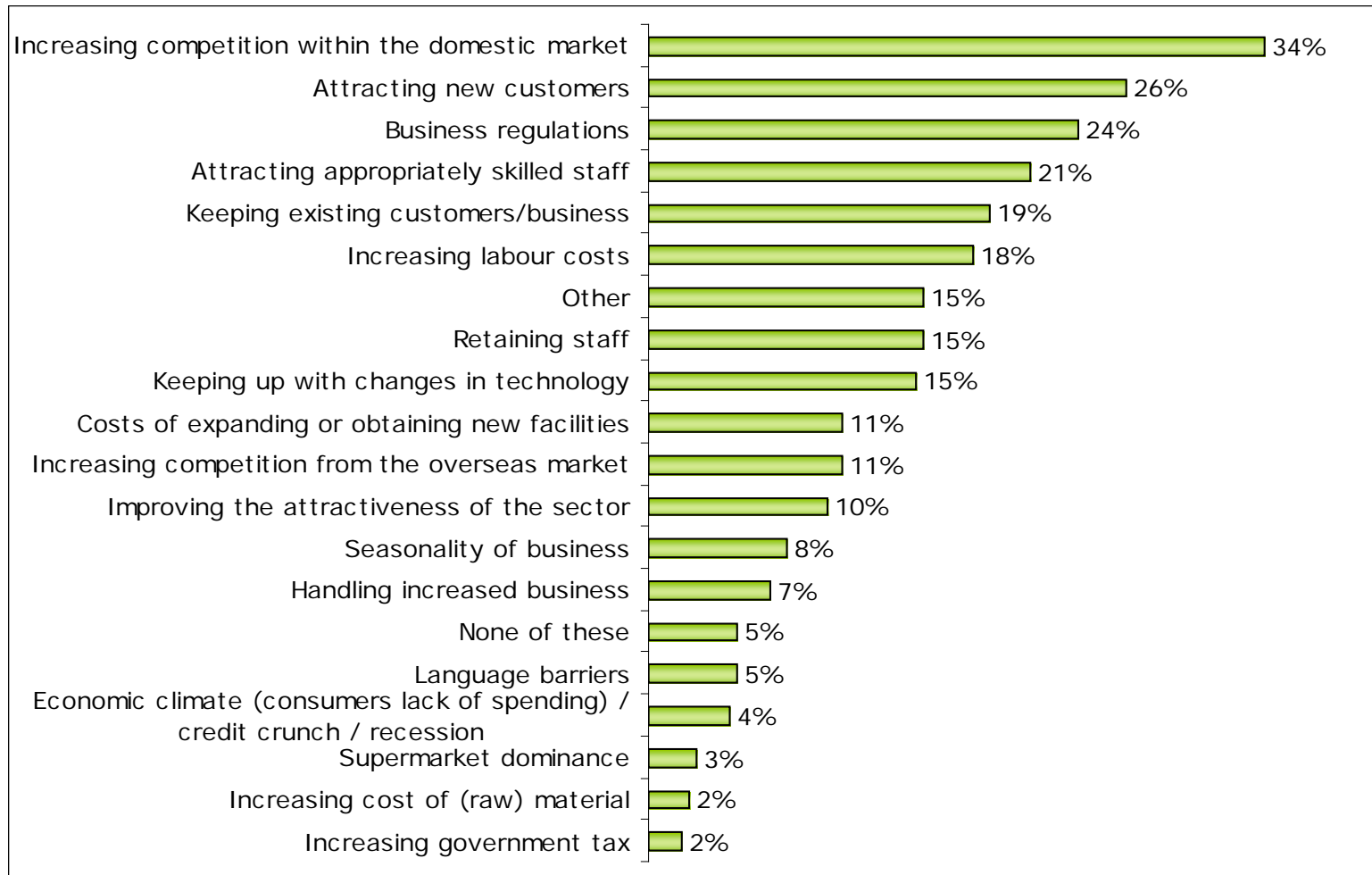


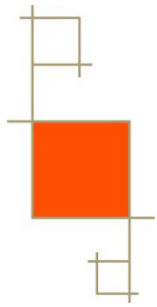
Research

- Purpose
 - Identify to what extent food and drink companies have access to the training they need within the region
 - Identify what the barriers are
 - Identify what the industry wants from it's training providers
 - Specifically to help identify what help might be needed to drive greater levels of innovation
- Methodology
 - Review of existing information sources
 - In depth and telephone interviews 270 employers- split of subsectors, sizes and types of business (branded/own label, multiple retailer focussed, own retail)
 - Today final part of the process



3 Biggest issues facing your business

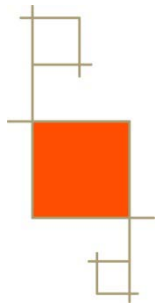




1. Is the industry getting what it needs ?

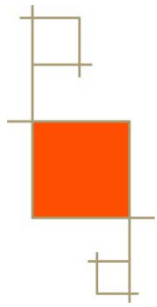
- It is getting what it asks for
 - Compliance training
 - Lots of production level training
 - mixed views on the value and suitability of NVQ's as currently delivered
- Majority of training informal, on the job much being done internally
- Relatively limited company assessment of impact
- Task and competency based
- Relative happiness with training being received in these areas
 - 81% good relations with providers
 - 72% able to access specialised training when required

Is this what the sector actually needs?



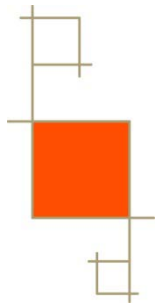
Is this what the industry needs?

- Will this activity drive up the skills of the industry?
 - 22 % of employees have no qualification (ave. 17%)
 - 40% of employees have below level 1 (ave.32%)
 - 20% of companies have vacancies (ave. 16%)
 - 69% of organisations don't allocate a budget to training (85% in bakery sector)

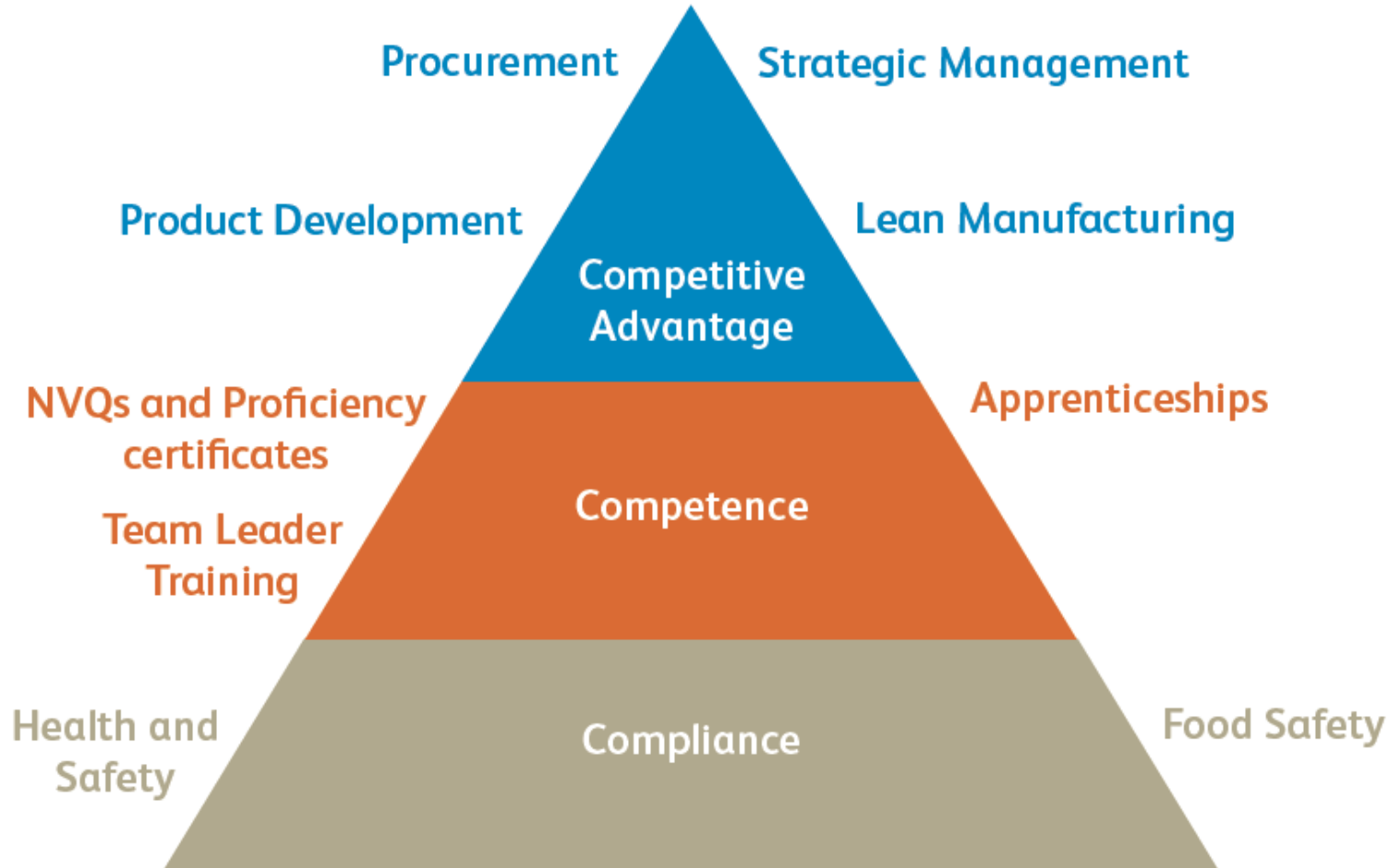


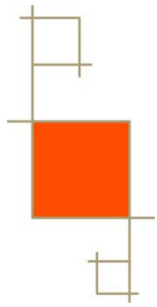
Is this what the industry needs?

- Will this support the individual ambitions of organisations for the future?
- Focus of business on growth – despite recession 75% looking to grow
- Key priorities
 - Building new markets
 - More marketing
 - New markets
 - New Products
 - Reducing production costs
 - Investing in new machinery
- Optimistic and positive picture painted
- What are the implications for the skills of those involved in bringing about this growth



Linking business strategy to people development strategy





Key Findings- Is the sector getting what it needs ?

- Gaps in training provision
 - Strategic awareness
 - Forecasting
 - Innovation
 - Management and leadership esp. team leaders and supervisors
 - Sales and marketing
 - Small business specific training



2. What barriers exist that stop employers undertaking training

- **Awareness**
 - Lack of awareness of types of training and courses 25%
- **Relevance of Training**
 - Lack of customised/innovative training 18%
- **Staff willingness**
 - Unwillingness to train 20%
- **Cost**
 - Costs of courses 31%
 - Limited budgets 26%
- **Quality**
 - Quality of courses /providers 12%
- **Accessibility**
 - Availability of courses locally or at suitable dates and times 30%
- **Operational Constraints**
 - Managers lack time to organise training 19%
 - Production pressures restricting time 29%



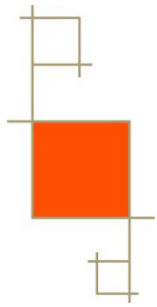
3. What does the industry want from providers

•Look for from training providers	•Butchery	•Bakery	•Fish	•Fruit/Veg	•Dairy	•Beverage	•Animal	•Other
Experience in the sector	47%	46%	65%	50%	75%	71%	80%	62%
Knowledge of what we do	37%	44%	35%	50%	25%	50%	33%	48%
Range of courses on offer	30%	21%	25%	23%	17%	38%	40%	30%
Relevance of courses on offer	27%	49%	55%	36%	58%	50%	73%	34%
Ability to provide training on site	13%	21%	40%	23%	25%	46%	47%	31%
Provider who can limit disruption to the business	17%	23%	25%	14%	8%	42%	47%	33%
Value for money	23%	36%	50%	36%	17%	50%	47%	33%



4. Innovation- the lifeblood of the industry

• Innovation activity	• 1-5	• 6-10	• 11-24	• 25-49	• 50-99	• 100-249	• 250-499	• 500+
Product innovation (e.g. new products, concepts etc)	66%	63%	61%	65%	70%	76%	78%	100%
Packaging innovation (e.g. new ways of packaging/presenting products)	34%	44%	47%	45%	30%	81%	78%	90%
Process innovation (e.g. new ways of doing things better/more efficiently)	39%	44%	45%	50%	74%	71%	78%	100%
People innovation (new skills, knowledge etc.)	34%	37%	42%	35%	43%	76%	56%	100%
Other areas	3%	2%	8%				11%	
None of the above	20%	27%	11%	5%	17%	5%	11%	



Conclusions

- Opportunity
 - Despite issues raised regional businesses are successful
 - Opportunity to ensure greater focus on development of training and provision to support areas of competitive advantage including innovation
 - Deliver greater business success and greater GVA in the region
 - Strong provider network in the region
 - Make it more visible
 - Enhance the offer
 - Qualifications reform will meet the needs of industry better
 - NVQ's replaced with more flexible, fit for purpose qualifications designed by employers
 - Reduce the barriers to training
 - Improve affordability of training
 - Working smarter