



Industry Skills Report

Agri-Food Industry Skills Council

June 2005

Executive Summary

This report *outlines the findings* of a high level review of the *skills and workforce* issues facing the agrifood industry and the five industry sectors which make up the Agri-Food Industry Skills Council. While the specific requirements of the five industry sectors are noted in the industry profiles contained in the report, the overall findings of the report focus on the common priority skills issues impacting across the agrifood industry.

Broad consultation with industry and enterprises in all states and territories has enabled the Council to identify key skills and workforce concerns, and to develop robust strategies to assist in addressing major people and skills shortages. Long term solutions will require a national and integrated approach by governments and industry to ensure effective change in the attraction and retention of a skilled workforce to meet the business demands of the agrifood industry. The solution to the skills and people shortages across agrifood industries requires an inter-connected strategy which considers and addresses the following:

- Skills and workforce development
- Development of Regions
- Business compliance
- Industry image and working conditions
- Business management

AFISC strategies to attract and retain people, will include, but are not limited to:

- Streamline training packages to facilitate portability *and quality* of skills across, and outside, agrifood to increase value to both participant and (potential) employers
- In partnership with industry, direct development and implementation of training and assessment support materials to ensure training providers meet industry business needs
- Partnerships with government agencies to concentrate on and facilitate regional development and services issues
- Through an industry reference network, facilitate the development and accreditation of skill sets - within existing training packages - to meet specific industry job requirements
- With the guidance of a training provider reference network, formulate and disseminate best practice models for the delivery of training packages
- Address industry image and promote the opportunities and careers available in the agrifood industry and enterprises

The report also highlights the overall importance of the agrifood industry to Australia's export potential, regional development and economic growth. It is clear

that, with leadership in addressing the issues identified in this report, the enormous growth potential of the agrifood industry can be realised.

We recognise that skills and workforce development represent only one element of a total solution. In recognition of this, the Agri-Food Industry Skills Council will demonstrate leadership to drive and effect real and sustainable change for the agrifood industry.

This report reflects the input and feedback from industry and other by stakeholders across Australia. The Agri-Food Industry Skills Council acknowledges these contributions which have been invaluable in identifying and developing strategies to address future national skills and workforce needs for the agrifood industry. We also acknowledge the assistance of the Australian National Training Authority and its staff in the preparation of this report.

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Forward

The Agri-Food Industry Skills Council (AFISC) represents the five sectors (meat, seafood, rural and related, food processing and racing) of the agrifood industry, and plays a key role in the development of solutions to the skill and workforce shortages that are facing the industry.

The industries represented by the Agri-Food Industry Skills Council are the major employers in regional Australia, and form the backbone of many communities throughout the country. Moreover, the agrifood industry accounts for almost a fifth of Australia's exports.

The agrifood industry nationwide is currently facing a major workforce and skills shortage, driven by a number of complex and inter-related issues. We are working to develop solutions that address people and skills shortages.

The initiatives we are driving in these areas are a mix of short and long-term actions. We will work in partnership with all stakeholders to drive long-term, sustainable outcomes that underpin economic growth and community wellbeing.

Our aim is to promote the development of an internationally competitive agrifood industry through industry-led workforce and skills development, working to access opportunities and remove the impediments that currently impede long term success. Our success will be measured in five key areas:

- Industry consultation
- Advocacy and advice
- Training products
- Implementation support
- Business management

The urgent task of the Agri-Food Industry Skills Council is to develop strategies and solutions to address the major skills challenges confronting the agrifood industry. This needs to be done in consultation and partnership with industry and governments, and will need to involve an integrated and systematic approach to addressing the range of issues impacting on skills and workforce issues.

The findings of this skills report will be a key driver of the Council's priorities and actions. Our Strategic Plan sets out the goals, strategies and targeted outcomes to guide the work program of the Council. With the 'skills shortages' debate, now occurring at the highest levels, our task could not be clearer. We are determined to achieve results – working with industry today to build the workforce of tomorrow.

John Baker
Chair
Agri-Food Industry Skills Council Ltd

Background to the Report

The Industry Skills Report is the product of consultations between the Agri-Food Industry Skills Council (AFISC), the Australian National Training Authority (ANTA) and a diverse group of stakeholders within the agrifood industry in all states and territories.

The purpose of the report is to assist the industry, government policy-makers and training providers to understand and address the issues and challenges affecting the agrifood industry's skill base. It is intended the report be revised each year to reflect contemporary developments and trends, and to document progress against the Council's priorities and actions.

The report provides an overview of the agrifood industry; an analysis of issues which impact upon the demand and supply of skills within the industry; and a picture of participation, attainment and expenditure trends in vocational education and training.

The key findings of this report were derived from industry skills workshops and broad consultations with industry, enterprise and government representatives across Australia. These discussions provided a wealth of information about current and emerging skills and workforce characteristics and trends across micro, small to medium and large enterprises. There was broad commonality of the identified issues impacting on workforce availability, skills and capability. Importantly these consultations and accompanying data analysis highlight the complexity of dealing with current and future people and skills shortages, and the need to adopt a strategic and integrated approach to addressing these shortcomings.

Against this background, this report recommends strategies to address a broad range of issues driving current and future skills and workforce needs, with a focus on the role of training.

It is intended that the Agrifood Industry Skills Report, be presented to Australian Government and State and Territory ministers responsible for training. It will also be disseminated widely to the agrifood industry, communities and training organisations.

A note on statistics

Data presented in this report derive from sources including:

- Australian Bureau of Statistics (ABS)
- Monash Centre of Policy Studies
- National Centre for Vocational Education and Research (NCVER)
- Industry association and organisation reports

Statistical sources may vary in their approach to the collection of data and definitions used for the agrifood industry. It is therefore important to note the source of each table, chart and graph used in the report.

Industry profile

The Agri-Food Industry Skills Council is one of ten newly created Skills Councils and represents the amalgamation of five former Industry Training Advisory Boards (ITABs) and/or Recognised bodies. The Council brings together key industry sectors located in regional and urban Australia, and are broadly grouped as follows:

- Food processing
 - Beverages including wine
 - Pharmaceutical
- Rural and related industries
 - Rural production (Agriculture)
 - Amenity Horticulture
 - Conservation and Land Management
 - Animal Care and Management
- Meat
 - Abattoirs
 - Smallgoods
 - Meat processing
 - Meat retailing
- Seafood
 - Aquaculture
 - Fishing operations
 - Seafood processing
 - Fishing compliance
 - Fishing charter operations
- Racing
 - Thoroughbred
 - Harness
 - Greyhound

Appendix A details agrifood industry classifications and training packages.

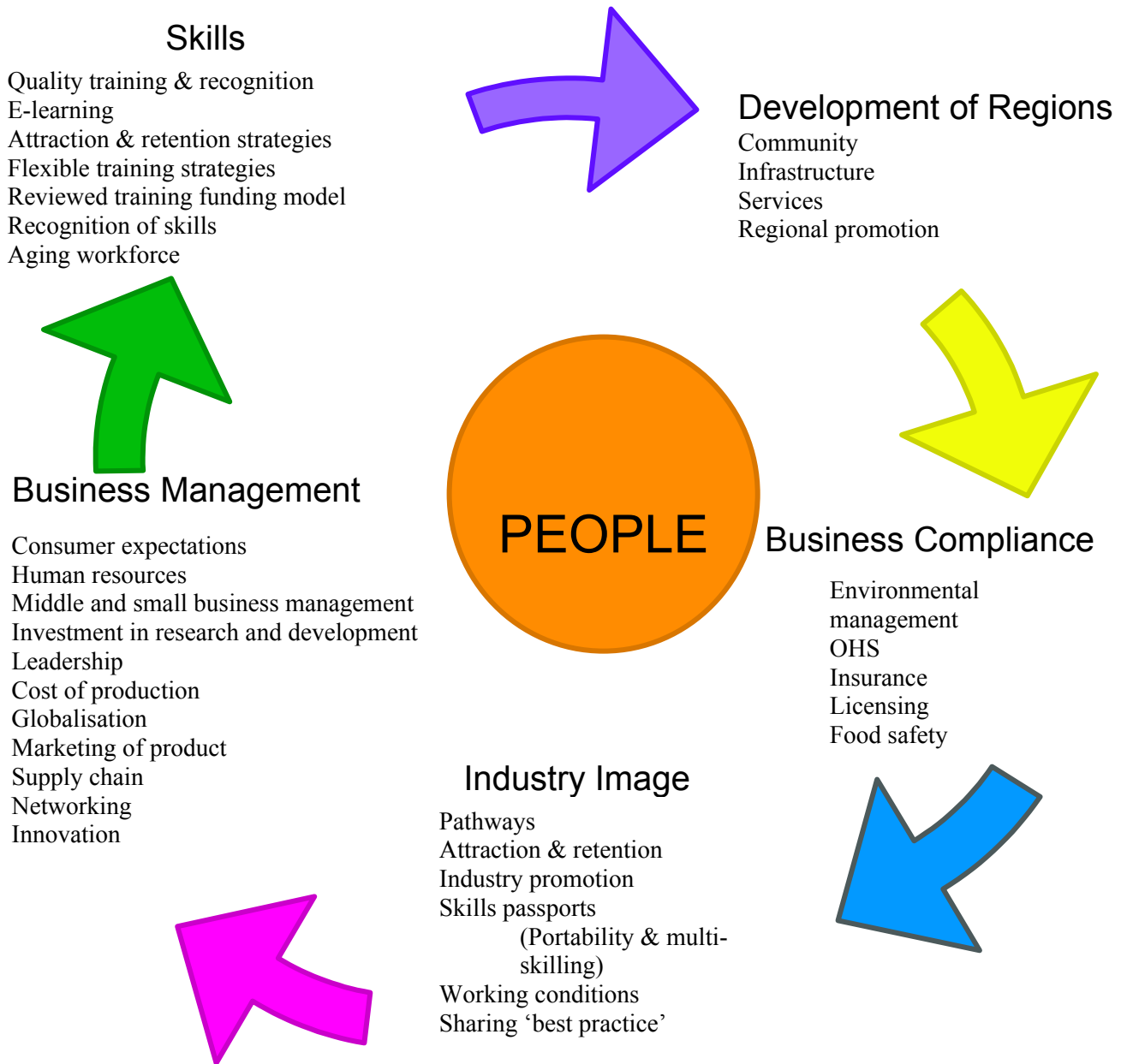
Although these industries are facing both unique and significant development and growth issues, nationally and at the state level, this report focuses on the many common characteristics and concerns for the agrifood industry as a whole.

It is agreed that development of the agrifood industry's skills and workforce will involve systemic change, requiring coordinated efforts by industry, government and communities.

A discussion about skills in agrifood needs to be considered in the context of regional infrastructure and development, industry competitiveness and image, business management, business compliance, industry image and working conditions. These issues need to be considered using an integrated 'whole of system' approach to overcome people and skills shortages, and to drive workforce development and economic growth for the agrifood industry.

The following diagram represents the critical elements which must combine to promote sustainable change. It also shows how the interrelatedness between key drivers underpins the success of future economic growth.

Drivers of workforce participation in agrifood industries



Across the country, the agrifood industry is facing a critical lack of people. Attracting people to work and stay in the agrifood industry, especially those located in regional areas, is a priority for the Agri-Food Industry Skills Council. A discussion about skills development is only meaningful if people are first attracted to live, seek employment and pursue careers within a regionally based industry

The agrifood industry is the major contributor to regional Australia's economy and its major employer. Consumer expenditure on agrifood products in Australia was \$80 billion during 2002-2003, 46% of total retail expenditure during this time. Agri-Food exports also account for 19% of total Australian exports.¹ Australia also spends over \$9 billion on racing products with export revenue in excess of \$1 billion.

A coordinated strategy for the attraction, development and retention of capable people is key to the continued development and growth of regional Australia.

Although AFISC accepts that the development of regions is a key driver for the success of the agrifood industry, we also acknowledge that many of the industries in agrifood are not regionally based and share the concerns of businesses located in an urban centre. In particular, food processing, meat, amenity horticulture and animal care and management are significantly urban based. Although, development of regions is not as critical for these areas, they do however share the concerns across the other drivers described in this report for the whole of agrifood.

Attracting people to work in the industry requires partnerships with government, industry and communities. This requires strategic investment in infrastructure development (including housing, telecommunications, roads), and the enhancement of communities and community services (including health and child care facilities). Other complementary requirements include industry promotion of career pathways, education about and improvement of industry image and career opportunities, improvements to work conditions for new and existing workers, and the development of all levels of small, medium and large business management skills. To achieve such fundamental changes requires integrated investment and development strategies and initiatives by governments and industry, as well as regional and community leadership in promoting the communities, industries and lifestyles that underpin innovation, wellbeing and economic growth. Without an integrated approach, industry development and economic growth will stall.

Skills and workforce development cannot be considered in isolation but as a critical driver of an integrated industry development and growth strategy. Hence, part of this strategy is a coordinated approach by Agri-Food Industry Skills Council to develop strategies that will attract, develop and retain people to meet industry needs, and to counteract the in effects of the industry's ageing workforce. This means changing the attitudes of young people, parents and school careers advisors towards agrifood as a first career choice.

This is especially challenging. The agrifood industry is competing with high-growth resources industries – particularly in the northern states and territories – for a very limited pool of human resources at a time of low unemployment.

To advance workforce participation and attract and retain workers to industries which are mostly based in regional areas, the interaction between the level of social security benefits and employment needs to be addressed. Remuneration for a job in the agrifood industry is often comparable to unemployment benefits, diminishing a potential worker's incentive to seek employment. The message that it is better to have

¹ Australian Food Statistics 2004 – Interim, Department of Agriculture Fisheries & Forestry – Australia

a job than not be working at all must be reinforced and incentive given to those who are working in low-paid jobs.

A significant factor in attracting, developing and retaining people in the agrifood industry is a re-thinking of the current funding arrangements for vocational training in Australia. The current model, including New Apprenticeships, is not meeting the needs of the industry and is regarded as inflexible and complex. The agrifood industry needs funding for short courses linked to specific job roles, technological advancement and regulatory requirements. There is also a requirement to fund existing worker training. They require nurturing and incentive for continued employment and learning. Increased funding to train existing workers is critical to develop and maintain the workforce and to build leadership, and training opportunities for new entrants is also a priority.

Training programs and courses need to be designed and driven by industry business needs, and be delivered in a way that maximises access and skills recognition at all levels. Industry must be able to develop their workforce using a variety of options suited to the business needs. Vocational training must be ready and willing to change and adapt delivery strategies as a business grows and changes.

The agrifood industry is a global industry and has a reputation for producing and exporting safe and clean food, and top quality livestock, including race horses. It is essential that resources are available to support agrifood businesses to continue to provide world best-practice through environment management systems, food safety, innovation and workforce reform.

To continue to be competitive and maintain customer satisfaction, agrifood businesses acknowledge that real change needs to occur at management level, particularly micro, small and medium businesses. The industry lacks certain sets of business skills making continued investment in quality development and training critical.

Following is a brief description of each sector of the agrifood industry including examples of specific issues they face. A table giving detailed information about these industries is at Appendix B.

Food, beverages and pharmaceutical processing

Food processing is the largest manufacturing industry in Australia. In 2002-2003 the industry had a turnover of \$65.9 billion and contributed around \$16.6 billion to Australia's total GDP.² The industry comprises over 7,774 firms³ and employed 187,300 people of which about half are located in non-metropolitan areas.⁴

The Australian food processing industry is facing a number of challenges deriving from an increasingly globalised food system, the removal of barriers to the flow of

² Australian Food Statistics 2004, Department of Agriculture, Fisheries and Forestry

³ National Food Industry Strategy 2003, *Food and Beverage Sector, Key Performance Indicators and External Trade*, Department of Agriculture, Fisheries and Forestry

⁴ Australian Food Statistics 2004, Department of Agriculture, Fisheries and Forestry

information, capital and goods, and rapid technological advancements. To remain competitive in this global marketplace, the industry needs to minimise the cost of production whilst also ensuring quality output.

The *National Food Industry Strategy* was prepared by the Department of Agriculture, Fisheries and Forestry in 2002 to guide the industry in meeting its challenges in the areas of competitiveness, productivity and innovation. The Strategy outlines a series of actions under four separate but integrated themes:

- Leveraging Australia's science and technology, education and training
- Developing a more integrated export strategy
- Enhancing the business environment
- Ensuring environmental sustainability

Clearly, the development of skills to lead, implement and maintain change in these four key areas is of paramount importance to success. "The future competitiveness of the Australian food industry depends on an appropriate education and training system targeted at building a highly skilled workforce with new and more extensive skills"⁵.

Specific areas of current skill needs or development identified by the industry include:

- Nutrition
- Food safety
- Food recall
- Quality assurance and auditing
- Business management
- Trades and other entry level training
- Environmental/waste management
- Innovation
- Quality assurance systems engineers
- Mechanical engineers
- Retail baking
- Food induction – pre-employment training
- Marketing and promotion – export as well as import replacement

The severity of the shortages identified is to some extent dependent on the location (urban or regional), and the infrastructure and flexibility in employment conditions of the business. Shortages in food safety, auditing and quality assurance, and the trades are, however, evident across the industry.

A sub-set of the food processing industry is the wine sector. This is a dynamic and important industry for Australia in terms of export and growth. The success of the wine industry represents a valuable model for consideration by other agrifood industries, particularly in terms of positioning for innovation and exporting. There are 1,899 wineries and 7,957 vineyards in Australia.⁶ The value of production was more

⁵ National Food Industry Strategy 2002, Department of Agriculture, Fisheries and Forestry, p.24

⁶ Wine Industry Directory, 2005, Winetitles Australia

than \$4.4 billion in 2002-03 and export earnings totalled over \$2.2 billion in 2003-04.⁷

Some ten national and international companies, whose production operations are highly automated, high volume and export focused, dominate wine production. This large business base is supported by an important small business network which is regionally based and thus faces some typically regional issues.

Overall, the important issues affecting the industry include:

- Trade access
- Environment
- Vine health
- Technological advancement
- Research and Development
- Licenses and regulation including label integrity
- Training and development of existing workers and new entrants

In 2004, WINETAC undertook research to establish the accessibility, relevance, responsiveness and quality of VET in the wine industry. The industry agreed that the system was accessible and that VET had relevance for their industry, although some of the larger wineries identified shortcomings in the responsiveness of providers in catering to specific training needs.⁸

Specific skill shortages in the industry include:

- Logistics
- Engineering
- Production management
- Technical operators
- Management skills
- Vine operations

The pharmaceutical processing industry is another significant contributor to employment and GDP for Australia. This sector is vitally important for Australia especially in view of the growing reliance upon legal pharmaceuticals by the Australian community. This is also a highly regulated industry requiring high-level technical and research and development skills.

Meat

The GDP value of the meat industry in Australia for 2003-04 was \$14.8 billion consisting of 5,791 enterprises and employing 51,000 people⁹.

⁷ *Australian wine industry at a glance*, Australian Wine and Brandy Corporation Winefacts Statistics, 22.10.04

⁸ An assessment of the accessibility, relevance, responsiveness and quality of vocational education and training solutions within the Australian grape and wine industry, WINETAC, 2004

⁹National Meat industry vocational education and training plan, MINTRAC, 2003.

Growth in the Australian meat industry has traditionally been driven by strong domestic and overseas demand. In recent years, however, international competition has intensified and is forecast to continue.

The Red Meat Advisory Council Ltd has highlighted the following as critical issues for the future of the industry.¹⁰

- Skill and labour shortages
- Access to international markets
- Product marketing
- Value adding (for example in areas such as convenience and interest)
- Food safety
- Eating quality
- Community concerns (including animal welfare, methane/greenhouse gas emissions, effluent disposal and land clearing)
- Whole-of-chain efficiencies

To remain competitive, especially in the international market, the industry needs to continue to maintain its reputation for clean and safe production methods, quality assurance and product integrity¹¹. Areas for future skill development include¹²:

- Entry level training
- Management training
- Quality assurance and management
- Supply chain management.
- Environmental management
- Intensive pre-employment training courses
- Retail butchery (including supermarkets)
- Smallgoods manufacturing
- Domestic & export abattoir practices

Seafood

The annual seafood production in 2003-04 was estimated at \$2.3 billion.¹³ It is a significant export industry – 30% of Australian production is exported. Fifty per cent of all seafood consumed in Australia is imported.¹⁴

The demand for seafood products both in Australia and overseas is predicted to continue to increase. However, with wild-catch fisheries production stable, there is

¹⁰ “More from Less” Strategic Direction for the Australian Red-Meat Industry 2004-2009

¹¹ Managing Director’s Address, Meat and Livestock Australia, Annual General Meeting, 2004.

¹² National Meat industry vocational education and training plan, MINTRAC, 2003.

¹³ Investing for Tomorrow’s Fish: the FRDC’s Research and Development Plan, 2000 to 2005, Fisheries Research and Development Corporation, 2000.p.3

¹⁴ Investing for Tomorrow’s Fish: the FRDC’s Research and Development Plan, 2000 to 2005, Fisheries Research and Development Corporation, 2000.

little opportunity to increase tonnage. There is much pressure on aquaculture to grow to meet the increasing consumer demands for fisheries products.

There are three main issues confronting the seafood industry:

- **Ecologically Sustainable Development (ESD)**
Using, conserving and enhancing the community's resources so that ecological processes, on which life depends, are maintained, and the total quality of life, now and in the future, can be increased.¹⁵ The quest for environmental sustainability impacts upon the other main issues facing the industry.
- **The Operating Environment**
To ensure sustainability of the industry, the transparency and predictability of regulation of access rights for the wild-catch sector, and a production strategy of high quality, high value and low tonnage, are critical¹⁶. Supporting the development of the aquaculture sector is critical for the ongoing overall competitiveness of the seafood industry.¹⁷
- **People Capacity**
An ecological, economic and socially sustainable industry requires that all stakeholders work as partners. This partnership includes the skills development of the existing workforce within the industry, the capacity of the industry people to deliver a sustainable system, and their ability to communicate with stakeholders.

Profitability is an important consideration for the seafood industry. The industry is facing pressure to lower costs to remain competitive. This pressure has led to cutting costs to achieve efficiencies. There is much debate that the industry must start to grow by value-adding to output. Marketing and differentiation of product are also important factors for success.

The seafood industry is experiencing specific skills shortages at all levels. The main areas of concern are:¹⁸

- Workplace environmental management
- Food safety skills
- Seafood processing skills
- Product and industry promotion
- Occupational health and safety skills
- Leadership and mentoring skills – succession planning
- Quality assurance
- Business management skills
- Deckhands
- Skippers and marine engine drivers

¹⁵ Investing for Tomorrow's Fish: the FRDC's Research and Development Plan, 2000 to 2005, Fisheries Research and Development Corporation, 2000, p.33

¹⁶ Investing for Tomorrow's Fish: the FRDC's Research and Development Plan, 2000 to 2005, Fisheries Research and Development Corporation, 2000, p.99

¹⁷ Farm Business, December 04/January 05, *The Australian Atlantic salmon industry-challenges and opportunities*.

¹⁸ Australian Seafood Industry VET Plan 2003-2008, Seafood Training Australia, 2003

The aquaculture sector is experiencing skill shortages at all levels of enterprise operation.

Rural & related industries

Rural and related industries contribute 3.2% of Australia's GDP, 24% of its export revenue and it employs 374,000 people, mostly in regional Australia.¹⁹ With the mining sector, it represents regional Australia's economic basis and has important linkages to a number of other industries.

In recent years, the drought has severely affected the rural industries, with a cascading effect on regional Australia as a whole. Apart from the loss of some 80,000 pre-drought jobs, farm production has reduced from \$11 billion in 2001-2002 to the current average level of \$5.4 billion.²⁰ The need to rebuild crops and stock will take years to overcome, as will the loss of people who have relocated to metropolitan areas (and other industries) to seek employment.

The National Farmers Federation, in its 2005-2006 pre-Budget submission highlights issues facing rural industries. These include:

- Drought
- Increasing competition from overseas markets
- Environmental demands from governments and community
- Labour shortages
- Red tape and taxation issues
- Multi-skilling/portability of skills across rural industries

Specific skills shortages identified in rural and related industries include:

- 'Farm-ready' – farm hands multi-skilled across rural sector
- Unskilled labour
- Business management skills
- Leadership skills
- Machine operators

Other important issues for the industry are:

- The loss of young people from the regions
- Poor capital and social infrastructure
- Natural resource management
- Lack of understanding of opportunities held by people living in metropolitan centers
- Lack of understanding of the challenges/realities held by people living in regionally centers

The loss of young people from regional Australia and the impact of the drought also means that rural industries are experiencing people and skill shortages across the board. These shortages are likely to impact on the capacity of farming businesses to

¹⁹ ABARE, Australian Commodity Statistics, 2004.

²⁰ Pre-budget submission, National Farmers Federation, 2005-2006

stay in operation, and could ultimately reduce the farming sector's contribution to economic growth.²¹

Included in the rural and related areas is animal care and management – veterinary services and the companion animal sector. The importance of the companion animal sector to Australia is significant. It employs more than 30,000 people and produces \$4.2 billion annually.²² It includes retailers of pet products, groomers, boarding kennels, pet food and accessories manufacturing. A major concern for the companion animal sector is the lack of recognition of its occupations as a vocation for statistical purposes.

Two other critical areas for the rural sector are the amenity horticulture and conservation and land management industries.

The amenity horticulture industry is one of Australia's fastest growing industries closely associated with urban development and lifestyle. This industry has capitalised on its ability to alleviate social and environmental problems and has encouraged the development of policies for increased green spaces for communities and environmentally responsible design.

The nursery and garden industry itself employs approximately 30% of all workers in the agriculture industry and is, for the majority, urban based the industry facing many unique challenges. As an urban business the nursery sector competes in the 'Lifestyle' market for success. This requires specific skills which are quite different from those needed in traditional rural enterprises. These include base-line employability skills, technical development, strategic planning, performance management, change management and retail development.

Conservation and land management encompasses the environmental issues of land care, salinity and water management, areas of training which are national priorities. Environmental concerns are critical for today's rural and related industries. The degradation of inland river systems, salinity and declines in soil fertility have all contributed to the realisation that management of the environment cannot be separated from questions of rural production. National priorities for weed control and other environmental threats highlight the importance now placed on land management skills and capabilities.

The Agriculture and Resource Management Council of Australian and New Zealand identified the need for training in weed management for secondary and tertiary students, postgraduates, natural resource managers and the community. The Council is only one of a number of national bodies calling for greater attention to training needs in areas such as weeds, animal pests and soil management. Government commitment is demonstrated by the resources committed through bodies such as the National Heritage Trust to assist in land protection and rehabilitation. But training is required to ensure that funding is applied effectively.

²¹ Pre-budget submission, National Farmers Federation, 2005-2006

²² Contribution of the Pet Care Industry to the Australian Economy, Australian Companion Animal Council Inc, 2003

Development of skills under this area has many proven success outcomes, which must be maintained. Some examples of the success are in the form of 'Green corps' and through the developmental opportunities achieved in many remote indigenous communities throughout the Northern Territory, Queensland and Western Australia in particular.

Racing

The racing industry generates over \$10 billion annually²³ and employs approximately 17,000 full time and 57,000 part time people.²⁴ Australian-bred horses and animal husbandry practices are well regarded internationally and are a niche export area with high growth potential.

Among the major issues facing this industry are:

- **Industry image**
Notwithstanding the fact that racing is an established part of Australian culture, especially in regional communities, it has a poor image as an employment option due to its working conditions and a male dominated jockey culture. Gaming and wagering associated with the industry may also impact negatively on its image, although is an important and vital contributor to the industry.
- Skills of the underpinning vocational 'hands on' sector are below the accepted standard for most industries.²⁵
- Accredited competency standards more formally assessed should be linked to licensing, with suitable training available to support this process.
- Many of the positions in the industry are part-time or casual which means that long term employment opportunities are sometimes hard to gain.

The racing industry, historically, has seen a high degree of occupational accidents. This is recognised by AFISC who have been encouraging the development of training tools to assist in the lowering of this.

Specific skills needs and shortages identified by the industry include:²⁶

- Occupational health and safety across industry levels
- Small business management skills development (including ICT)
- Apprentice jockeys
- Trainers
- Track riders
- Farriers (specifically during race-day procedures)
- Stable hands
- Racing administrators and stewards

²³ Size and scope of the Australian Racing Industry, Australian Racing Board, 2004.

²⁴ Racing Training Australia, National VET Plan for the Racing Industry, 2003-2006

²⁵ National Racing Industry Training Conference, "Race Training 2004", Tasmania, Australia, p.11

²⁶ National VET Plan for the Racing Industry 2003-2006, Racing Training Australia.

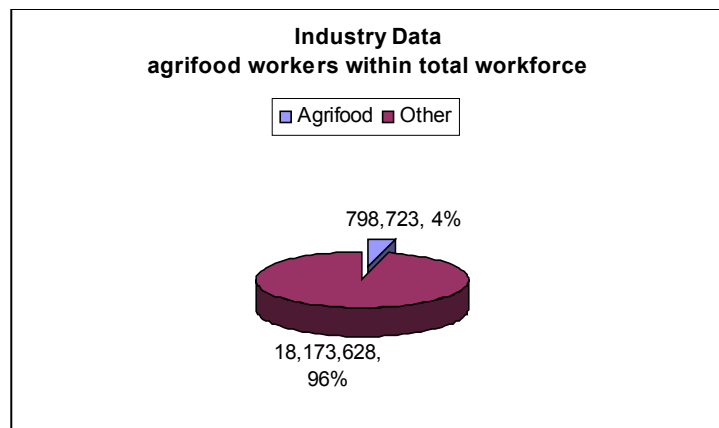
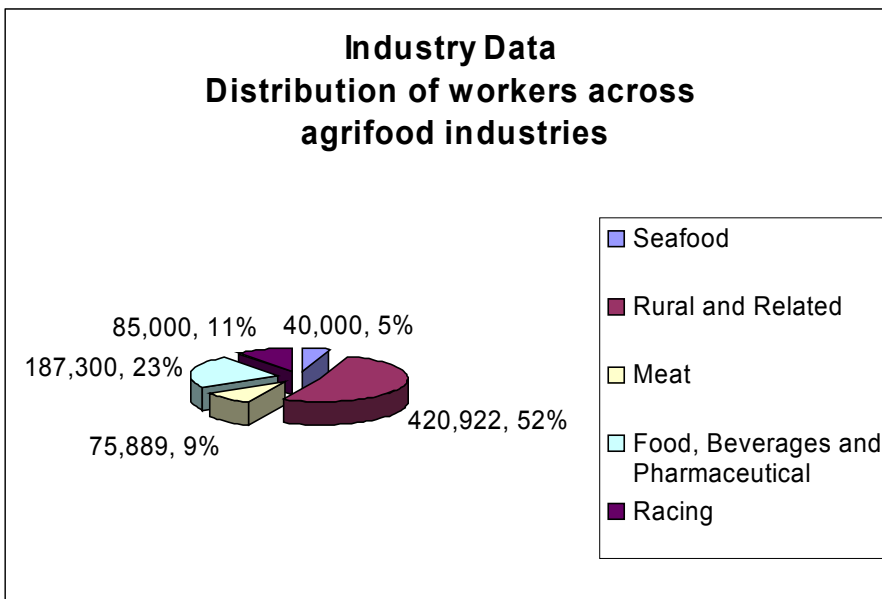
- Harness racing trainers and drivers
- Greyhound racing trainers and handlers
- Governance knowledge for boards and employees
- Race day operations
- Barrier staff.

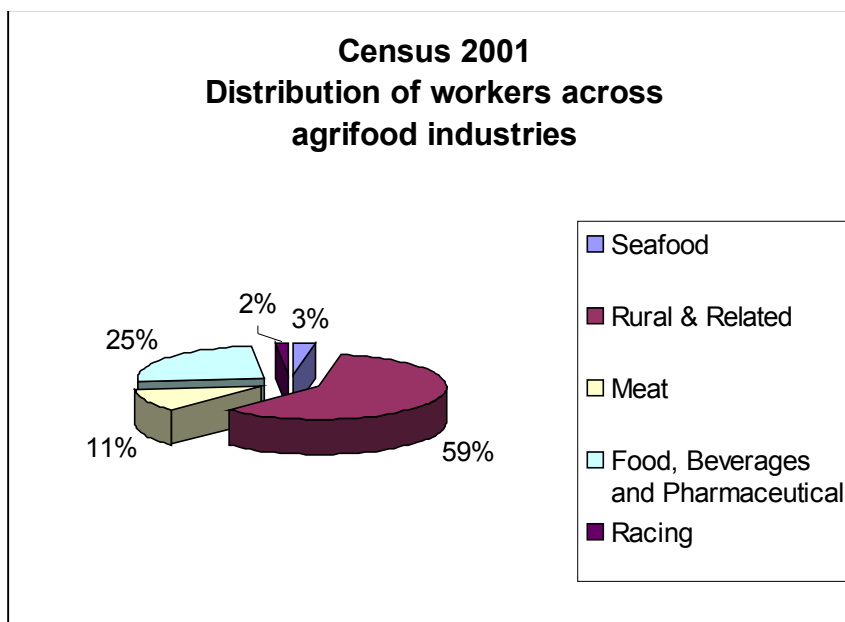
Employment trends

Interpretation of Statistics

The Australian Bureau of Statistics Census Counts for the number of persons employed in industry is calculated using Australian and New Zealand Standard Industry Classification (ANZSIC) categories. At the finest classification level, 'Classes' the categories do not allow for a *precise* calculation of *agrifood* industry workers. This is partly due to overlap across 'Divisions'. For example, Gambling Services not elsewhere classified listed in the division of Sport and Recreation (ANZSIC code 9329) accounts for over 12, 000 workers while the specific code for racing – Horse and Dog Racing (9311) totals only 8,577 employees. Similarly, a significant proportion of all Horse Farming (0152) is related to stud farming for racehorses yet this is listed within the division of Agriculture, Forestry and Fishing.

The Seafood industry has also found significant inconsistencies in available data and, despite obstacles, has endeavoured to determine the best options for improving the accuracy and availability of employment information. While published data totals fisheries employment at over 19, 000 workers, the Fisheries Research and Development Corporation estimate the total number of workers in commercial sector employment to be far greater.





The most recent Census count shows the agrifood industry employing over 704, 000 persons, accounting for approximately 3.7% of national employment. The majority were employed in rural and related industries (423,720) and the remaining were employed in food, beverages and pharmaceutical (176,912), meat (75,889), seafood (19,628) and racing (8,577).²⁷

In the years 1995-96 to 2003-04, employment in the agrifood industry (excluding racing) fell overall by 7%. This percentage drop reflects the impact of the drought on farm production, particularly since the year 2000. Employment in the agrifood industry is forecast to grow by 9.7% or 1.2% per year, in the period from 2003-2004 to 2011-12, with the greatest gains being made in racing and rural and related industries. This forecast rate of employment growth is close to that forecast for all industries (10.6% total or 1.3% yearly) in the same period. The forecast increase in employment will be fuelled by the recovery from the drought in rural and related industries and the increased demand for Australian rural products from increasingly prosperous Asian countries notably China.

A number of other employment trends, such as working arrangements and conditions, and characteristics of the workforce, such as age and gender representation, in the agrifood industries, will be examined in greater detail under the analysis of skill need drivers that follows.

²⁷ National Centre for Vocational Education Research (NCVER), 2002

Drivers of industry skill needs and skills issues

Skill needs vary across an industry for a range of reasons – reasons that are often complexly interrelated – including the way work is organised, the type and location of work, recruitment policy and practice, employee relations, job design and training. Research has isolated a number of ‘drivers’ – major trends and issues that may impact, either alone or in association, to a greater or lesser extent, on an industry’s skill requirements.

In this section, we analyse the relationships between drivers and skill requirements, specifically in the agrifood industry, and derive conclusions on the implications of change in drivers for the skill base. Based on this analysis, responses are suggested to address the needs.

DRIVERS	FOOD	MEAT	SEAFOOD	RURAL	RACING
Development of Regions	IMPORTANT	CRITICAL	CRITICAL	CRITICAL	CRITICAL
Worker attraction & retention	CRITICAL	CRITICAL	CRITICAL	CRITICAL	CRITICAL
Consumer & customer demands	IMPORTANT	IMPORTANT	CRITICAL	IMPORTANT	FAIR
Competitiveness & productivity demands	CRITICAL	CRITICAL	FAIR	IMPORTANT	IMPORTANT
Business compliance	CRITICAL	CRITICAL	CRITICAL	CRITICAL	CRITICAL
Innovation – technological advancement, e-business	CRITICAL	IMPORTANT	IMPORTANT	CRITICAL	IMPORTANT
Globalisation – market expansion & access	CRITICAL	CRITICAL	CRITICAL	IMPORTANT	IMPORTANT

Development of Regions

The development of regions for the agrifood industry is vital. The industry is facing a critical shortage of workers. The industry must attract people to work in the industry and then implement coordinated strategies to train and retain them. The development of regions is a key driver for this to occur.

Regional business is a major contributor to the Australian way of life, our culture and our identity; and most importantly, it also accounts for half the national export income. The agrifood industry is a major contributor to regional Australia's economy and its major employer. For this reason, many of the issues facing skill development and needs in the agrifood industry are the same as those of regional Australia.

An issue at the core of developing regional business is the perception of regional image held by many people living in metropolitan Australia, and some regional people, that regional Australia is declining and that there are limited business and personal career opportunities. This creates significant problems for regional businesses in recruiting staff to grow and develop businesses. Their future is dependent upon attracting people to commit to pursuing career and business opportunities in regional Australia which in turn facilitates growth and community development. Critically, approximately 36% of all regional young people are moving to metropolitan centres.²⁸ It is important that the Agri-Food Industry Skills Council focuses on the 64% who are staying and to discover why this is, and use this information to encourage less young people to leave and/or encourage urban people to move.

It has been identified, and confirmed through consultation with the agrifood industry, that those who are actively trying to reorient or strengthen their community display and actively encourage.²⁹

- Efficient infrastructure, business support and community services
- Labour market opportunities supported by education and vocational training
- Community leadership and support
- Promoting the strength and opportunities of the regions, and
- Integrated government policies to build incentives and lifestyle amenity

Infrastructure (roads, telecommunications, and health and child care facilities) is seen as the biggest obstacle in attracting people to and developing regional Australia. Carefully planned and integrated infrastructure investment by governments at both state and federal level will attract workers and families to the agrifood industry and enable the industry to continue to add significant value to Australia's way of life and economic sustainability and growth.

A primary challenge for agrifood industry is to attract and keep young people in their local community, and to attract skilled people to the regions. Attracting people to an industry which is regionally based, displays limited opportunities and working conditions that compare poorly with other industries, is especially challenging. To add to this challenge the Australian labour market is, at present strong, showing

²⁸ Regional Business – A Plan for Action, Commonwealth Department of Transport and Regional Services, 2003

²⁹ Regional Business – A Plan for Action, Commonwealth Department of Transport and Regional Services, 2003

substantial job growth, increased participation in employment and decreasing unemployment.³⁰

Attracting and/or retaining people and businesses into regional areas require a coordinated and sustained strategy by industry, all levels of government, indigenous and local communities. It will need to be explicitly linked to other regional development initiatives and will specifically depend on leadership shown by industry and governments. Leaders need to be identified, targeted, motivated and empowered. Local leadership is linked to the creation of business opportunities and gives confidence to grow regional business. Without that confidence, business can't grow.

In the paper *Good enough never is*, the authors discuss the concept of industry champions in creating opportunities. An industry champion is a key person in business who provides vision, drive, energy and commitment to turn a vision into reality.³¹ The vocational education system has embraced the concept of industry leadership. Providing this leadership to encourage and develop agrifood industries will be a main focus for the Agri-Food Industry Skills Council.

The development of skills is part of the bigger picture to ensure growth of the agrifood industry. "Extension and education programs per se are unlikely to stimulate action if they fail to complement existing action intentions."³²

This underlies the premise that the Agri-Food Industry Skills Council needs to partner with other groups working towards regional development. These partnerships will look at the realities of lifestyles and develop and trial training programs that align with lifestyle, employment and training needs.

Regional policy cannot be seen as one-off injections, but should be a long term and integrated commitment to position regions to help themselves, "...long run, interdependent, region specific policy that enables companies to innovate and respond to change."³³ A key to this is human capital (skills) – attracting and retaining skilled workers and their ongoing education.

There is also a disparity between the long term development goals of the agrifood industry and training providers. There are underlying tensions between the needs of industry and the delivery of appropriate training packages in a flexible and work-ready format. It is apparent that, "... the training system is inadequately meeting the needs of a significant section of its market in regional Australia".³⁴

The provision of training by both public and private RTOs needs to be driven by the industry's business needs.

³⁰ Good Jobs or Bad Jobs – An Australian Policy and Empirical Perspective, Department of Employment & Workplace Relations, August 2003.

³¹ Good Enough never is: lessons from inspirational businesses in rural Australia, Rural Industries Research & Development Corporation, 2005.

³² Growing the capital of regional Australia-The task of capacity building, Rural Industries Research and Development Corporation, 2004, p.x

³³ Regional Business – A Plan for Action, Commonwealth Department of Transport and Regional Services, 2003, p.16

³⁴ Regional Business – A Plan for Action, Commonwealth Department of Transport and Regional Services, 2003, p.42

Another challenge for the Agrifood Industry Skills Council is to engage the regional communities and VET to work for regional communities. Many regional agrifood business people are disenfranchised from the formal training system. This is arguably due to limited and inflexible training options, travel time and expense for both owner and New Apprentice training, and funding for (and the perceived lack of flexibility) offered to businesses requiring training in situ.

This is also true for Indigenous Australia as the current approach to, and structure of, training programs are not compatible with meeting Indigenous skill and cultural needs. This is an important area for the Agri-Food Industry Skills Council and we are currently working on strategies to resource the specific needs of Indigenous learners, and to create resources which will specifically assist with the skills development of this group for the agrifood industry.

Broadening participation in the workforce is a key component of addressing skills shortages. Some areas for attention include targeting mature age people, developing opportunities for Indigenous youth and targeted integration of industry sectors.

For the majority, training is not responding to the critical long-term development needs of regional Australia. This is an area where the training system can significantly assist in the inherent issues facing regional Australia – and this requires the whole community to work towards common goals.

“Regional training, due to the complexities of remote locations and delivery through training packages, has commonly focused on specific short-term goals and has thus far ignored the regional or industry medium and/or long-term development needs.”³⁵

“...the most fundamental challenge for training, and regional development, over the next ten years will be its ability to develop in learners and communities a capacity to integrate the global and the local in ways which produce the kind of knowledge and skill that is immediately and locally useful, while at the same time being adaptive and generative.”³⁶

At the base level there are underlying tensions between training providers and regional businesses:

“...tensions between the demands of specific enterprise contexts and the demands of learners, industries, providers and markets, will persist. It is critical that local communities identify these tensions and develop ways of managing them which exploit the pedagogical and developmental possibilities of these tensions rather than deny or decry them.”³⁷

Communities have to work with local training providers to deliver long-term strategies to achieve portability of skills and regional development goals. Job specific skill set training and accreditation needs to meet job-ready requirements.

³⁵ Serving client needs in Regional and local communities, NCVER, ANTA, 2003, p.53.

³⁶ Serving client needs in Regional and local communities, NCVER, ANTA, 2003, p.54.

³⁷ Serving client needs in Regional and local communities, NCVER, ANTA, 2003, p.53

Implications for skills development

Critically, a better understanding of the appeal and the opportunities to be gained in a regional area is needed to encourage more Australians to work and live in regional Australia. Regional businesses will not be able to grow, and in many cases will have to discontinue operations, if more people do not move from the urban centers.

Responses

- Agri-Food Industry Skills Council, working in partnership with industry, government, indigenous and local communities and training providers, to develop a coordinated strategy to achieve training priorities which complement a systematic worker attraction strategy to achieve long term skill and community goals.
- In partnership with regional development bodies, schools and training providers, develop and implement specific programs, and incentives, to assist in the attraction of young people to the agrifood industry (Focused VET in Schools programs, short-term, intensive pre-employment initiatives, strategic industry ‘taster’ programs).
- Skill industry champions (by developing key people who are already active in the regions) to promote Agrifood industry as a preferred career choice, through a directed change strategy, to people from regional and metropolitan areas.
- Develop infrastructure and community based human and support services to accommodate workers and families.
- Investigation and implementation of more tailor-made courses and rigorous skill set accreditation.
- Coordinated strategy to increase participation in recognition of competencies and using these to assist the development of new entrants.

Worker attraction and retention – demographic change and employment arrangements

Worker attraction is presenting significant challenges for the many agrifood sectors. Reasons for this include the issues raised under regional development and extend to remuneration and the perceived lack of career path and transferability of skills. The industry is particularly failing to attract young people and females.

Worker attraction and retention within the agrifood industry, as in all industries, is influenced by many factors such as remuneration, employment entitlements and working conditions, the availability of career pathways and training, and the image of the industry.

Many of the jobs offered in the agrifood industries are hard, involve long hours, are sometimes dangerous, are seasonal and offer low pay. Coupled with the regional location of the jobs and the perceived lack of a career path in many of the sectors, attracting and retaining workers in a competitive employment market is challenging.

As some of the sectors in the agrifood industry do not offer clear career pathways, it is important that the industry can skill participants in general career development skills. This skilling is also necessary for career advisors in schools who are still encouraging young people to pursue university qualifications, even though this is not always a suitable pathway for all individuals. Therefore, information about careers to entice people into the agrifood industry must be developed and be of quality, suitable, realistic and accessible. In particular, information needs to be tailored to meet the requirements of young people, where expectations are different to earlier generations.

To the extent that labour mobility may be approximated by duration in the current job, employees in the agrifood industry tend, on average, to stay longer in the same job than do employees across all-industry. However, there are some significant variations across occupations. This situation is shown in the following table.

Labour mobility, main agrifood occupational groups, 2004

Occupation of current job	Duration of current job				Total
	Under 1 year	1-4 years	5 - 9 years	10 years and over	
Managers and administrators	12%	27%	19%	42%	100%
Farmers and farm managers	5%	16%	12%	68%	100%
Tradespersons and related workers	21%	36%	16%	27%	100%
Food tradespersons	32%	41%	15%	11%	100%
Skilled agricultural and horticultural workers	22%	32%	19%	27%	100%
Labourers and related workers	31%	39%	13%	17%	100%
Other labourers and related workers	34%	41%	11%	14%	100%
All occupations	23%	37%	17%	24%	100%

Source: ABS Labour Mobility Survey, February 2004, unpublished data.

The longer duration of employment in some occupations across agrifood, for example farmers and farm managers, may be due to the high numbers of farm owner/managers

in the industry. On the other hand, the higher mobility among the labourers and related workers compared with the all-industry average, may be due to the high seasonality of labouring work in the agrifood industry. There are many other attrition issues such as burn-out, drought, pursuing other opportunities due to a healthy economy. The Council will be pursuing this area as a priority to discover what contributes to attrition and how the Council can develop strategies to turn this around.

An issue closely related to the pattern of mobility shown above is the demography of the agrifood workforce. The following tables show the age profile by agrifood sector and selected occupations.

Age profile: Agrifood industries, 2003-2004

Industry	Age (years)							Total
	15-19	20-24	25-34	35-44	45-54	55-64	65-69	
Rural & related industries	5.4%	8.2%	18.7%	22.0%	21.5%	17.2%	7.2%	100.0%
Food processing	5.8%	10.7%	24.2%	25.8%	22.1%	10.3%	1.3%	100.0%
Seafood industry	6.1%	11.6%	25.5%	26.1%	16.7%	12.6%	1.4%	100.0%
Meat industry	14.1%	13.8%	22.8%	21.5%	18.1%	8.6%	1.0%	100.0%
Racing industry	13.1%	17.6%	23.5%	19.4%	16.1%	8.5%	1.9%	100.0%
All Agrifood	6.6%	9.6%	20.6%	22.8%	21.0%	14.5%	5.1%	100.0%
All industry	7.2%	11.0%	23.2%	23.9%	22.0%	10.9%	1.6%	100.0%

Source: Monash Centre of Policy Studies June 2004

Age profile: selected agrifood occupations, 2003-2004

Occupation	Age (years)							Total
	15-19	20-24	25-34	35-44	45-54	55-64	65+	
	%	%	%	%	%	%	%	%
Mixed Crop/Livestock Farmers	0.3%	2.3%	11.7%	22.8%	23.4%	25.2%	14.1%	100.0%
Livestock Farmers	0.3%	1.4%	10.7%	17.3%	23.7%	29.3%	17.2%	100.0%
Crop Farmers	0.7%	2.6%	18.2%	23.5%	22.1%	22.1%	10.7%	100.0%
Veterinarians	0.0%	2.2%	25.4%	18.8%	38.2%	13.6%	1.8%	100.0%
Meat Tradespersons	13.7%	13.6%	31.7%	13.5%	18.5%	8.8%	0.3%	100.0%
Shearers	3.2%	5.1%	26.7%	38.6%	21.8%	2.9%	1.7%	100.0%
Animal Trainers	0.0%	1.5%	21.9%	24.7%	31.5%	12.6%	7.8%	100.0%
Gardeners	5.8%	13.9%	22.8%	24.3%	18.6%	11.7%	2.6%	100.0%
Veterinary Nurses	14.7%	38.7%	20.2%	19.3%	5.3%	2.0%	0.0%	100.0%
Seafarers & Fishing Hands	8.9%	15.4%	33.6%	17.2%	12.1%	11.9%	0.8%	100.0%
Meat & Fish Process Workers	9.0%	18.2%	29.9%	25.2%	13.2%	4.6%	0.0%	100.0%
Other Food Factory Hands	4.6%	8.7%	25.3%	27.4%	25.8%	7.8%	0.0%	100.0%
Hand Packers	9.8%	15.8%	22.4%	24.1%	18.4%	8.3%	0.9%	100.0%
Farm Hands	16.4%	15.9%	20.9%	18.7%	15.6%	10.3%	2.2%	100.0%
Nursery & Garden Labourers	10.5%	15.6%	20.9%	19.0%	23.7%	8.6%	1.7%	100.0%
All occupations	7.2%	11.1%	23.2%	23.9%	22.0%	10.9%	1.6%	100.0%

Source: Monash Centre of Policy Studies June 2004

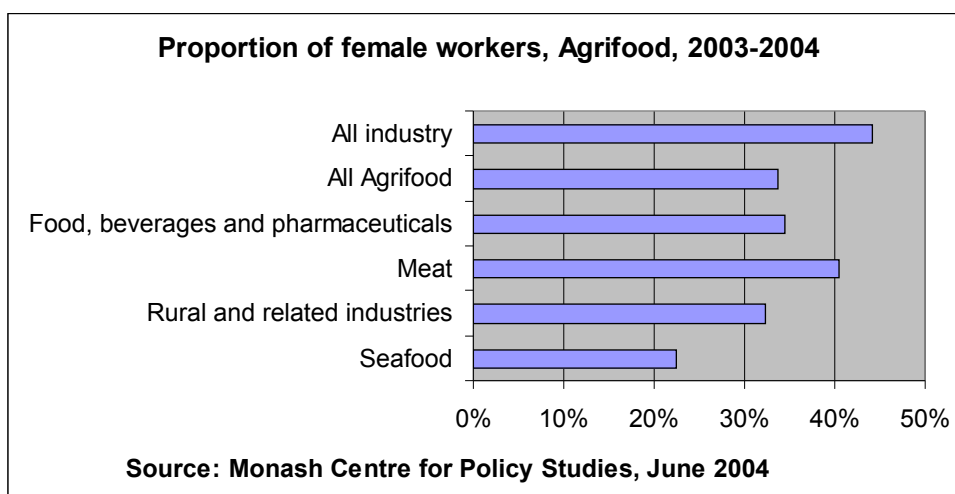
Compared with industry as a whole, there are somewhat fewer workers in the younger age groups and more workers in the older age groups in the agrifood industry overall. For example, 5.1 per cent compared with 1.6 per cent in the 65 – 69 age group. The

data on age profile by occupation highlights the ageing of the workforce particularly in the rural and related industry occupations.

Among the reasons cited for low attraction of young workers into the agrifood industry, and the rural sector in particular, are lack of clear career pathways, a lack of understanding about how skills can be transferred between agrifood sectors, and a lack of leadership/mentoring programs to guide new entrants.

Another demographic factor characterising the agrifood industry workforce is the low participation by women. The following graph shows the proportion of women in agrifood and its sectors compared to industry overall.

%%%



Implications for skills development

The major implication of the low attraction of workers to the industry and its particular demographic pattern is the shortage of skills as an ageing workforce fails to be replaced by new entrants, although the high turnover of the under 35 age group is of more importance for the meat industry. These shortages have the potential to create a cascading effect throughout industry, ultimately leading to decreased outputs and exports.

Responses

- Research and implement portable skills passports (flexible skills development) for access to agrifood industries. Skills passports to be developed to facilitate multi-skilling and portability across the industry to increase total industry workforce numbers and opportunities.
- Research and develop career pathway materials for the agrifood industry, whilst also promoting the individual sectors' uniqueness and the different opportunities available. A campaign for the dissemination of materials also needs to be coordinated.

- Strategies to engage seasonal workers into training or long-term occupations, whilst also considering immigration campaigns such as ‘guest workers’ or migration visas to be analysed.
- The accessibility and usability of recognition of prior learning to develop existing workers to train lead and mentor new entrants to be researched and reported.
- Research and report on funding arrangements for vocational education and the effectiveness of this for the agrifood industry. Report to be used to drive change in arrangements for the agrifood industry, especially for existing workers and New Apprenticeships.
- Development of promotional material showcasing success stories across the agrifood industry and strategise how these case studies can be used to develop best-practice models across industry.
- Work with reference group to enable us to identify Top 15-20 Food, Meat, Racing, Rural and Seafood companies to undertake a longitudinal study to assess – number of employees undertaking vocational training, what are the units/qualifications they are participating in, retention rates, where the participants have been originally sourced and are they still in the industry.
- Investigation and implementation of strategies to disseminate better information found through research and development. Solutions for the linking of training to this knowledge management through best-practice methodologies

Consumer and customer service demands

Today’s consumer expects clean, green and highly nutritious food that represents good value for money. For the agrifood industry to remain competitive in the Australian and international market, it must meet these demands at a product and industry level. This requires development of specific skills and community advocacy and marketing strategies.

Changes in market demands are requiring the industry to focus on increasing the range and quality of products and services offered and meeting specific requirements. The agrifood industry is facing the following issues:

- changing customer tastes, preferences and expectations
- the need for innovative products and service delivery
- increased environmental awareness and the expectation that the food chain is environmentally sustainable
- increased awareness of food safety

The consumer is demanding clean, green and highly nutritious food that represents good value for money. Food's convenience and ease of preparation is also becoming a consideration for many consumers.

In this more demanding market, the trace ability of food products, and the quality of breeding and cultivation techniques, have become essential. This demand is resulting in growers having to introduce transparent systems on-farm (and right through the whole supply chain) to ensure traceability is possible if there is a problem at the consumer end.³⁸

Some sectors of the agrifood industry are perceived by consumers as having unhealthy environmental practices. This is particularly relevant for the racing industry. The industry must address these perceptions held by the consumer at both a product and industry level through community advocacy and marketing programs.

Implications for skills development

Consumers and community demands drive production in the agrifood industry and are critical to the sustainability and international competitiveness of the industry. The emerging demands by consumers and communities for safe and environmentally sustainable products emphasise the importance of skills in product development, supply-chain management, environmental management, quality assurance and animal and plant health.

Responses

- An industry awareness campaign on the management of safe and clean technology of the whole of the supply-chain and the value of understanding the importance of this to the consumer. This campaign to focus on skill development for industry advocates/champions.
- Drive strategies to achieve continued funding for the development and implementation of food safety and food safety auditing standards, professional development and resources for training delivery.
- Development and implementation of a public education initiative to promote industry advocacy and to skill industry personnel to deliver these messages.

³⁸ Farm Business, December04/January 05, 2004 *Australian Innovative conference*, p.39.

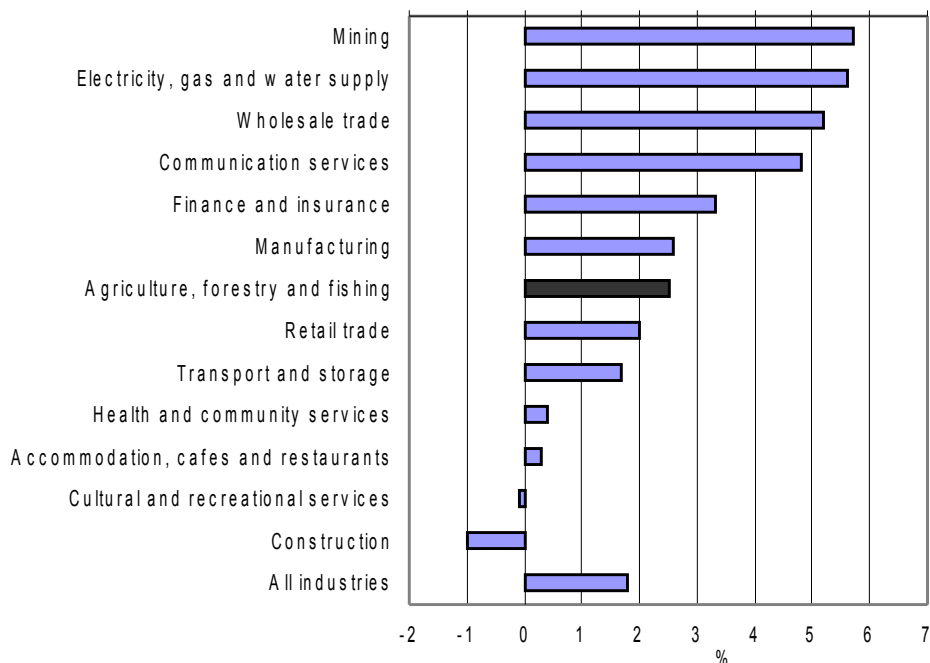
Competitiveness and productivity demands – business management

The maintenance of agrifood's productivity and competitiveness in the global market, in view of the industry's demographics, requires the engagement across the industry of professional agrifood business managers with skills in product marketing, in communication and leadership and succession-planning.

An industry's productivity impacts greatly upon its competitiveness and this is in turn greatly influenced by business management practices and the adoption of efficient production methods.

Productivity demands and resultant increases in efficiency in the industry are reflected in the labour productivity rates.

Changes in labour productivity (Index of gross product per hour worked):
Average annual rate of growth from 1992-93 to 2000-01



Source: ABS, Australian System of National Accounts 2000-2001 (5204.0)

The average increase in labour productivity, across all industry over the period from 1992 –93 to 2000-2001, was 1.8 per cent per annum. The agriculture, forestry and fishing industry productivity gains were above the average with an increase of 2.5 per cent per annum. However, productivity improvements varied regionally and with size of operation, with small businesses making the lowest gains.

The productivity of small businesses is a critical factor in the agrifood industry. Small businesses represent a great part of the industry and are considered the backbone of the agrifood industry and the wider community. In the face of declining terms of trade, changing customer demands noted earlier, rapid technological change and the

pressure to increase productivity in a global market, it is considered that these small operators need to develop innovative business management techniques through training. In a predominantly regionally based industry, this will require ready access to flexible learning solutions such as e-learning.

The difficulties noted earlier in attracting new entrants to the industry and the ageing agrifood workforce mean that the need for skills in business management is not confined to the small business end of the industry. Across the industry, managers with skills in marketing, production costing, and communications are needed. This issue also places greater emphasis on effective succession-planning.

Implications for skills development

Without better business managers and succession planning, the agrifood industry will lose the competitive edge as older workers leave the industry with no initiatives in place to develop new entrants.

Responses

- Continue to deliver accredited courses with the support of federal and state authorities to develop managers in the agrifood industry, and to educate registered training providers better about the opportunities for funding of innovative programs.
- To ensure that adequate government funding is provided to reflect agrifood as a high priority area for development of new e-learning resources.
- Research, and report on the level of “red tape” an employer has to endure when taking on a New Apprentice and recommend and promote improvements to the system that will assist agrifood businesses engagement.
- Develop and implement a strategy to engage the small business agrifood sector in the VET system. To be developed in partnership with industry associations and business employment centres.
- Research and report on management problems within the agrifood industry. Report to include recommendations for change.
- Future development of training packages to take a futures approach and better link research and development to competencies. High level technical skills for ongoing competitiveness also need to be addressed.

Business compliance – regulations, health and safety, licensing, insurance

Changing regulatory requirements and the tendency by government and industries themselves to increase or strengthen the regulation of business activities is an on-going trend in all industries. This is unlikely to change as governments at all levels and industries seek to achieve social, economic and environmental goals.

Business regulation and compliance are impacting on the agrifood industry at all levels of government. They have implications for the on-going sustainability of the industry, its image and competitiveness. Business regulation and compliance therefore impacts upon the industry's training requirements.

Self-regulation by the industry and government requirements in relation to environmental sustainability are crucial for the agrifood industry. The need to do so pervades the operations of farms, manufacturing plants and fisheries; it is important to the consumer and the community; and ultimately impacts the image of the industry.

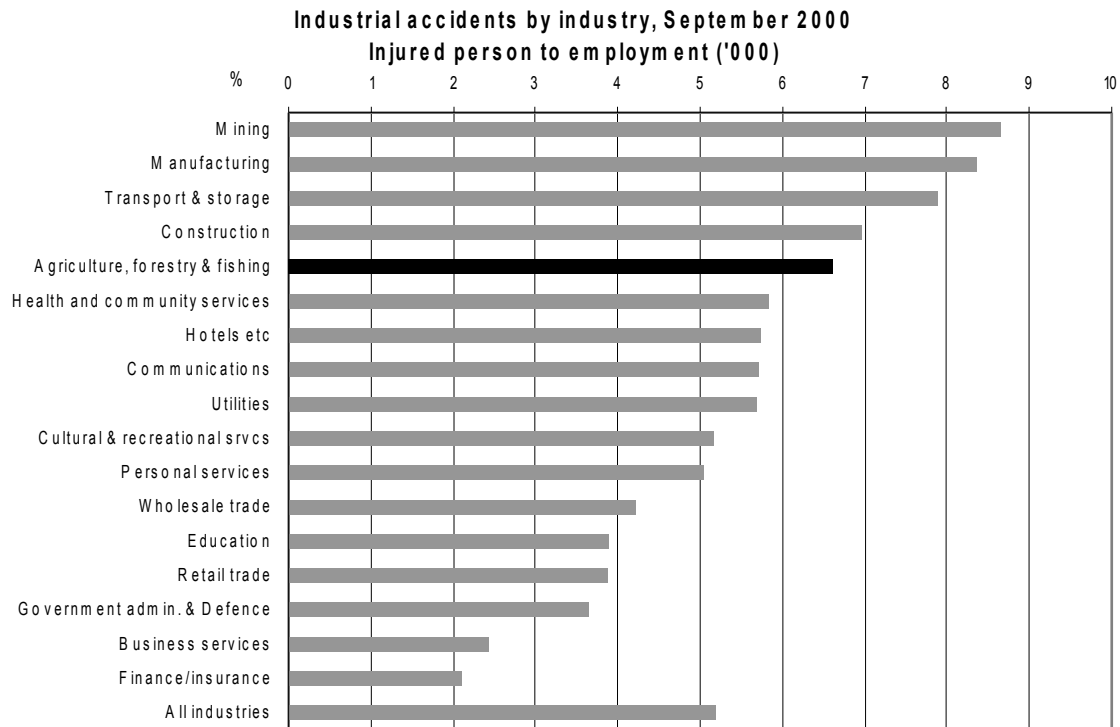
The legislated and industry driven necessity to comply puts pressure on agrifood businesses to be aware of environmental and safety regulations and to adopt production strategies that align productivity and efficiency to sustainable land and water usage, sustainable packaging and processing techniques, and animal and plant health and safety.

Occupational health and safety is a highly regulated area in agrifood as this industry continues to report a relatively high number of accidents – in September 2000 workplace injuries as a proportion of employment at 6.6 per cent, above the all-industry average of 5.2 per cent. This percentage represents an improvement.

The agrifood industry sees as one of its major goals to continue to develop a culture of safe and healthy workplaces. This work requires continued funding and resources to support training.

Among the major concerns for the agrifood industry in relation to business regulation and compliance is the lack of national consistency in licensing, and the remaining deficiencies in linking regulatory requirement to competency standards.

An issue closely related to business regulation and compliance is the increasing cost of insurance and the conditions imposed on businesses to obtain insurance.



Source: Monash employment forecasts (based on ABS data) and ABS Work-related injuries (6324.0)

Implications for skills development

Skills and strategies for skilling workers to comply with regulatory requirements are essential for the agrifood industry. There is an increasing demand for knowledge of environmental regulation and compliance procedures as well as for occupational health and safety requirements. This pressure is originating from within and outside the industry.

Responses

- Proposal to be presented to government to develop and distribute tools and resources for environmental, food safety and occupational Health and Safety risk and sustainability training. In order to then provide training to businesses through both on and off-site delivery modes.
- Develop national partnerships with state training authorities and regulators to research licensing arrangements across the agrifood industry and develop a plan for achieving national consistency.
- Lobby government to subsidise training to meet licensing and regularity requirements across the agrifood industry.
- Development of resources (for on-and off-site) training delivery for OH&S, environmental risk and sustainability focusing on improvement strategies.
- Lobby for the continued funding for plant and animal health standards, professional development and resources for training delivery.

- Lobby for streamlining and simplification of existing regulatory arrangements.

Innovation – technological advancement, e-business

Innovation for the agrifood industry is fast-paced and occurring in both a structured and adhoc way. Businesses are continually improving their work practices to remain competitive within the global marketplace. Government provides funding for research and development across the agrifood industries and there is a requirement that findings achieved through these grants are disseminated to industry and groups to share information and innovative practices.

Governments and industry need to continue to invest in funding for innovation improvements for the agrifood industries. Funding for research at all levels of product, packaging, job design, workforce development and growth is a key for the future expansion and global competitiveness of the industry.

Whole of supply chain efficiencies, including international chain arrangements, are also important for enterprises to work towards improvements in their networks. The skilling of these people remains an important issue. Increased competition from world markets is making the use of exclusive global supply chain networks more and more important for the agrifood industry. Networks to share information and to address inefficiencies will increase competitiveness.

Continued research and development into technological improvement will be the cornerstone of agrifood industries' continued competition on the world stage. Research and development is critical to sustainability, Health and Safety, competition, supply chain efficiencies and export strategy.

Implications for skills development

Innovation is related to the competitiveness of the industry and as such the skilling and development of people within the industry is imperative to a sustainable and competitive industry.

Responses

- Research into the requirements for the skills needed to develop Agrifood personnel involved in supply chain activities. Report strategy to develop these skills for industry
- Develop and implement strategies for the expansion of training providers to deliver skills development and training for industry to include investigation and trial of innovative work practices

- Assist and guide industry in the development of networking skills and forums for the sharing and exchanging of information inside and outside the industry. These skill needs are closely linked to, and dependent upon, developing a climate of continuous innovation and management improvement.
- Development and dissemination of best practice models to assist industry development, focusing on the career development opportunities within the industry.
- Encourage more networking across and within industry through the development of communities of practice to assist in the sharing of skilling, best practice and development strategies.

Globalisation – market expansion and access

The Australian agrifood industry is essentially a global industry. Exporting and competing in the world market is crucial to business growth and sustainability. Australia already has a world best class reputation for our agricultural and food products and it is agreed across the industries that this reputation must be further developed and sustained. Food safety is of major concern and continues to be a priority for the agrifood industry.

The agrifood industry is a key export industry for Australia. To remain competitive in an aggressive global marketplace, governments and industry need to be encouraged to continue to invest in R&D. R&D funding will provide a competitive edge, and will retain Australia's good reputation and enhance career opportunities.

Quality systems management needs to be encouraged and supported for all enterprises in the agrifood industry. Quality management at all levels of the supply chain and production cycle is essential for market expansion, access and building exports. Leadership and technological skills development are also vital to build and sustain Australia's exporting advantages.

Implications for skills development

Protecting Australia's place in the world market place involves the continued substantial investment in R&D by government. This investment is crucial to support innovation in the industry and to encourage export growth.

Responses

- Research and report on the relevance of e-business (encompassing e-Learning capabilities) for agrifood industry and how training and skill resources can assist business global development.
- Deliver quality assurance training initiatives which embrace total systems management (EMS, OHS, food safety and risk management).
- Research comparison of international experience for training and the globalisation of the market place and what role skills development plays in this. Report to recommend an action agenda.
- Development of training programs to guide businesses in gaining research and development grants and how to incorporate research and development into their business management.
- Development of managers in e-business skills to assist in business development.

Vocational education and training trends

Vocational education and training is education and training for work. It exists to develop and recognise the skills of learners.

The Australian VET system is a nationally led, client-focused system that is among the most sophisticated in the world. This Agrifood Industry Skills Report, together with other Industry Skill Reports developed, will enhance the links between present and future skill needs and the VET system.

Qualification Profile

The agrifood industry has a lower proportion of its workforce in possession of post-school qualifications than does industry overall. The qualifications held by the 19.4% of the workforce that do have VET qualifications are mostly at the Certificate III or IV level. This situation is shown in greater detail in the following table and figure. This does not necessarily mean that the workforce is not skilled. It just does not have the skills recognised.

The following table details the qualification profile of key occupations across the agrifood industries.

Qualifications profile, Agrifood industries, 2003-2004

	Higher educational qualifications %	Diploma or Adv Certificate Dip III or IV %	Certificate or II %	School qualifications only %	Total %	
Rural & Related	8.5	5.4	11.6	1.3	73.2	100
Food processing	11.7	5	15.9	1	66.3	100
Seafood	9	8.6	13.5	1.4	67.5	100
Meat Industry (b)	7.5	3.8	15.3	0.9	72.5	100
All Agrifood (c)	9.1	5.3	13	1.2	71.5	100
All Industry	20.1	7.3	15.3	0.9	56.2	100

(a) No data available for Gardening and Landscaping services or Grain Storage

(b) No data available for Meat retailing.

(c) No data available for Racing industry

Source: Monash, Centre for Policy Studies June 2004

Participation

The number of VET students in agrifood related courses decreased overall by 3 per cent over the period 1998-2003. It needs to be noted that this percentage decline, which was well below the 13 per cent growth in VET participation experienced across all industries, represents the aggregate of above-average growth in participation in primary industry (excluding forestry) courses and a significant decline in participation in food processing courses. This situation is shown in the following tables.

Students by industry of course, 1998 - 2003

	1998	1999	2000	2001	2002	2003	% change 1998 - 2003
Agrifood Courses	93,498	112,080	102,583	115,613	114,092	90,491	-3%
All clients	1,514,167	1,619,740	1,713,358	1,684,498	1,690,139	1,717,795	13%

Source: NCVET, Australian Vocational Education and Training Statistics, 1998-2003

Enrolments in Agrifood-related courses 1998-2003

Industry group	1998	1999	2000	2001	2002	2,003	% change 1998-2003
Food Processing	32,951	39,137	24,111	26,224	28,038	20,512	-38%
Primary industry excluding forestry	60,547	72,943	78,472	89,389	86,054	69,979	16%
All clients	1,514,167	1,619,740	1,713,358	1,684,498	1,690,139	1,717,795	13%

Source: NCVET, Australian Vocational Education and Training Statistics, 1998-2003

These figures represent data on publicly funded training activity only and include training under Training Packages and other registered courses. The data does not include training provided by any industry RTOs, other government instrumentalities (for example FarmBis) which self-fund training, and private providers where the training has not been funded through the government VET system.

The take-up of training under Training Packages has expanded by around 1.8 per cent since 2001. It is important to note that growth under Training Packages is associated with the progressive implementation of Training Packages. The Food Processing Training Package for example was reviewed and re-endorsed in 2003. Implementation is now occurring and is not yet reflected in the statistics.

Enrolments in main qualifications under Training Packages, Agrifood, 2001 to 2003
Publicly-funded training

	2001	2002	2003
	<i>no.</i>	<i>no.</i>	<i>no.</i>
FDF10198 - Certificate I in Food Processing	4,252	3,224	2,390
FDF10498 - Certificate I in Food Processing (Wine)	568	1,058	548
FDF10800 - Certificate I in Food Processing (Retail Baking)	23	296	502
FDF20198 - Certificate II in Food Processing	5,972	5,455	5,152
FDF20498 - Certificate II in Food Processing (Wine)	1,092	1,253	1,639
FDF30198 - Certificate III in Food Processing	5,267	4,238	4,097
FDF30498 - Certificate III in Food Processing (Wine)	1,579	1,588	1,325
FDF30600 - Certificate III in Food Processing (Retail Baking - Bread)	0	750	1,182
FDF30700 - Certificate III in Food Processing (Retail Baking - Combined)	0	813	1,387
MTM20100 - Certificate II in Meat Processing (Abattoirs)	331	4,307	5,555
MTM20198 - Certificate II in Meat Processing (Abattoirs)	5,689	1,245	81
MTM30800 - Certificate III in Meat Processing (Meat Retailing)	20	740	1,403
RTD20102 - Certificate II in Conservation and Land Management	0	69	1,998
RTD30102 - Certificate III in Conservation and Land Management	0	11	1,060
RUA20198 - Certificate II in Agriculture	4,859	6,473	4,364
RUA22498 - Certificate II in Agriculture (Shearing)	1,234	770	719
RUA30198 - Certificate III in Agriculture	4,044	5,674	1,592
RUA30298 - Certificate III in Agriculture (Beef Cattle Production)	1,681	565	382
RUA40198 - Certificate IV in Agriculture	2,400	1,699	1,491
RUA40498 - Certificate IV in Agriculture (Dairy)	2,313	1,187	386
RUA41198 - Certificate IV in Agriculture (RBM)	1,267	1,677	556
RUA41498 - Certificate IV in Agriculture (Wool Classing)	2,259	2,533	1,007
RUA50198 - Diploma of Agriculture	463	1,044	1,494
RUH10198 - Certificate I in Horticulture	1,295	1,809	1,846
RUH20198 - Certificate II in Horticulture	7,010	7,401	6,767
RUH20698 - Certificate II in Horticulture (Parks and Gardens)	1,176	1,609	1,275
RUH20898 - Certificate II in Horticulture (Production)	805	1,041	1,330
RUH30198 - Certificate III in Horticulture	6,971	5,885	4,435
RUH30498 - Certificate III in Horticulture (Landscape)	1,133	1,890	2,347
RUH30598 - Certificate III in Horticulture (Nursery)	804	1,007	1,088
RUH30698 - Certificate III in Horticulture (Parks and Gardens)	1,054	1,647	1,995
RUH30798 - Certificate III in Horticulture (Turf Management)	748	1,090	1,249
RUH40198 - Certificate IV in Horticulture	1,429	1,575	1,861
RUH50198 - Diploma of Horticulture	1,095	1,187	1,545
RUV30198 - Certificate III in Animal Studies	1,010	1,097	1,130
Total Agrifood	92,064	97,258	93,696

Source: NCVER

Apprenticeships and Traineeships

The number of apprentices and trainees in training in the agrifood industries increased from 20,946 in 2000 to 27,681 in 2003, overall an estimated 32 per cent rise. To some extent this trend is consistent with the overall expansion in apprentices and trainee numbers in recent years and the uptake of training packages.

Appendix A

Concordance

Agrifood industry activities mapped to ANZSIC codes [Industry of Employment]

Sector	Agrifood activity	ANZSIC title	ANZSIC code
<i>Food, beverage and pharmaceutical manufacturing</i>			
	Aerated waters/water	Soft drink, cordial and syrup manufacturing	2181
	Biscuits	Biscuit manufacturing	2163
	Brewing	Beer and malt manufacturing	2182
	Confectionery	Confectionery manufacturing	2172
	Dairy	Dairy product manufacturing	212
	Edible oils and fats	Oil and fat manufacturing	214
	Egg processing	Grocery wholesaling nec (part)	4719 (part)
	Flour milling	Flour mill product manufacturing	2151
	Fruit and vegetables	Fruit and vegetable processing	213
	General foods	Food manufacturing nec (part)	2179 (part)
	Honey	Food manufacturing nec (part)	2179 (part)
	Ingredients/spices/condiments/seasonings	Food manufacturing nec (part)	2179 (part)
	Pasta	Cereal food and baking mix mfg (part)	2152 (part)
	Pet foods	Prepared animal and bird feed mfg (part)	2174 (part)
	Pharmaceuticals	Medicinal and pharmaceutical product mfg	2543
	Plant baking (bread and pastry)	Bakery product manufacturing	216
	Poultry	Poultry processing	2112
	Prepared meals	Food manufacturing nec (part)	2179 (part)
	Retail baking	Bread and cake retailing	5124
	Rice	Cereal food and baking mix mfg (part)	2152 (part)
	Stock feed milling	Prepared animal and bird feed mfg (part)	2174 (part)
	Sugar	Sugar manufacturing	2171
	Tea and coffee	Food manufacturing nec (part)	2179 (part)
	Wine	Wine manufacturing	2183
	Tobacco manufacturing	Spirit manufacturing	2184
			219
<i>Meat</i>			
	Abattoirs	Meat processing	2111
	Retail	Fresh meat, fish and poultry retailing (part)	5121 (part)
	Smallgoods	Bacon, ham and smallgood manufacturing	2113
		Technical services nec (part)	7829 (part)
	Food services	Central government administration (part – legislation enactment and enforcement [part])	8111 (part)
<i>Seafood</i>			
	Aquaculture	Aquaculture	0420
	Fisheries compliance	State government administration (part – legislation enactment and enforcement [part])	8112 (part)
	Seafood processing, sales and distribution	Seafood processing	2173
	Fishing operations	Fresh meat, fish and poultry retailing (part)	5121 (part)
	Fishing charter operations	Marine fishing	041
		Coastal water transport (part)	6302 (part)
<i>Racing</i>			
	Thoroughbred racing		
	Harness racing	Horse and dog racing	9311
	Greyhound racing		
<i>Rural and related industries</i>			
	• Rural production		
	Beef	Beef cattle farming	0125
		Cotton growing	0162
	Cotton	Cotton ginning	0211
	Dairy	Dairy cattle farming	0130
		Grain-sheep and grain-beef cattle farming	0122
		Sheep-beef cattle farming	0123
	General agriculture	Deer farming	0153
		Livestock farming nec (part)	0159 (part)
		Crop and plant growing nec	0169
	Goat	Livestock farming nec (part)	0159 (part)
	Grains	Grain growing	0121
		Grain storage	6701
	Horse breeding	Horse farming	0152
	Irrigation	Services to agriculture nec (part)	0219 (part)
	Milk harvesting	[Dairy cattle farming perhaps?]	[0130 perhaps?]

Sector	Agrifood activity	ANZSIC title	ANZSIC code
	Pig	Pig farming	0151
	Poultry	Poultry farming	014
	Production horticulture	Crop and plant growing nec	0169
	Shearing	Shearing services	0212
	Sheep and wool	Sheep farming	0124
	Sugar	Sugar cane growing	0161
	Wool handling and classing	Services to agriculture nec (part)	0219 (part)
•	<i>Horticulture</i>		
	Arboriculture	Plant nurseries	0111
	Floriculture	Cut flower and flower seed growing	0112
	General horticulture	Horticulture and fruit growing (part)	0113-0119
	Landscaping	Landscaping services	4251
	Nursery (retail and wholesale)	Farm produce & supplies wholesaling nec (part)	4519 (part)
		Garden supplies retailing	5253
	Parks and gardens	Zoological and botanic gardens (part)	9231 (part)
		Recreational parks and gardens (part)	9239 (part)
	Turf management	Landscaping services (part)	4251 (part)
•	<i>Conservation and land management</i>		
	Community coordination and facilitation	Services to agriculture nec (part)	0219 (part)
	General land management	Recreational parks and gardens (part)	9239 (part)
	Indigenous land management		
	Conservation earthworks	Site preparation services (part)	4210 (part)
	Lands, parks and wildlife	Recreational parks and gardens (part)	9239 (part)
	Natural area restoration	Gardening services	9525
	Vertebrate pest management	Hunting and trapping (part)	0220 (part)
	Weed management	Services to agriculture nec (part)	0219 (part)
•	<i>Animal care and management</i>		
		Hunting and trapping (part)	0220 (part)
	Animal control and regulation	State government administration (part – legislation enactment and enforcement [part])	8112 (part)
		Local government administration (part)	8113 (part)
	Captive animals	Zoological and botanic gardens (part)	9231 (part)
	Animal technology	Technical services nec (part)	7829 (part)
	Veterinary nursing	Veterinary services (part)	8640 (part)
	Companion animal services	Services to agriculture nec (part)	0219 (part)

Agrifood Training Package Coverage

<i>Training Package</i>	<i>Description</i>
Amenity Horticulture	The Amenity Horticulture Training Package includes training for the following sectors of the Horticulture industry: Arboriculture, Floriculture, Landscape, Retail Nursery, Wholesale Nursery, Parks and Gardens, Turf and General Horticulture. Qualifications covered by the Training Package are from Certificates I to Advanced Diploma level.
Animal Care and Management	The Animal Care and Management Training Package cover training for a number of areas in the animal care and management industry. The qualifications covered by this training package span from Certificate I to Diploma.
Australian Meat Industry	This Australian Meat Industry Training Package includes training for the following areas of technical competence and specialisation in the meat industry: Abattoirs (General, Boning, Slaughtering, Meat safety, Rendering), Food Services, Meat Retailing, Smallgoods, Laboratory operations, Leadership and Quality Assurance in Meat Processing. Levels of qualification attainable depend on the area of interest pursued.
Conservation and Land Management	The Conservation and Land Management Training Package provides the mechanisms to gain qualifications from Certificate I through to Advanced Diploma in General Conservation and Land Management; and from Certificate II to Diploma level in Conservation Earthworks, Community Coordination and Facilitation, Indigenous Land Management, Lands, Parks and Wildlife, Natural Areas and Restoration, Weed Management, and Vertebrate Pest Managements
Food Processing	The Food Processing Industry Training Package (food, beverage, tobacco and pharmaceutical) provides the mechanisms to gain qualifications from Certificate I to Certificate III in Plant Baking, in Sales, in Pharmaceuticals Manufacturing and Wine; in Certificate I or III in Retail Baking; and from Certificate I to Diploma in Food Processing.
Racing Industry	The Racing Industry Training Package covers the following occupations in the three codes of the racing industry, Thoroughbred Racing, Harness Racing and Greyhound racing: Trainers (horse and greyhound), Jockeys, Harness drivers, Track work riders, Stablehands, and Greyhound attendants. The range of qualifications covered by the Training Package is from Certificate I to Diploma.
Rural Production	The Rural Production Training Package includes Beef Cattle Production, Dairy, Grain Production, Pig Production, Poultry Production, Rural Business Management, Sheep/Wool Production, Sugar Cane Production, Cotton Production, Goat Production, Horse Breeding and Rural Merchandising sectors of the industry. The range of qualifications covered by the Training Package is from Certificate I to Advanced Diploma.
Seafood	The Seafood Industry Training Package includes training for the following sectors of the Seafood industry: Aquaculture, Fisheries Compliance, Fishing Operations, Seafood Processing and Seafood Sales and Distribution. Qualifications covered by the Training Package are from Certificates I to Diploma level
Sugar Milling	The Sugar Milling Training Package includes training in the process, service, maintenance and transport areas of sugar milling industry. Qualifications covered by this Package are at Certificate I, II, and III level.
Enterprise Packages	Woolworths Training Package Ricegrowers' Cooperative Limited

Agrifood Qualifications

RTE10103	Certificate I in Rural Operations
RTE20103	Certificate II in Agriculture
RTE20203	Certificate II in Irrigation
RTE20303	Certificate II in Wool Handling
RTE20403	Certificate II in Shearing
RTE20503	Certificate II in Crutching
RTE20603	Certificate II in Production Horticulture
RTE20703	Certificate II in Rural Operations
RTE30103	Certificate III in Agriculture
RTE30203	Certificate III in Agriculture (Beef Production)
RTE30303	Certificate III in Agriculture (Cotton Production)
RTE30403	Certificate III in Agriculture (Dairy Production)
RTE30503	Certificate III in Agriculture (Goat Production)
RTE30603	Certificate III in Agriculture (Grain Production)
RTE30703	Certificate III in Agriculture (Horse Breeding)
RTE30803	Certificate III in Agriculture (Milk Harvesting)
RTE30903	Certificate III in Agriculture (Pig Production)
RTE31003	Certificate III in Agriculture (Poultry Production)
RTE31103	Certificate III in Agriculture (Sheep and Wool Production)
RTE31203	Certificate III in Agriculture (Sugar Production)
RTE31303	Certificate III in Irrigation
RTE31403	Certificate III in Wool Clip Preparation
RTE31503	Certificate III in Shearing
RTE31603	Certificate III in Production Horticulture
RTE31703	Certificate III in Rural Business
RTE31803	Certificate III in Rural Merchandising
RTE31903	Certificate III in Rural Operations
RTE32003	Certificate III in Advanced Wool Handling
RTE40103	Certificate IV in Agriculture
RTE40203	Certificate IV in Irrigation
RTE40303	Certificate IV in Wool Classing
RTE40403	Certificate IV in Shearing
RTE40503	Certificate IV in Production Horticulture
RTE40603	Certificate IV in Rural Business
RTE50103	Diploma of Agriculture
RTE50203	Diploma of Irrigation
RTE50303	Diploma of Production Horticulture
RTE50403	Diploma of Rural Business Management
RTE60103	Advanced Diploma of Agriculture
RTE60203	Advanced Diploma of Rural Business Management

Arboriculture

RTF20203	Certificate II in Horticulture (Arboriculture)
RTF30203	Certificate III in Horticulture (Arboriculture)
RTF40203	Certificate IV in Horticulture (Arboriculture)
RTF50203	Diploma of Horticulture (Arboriculture)

Floriculture

RTF20303	Certificate II in Horticulture (Floriculture)
RTF30303	Certificate III in Horticulture (Floriculture)
RTF40303	Certificate IV in Horticulture (Floriculture)

RTF50303 [Diploma of Horticulture \(Floriculture\)](#)

Horticulture

RTF10103 [Certificate I in Horticulture](#)
RTF20103 [Certificate II in Horticulture](#)
RTF30103 [Certificate III in Horticulture](#)
RTF40103 [Certificate IV in Horticulture](#)
RTF50103 [Diploma of Horticulture](#)
RTF60103 [Advanced Diploma of Horticulture](#)

Landscape

RTF20403 [Certificate II in Horticulture \(Landscape\)](#)
RTF30403 [Certificate III in Horticulture \(Landscape\)](#)
RTF40403 [Certificate IV in Horticulture \(Landscape\)](#)
RTF50403 [Diploma of Horticulture \(Landscape\)](#)

Parks and Gardens

RTF20703 [Certificate II in Horticulture \(Parks and Gardens\)](#)
RTF30703 [Certificate III in Horticulture \(Parks and Gardens\)](#)
RTF40703 [Certificate IV in Horticulture \(Parks and Gardens\)](#)
RTF50703 [Diploma of Horticulture \(Parks and Gardens\)](#)

Retail Nursery

RTF20503 [Certificate II in Horticulture \(Retail Nursery\)](#)
RTF30503 [Certificate III in Horticulture \(Retail Nursery\)](#)
RTF40503 [Certificate IV in Horticulture \(Retail Nursery\)](#)
RTF50503 [Diploma of Horticulture \(Retail Nursery\)](#)

Turf

RTF20803 [Certificate II in Horticulture \(Turf\)](#)
RTF30803 [Certificate III in Horticulture \(Turf\)](#)
RTF40803 [Certificate IV in Horticulture \(Turf\)](#)
RTF50803 [Diploma of Horticulture \(Turf\)](#)

Wholesale Nursery

RTF20603 [Certificate II in Horticulture \(Wholesale Nursery\)](#)
RTF30603 [Certificate III in Horticulture \(Wholesale Nursery\)](#)
RTF40603 [Certificate IV in Horticulture \(Wholesale Nursery\)](#)
RTF50603 [Diploma of Horticulture \(Wholesale Nursery\)](#)

RUV10104 [Certificate I in Animal Studies](#)
RUV20104 [Certificate II in Animal Studies](#)
RUV30104 [Certificate III in Animal Technology](#)
RUV30204 [Certificate III in Captive Animals](#)
RUV30304 [Certificate III in Companion Animal Services](#)
RUV40104 [Certificate IV in Animal Control and Regulation](#)
RUV40204 [Certificate IV in Captive Animals](#)
RUV40304 [Certificate IV in Companion Animal Services](#)
RUV40404 [Certificate IV in Veterinary Nursing](#)
RUV50104 [Diploma of Animal Technology](#)
RUV50204 [Diploma of Veterinary Nursing \(Surgical\)](#)

RUV50304	Diploma of Veterinary Nursing (Dental)
RUV50404	Diploma of Veterinary Nursing (Emergency and Critical Care)
RTD10102	Certificate I in Conservation and Land Management
RTD20102	Certificate II in Conservation and Land Management
RTD30102	Certificate III in Conservation and Land Management
RTD40102	Certificate IV in Conservation and Land Management
RTD50102	Diploma of Conservation and Land Management
RTD60102	Advanced Diploma of Conservation and Land Management

Aquaculture

SFI10104	Certificate I in Seafood Industry (Aquaculture)
SFI20104	Certificate II in Seafood Industry (Aquaculture)
SFI30104	Certificate III in Seafood Industry (Aquaculture)
SFI40104	Certificate IV in Seafood Industry (Aquaculture)
SFI50104	Diploma of Seafood Industry (Aquaculture)

Fisheries Compliance

SFI20404	Certificate II in Seafood Industry (Fisheries Compliance Support)
SFI30404	Certificate III in Seafood Industry (Fisheries Compliance)
SFI40404	Certificate IV in Seafood Industry (Fisheries Compliance)
SFI50404	Diploma of Seafood Industry (Fisheries Compliance)

Fishing Charter Operations

SFI30304	Certificate III in Seafood Industry (Fishing Charter Operations)
SFI50304	Diploma of Seafood Industry (Fishing Charter Operations)

Fishing Operations

SFI10204	Certificate I in Seafood Industry (Fishing Operations)
SFI20204	Certificate II in Seafood Industry (Fishing Operations)
SFI31204	Certificate III in Seafood Industry (Fishing Operations)
SFI32204	Certificate III in Seafood Industry (Fishing Operations - Marine Engine Driver II)
SFI33204	Certificate III in Seafood Industry (Fishing Operations - Master 5/Skipper 3)
SFI41204	Certificate IV in Seafood Industry (Fishing Operations)
SFI42204	Certificate IV in Seafood Industry (Fishing Operations - Marine Engine Driver I)
SFI50204	Diploma of Seafood Industry (Fishing Operations)

Seafood Processing

SFI10504	Certificate I in Seafood Industry (Seafood Processing)
SFI20504	Certificate II in Seafood Industry (Seafood Processing)
SFI30504	Certificate III in Seafood Industry (Seafood Processing)
SFI40504	Certificate IV in Seafood Industry (Seafood Processing)
SFI50504	Diploma of Seafood Industry (Seafood Processing)

Seafood Sales and Distribution

SFI20604	Certificate II in Seafood Industry (Seafood Sales and Distribution)
SFI30604	Certificate III in Seafood Industry (Seafood Sales and Distribution)
SFI40604	Certificate IV in Seafood Industry (Seafood Sales and Distribution)

Food Processing (Plant Baking)

FDF10303	Certificate I in Food Processing (Plant Baking)
FDF20303	Certificate II in Food Processing (Plant Baking)
FDF30303	Certificate III in Food Processing (Plant Baking)

Food Processing (Retail Baking)

FDF10803	Certificate I in Food Processing (Retail Baking)
FDF30503	Certificate III in Food Processing (Retail Baking - Cake and Pastry)
FDF30603	Certificate III in Food Processing (Retail Baking - Bread)
FDF30703	Certificate III in Food Processing (Retail Baking - Combined)

Food Processing (Sales)

FDF10903	Certificate I in Food Processing (Sales)
FDF20903	Certificate II in Food Processing (Sales)
FDF30903	Certificate III in Food Processing (Sales)

Food Processing Industry

FDF10103	Certificate I in Food Processing
FDF20103	Certificate II in Food Processing
FDF30103	Certificate III in Food Processing
FDF40103	Certificate IV in Food Processing
FDF50103	Diploma of Food Processing

Pharmaceutical Manufacturing

FDF10203	Certificate I in Pharmaceutical Manufacturing
FDF20203	Certificate II in Pharmaceutical Manufacturing
FDF30203	Certificate III in Pharmaceutical Manufacturing

Wine

FDF10403	Certificate I in Food Processing (Wine)
FDF20403	Certificate II in Food Processing (Wine)
FDF30403	Certificate III in Food Processing (Wine)

Abattoirs

MTM20100	Certificate II in Meat Processing (Abattoirs)
MTM30100	Certificate III in Meat Processing (Boning)
MTM30300	Certificate III in Meat Processing (Meat Safety)
MTM30400	Certificate III in Meat Processing (Rendering)
MTM30500	Certificate III in Meat Processing (Slaughtering)
MTM30600	Certificate III in Meat Processing (General)
MTM40200	Certificate IV in Meat Processing (Meat Safety)
MTM40400	Certificate IV in Meat Processing (General)

Food Services

MTM20400 [Certificate II in Meat Processing \(Food Services\)](#)
MTM30200 [Certificate III in Meat Processing \(Food Services\)](#)

Meat Retailing

MTM10200 [Certificate I in Meat Processing \(Meat Retailing\)](#)
MTM20300 [Certificate II in Meat Processing \(Meat Retailing\)](#)
MTM30800 [Certificate III in Meat Processing \(Meat Retailing\)](#)
MTM50200 [Diploma of Meat Processing \(Meat Retailing\)](#)

Qualifications Across Sectors (some or all)

MTM40100 [Certificate IV in Meat Processing \(Leadership\)](#)
MTM40300 [Certificate IV in Meat Processing \(Quality Assurance\)](#)
MTM50100 [Diploma of Meat Processing](#)
MTM60100 [Advanced Diploma of Meat Processing](#)
PML30199 [Certificate III in Laboratory Skills](#)

Smallgoods

MTM10100 [Certificate I in Meat Processing \(Smallgoods\)](#)
MTM20200 [Certificate II in Meat Processing \(Smallgoods\)](#)
MTM30700 [Certificate III in Meat Processing \(Smallgoods\)](#)

RGR10102 [Certificate I in Racing \(Stablehand\)](#)
RGR10202 [Certificate I in Racing \(Greyhound Attendant\)](#)
RGR20102 [Certificate II in Racing \(Stablehand\)](#)
RGR20202 [Certificate II in Racing \(Greyhound Owner Trainer\)](#)
RGR30102 [Certificate III in Racing \(Trackrider\)](#)
RGR30202 [Certificate III in Racing \(Advanced Stablehand\)](#)
RGR30302 [Certificate III in Racing \(Harness Owner Trainer\)](#)
RGR30402 [Certificate III in Racing \(Harness Driver\)](#)
RGR30502 [Certificate III in Racing \(Greyhound Trainer\)](#)
RGR40102 [Certificate IV in Racing \(Thoroughbred Owner Trainer\)](#)
RGR40202 [Certificate IV in Racing \(Jockey\)](#)
RGR40302 [Certificate IV in Racing \(Advanced Harness Driver\)](#)
RGR40402 [Certificate IV in Racing \(Harness Trainer\)](#)
RGR50102 [Diploma of Racing \(Thoroughbred Trainer\)](#)

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