

Trends and drivers of change in the food & beverages industry and its skills needs

Aequor, Lisbon 22 november 2006

Some numbers (emcc)

Companies

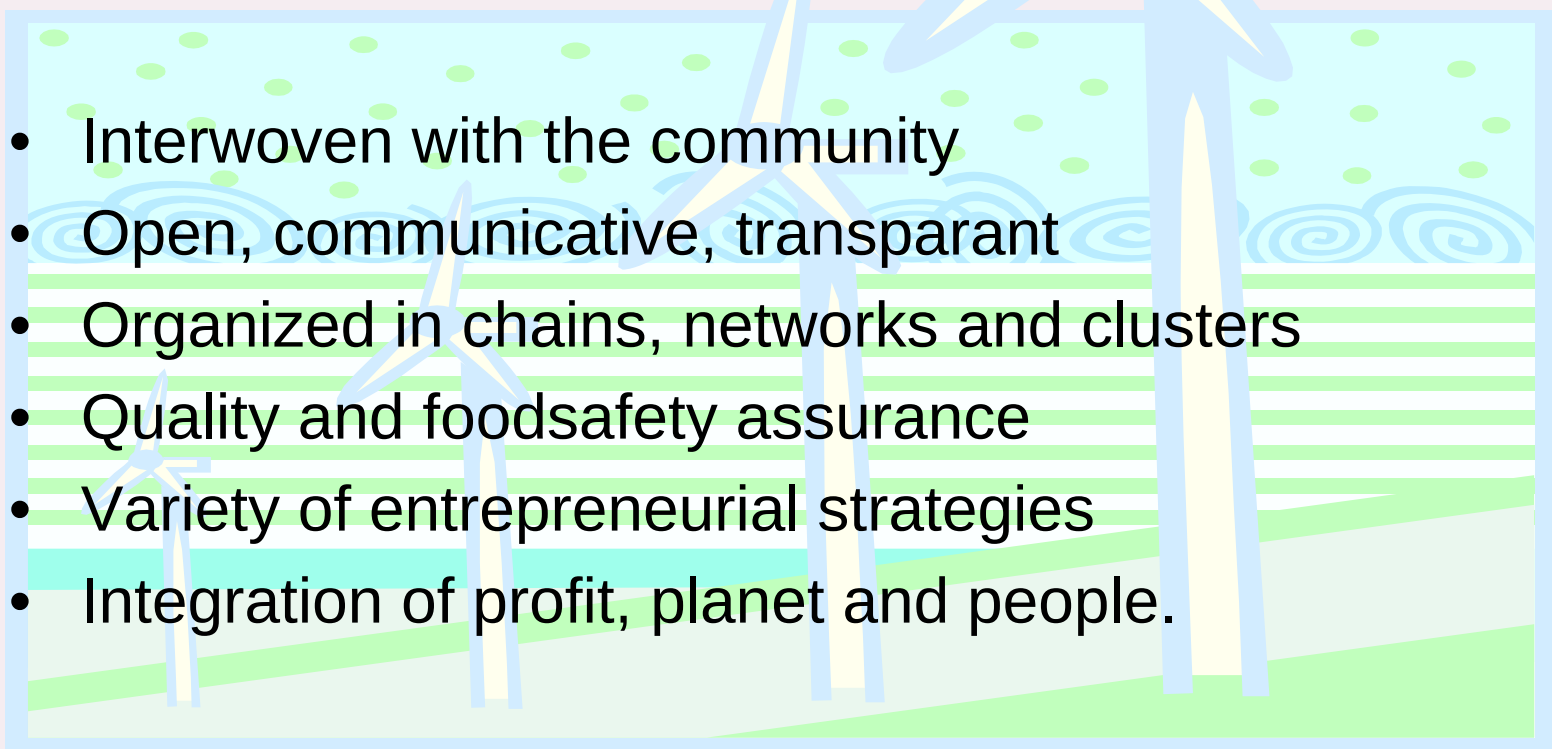
- Large (250 +)
 - Medium (100 -250)
 - Small & micro
-
- Total turnover ca 815 billion Euro

Employees

- 41 %
 - 26 %
 - 33 %
-
- Total ca. 4 million workers



Sustainable sector

- 
- Interwoven with the community
 - Open, communicative, transparant
 - Organized in chains, networks and clusters
 - Quality and foodsafety assurance
 - Variety of entrepreneurial strategies
 - Integration of profit, planet and people.

Trends

- Globalization
- Internationalization
- Integration (agrifood-complex)
- Growing interference with other sectors
- Transparency and communication



Change drivers - strategies

Challenges

- Globalisation
- Competition
- Retail-power
- Foodsafety
- Sustainability



Strategies

- Strong branding
- Innovation
- Niche marketing
- Local hero
- Service
- Quality assurance
- Cost reduction

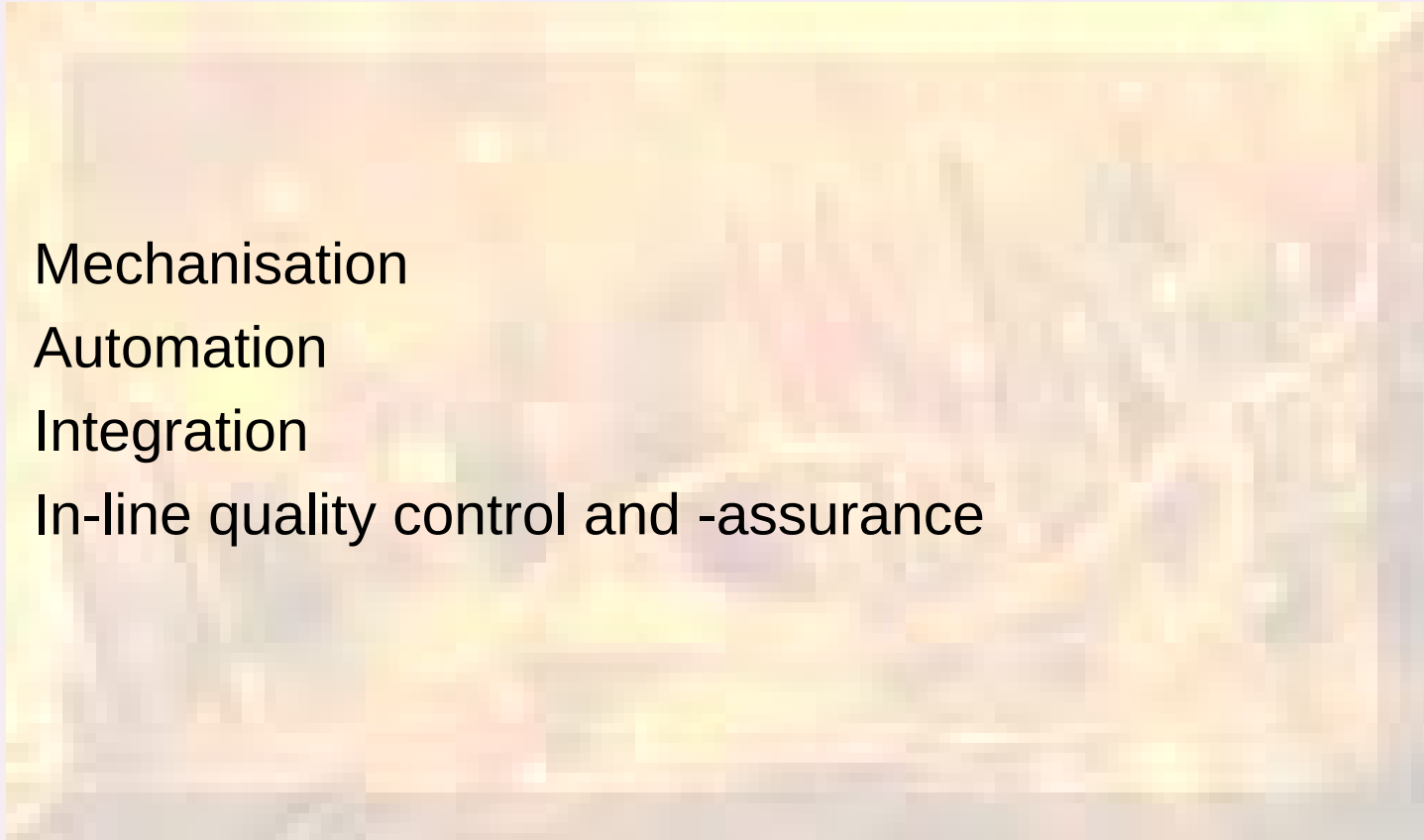
Major trends (products)

- Convenience
- Health
- Wellness
- Sustainability / organic products
- Snacks / “grazing”



Major trends (production/process)

- Mechanisation
- Automation
- Integration
- In-line quality control and -assurance



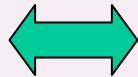
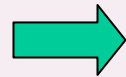
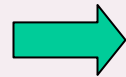
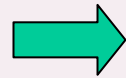
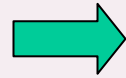
trends (management & organisation)

- Outsourcing
- Less hierarchic levels
- Optimalisation (lean production, TPM, WCM etc.)
- Integration of tasks and responsibilities (complexity)
- Teamwork
- Flexibilisation
- Competence management



Trends in skills needs

- foodtechnology
- Q-level 1 – 2
- input thinking
- knowledge
- vocational skills
- “hard” skills



process technics
level 3 – 4 – 5
output thinking
performance
competences
“soft” skills

Client-orientation

Product-orientation

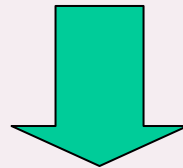
- Supply without customer
- Objective quality criteria
- Supply-side technicians define the quality
- Few people define quality
- Service “owned” by the company
- Production equipment orientation (what can we make to sell)

Client-orientation

- Services delivered
- Subjective quality concept
- Contact people determine quality as experience
- Many people determine quality
- Quality perception based on experience
- Client expectations central issue

Client orientation

Services provide experiences



product ➡ service
input ➡ output
skills ➡ competences

Competences

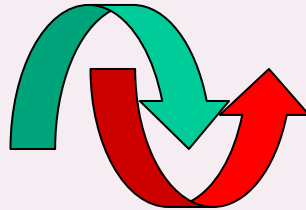
Competences are capacities to be seen as abilities of individuals, teams, units or organisations which enable them to produce the desired performances.



Competences

General or specific?

- Competences are general and valid in more sectors and professions.



- Performance, behaviour and success-criteria are specific in each specific context

Competences

Competence



behaviour



performance



yield

➤ abilities

➤ context

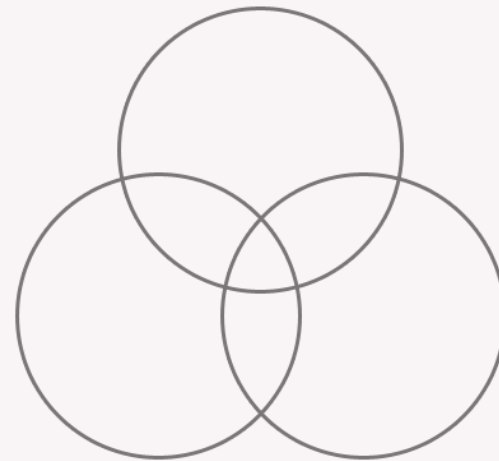
➤ show

➤ results

Competences

3 integrated aspects

- Knowledge
- Abilities
- Attitude



Foodindustry conference 30-09-2005

10 most wanted competences

- Quality attitude
- Learning ability
- Basic foodtechnology / hygiene
- Teamplayer
- Commercial feeling
- Technical / mechanical skills
- Involvement / commitment
- Entrepreneurship
- Communication
- Problem solving

Competence based education and training

- Development within the framework of integrated assignments
- Practice, experiences and challenges are starting points of the learning process
- Professional practice essential source
- Internal steering, external support

To conclude

- “People make the difference in national and international competition” (*Unilever*)
- “Investment in human capital is investment in innovative and competitive power”
- Social partners have a key responsibility in the “qualification chain”, representing the demand side