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Training Needs Analysis Meat Sector

Analysis results of Ireland, Finland, Spain and Denmark

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Appendix: summary of analysis data

1. Executive summary

This report contains the results of the Irish, Spanish, Finnish and Danish questionnaires in the SLMSC project.

The majority of companies surveyed were established between 1976-2000. Most of the enterprises are owner managed and employ between 1 & 10 people. The companies are involved in different activities including primary production/farm shops, slaughtering and deboning of animals to the production of high value cuts/processed meat, sales of products which are to a large extent directed at customers and retail, as well as catering and whole sale sectors. However, there is a big variance from country to country, company to company in the activities of each company.

It is quite common for a majority of the companies to have links to other companies or organizations as part of product or business development.

In general, companies with highest number of employees invest more time and money in training. However, comments in the report show that many companies are aware of advantages of investment in training of staff even though they do not systematically train their staff.

Employees in Finland and Denmark tend to have a vocational educational back ground.

The subjects in demand for future training are primarily meat safety and hygiene, branding and marketing and meat quality. The preferred time for training varies depending on the country - the majority of companies in Ireland and Spain prefer evening time for training, while Denmark and Finland have the highest preference for training during work hours.

The cost of training is a high barrier for all countries, except Finland, who in general prioritize training very highly. Content is another high to very high barrier; time must not be wasted on training which is not mostly relevant. Most respondents want some certification/accreditation after completion of training programme.

56 % of the respondents are interested in participating in the pilot testing of the training programmes, which will be produced during the project.

2. Introduction

This report reflects the results of questionnaires distributed to SMEs in the meat sector in Ireland, Finland, Denmark and Spain as part of the Leonardo da Vinci Transfer of Innovation project “Strengthening Local Meat Supply Chain” (SLMSC).

The purpose of the analysis in W.P.2 is to gain reliable information about what training programmes are required by the SME target group in the project. This will serve as a platform for decision making on which materials to adapt in W.P. 3, the next phase in the project.

Some questionnaires have not been completed in full, and leave us with only limited answers. In other cases, some questions have been answered differently than was intended by the authors, and here some interpretation of the result has been done in order to get best possible input for the further work.

The detailed figures and results of questionnaires are attached in annex 1.

Additionally, another questionnaire has been distributed in the same four countries to organisations that are actively involved with the meat industry or governmental departments with responsibility for the sector, in order to get a good picture of the training support offered by public and/or private organizations.

3. Survey results for the meat industry (SME)

The questionnaire is divided into three main categories.

- General situation
- Current situation
- Training needs analysis

Results are presented by category below; however, the analysis results may be included randomly in the text below

3.1. General situation

The category “general situation” included the following questions:

- What is your role in the business?
- In what year was your business established?
- Please highlight which of the sectoral operations your business is involved in
- Which meat categories do you work with?
- How many people are currently employed in your business?
- Do you have a formal business plan for your business?
- Over the past years, please rate how your annual profitability has changed
- Do you expect the profitability to increase, decrease or stay unchanged in the coming 2 years?
- Do you have links with any other companies or organizations as part of your product or business development?

General characteristics

80% of the respondents to the questionnaires were owners of the company. In several cases the owners also had positions in the company as general manager, or held several other positions at the same time. This was typically for the smallest companies in the category of 1-5 or 6-10 employees, where companies with other categories of respondents (production manager/distribution manager) were larger companies.

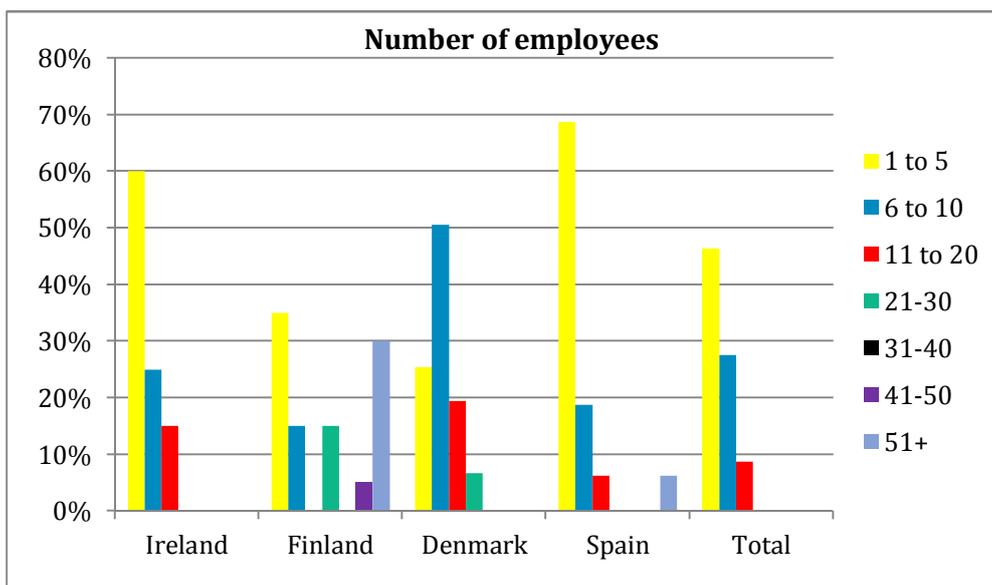
The majority of the companies were established during 1976-2000 (39 % of total). Irish companies represented especially the categories of companies dating from before 1950 (35 % of Irish companies

in the analysis) and only 15 % of the Irish companies were established since 2000. This is probably due to the tradition of family business spanning many generations, whereas in Finland (75 % of Finish companies in the analysis) and Denmark (90 % of Danish companies in the analysis) represented the majority of companies established during 1976 to 2005 (56 % of the total). Of Spanish companies 56 % were started between 1976 – 2000. Only 9 % of the total companies in the analysis were established since 2006.

In general we conclude, based on the figures that the majority of companies in the analysis are all well established businesses with many years’ experience in the market place.

In what year was your business established?	Ireland	Finland	Denmark	Spain	Total
<1900	15%	0%	7%	6%	7%
1900-1950	20%	0%	0%	0%	6%
1951-1975	30%	25%	0%	25%	21%
1976-2000	20%	40%	47%	56%	39%
2001-2005	5%	25%	33%	6%	17%
2006-present	10%	10%	13%	0%	8%
No answer	0%	0%	0%	6%	1%
total	100%	100%	100%	100%	100%

The majority of the companies are very small with 15 employees (47%). Ireland (60%) and Spain (69%) represent most of the companies identified in this category, followed by companies with 6-10 employees totalling (27%) of those surveyed. 50% of Danish companies are in this category. The total percentage of companies in the categories with 11-20 and 21 to 40 employees’ stands at 16%, while the category of company with 41 employees and 51 + is 11%. Finland has the biggest representation in these categories with 35% of businesses represented here.



Obviously, the respondents in the analysis face very different challenges, depending on their size when it comes to training opportunities and needs as well as having the resources and capacity for product and business development.

Links to other companies or organizations

It is important that companies have the opportunity to share knowledge and get inspiration for further product development in cooperation with linkages in the business chain. With regards to product or business development, the main links to other companies or organizations are to primary producers (44 %), suppliers (54 %) and customers (58 %). There are a smaller number of companies (27%) who look to their competitors for such development. However, there is a big variation between countries in these figures.

There are also linkages to sector/industry organizations whereas cooperation with consultancy organizations, universities, vocational educational and training institutions and research institutes and others varies non-existent (Ireland) to high degree of interaction, primarily in Finnish and Danish companies. However, it seems that there are many opportunities to cooperate with different partners, such as development associations, suppliers of goods, research doctorates through local projects etc.

Irish respondents often mention links to Board Bia, the Irish Food Board, (<http://www.bordbia.ie/Pages/Default.aspx>), and in Denmark to the Danish butcher organization DSL (<http://www.danskeslagtermestre.dk/>) which support the SMEs with various activities, business development, marketing support and training activities, and of which many of the SMEs are members.

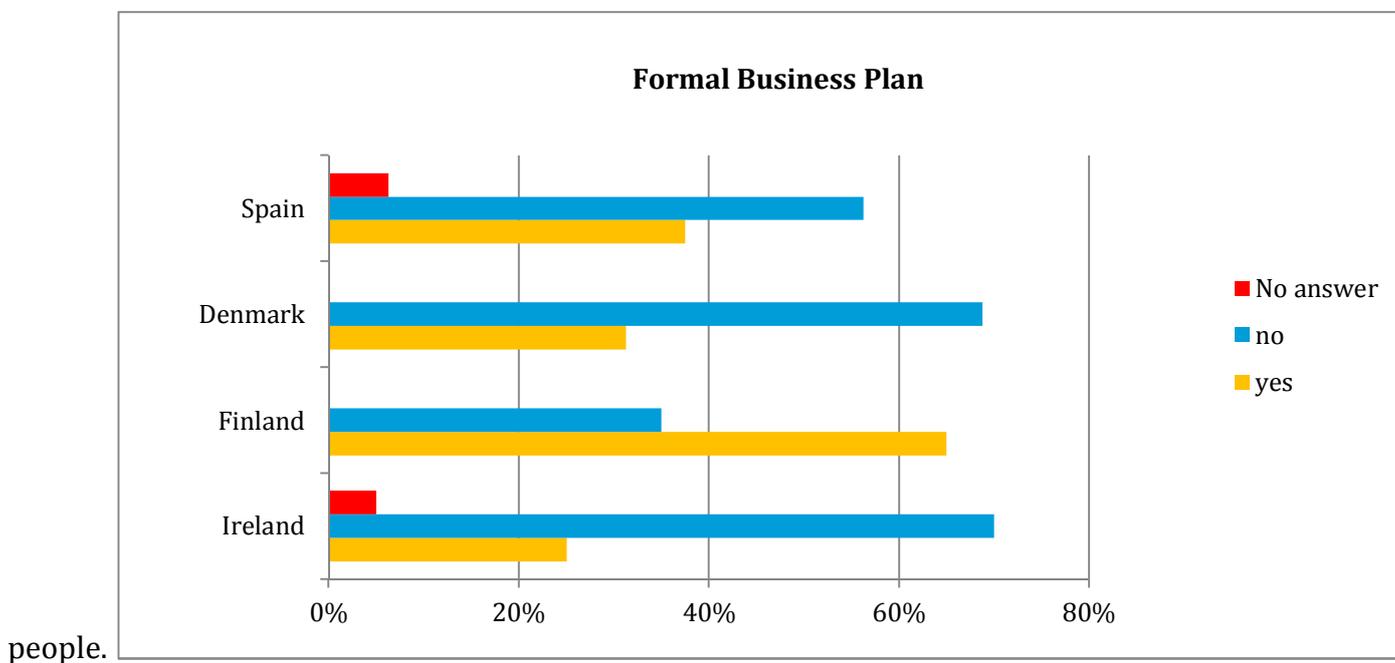
Vocational educational institutions are not ranked by the respondents in Ireland, whereas 15% in Finland, 13% in Spain and 44% in Denmark use this link. The reason may be that the educational systems differ from country to country, with differences in resources and right facilities that can be a platform for such cooperation. According to the analysis the VET-institutions provide apprentices/students to the industry to a larger extent in Finland and Denmark and this may be a reason for a closer cooperation in this context.

12% of the respondents surveyed stated that they do not have any link to any other companies or organizations. Ireland represents 25% of this cohort with responses from the other countries varying from 5-8%. A module on networking may be a useful learning resource for the Irish companies.

Business plan

A general trend regarding having a business plan is that the bigger the company, the more likely a formal business plan is in place. Out of the total, only 40% have a plan.

What comes first, the chicken or the egg? “How to develop a business plan” could be an obvious subject to target, maybe integrated into a training module for companies employing between 1-20



Involvement in sectoral operations

Regarding sectoral operations, in which the companies are involved, there is a large spread between the companies and between countries. This may be explained partly due to the variety of companies selected for interview by the partners in the project.

Irish companies are to a large extent involved in slaughtering of pigs, cattle and sheep/lamb and deboning and are at the same time involved in sales through many channels, including Retail. However, Irish businesses are less involved in the production of high value cuts and processed meat (5-10 %). A higher percentage of Finnish, Danish and Spanish companies are involved in producing high value cuts or processed meats (from 25 % up to 94 %), but less involved in slaughtering. In general, a high percentage of respondents are involved in the retail operations (69 %), whereas catering is rather low in comparison (23 %).

Please highlight which of the sectoral operations your business is involved in?					
	Ireland	Finland	Denmark	Spain	Total
Primary production and farm shop	25%	30%	13%	0%	18%
Slaughtering	85%	20%	44%	6%	41%
Deboning	45%	30%	81%	19%	44%
Catering	25%	5%	50%	13%	23%
Retail	75%	35%	81%	88%	69%
High value cuts	5%	25%	56%	0%	21%
Processed meat (sausage prod..)	10%	55%	94%	56%	52%
Other	20%	10%	25%	13%	17%
Whole sale	15%	0%	0%	6%	6%

Meat Categories

Regarding meat categories, 85 % of the companies work with pork, 89 % with beef, 87 % with sheep or lamb, 59 % with poultry and 27 % with game. Other species mentioned include horse meat, ostrich, goat and rabbit (20 % of companies). In Spain the percentage of companies using poultry was as high as 94 %, but at the same time the Spanish companies in the analysis are mostly involved in retail sales direct to public, with very few involved in slaughtering activities. Therefore they probably offer a broader assortment of meat categories, including poultry in their retail shops.

Sales channels

The sales of respondents are in general very retail oriented, with a spread within the countries from 50 -100 % .Second comes sales to whole sale and distributors which represents 39 % of respondents. Again the figures cover large local differences (please see below chart).

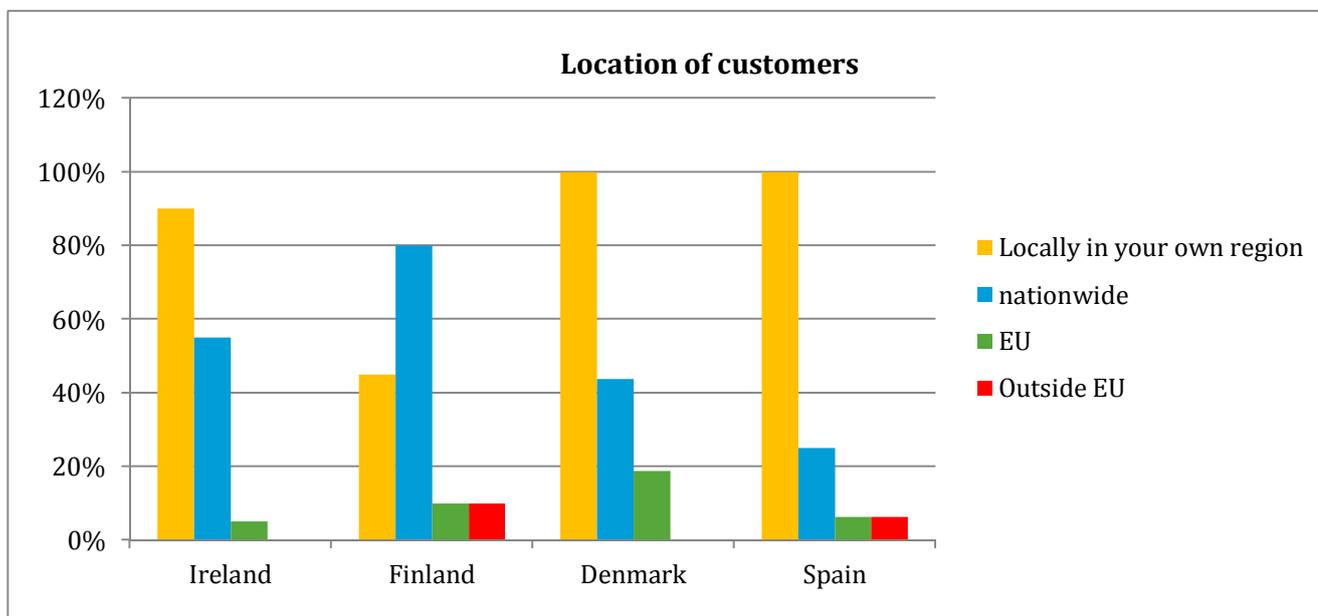
Who do you supply goods to?	Ireland	Finland	Denmark	Spain	Total
Direct to public	85%	50%	100%	88%	80%
Farm shops	5%	5%	44%	0%	13%
Wholesalers/distributors	25%	80%	31%	13%	39%
Local butcher shops	45%	5%	31%	13%	24%
Hospitality/catering establishments	45%	20%	6%	13%	23%
Public catering	20%	15%	6%	0%	11%
Multiples	0	10%	13%	0	6%

Farm shops are cited as an additional activity for several respondents engaged in business activity such as slaughtering, deboning and processing. This is a business avenue for diversification, and draws much attention in various national and international EU development projects at present, since it is looked upon as an opportunity for growth.

Very few of the respondents is involved in business activities with sales to multiples. Finland and Denmark represent the 6 % of total number of companies, who supply to multiples. The rather small size of the companies makes it difficult, if not impossible to offer security of supply in sufficient quantities at demanded low prices. Supplying multiples is therefore not attractive for the SMEs. This statement can be supported by the high percentage of sales into the local market instead of national sales.

The majority of sales into the local market, with sales activities nationwide varying from 55% of companies in Ireland, 80 % in Finland, 54 % in Denmark and 25 % in Spain. Companies exporting to other EU- countries amount to 10 % on average for all countries in the analysis.

An EU- regulation, which has recently come into force, is an additional demand and barrier to food companies, who distribute beyond 50 km from their production place. They are obliged to have wholesale authorization, which in case of many small companies is an extra hurdle and cost for expansion of business to areas with more consumers. This will limit the opportunity for some of the companies in our analysis to develop their market place nationally.



Profitability

39 % of the companies have experienced a decrease in the profit margins during the last two years, which most probably reflects the results of consumers' behaviour during the financial crisis in Europe. Ireland (40 %) and Spain (75 %) have experienced the largest declines in profitability. On average for all countries, 29 % of companies reported no change and 31 % have experienced an increase. 50% of Finnish companies have reported increases in profit and is well over the average figure.

A reason for decreasing profitability is as well an increase in price on livestock and raw material on beef and lamb, where in the same time the market has not allowed additional increase in sales prices.

The expectations for increased profitability during the coming 2 years are on average 50 %, with a spread from Spain as the lowest (25%) to Denmark (69 %). 29 % of respondents expect unchanged profitability and 20 % a decrease. There is apparently optimism among many companies that the market conditions will improve, in spite of the past two years financial difficulties in the EU-markets. Besides, there can be individual reasons for improvements such as investments and new activities.

Conclusions

In general the interviewed companies are well established with many years' experience in the business. However, they also have very diverse needs, due to variance in size and production.

The meat companies in general are quite good at having links with other companies or organizations, which can be helpful to them in their product development, but also that there is a small group, who could strengthen their links to a network starting from present level at 0 %, in order to strengthen their idea generation in a product and business development phase.

Only 40 % of the companies have a formal business plan, and this subject could be interesting to include in the project, since a business plan is important to fund the basis for further business development, which is part of the project idea.

The majority (80 %) of all respondents are involved in sales direct to public and this means there are probably some needs common to their businesses. The majority of sales of respondents take place to the local market.

In spite of decrease in profitability for many respondents there is an optimism that the situation will improve in the coming 2 years.

3.2. Current situation

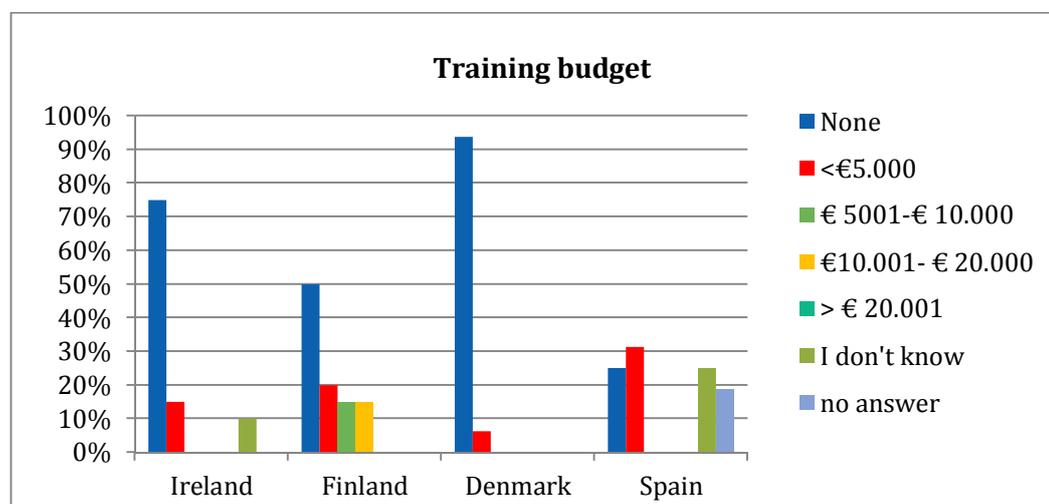
The category “current situation” included the following questions:

- Do you currently have a staff training program in place?
- Please state the annual training days typically completed for each of the following staff levels?
- What is the current level of educational qualification of your company’s employees?
- Please give an estimate of the current training budget within your company.
- Please complete the table below by ticking the cell relevant to training undertaken by the staff within your company over the last 2 years
- What are the main benefits you feel can be gained from providing staff training?

Current staff training programmes

Only 29 % of respondents have a staff training program in place. The response from respondents is, however, not complete, so unfortunately we are not able to see the full picture, but if we look at the available data, the companies give priority to training of the operative staff, second to management and third to supervisors. 51 % of the companies do not provide any training at all, even though it must be expected that compulsory training is provided, when it comes to food safety, animal welfare programs etc. Probably a lot of training here is done on the job, and may not be classed by owner /managers as “training” because it is built into daily routine

Budget for training is zero for 59 % of the respondents. 19 % have a budget of max. 5000 € per year. 13 % did not answer or don’t know. The remaining companies in the other categories are all Finnish and have training budgets ranging 5001- 10.000 € and 10.001 € - 20.000 €. These 7 companies in this category are large employers with 51+ employees.



To make a budget available for training is apparently not a general concern, even though when asked about benefits of staff training comments from respondents were as follows:

- Hygiene**
 - Up skilling, good for costumers, improved hygiene
 - It would be nice to stay up-to-date in the always changing regulations
 - Better hygienic level, better process management
 - Product safety, product quality, motivation
 - Increased awareness of hygiene, traceability, customer contact. If new lines are developed, it is a bonus
 - Product safety, cooperation with official government

- Quality and profitability**
 - Improve quality of services
 - Improvement of quality and profitability
 - More motivation of staff, more profit to be made on staff
 - Motivation, quality improvement, profitability in production

- Efficiency**
 - Staff works better, better understanding of job and process
 - Training helps worker get product through better and easier
 - Improves profitability and work safety. Effects also economics of the company when you start doing things in a more efficient way

- Innovation and business development**
 - To become better, sausage production
 - Innovation
 - Craftsmanship, inspiration –comparison of prices

- General comments**
 - Understanding of the direction of the company
 - More motivated staff, more personal competences, more quality
 - New inspiration
 - New competences
 - Trainee becomes more aware of importance of the job
 - Increases motivation and gives possibilities for networking. It also adds the credit for your own work and production
 - Benefits worker, company and costumers
 - Staff are the strength and (future?) of a small business company and

therefore it is worthwhile to invest in them. We can say we are in “handcraft” and employees are proud of their work. Without the good workers the company will fail, with good motivated workers it will bloom. We have also noticed it is good to give cases for employees to solve. Then they feel the solution comes from them and they are more committed.

- Other comments**
- No knowledge, don't know
 - Update of staff is a way to get rid of money..!
 - Good with training, if they learned something

We have included these comments in full to demonstrate that many companies are fully aware of benefits from training and what are the expected results from it. But why do they not invest more in training activities, then? It is a general issue that results of training are not measurable in the same way as investment in new equipment, so why spend money on it; however, only one respondent directly expressed the view that updating staff is a way to get rid of money..! but this is not a general argument.

One reason for not spending money could be explained by a high turnover of staff in many meat companies. The meat sectors are typically not considered as an attractive workplace, and why then invest in staff, which may not be in the company in a couple of months. However, it may be a vicious circle for some companies. Many meat companies are under financial pressure and do not allocate money for investment in training of their staff. However, again, what comes first, the chicken or the egg when it comes to improvement in profitability..?

The Finnish respondents are clearly the top scorers, when it comes to having a training budget. A reason for this relatively high budget for training of staff in Finland may be due to size of companies, who are included in the analysis in combination with a high degree of employment of a local work force, which is considered worthwhile to invest in. A reason for the relatively high training budget is that Finnish companies are obliged by Governmental regulations to offer training to their staffs.

The analysis results of the current level of education in the companies are very uncertain, again due to lack of completion of many the questionnaires. However, using the collected data as very rough indication, the most clear impression is given of Finnish companies, where the level of education is mainly divided among no formal education/secondary school and apprentices/vocational education

and training. Also Denmark has a quite high number of staff with vocational training. A quite common background for owner/management and staff in a small/medium sized Danish meat company is a vocational education (apprentice background).

Training programmes in the past 2 years

Again Finland dominates when it comes to staff training. All respondents from Finland have carried out training programs for their staff. Respondents with no training programs were Ireland 30 %, Denmark 38 % and Spain 19 %.

The 5 most frequent training courses taken were:

- | | |
|---------------------------------|------|
| ➤ Meat safety and hygiene | 61 % |
| ➤ Branding and marketing | 22 % |
| ➤ Meat quality | 22 % |
| ➤ Networking | 17 % |
| ➤ Sustainability/animal welfare | 16 % |

Next to Finland, Ireland was well represented in participation in above training programmes, which may be due to availability of training through the Meat Matters project, which covered branding and marketing/networking. In general companies outside the Meat Matters project are not in general as proactive, when it comes to offer training programmes to their staffs.

The Danish respondents scored low on all other subjects than meat safety and hygiene, again it is a compulsory program for the companies, and an obvious reason for a high score.

Conclusions

Only 29 % of the respondents have a training plan in place, of which the bigger companies are far the most active. 59 % of the respondents do not have a training budget. Again in this respect the bigger companies represent the majority according to the analysis. Comments from respondents to the question about the main benefits from staff training are very contradictory to the level of the training activity that the analysis shows, since the answers contain many positive opinions about the advantages of training.

Our conclusions regarding level of and lack of training budget are that among the respondents there is a big gap between the allocated budgets for training in the companies and the generally high expectations of the results from training of staff. So basically the incentive for staff training seems to be present. Other obstacles must be overcome to improve the training activities in the companies.

3.3. Training needs analysis

The category “needs analysis” contains questions about the barriers that may prevent the companies to take a course:

- How would you rate the following barriers that may prevent the provision of necessary or relevant training within your business? (Costs, location, time, content, unawareness)
- Please complete the table below by ticking the cell relevant to training needed or desirable within your company in the next 2 years
- Please identify from the list the three most important characteristics of a training program.
- What time would be most convenient for specialist training?
- Which way would you prefer to achieve training of yourself or other staff in your company?
- Do you feel that a training certificate/accreditation of the training programme is of added value when completed the training course?
- Any other comments or observations?
- Are you interested in participating in a focus group interview during spring 2012?
- Are you interested in participating yourself or with staff in a pilot testing of E-learning training materials in this project, estimated spring 2013?

Again the validity of the answers given is influenced by many randomly given answers. Some have not paid attention to the systematic approach and have left out answers on some of the subjects. However, an indication, based on the figures available, is as follows:

The **cost** of training is a high barrier for all countries, (results from many Spanish respondent were lacking, and has been marked as neutral in the analysis.)

The **time** is a high to very high barrier for all countries except Finland, who represented the only respondents with low /very low barrier (15 % of Finnish answers)

The **content** was a high/very high barrier for the majority, which goes hand in hand with above – when the companies invest money and time in training the training programmes must be “spot on”, otherwise it is waste of time and money, and it may be even more difficult to attract the companies for other training programmes in the future. Again in this matter Finnish respondents gave more varied answers with 45 % neutral to very low.

The **unawareness** was mainly very low to neutral for the Finnish companies (60 %), but high to very high for the other countries. Again, lack of many figures for Spain is making the conclusions imprecise;

however, there may be good reasons to improve awareness among the companies of available training programmes targeted to the industry.

Requested training programmes

The subjects for courses needed or requested are listed below according to the score at answers from respondents:

➤ Meat safety and hygiene	35
➤ New product development	31
➤ Branding and marketing	26
➤ Meat quality	26
➤ Sustainability/ethics and animal welfare	25
➤ Development of new business channels	24
➤ Innovation	22
➤ New technologies	21
➤ Networking	17

Of other subjects of interest are mentioned in the comments:

- Work safety
- To increase knowledge of what you can make from different parts of the carcass

Meat safety and hygiene courses have again first priority probably due to the fact that companies are forced to prioritize this subject. All new staff must undergo this training; therefore it is always on the agenda for companies. It is at the same time a subject, which is under constant change and tightening of rules and regulations from authorities and in many cases also from customers.

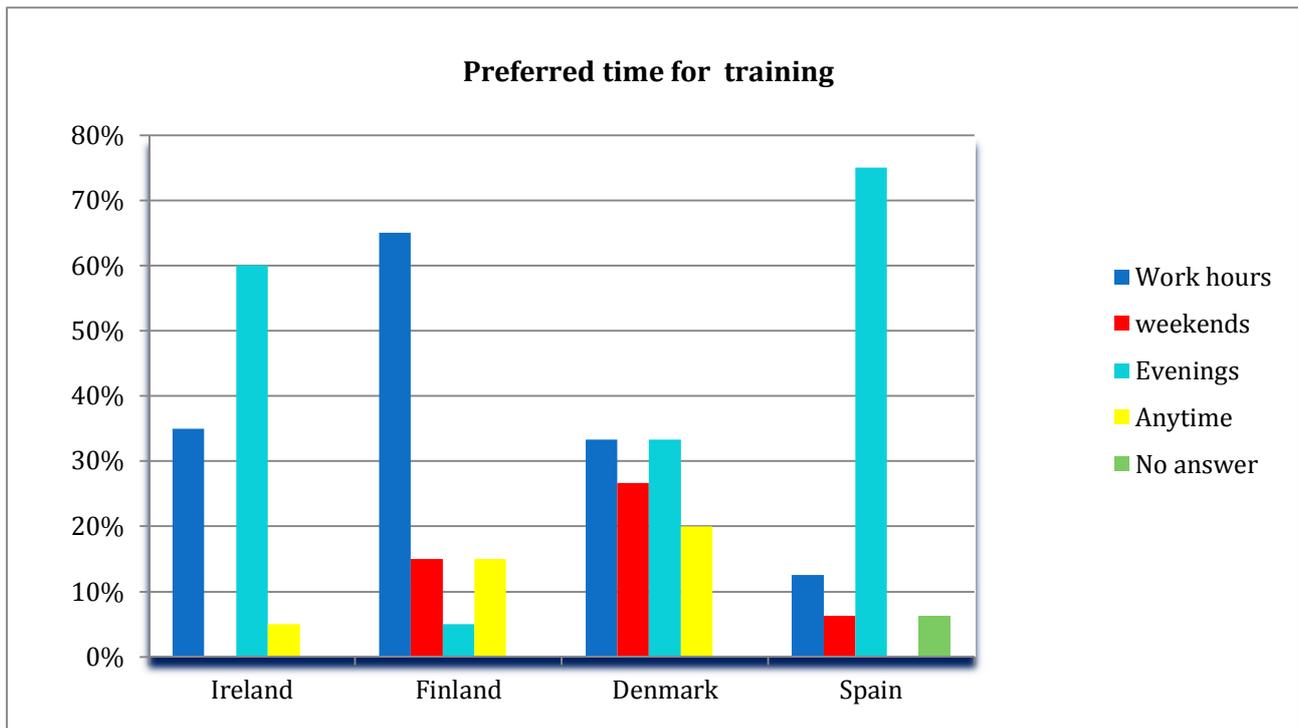
New product development ranks second with branding and marketing and meat quality on a shared third place. This is a very important knowledge for the further work in the W.P. 3 in the SLMSC-project.

The preferred time for participation in a course is different from country to country.

Ireland (60%), Spain (75%) and to a certain extent Denmark (38%) prefer evenings, whereas Finland prefers to conduct training during work hours (65%). 31% of Danish, 15% of Finnish and 1% of Spanish companies prefer weekends.

We postulate that the size of companies has an influence on this fact, since more small companies in general prefer evening or weekend training opportunities, probably since they have most difficulty to set aside time during work hours, since few employees gives little flexibility. However, some respondents have commented that they are tired after a long work day, and do not see themselves in a situation where they can find the motivation and energy to study during evenings.

Often it is employees (or owners), who are used to being physically active during the day, and to sit down for more than a couple of hours to study is a very hard thing to do and demands a lot from the training programme and its ability to engage the participants!



Ways of training

Regarding ways of training the results of analysis show the following picture:

Which way would you prefer to achieve training of yourself or other staff in your company?	Ireland	Finland	Denmark	Spain	Total
E-learning	0%	18%	31%	13%	15%
At an educational institution with traditional teaching	10%	10%	56%	31%	25%
Consultant	75%	45%	25%	13%	42%
Combination	15%	35%	38%	19%	27%
No answer	0%	0%	0%	25%	6%
Total	100%	110%	150%	100%	115%

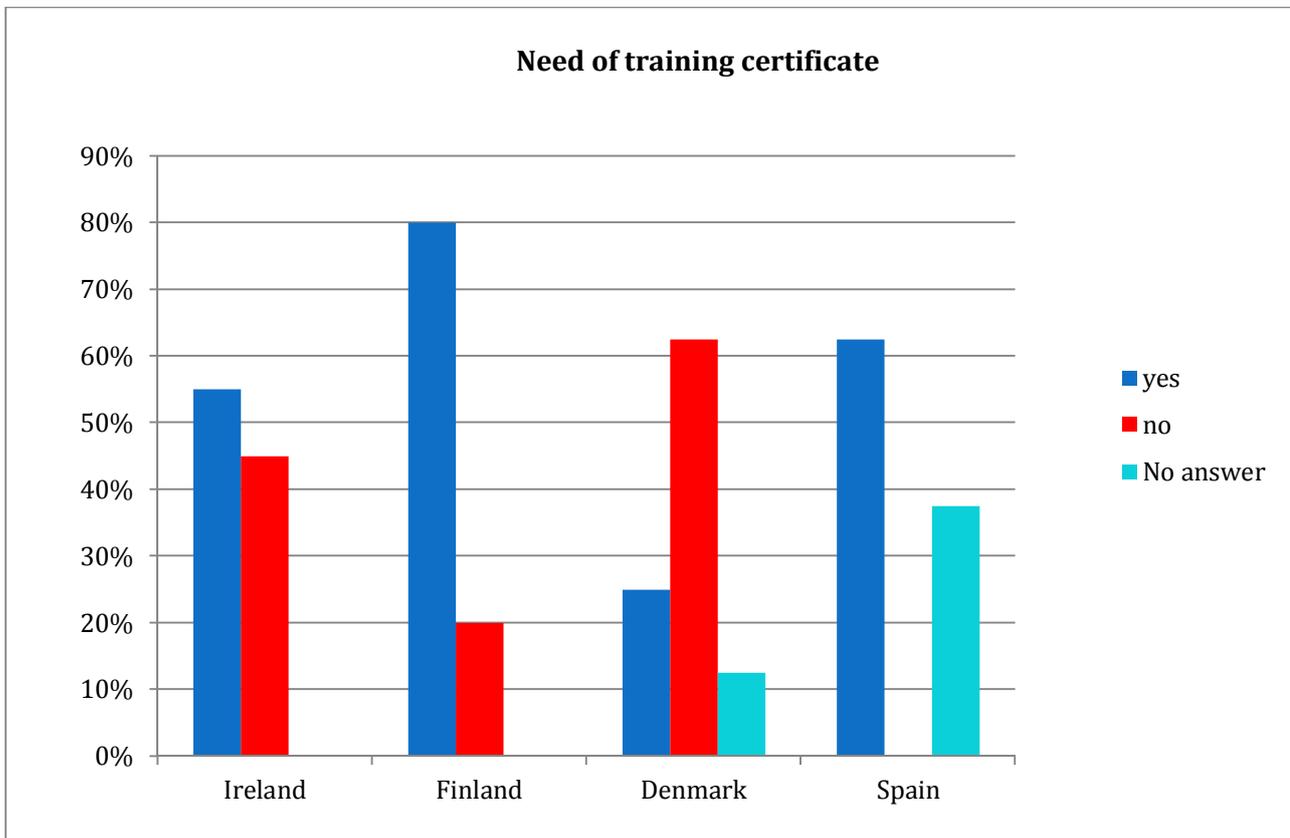
As the figure show, E-learning has a very low score in all countries. For example, no Irish companies have shown an interest in it, which may relate to the fact mentioned in an interview in this project with the Craft Butchers Association of Ireland, who informed that only 200 out of the 450 members have an e-mail, and some may not have a computer or broadband connection available at work. However, it seems that the trend is towards the increasing use of computers.

There is no past experience in using E-learning for the target group in Ireland and limited knowledge and use of e-learning in the other partner countries. This project will be an excellent test of informing about and testing this way of training among people working in the meat sector and could go in some way towards addressing barriers to training such as cost, location and time. In case it proves to be a success, this could be an efficient way of strengthening training of small companies at low cost and at flexible time schedule according to their demands. Furthermore, the project will produce a series of blended learning formats so that the modules can be adapted for classroom based scenarios should this become a preferred option.

Assistance by consultants are the preferred way for Irish (75 %) and Finnish(45 %) companies, whereas Danish (54 %) and Spanish (31 %) companies have a preference for educational institutions with traditional teaching. The high percentage for Denmark may be due to a well-financed educational system with many possibilities for taking a big variety of courses at very reasonable costs, even with public financial support to cover partly the wages to staff on skilled/unskilled level, during absence in connection with training (called AMU-programmes).

Most probably the high percentage of use of consultants by small companies in Ireland reflects the information/instruction given by local food-inspectors on location and is considered as training in the analysis context.

A majority of respondents (57 %) feel that a certificate/accreditation of the training is adding value to a completed training course. 32 % of respondents did not think of it as added value, 11 % did not answer the question. Our conclusion in this regard is that at an official training programme certification is required. The pilot programme in the project will not provide facilities for execution of examination; however, it will be investigated, if a document could be printed out by end of the programme as proof of participation.



Other comments from respondents were:

- Certification is only of use if it is of a high technical level. Also mentor style follow-up/checks ups are by far the best way to make sure training participants actually do what they should do.
- A test after the training would be nice. Then you can see if you have learned anything
- Continuity of the training, maybe two-phased training, exercise practice in between them.
- Relates closely to business making and is continuous part of the business
- Training from the company's own offsets and right standard for the company
- Best time for training are October-November and January-February
- Do not give a damn for compulsory training programmes!

Asked if the respondents would like to participate in a focus group interview about training needs, from the total 48 % answered yes, of which Ireland 70%, Finland 55% , Denmark 38% and Spain 19%.

Regarding participation in a pilot test of E-learning 54 % said yes, of which Ireland 70%, Finland 60%, Denmark 46% and Spain 31 %. 9 % of the total respondents did not answer the question.

Important characteristics of training programmes

Regarding the most important characteristics of training programmes, the data are not complete. Several respondents have filled out all alternatives instead of just the three they were asked to prioritize.

However, we shall make some very general conclusions based on the answers given:

Most important

Most respondents found an easy access to training material most important.

Second most important and third most important characteristics were evenly spread over the other alternatives so we find it not possible to draw any conclusions regarding what to prioritize.

However, easy access to training materials supports the E-learning model, under the prerequisite that the companies find it easy to get access to such learning resource. This means that they must have internet access and experience in using a computer. One important question that we have missed out in the questionnaire is about such possibility for connecting to the internet.

Conclusions

Next to meat safety and hygiene, new product development, branding and marketing and meat quality have highest preference among the majority of respondents.

The content of training programmes must be “spot on” with learning that is targeted exactly to the target group in order to be successful.

Training must (also) be available in the evenings or weekends to attract a larger group of companies.

There is a risk that E-learning programmes will not be a realistic option for a number of companies and other solutions that make the learning possible for these companies must be found.

Certification of the learning is important in order to make the programmes attractive for the companies and their staff.

With low cost, flexible time for training and up-to-date training material of a high technical level we should be able to reach a broad target group for our training programmes.

4. General characteristics of the meat business

Finland:

All together there are about 300 companies in the Finnish meat industry.

10 biggest takes care of the 70 % per cent of the turnover in the industry and 20 biggest 90 % of the turnover. 65 % per cent of the companies employ less than 10 persons.

Biggest 4 companies are HK Scan Oyj turnover 2 114 million EURO, Atria Oyj turnover 1 300 million EURO, Saarioinen Oy turnover 327 million EURO and Oy Snellman Ab turnover 191 million EURO. HK Scan and Atria are quoted in the stock exchange; others are private family owned companies.

Mid-size companies are like Tapola Oy, Lihajaloste-Korpela Oy, Huhtahyvät Oy, Wursti Oy, Lapin Liha Oy etc., which have a turnover between 10-30 million EUROS. Meat production in Finland is about 400 million kilos, and consumption 382 million kilos.

Finnish owned companies operate also in Sweden, Denmark, Estonia, Russia, Poland and other Baltic countries.

Ireland:

There are currently 219 registered abattoirs / slaughterhouses with the local authorities here in Ireland. To be registered with the local authority, the slaughterhouse must not kill any more than 100 livestock units (LSU) per week (1 LSU = bovine aged >24 months) or a maximum of 5000 LSU in a calendar year. With regards to poultry, no more than 3000 birds in any one week or 150,000 birds max per year.

The local authority is an arm of local government (usually broken up along county lines). The local authority veterinary officer is the enforcing officer and monitors these slaughterhouses.

However, about 65% of these slaughterhouses would kill fewer than 10 cattle per week, the remaining 35% kill in excess of that. (Source: Meat Matter project Evaluations SW region)

46% of abattoirs would kill fewer than 20 sheep per week (1 sheep = 0.15LSU) and 64% kill more than that. (Source: Meat Matter project Evaluations SW region)

Of the abattoirs that kill pigs, practically all kill fewer than 10 pigs per week (1 pig = 0.2 LSU)

The larger slaughterhouses that kill in excess of 100 LSU per week have to be registered directly with the Department of Agriculture. There are 30 of these registered killing bovine, 13 killing ovine or sheep and 9 killing pigs. With regards to those killing poultry there are also 9 registered.

Some of these larger plants may kill both cattle and sheep and some would be big industry players with 5 or 6 different plants such as AIBP or Kepak.

Kepak for example has 6 factories in Ireland with more in the UK. In Ireland, Kepak processes in excess of 190,000 carcass beef animals and over 600,000 carcass lamb per annum. They also process primal beef and lamb.

The value of beef exports in 2010 was €1.510m; pig meat was €317m and sheep meat €170m.

Spain:

Meat industry is the 4th industrial sector in Spain (before car industry, oil and electricity). Moreover, within food and beverages industry (F&B), meat is the first subsector.

There are more than 3.000 SME in the country including slaughterhouses, quarter and processing firms. The annual turnover is around 19.000 M €, which represents 20% of F&B.

Employment is around 87.000 people (23% of F&B employment). More than 75% of firms have less than 20 employees. Exports reach the value of 2.500 million €.

The main meat production in Spain is pig (around 3.5 million tonnes, which is 61% of total meat production), second is poultry and third bovine. Sheep production has been decreasing during last years.

Data for 2009. (Source: ANICE-Spanish Association of Meat Industry)

Denmark:

Denmark is to a large extent a pig producing country with a production of approx. 28, 6 mill. pigs yearly of which approx. 20 mill are slaughtered in Denmark. Export is 2 mio. Tons at approx. value 28 bill. DKK

Number of larger pig slaughter companies are 10 of which one (Danish Crown) slaughters approx. 16.5 mio. per year. 90 % of production is exported worldwide to approx. 100 countries.

Slaughtering of cattle is approx. 500.000 heads per year, divided on 8 companies with 10 abattoirs of which Danish Crown kills approx. 300.000 heads per year.

Lamb/sheep meat production is on a very low level, and consumption is mainly based on imported meat apart for a small quantity, base done on a more “hobby” oriented production.

Besides the big companies there are approx. 400 butcher shops and smaller producers and slaughterhouses.

5. Interviews national representative bodies

Each partner carried out an interview with a representative body in each their respective countries. It was in general not an easy task to get the interviews completed and not all representative bodies were so talkative; however below please find a summary of the comments given during these interviews.

Finland

Name of representative organisation interviewed in Finland was The Finnish Food and Drink Industries' Federation, ETL, represented by field manager (EU-agricultural policy) Marika Säynevirta. It has approximately 300 member companies and two member associations that represents 90 % of all food and drinks production in Finland. ETL also has more than 20 branch associations that represent the interests of different food and drinks industry sectors.

They work with organisations in different areas of society. Their goal is to build a competitive operating environment for food and drinks industry businesses in Finland. The organisation is not specialised in knowledge and learning issues, but discusses the topics in general.

ETL is founded on the principle of member satisfaction. The Finnish Food and Drink Industries' Federation works in close cooperation with its members' representatives through the federation's Board of Directors, executive committee, electoral committee, and various other committees and working groups.

ETL promotes knowledge generation and learning amongst meat sector businesses through the Finnish meat industry organisations

In the opinion of ETL, there is not sufficient formal training programmes in place for the meat sector businesses, there is room for improvement. Meat companies are members of the Finnish Meat Board. Educational issues are discussed at the committee on development and labour committee of Food and Drink Industries' Federation

Regarding further needs the Finnish meat industry organisation has stated in generally that vocational high school education is too general and there are too few applicants. They should get technical education (one level below engineer education) back. Companies have complained that the sector nowadays lacks persons with practical management knowledge and knowhow. The education offered today is too general especially at universities of applied science, not specializing enough in meat sector and meat production issues. Previously the so called meat technician/engineer education produced motivated personnel with practical knowledge.

Also here has been a concern about the future of continuation of the universities meat technology education.

Ireland

As representative organization from Ireland Dave Lang, Project Development Manager from Associated Craft Butchers of Ireland (in the following called ACBI) was interviewed about his view on training and training opportunities of Irish meat sector.

The national representative organisation for butchers, abattoir owners and small meat processors. Membership currently stands at 450. Services provided include: Training, HR advice, one to one mentoring, publicity & PR for the sector. The ACBI produces a quarterly magazine for members, posters and displays for butcher shops, and hold annual competitions for categories such as best sausage, best pudding, best retail shop, best spiced beef, best BBQ product, speciality foods etc. ACBI website: www.craftbutchers.ie.

The organisation promotes knowledge generation and learning amongst meat sector businesses, being a FETAC accredited training centre. It has 2 accredited trainers on staff. It provides a FETAC Level 5 National Certificate in Butchery Skills and a range of other non-accredited training provided on an ad-hoc individual basis to members.

ACBI undertakes a series of annual road shows to its members providing updates and refresher training on different aspects of the trade. For example, the next road show will feature pork – ACBI will demonstrate different cuts, how to prepare them and a chef will also cook different cuts so that butchers can provide recipes for customers in their shops.

(*FETAC is the statutory awarding body for all further education and training in Ireland)

There is no specific state training support available in Ireland. ACBI did have a Skillnets programme up until 2011. Skillnets is an enterprise led learning network part funded by the Department of

Enterprise targeted at private enterprise. Also privately run is the national Butchery Academy in Co Galway – which trains butchers for industry and factories. The academy is part funded by some of the larger meat factories in Ireland .

The level of knowledge about training opportunities amongst meat sector businesses is according to Dave Lang quite good. Since there is very little training to avail of, most are aware of what is out there, he comments.

In his opinion the meat sector makes use of the training opportunities which are offered to a good extent.

It is however Dave Lang's opinion that meat sector businesses have insufficient formal training programmes in place.

When asked which further needs he sees, he comments that ACBI is looking at providing training at different levels – 1st level would be a butcher technician, level 2 would be a craft butcher (level most operate at now – FETAC Level 5) and the 3rd level is the Master Butcher which would have added training in terms of management techniques etc.

Regarding room for improvement in formal training programmes for SME in the meat sector at management / supervisory / operatives level there is a definite need for marketing, computer skills and financial training. Of the 450 members of the Craft Butchers Association, just 200 have e-mail. Further, customer care is also required as well a profit maintenance – how to run a leaner operation to maximize profit. Most of these would be targeted at management & supervisory with customer care being undertaken by all categories.

ACBI has links to the SMEs in the meat sector via membership of the association as well as visits by Association to members, phone, email contact meetings and seminars coordinated by ACBI.

ACBI is finalising a Certified Craft Butcher programme to be launched in April / May 2012 – a programme which will provide butchers who pass an audit test with certification as a craft butcher operating to a standard that sets them apart from the supermarkets.

Spain

An interview was carried out with a representative from Directorate General for Food Security, Planning and Management of Official Controls of food enterprises other than those of primary production.

The function of the governmental body is to guarantee consumers safety and health through activities along the food chain aimed to eliminate or minimize health risks. For more detailed information:

<http://www.sp.san.gva.es/sscc/servEntrada.jsp?CodSer=S002&Nivel=2&Opcion=SANMS3&MenuSup=SANMS>

The department does not promote knowledge generation and learning for the Spanish meat sector.

The training that affects businesses is conducted indirectly through business organizations and other stakeholders.

It is the opinion of the interviewed representative that the level of knowledge about training opportunities in the meat sector is high and that the meat sector is good at making use of the existing training opportunities.

However, there is a need of more formal training programmes for the meat industry and that managers of companies should realize that training is important both for food security and for competitiveness.

The government department has links with SME through their business associations. It is an institutional collaboration developed through the “Food Safety Plan of the Autonomous Community of Valencia”

Denmark

The interviewed national representative body in Denmark, John Nielsen is executive secretary in “Slagterfagets Fællesudvalg”, unfortunately without an official English name, best translated to “The Butcher’s skills joint committee”. (<http://v2.slagterfaget.dk/>)

The committee is the extended arm of the Ministry of Children and Education, (<http://eng.uvm.dk/>) representing both employer and employee organizations and the function is to currently secure that the educations for the sector is up-to-date. Both SMEs and the big companies are represented, the slaughter house industry as well as the retail business. The vocational educations for the meat industry are separated in three individual educations: 1. Industrial butcher, 2. shop butcher and 2. casing cleaner

The committee is responsible for organizing the final examination with external censors and issues the journey man certificates. They are not involved in promoting of knowledge generation and learning amongst meat sector directly; this job belongs to the vocational schools. However, they are

involved in various promotion activities like DM I Skills, a yearly competition for the vocational schools, where the meat education (shop butcher) is represented and marketed towards primarily pupils from the secondary school.

Besides vocational training for apprentices, there is a well-developed further training system, AMU, which is provided primarily by the vocational schools to the work places. Development of the programmes are decided by the committee and typically developed in cooperation with the training providers = the vocational schools. The cost for participation is very modest and additionally, the companies have access to partly compensation for salary, when sending unskilled/skilled workers for up skilling.

Additionally, another association - the Association of Danish butchers – offers consultancy and various courses to its 400 members as well as a marketing concept for the private butcher shops during the brand name “Mad med mere” (directly translated “Food and so on”)

In John Nielsen’s opinion the SMEs in the meat sector do not make sufficient use of the training opportunities that are offered, even though there are a broad variety of formal training programmes available. Knowledge generation of the opportunities could be relevant; however, this is a job for the training providers. Time is an important factor for the SMEs, who in many cases can hardly bear to send as much as one employee away for training. This is another issue that keeps the training activists at a low level.

“Slagterfagets Fællesudvalg” approves all the meat companies, who want to employ an apprentice, and has due to this a steady link to the SMEs. However, the educational system also causes quite a lot of bureaucracy, which makes it complicated for the meat businesses.

6. General Conclusions and recommendations

The majority of companies surveyed were established between 1976-2000. Most of the enterprises are owner managed and employ between 1 & 10 people. The companies are involved in different activities including primary production/farm shops, slaughtering and deboning of animals to the production of high value cuts/processed meat, sales of products which are to a large extent directed at customers and retail, as well as catering and whole sale sectors. However, there is a big variance from country to country, company to company in the activities of each company. This is an additional challenge for the project to find common targets when developing training materials

It is quite common for a majority of the companies to have links to other companies or organizations as part of product or business development and training and other support from various associations is quite common in the partner countries.

In general, companies with highest number of employees invest more time and money in training. However, comments in the report show that many companies are aware of advantages of investment in training of staff even though they do not systematically train their staff. Also there may take training place in the companies, which is not considered as training, but as part of daily activities; the high score when it comes to obligatory subject of meat safety and hygiene support this statement.

Employees in Finland and Denmark tend to have a vocational educational background to a higher degree than Ireland and Spain.

The subjects in demand for future training are primarily meat safety and hygiene, branding and marketing and meat quality.

The preferred time for training varies, depending on the country - the majority of companies in Ireland and Spain prefer evening time for training, while Denmark and Finland have the highest preference for training during work hours.

The cost of training is a high barrier for all countries, except Finland, who in general prioritize training very highly. Content is another high to very high barrier; time must not be wasted on training which is not mostly relevant.

Most respondents want some certification/accreditation after completion of training programme.

56 % of the respondents are interested in participating in the pilot testing of the training programmes, which will be produced during the project.