



International
Specialised
Skills
Institute

Options and Directions for the Continuous Improvement of the Australian Meat Retail Qualifications



Jodie Hummerston

2011 AgriFood International Fellowship

Fellowship funded by AgriFood Skills Australia.





**International
Specialised
Skills
Institute**

ISS Institute

Level 1
189 Faraday Street
Carlton Vic
AUSTRALIA 3053

T 03 9347 4583

F 03 9348 1474

E info@issinstitute.org.au

W www.issinstitute.org.au

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i. Executive Summary

The purposes of this Fellowship were to:

- gain insight into future trends for the Australian meat industry, based on current European trends
- provide advice on alternative training qualifications and models for meat retailers (butchers)
- gain insight into potential models for post-trade training for Australian butchers.

The Fellow visited butcher shops, meat departments and food halls in supermarkets/department stores and training organisations in the United Kingdom, Germany, Belgium and Denmark over a five-week period in 2012.

Each of the nations visited had a vastly different industry to Australia, and to each other. The German and British industries were more traditional than that of Australia. They sold very traditional cuts and only a limited variety of value-added products. The Danish meat industry was more similar to the Australian industry in that they specialised in value-added meat products. In contrast to Australia, however, the Danish butchers also offered a range of pre-cooked meals.

Australian independent butchers have a much higher market share than independent butchers in the UK or Denmark. Whilst both nations are still training a large number of apprentice butchers, many of these work in supermarkets and food halls, rather than independent butcher shops. The European supermarkets sold a larger variety of meat products than supermarkets in Australia. They even offer a range of qualities of the same cuts of meat, as well as better designed whole meal solutions. Most large supermarkets in both Denmark and the UK also have butchery counters, so customers who prefer interacting with the butcher, or having meat cut specially for them, still have this opportunity within the supermarket.

There were a number of trends evident in the UK and Denmark that provided some insight into potential trends in Australia in the coming years.

- Dry-aging beef – this is a traditional way of preparing primals for sale in the UK which is said to improve tenderness and eating quality. This trend is just becoming popular in Australian butcher shops. It is recommended that the industry consider developing units of competency for dry-aging beef to ensure they are managing the process safely. Training would also help butchers who are just setting up dry-aging rooms to reduce errors and wastage.
- Pre-cooked meal solutions – this was popular in Denmark, in both supermarkets and independent butcher shops. Butchers were trained in meal preparation and understood how to minimise cross contamination risks. Supermarkets in the UK sold a huge variety of fresh (i.e. not frozen) heat and serve meals. Butchers in Australia are already considering this as a potential point of difference with supermarkets, but are wary of the food safety issues and regulatory requirements of preparing and selling cooked and raw products in the same premises. It is recommended that a unit of competency on cooking meat-based meals for retail sale be included in the Certificate III in Meat Processing (Retail Butcher).
- Online selling – most stores in the UK and Denmark have interactive websites that allow customers to order online. In the UK, butchers use refrigerated couriers to deliver meat across the nation. Australian shoppers are increasingly using online shopping and delivery services to purchase fresh produce and groceries. Butchers in Australia need to keep on top of this trend to maintain their market share against supermarkets who already offer these services.

The UK, Denmark and Germany all offer formalised training for butchers, as does Australia. However, the European nations also provide training programs for meat retailing customer service specialists. These qualifications focused more on simple cutting and slicing, customer service skills and display and presentation skills. These training programs were made possible either through more flexibility in subject choices for the butchery qualification, or as separate qualifications. There needs to be a similar approach in Australia to meet the changing skill needs of our meat retailers.

i. Executive Summary

This could be achieved through a second Certificate III qualification for meat retailers. This recommendation has since been discussed with AMIC and the two major supermarket chains and a second qualification has been developed.

Higher level training is also more common in the UK, Germany and Denmark. In the UK, qualifications for supervisors to managers attract large numbers of enrolments. In Germany, it is compulsory to undertake additional training before you are eligible to manage a butcher shop. In Denmark, supervisors and managers can undertake a range of higher level, meat-focused qualifications and training programs. The Australian industry needs to establish models of training for supervisors and managers. There is already a suitable Certification IV qualification in Australia. MINTRAC needs to support registered training organisations to develop a suitable training program.

Some of the most valuable ideas that the Fellow brought back were not part of the initial scope for the investigation. The Fellowship provided the opportunity to discuss the potential for international apprentice competitions and exchange programs, especially between Denmark, the UK and Australia. This is an opportunity that should continue to be investigated in order to continue sharing skills and knowledge between the three countries.

The other, unexpected recommendation from this Fellowship came following an invitation to the monthly members' luncheon at the Worshipful Company of Butchers in London. Membership in the Company is highly valued by butchers, suppliers and trainers in the industry. The formal lunches and presentations allowed members to network and feel part of a very important and traditional industry. It would be worthwhile establishing an industry association for butchers in Australia to improve the pride and professionalism in a great, historical trade.

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ii. Abbreviations/Acronyms

AMIC

The Australian Meat Industry Council is the Peak Council that represents retailers, processors, exporters and smallgoods manufacturers in the post-farm-gate meat industry.

APL

Australian Pork Limited is the producer owned organisation that supports and promotes the Australian pork industry.

MINTRAC

National Meat Industry Training Advisory Council

MLA

Meat and Livestock Australia. Meat and Livestock Australia delivers marketing and research programs for Australia's cattle, sheep and goat producers.

NFMFT

National Federation of Meat and Food Traders. This is the English Federation for butchers. Their role is similar to AMIC in Australia.

NVQ

National Vocational Qualification. This is the British qualification framework for vocational training. It is similar to Australia's Australian Qualifications Framework.

SFMT

Scottish Federation of Meat Traders. The Scottish equivalent of the NFMFT.

iii. Definitions

Certificate III

MTM30811 Certificate III in Meat Processing (Retail Butcher). This is the trade qualification for retail butchers in Australia.

Dry-aged beef

beef that has been hung or placed on a rack to dry for several weeks in order to break down the connective tissues in meat to improve tenderness.

Heat and serve

Pre-cooked whole meals that only require the consumer to re-heat in the oven or microwave oven and transfer to a dish before eating.

Meat Retailers

Butchers who sell meat direct to consumers, either in a supermarket or independent butcher shop.

MTM11

The Australian Meat Industry Training Package. This is the national training package that contains all meat industry qualifications.

Value-added products

Meat products that are prepared beyond slicing, such as marinated steaks, meat wrapped in pastry, stir fries, pre-prepared casseroles or rolled roasts with stuffings etc.

Wet-aged beef

Beef that is cut into primals and vacuum packed, then stored in a cool room for several weeks to age. It is different to dry-aging in that the vacuum bag holds the meat in its juices.

1. Acknowledgements

Jodie Hummerston would like to thank the following individuals and organisations who gave generously of their time and their expertise to assist, advise and guide her throughout the Fellowship program.

Awarding Body – International Specialised Skills Institute (ISS Institute)

The International Specialised Skills Institute Inc is an independent, national organisation that for over two decades has worked with Australian governments, industry and education institutions to enable individuals to gain enhanced skills and experience in traditional trades, professions and leading-edge technologies.

At the heart of the ISS Institute are our Fellows. Under the **Overseas Applied Research Fellowship Program** the Fellows travel overseas. Upon their return, they are required to pass on what they have learnt by:

1. Preparing a detailed report for distribution to government departments, industry and educational institutions.
2. Recommending improvements to accredited educational courses.
3. Delivering training activities including workshops, conferences and forums.

Over 200 Australians have received Fellowships, across many industry sectors. In addition, recognised experts from overseas conduct training activities and events. To date, 22 leaders in their field have shared their expertise in Australia.

According to Skills Australia's 'Australian Workforce Futures: A National Workforce Development Strategy 2010':

Australia requires a highly skilled population to maintain and improve our economic position in the face of increasing global competition, and to have the skills to adapt to the introduction of new technology and rapid change.

International and Australian research indicates we need a deeper level of skills than currently exists in the Australian labour market to lift productivity. We need a workforce in which more people have skills, but also multiple and higher level skills and qualifications. Deepening skills across all occupations is crucial to achieving long-term productivity growth. It also reflects the recent trend for jobs to become more complex and the consequent increased demand for higher level skills. This trend is projected to continue regardless of whether we experience strong or weak economic growth in the future. Future environmental challenges will also create demand for more sustainability related skills across a range of industries and occupations.

In this context, the ISS Institute works with Fellows, industry and government to identify specific skills in Australia that require enhancing, where accredited courses are not available through Australian higher education institutions or other Registered Training Organisations. The Fellows' overseas experience sees them broadening and deepening their own professional practice, which they then share with their peers, industry and government upon their return. This is the focus of the ISS Institute's work.

For further information on our Fellows and our work see <http://www.issinstitute.org.au>.

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1. Acknowledgements

Fellowship Sponsor

AgriFood Skills Australia is the Industry Skills Council for the agrifood industry: the rural and related industries, food processing (including beverages, wine and pharmaceuticals), meat, seafood and racing. The Fellow would like to thank them for providing funding support for this Fellowship.

Supporters

The Fellow would like to thank the following people for their support for the Fellowship:

- Roger Bond, Meat and Livestock Australia (MLA)
- Kevin Cottrill, Australian Meat Industry Council (AMIC)
- Peter Batten, TAFE NSW
- Lachlan Bowtell, Meat and Livestock Australia.

It is important that such a project has the support of industry bodies and major training providers if recommendations from the project are to be adopted.

Employer support

Thanks needs to be given to Jenny Kroonstuiwer, CEO, National Meat Industry Training Advisory Council (MINTRAC) for her encouragement and assistance in developing the Fellow's application for the Fellowship and allowing the Fellow to take time off work to undertake the Fellowship.

Organisations Impacted by the Fellowship

The outcomes of this Fellowship will feed into a larger industry project reviewing the qualifications for meat retailers (butchers) nationally. As such, the following organisations will be affected by the outcomes of this Fellowship:

Government

- Commonwealth and State Governments

Industry

- MINTRAC
- AgriFood Skills Australia
- The entire meat retail industry will be affected from future changes to the training package, including the following stakeholder groups:
 - » independent meat retailers
 - » supermarkets, including:
- Coles
- Woolworths
- Aldi
- IGA

1. Acknowledgements

- Meat wholesalers and boning rooms creating shelf-ready products
- Food service operations preparing shelf-ready products.

Industry Organisations

- Meat and Livestock Australia (MLA)
- Australian Pork Limited (APL)
- Australian Meat Industry Council (AMIC)
- Australian Meat Industry Employees Union (AMIEU)

Education and Training

- All Registered Training Organisations delivering Certificates I and II in Meat Processing (Meat Retailing) and Certificate III in Meat Processing (Retail Butcher)
- Schools participating in School-based apprenticeships
- Registered Training Organisations delivering, or considering delivering Certificate IV qualifications to retail butchers.

Community

- New apprentices commencing meat retail qualifications
- Career guidance counsellors advising school students on career choices.

2. About the Fellow

Name

Jodie Hummerston

Employment

Project Officer, MINTRAC

Membership

Red Meat Networking Club

Australian WELL Practitioners Network

Qualifications

- Diploma of Training and Assessment: Aurora Training, 2007
- Certificate IV in Training and Assessment: Aurora Training, 2007
- Masters in Applied Linguistics (TESOL): Macquarie University, 2002
- Bachelor of Arts (Tourism): University of Canberra, 1994

Biography

The Fellow has worked for MINTRAC for almost eleven years. For the past seven years, she has been employed as a Project Officer. This role has covered a vast array of projects and portfolios, including advising on training issues in the meat retail sector, managing the Diploma and Advanced Diploma of Meat Processing programs, providing industry advice, developing resources for Language, Literacy and Numeracy (LLN), and developing e-learning resources.

The Fellow has managed the annual National Meat Retail Trainers Conference since its inception, six years ago. She has been involved in three training package reviews for the Australian Meat Industry Training Package and is currently undertaking a project to determine future industry needs for meat retailing qualifications, which will lead into another training package review in the next two years. Prior to working for MINTRAC, Hummerston was an English Language teacher for Japanese, Korean and Chinese students. She spent two years working in Japan in this capacity.

Awards

- Captain of Australian Butchery Team in the Trans-Tasman Test (Australia-New Zealand butchery competition), 2011 & 2012 (winners)
- Gold Learn X Young Learning Leader award, 2009

Publications

- 2013 Writing effective work instructions workshop resources
- 2012 Review of the Recognition of Prior Learning kit for meat retailing
- 2012 E-learning resource for the Animal Welfare Officer Skills Set
- 2012 LLN for trainers workshop resources
- 2011 The Chopping Board – LLN e-learning resource for meat retail apprentices
- 2010 WELL resources for six core Units of Competency for Certificates I – III in Meat Processing

2. About the Fellow

- 2009 Training and assessment materials for 51 Units of Competency for MTM30807 Certificate III in Meat Processing (Meat Retailing)
- 2009 Managing cultural diversity in the meat industry resource kit – co-written with Wendy Hall, Response Learning
- 2009 VET in Schools for the meat industry resource kit
- 2009 Meat Industry Basic Training Skills Set resource kit

3. Aims of the Fellowship Program

The Fellowship will provide the opportunity to:

- Establish a picture of how industry is likely to change over the next five to ten years by reviewing like-industries in similar European cultures and economies (UK, Germany and Denmark)
- Gain an understanding of current training practices in the meat retail sector in the UK, Germany and Denmark, including preferences for workplace training, block release, e-learning etc
- Research successful models of post-trade training for butcher shop managers and owners
- Gain an understanding of international trends within the meat retail industry, including food safety, animal welfare requirements, organic or HGP-free meats, sustainability and technology.

4. The Australian Context

Description of the Meat Retail Sector

There are three major business types that employ butchery apprentices and tradespeople in Australia:

1. Independent local butchers
2. Supermarkets
3. Wholesale food service operations.

Independent Local Butchers

These businesses have approximately 25 per cent of the market¹. They are generally considered 'traditional' butchers; however, the skills required by this stakeholder group are rapidly changing. Whilst there are still a large number of butchers requiring very traditional skills, there is a continuing shift in skills away from breaking carcasses and preparing and slicing meat cuts for sale, to a more customer service and menu-planning skills set. These butchers are beginning to need more online marketing skills, cooking (chef) skills and a greater knowledge base to provide advanced customer service.

Supermarkets

The major supermarkets using trade butchers and apprentices are Woolworths, Coles, IGA and Aldi. They make up around 71 per cent of the market², and as such have the largest portion of apprentices. The largest supermarket chains require a very different skills set to independent retail butchers. All the breaking and boning is undertaken in boning rooms by boners and slicers. The retail butcher in store is required to slice and pack meat products and provide advice to customers. They do very little value-adding in store as value-adding products are brought into the store pre-prepared and packed by wholesale food service operations. Supermarket butchers require a greater focus on customer service and stock management skills. Both the largest supermarkets are currently reviewing their business models for the meat department. This is also leading to a review of training plans and qualifications for meat retailers in their stores.

Wholesale Operations

The wholesale sector includes boning rooms and food services organisations that prepare and package meat for retail sale. They sell shelf-ready cuts to supermarkets and the hospitality industry. These operations are now also preparing value-added products.

The increasing usage of these operations for supermarkets means the skills required by in store butchers are changing from traditional cutting skills to stock management and customer service.

Training for the Meat Retail Industry

Butchery is a recognised trade in Australia. There is an apprenticeship in Certificate III in Meat Processing (Retail Butcher). There are also two traineeships offered at Certificate I and II:

- Certificate I in Meat Processing (Meat Retailing)

¹ MLA, in Condon, J. 2012. Butchers fight back in latest retail market survey. Beef Central: <http://www.beefcentral.com/p/news/article/1785>

² MLA, in Condon, J. 2012. Butchers fight back in latest retail market survey. Beef Central: <http://www.beefcentral.com/p/news/article/1785>

4. The Australian Context

- Certificate II in Meat Processing (Meat Retailing).

These two qualifications are recognised pathways into the Certificate III, but not pre-requisites.

Workers in the meat retail sector may also undertake the following qualifications, depending on their job roles:

- Certificate II in Food Services
- Certificate III in Food Services.

These two qualifications are much more flexible and are best used for job roles that do not use the full range of skills necessary for the Certificate III in Meat Processing (Retail Butcher). They suit:

- Counter staff in meat retail establishments who do little or no cutting or meat preparation
- Operators in food service operations who have limited job roles in a factory setting
- Meat retail workers in supermarkets who do not use the full range of skills required in the Certificate III in Meat Processing (Retail Butcher).

Food service operations personnel may also use:

- Certificate II in Meat Processing (Abattoirs)
- Certificate III in Meat Processing (Boning)
- Food processing or competitive manufacturing qualifications.

Over the last three years, commencements in meat retail qualifications have remained steady, at around 1500 per year. Enrolments in food services qualifications have increased in the same period to around 400 to 500 per year³.

Higher level training

There are a number of qualifications available to meat retailers following their Certificate III, or trade-level qualification. The Certificate IV in Meat Processing (General) is suitable for supervisors, managers and owners. It contains a wide variety of units, including Quality Assurance, leadership, finance and meat safety. Graduates of the Certificate IV may then undertake the Diploma of Meat Retailing. The Diploma is suitable for owners and managers of large establishments or multiple stores. It is a high level management qualification that is focused on management systems that are not relevant to small butcher shops.

In addition to meat-specific qualifications, there are many other Certificate IV qualifications relevant to small business owners and managers available within the Australian Qualifications Framework.

Currently, very few butchers progress to further study post Certificate III. They learn business and management skills from their bosses, rather than through formal training. Shop owners and managers often lack important food safety knowledge, financial management skills or leadership skills. AMIC is currently looking into two new awards of excellence for independent butchers to promote their skill level to customers. Both of these awards will utilise existing Units of Competency from the Certificate IV and Diploma qualifications, either to assess existing skills, or to deliver additional training to meet the award requirements. This is going to create a need for Certificate IV training for butchers across the country.

For butchers working in supermarkets, the company generally offers in-house training programs for career progression, but this often involves shifting butchers from the meat department to management roles in other areas.

³ NCVER, 2009-2011. Special data run for MINTRAC on Apprentice and Trainee commencements in MTM qualifications. Commonwealth of Australia.

4. The Australian Context

Call for Research

Meat retail training is representative of a fairly homogenous industry. However, as the description above suggests, the industry is no longer homogenous. The skills required by apprentices in the meat retail sector are very diverse, as are the career paths followed by graduates.

For the past ten years, Registered Training Organisations delivering meat retail qualifications have been calling for changes to the structure of the meat retail qualifications to include two distinct Certificate III qualifications. Until 2012, both the AMIC Retail Council and supermarkets (Coles and Woolworths) have unanimously agreed that there should be no distinction between the types of workplaces, and thus the qualifications for trade butchers. In 2011, AMIC and the supermarkets both agreed that that the Australian Meat Industry Training Package, in its current form, may not be able to meet the needs of industry in the future. Traditional shops still require a traditional set of skills such as corning, sausage making and breaking of carcasses. Other stores require less physically demanding skills, like breaking carcasses, but more creative skills, such as value adding, cooking and merchandising.

The apprentices have also changed. They no longer want to engage in a four year apprenticeship, but want short, sharp training programs to teach them just the skills they want now. They are likely to change careers often and don't want to invest as much time learning one career. One major retailer has already identified and begun to address this issue. Instead of training a large number of butchers, they are now putting more people through shorter programs in Certificate II in Food Services. The qualification takes just one year and is very flexible. They can pick and choose all the Units in the qualification.

Another major provider has feedback from their employees that they want to engage in the three-year program and learn a trade. Yet the skills they need from their employees are significantly different from the compulsory Units in the Certificate III in Meat Processing (Retail Butcher).

MINTRAC has been contracted by AgriFood Skills Australia to undertake this research within Australia. As there are similar industries in the UK and Europe, the study tour will investigate training models and industry changes in those industries to determine likely changes in the Australian industry.

SWOT Analysis

Strengths

- Good networks between RTOs, MINTRAC, the peak body for independent butchers and supermarkets.
- Good working system for continuous improvement of the training package.
- Excellent network of RTOs delivering meat retail qualifications already established.
- Existing post-trade qualifications within the Training Package.
- Over the last five years RTOs have become more client-focused, now offering training models that better suit industry.
- Many RTOs now have the capacity to deliver online training programs.

4. The Australian Context

Weaknesses

- The existing trade qualification no longer reflects all meat retailing job roles.
- Meat Retailers are reluctant to enter into further training once they have their trade certificate.

Opportunities

- The continuous improvement project will allow industry to make changes to the Certificate III qualification to better meet current and future needs of the industry.
- MLA and APL run professional development events for independent butchers regularly that could be better connected to accredited units to encourage formalised training.
- State Food Authorities are starting to demand that retail butchers undertake further training to produce or sell specific high-risk meat products, such as smallgoods products. This will encourage new culture of life-long learning.
- RTOs considering options for delivering post-trade qualifications.
- Technology is making it easier to deliver training online, rather than face to face. This allows butchers to undertake training at a time suitable to them.
- Ability to develop skills sets as an alternative to full qualifications may help bridge skills gaps post trade training.
- Government funding is available for higher-level training.
- There is already a lot of focus from industry organisations on building better business skills.

Threats

- Changes to Government funding policies are likely to continue to push the cost of Certificate II and III training back onto the user (employer or apprentice), yet the cost of training will continue to rise.
- Number of independent retailers decreases every year. Most don't have the skills needed to make their shop continually viable.
- Meat retailers work long hours, often six days per week. They have limited time outside of work to participate in further training.
- Many independent butcher shops have very few staff, often only two or three in the store. This makes it difficult for supervisors or managers to take time out from work to undertake further training.
- There is a great divide between supermarkets and independent butchers when talking about training, even though the skill divide is otherwise located (generally between metropolitan butchers and regional butchers).
- There is a strong desire in industry to continue teaching traditional skills, even though those skills are no longer used by many butchers. This has implications for the quality of training and assessment that can be provided.
- Funding for additional training after completion of a Certificate III is limited, making it expensive to undertake further training.

5. Identifying the Skills Deficiencies

Skill deficiency 1

Need for changes to Australian qualifications for meat retail apprentices to meet greater range of meat retail businesses and job roles.

- Examine content of international meat retailing qualifications.
- Map Australian qualifications and international models to identify differences.
- Identify strengths, weaknesses, opportunities and threats for Australian meat retail qualifications.
- Include global perspective to continuous improvement project for the Australian meat retail qualifications.
- Make recommendations for changes to the meat retail qualifications.

Skill deficiency 2

Lack of insight into future trends for the Australian meat retail sector.

- Examine global trends in meat retailing (build on previous research undertaken in the USA and Canada by Craig Peacock, 2009 Skills Victoria/ISS Institute Fellow).
- Assess the likely directions and future trends/context of the Australian industry.
- Identify skill gaps and superseded skills within the Australian meat retail qualifications
- Identify requirements for flexibility of the Australian meat retail qualifications.

Skill deficiency 3

Need for greater understanding of who should pay for apprenticeship training.

- Research alternative funding models for apprenticeship training.
- Determine the effect of alternative funding strategies on motivation and commitment to training from industry and apprentices.
- Establish alternatives to heavy reliance on public funding for apprenticeship programs.
- Identify potential efficiencies in training delivery, thus reducing costs of training for industry.
- Provide advice to industry on potential alternatives to current situation.

Skill deficiency 4

Unmet opportunities for post-trade training for butchers to improve career pathways and develop higher-skilled industry leaders (as noted in the 2011 Environmental Scan of the AgriFood industry) and facilitate workforce development.

- Identify successful post-trade training programs in similar industries overseas.
- Identify the changing environment in which the industry operates, including changing customer requirements, regulations etc., of which industry leaders need to be cognisant.
- Determine suitable units of competency and qualifications within the Australian Meat Industry Training Package.
- Provide recommendations on additional/alternative units of competency for the Australian Meat Industry Training Package (if appropriate).
- Establish a model of training for butchers, which is effective, suitable to their needs, affordable and appropriate for time-poor butchers.

6. The International Experience

The United Kingdom

Butcher shops

- The Ginger Pig, Borough Markets, London
- Allens of Mayfair, London
- Godfreys, Finsbury Park, London
- Godfreys, Highbury, London
- Lidgates, Holland Park, London
- Barbecoa, London
- Walter Smith Fine Foods, Birmingham
- Thomas Shaw Butchers at Dobbies Garden Centre, Edinburgh, Scotland
- Simon Howie, Perth, Scotland
- Hunters of Kinross, Scotland
- Tom Courts, Cowdenbeath, Scotland
- NR Hoey Family Butchers, Fife, Scotland
- DG Lindsay and Son, Perth, Scotland
- Smithfield markets – wholesalers

Supermarkets/Food Halls

- Sainsbury's
- TESCOs
- Marks and Spencers
- John Lewis
- Waitrose
- Harrods
- Selfridges

Training Providers

- Westminster Kingsway College, London
- Crosby Management Training, Birmingham
- Harper Adams University
- Leeds City College, Thomas Danby Campus
- Scottish Meat Training

Also talked to:

- M.E.A.T. Ipswich

Industry organisations

- Institute of Meat

6. The International Experience

- Meat Training Council
- BPEX
- National Federation of Meat Traders
- Worshipful Company of Butchers
- Scottish Federation of Meat Traders

Belgium

Industry organisations

- Meat and Livestock Australia European Office

Butcher shops

- Three Muslim butchers in Brussels
- One Polish butcher in Brussels

Germany

Butchers

- Ravensburg butchers
- Ravensburg village markets
- Kulmbach butchers

Training provider

- College of Food Technology, Kulmbach

Denmark

Butchers

- Mesterslagteran
- Slagterans
- Slagterrigett

Supermarkets

- Hilton Food Group
- Kvickly
- Lidl
- Fakta
- Brugsen

Training providers

- Danish Meat Trade College, Roskilde

6. The International Experience

Day 1: London butchers and food halls

On the first day of the study tour, the Fellow visited several famous butchers and food halls in London.

Ginger Pig, Borough Markets

Borough Markets is located south of the Thames, near London Bridge Subway Station. The markets are a foodie's paradise, with fresh fruit and vegetables, cheese shops, jamon shops and niche bakeries. One of the five Ginger Pig¹ butcheries is located at the markets.

Ginger Pig started as a hobby farm in Nottinghamshire with just a dozen pigs. The farm now stocks rare breeds of pig, cattle and sheep and supplies the five stores with all the meat they sell. The animals are fed on barley, wheat, oats and fodder beat that is all grown on the farm. As the farm does not sell to other retailers or wholesalers, they sell the whole of the animals in store.

The Fellow visited in the morning on a weekday, when the markets are generally closed (they were open throughout the Olympic and Paralympic games). As such the displays were perhaps not at their finest. What was notable was the distinct lack of value-added product, with the exception of pork pies and sausages.



Ginger Pig, Borough Markets



Ginger Pig, Borough Markets

Allens of Mayfair

Allens of Mayfair² is a very famous butcher shop located a short walk from Oxford Street, in a very wealthy area of London. The store has been operating as a butchery for 130 years. It services high-end restaurants and hotels, such as Claridges, the Dorchester and the Savoy, as well as serving the general public from its shop front.

The shop has a very antique style, with a huge octagonal butchers block taking centre stage. There is no counter; customers are free to walk right around the store. The butchers do not handle money; there is a traditional cashier's window in the back corner. The front of the shop is taken up with a small window display and hanging carcasses.

The only value-added products seen in Allens were pork sausages. They focus on selling high quality aged beef, lamb, free-range pork and game meat. On their website they claim to be, "one of London's finest and largest game dealers. Providing a selection of venison, grouse, mallard (or wild duck), pheasant, red leg partridge, wood pigeon and woodcock game birds"³. The store sells thousands of

¹ Ginger Pig: www.thegingerpig.co.uk

² Allens of Mayfair: www.allensofmayfair.co.uk

³ Allens of Mayfair: www.allensofmayfair.co.uk

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birds during the shooting season and even the butchers and managers shoot some themselves.

Allens strongly promote good animal welfare practices and only stock free-range pork.

Allens offers butchery classes to the general public in the store. The cost is £150 for one and a half hours and includes the meat they prepared in the class.⁴

Justin Preston, one of the owners of Allens of Mayfair was a judge on TV program in 2010 called 'BBC Young Butcher of the Year'. Four young butchers competed on TV to win the title, however there were 100 applicants who competed prior to the show to narrow the competitors to four. A YouTube clip of the series is available at the following URL: <http://www.youtube.com/watch?v=Tiuq5Hhxl8U>. Since then, Allens of Mayfair has created its own TV show on Dave. "The show follows Allens' owners, David and Justin as they embark on a mission to shoot the first grouse of the season, source zebra for Shaka Zulu, London's, not to mention Europe's largest African restaurant and visit Paris to find the magnificent, milk-fed Poulet de Bresse".⁵



Allens of Mayfair



Window display at Allens of Mayfair



Allens of Mayfair butchers block

⁴ Allens of Mayfair: www.allensofmayfair.co.uk

⁵ Allens of Mayfair: www.allensofmayfair.co.uk

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Harrods food hall

Harrods, the iconic Knightsbridge department store, has a large butchery department. Again, the meat on display included a large range of game birds, such as pheasant, duck and poussin. The red meat was generally displayed in primals and cut specifically for the customer. The displays were very fresh-looking with leaves and grasses breaking up the red.



*Top: Harrods Beef
Middle: Harrods poultry
Bottom: Harrods game*

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Day 2: London with National Federation of Meat and Food Traders

The National Federation of Meat and Food Traders (NFMFT)⁶ is an organisation with specialist knowledge and expertise in fresh chilled foods. The NFMFT has represented the interests of its members, primarily butchers, in the independent meat and food trade throughout England and Wales for more than one hundred years. It represents members' interests at industry, UK government and European level, regularly provides information and, if required, is available to give its members mentor support in the day to day running of their business.

The CEO of NFMFT, Roger Kelsey, guided the Fellow around Smithfield markets, a number of butcher shops, supermarkets and food halls in the London area.

London Central Markets (Smithfield markets)

There has been a livestock or meat market on the site of Smithfield markets since the 12th century. In the mid 19th century, as the city of London continued to expand, it became impractical to bring livestock into the market to be slaughtered. The livestock component of the market was relocated and a new market building established. Train lines were laid directly under the market so that carcasses could be easily transported from the livestock market and slaughtering facilities to the Smithfield markets. Elevators were installed from the underground train station to the market floor to move the carcasses from the trains to the market.

The new market building was designed by Sir Horace Jones, the London City architect. It opened in 1868.⁷ It was originally designed as a large open hall, with vendors setting up stalls in long rows. As food safety regulations became tighter, the inside of the market was refurbished to ensure better hygiene standards. The market still runs today but is now patronised more by catering companies and restaurants than butchers. Today, most butchers have preferred suppliers who deliver the meat direct to the store.

Four years after the meat market building opened, an additional four buildings were added to the market. Most of these have now gone however the Poultry Market still remains. This building was destroyed in a fire in 1958, and was rebuilt by 1963.



Smithfield Markets clock



Smithfield Markets at 6.30am

⁶ National Federation of Meat and Food Traders: www.nfmft.co.uk

⁷ Smithfield Markets: www.smithfieldmarket.com

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Smithfield Markets

The markets were very heavily unionised until fairly recently (the last two decades). Every worker had a job to do and no worker or customer could step in and do that job in their place. Stall holders sold the meat to the customers, but cashiers would handle the cash transactions. The barrow boy carted the meat from the market stall to the truck or cart (depending on the era). The stall holder could not do the job of the barrow boy, not the cashier. Not even a customer could take their own meat from the stall to the truck, even if they only had a bag-full. It was irrelevant how much or how little the customer purchased, they were not allowed to shift the meat without a barrow boy.



Stallholder at Smithfield Markets

Likewise, when meat was delivered to the market, there was one worker whose role was to hang the meat on the rails in the delivery dock, and another to push the meat along the rail to the correct store. Interfering in someone else's job would inevitably result in a punch in the nose, or worse. Many of the stall holders had personal stories to tell about their experiences of interfering in the process and whilst thankful for the withdrawal of the union from the market, they still seemed proud of this part of the market's history.

Until her death, the Queen Mother was a patron of Smithfield market. She visited the markets on a number of occasions, and was much loved by the workers and stall holders. According to Roger Kelsey, the Queen Mother would refer to the workers of the markets as 'her boys'.

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Butcher shops

Together with Roger Kelsey, the Fellow visited a number of butcher shops around London.

The first butcher visited was actually a processing and distribution centre called Godfreys. Godfreys is a long standing butchery in London. It was first established in 1905^a and has been in the same family for four generations. The company is now run by three brothers, Jeremy, Philip and Christopher, whilst father, Peter, still works in the office.

Godfreys has operated as a mail order company for a number of years and has recently upgraded to web-based sales. The meat is of high quality and priced accordingly. Jeremy explained that the business is very much about offering a good experience from sale to plate. Every aspect of the sale has been analysed and perfected to ensure every customer feels special about buying meat. This is a concept that hasn't yet reached most Australian butchers. This store treats meat as a luxury item, rather than an everyday item.

Jeremy explained his company's philosophy in detail.

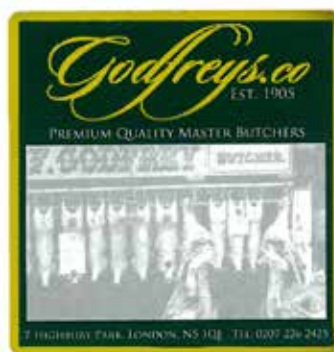
The most important aspect of the business is the website as this is how they pick up new business and where customers make the decision to engage with them, or go elsewhere. Consumers need to look at it and feel special about buying from the site. The website must be simple to use, easy to find, but most importantly look spectacular. They engaged a food photographer to take product photos to ensure a consistent look and quality of image across the site. They also consulted a marketing expert to determine the website address. Whilst most UK websites end in .co.uk Godfreys have bought a Columbian web address to simplify their address, whilst ensuring it still resembles a UK site. Their website url is www.godfreys.co.

The website is the most important part of their business as it attracts first time customers.

The second most important aspect of the business is ensuring that every customer feels special when they receive their carton of meat. They have very specific procedures for packaging the meat products, so that every customer receives the same package, wrapped the same way. It looks gift wrapped and the labels and tickets on the meat all have a very luxurious look to them. The packaging costs around £3-8 per sale. The order is packed in an insulated box lined with a piece of Godfreys printed wax paper. The meat is vacuum-packed and laid inside the wax paper, which is then folded over the meat and sealed with a shiny Godfreys sticker. The whole box is taped with Godfreys packing tape. This presentation is extremely important to the business. Customers will remember the feeling they experience as they open the Godfreys package. Before they even consume the meat they feel good about buying from Godfreys.



Godfreys packaging



Godfreys packaging

6. The International Experience



Godfreys packing tape



Quality meat at Godfreys



Black pudding and Haggis at Godfreys

Meat quality is only the third most important aspect of the sale. They have already made the sale and created an impression before the meat is even cooked. This stage is the one that guarantees repeat business. This is a surprising twist for most butchers, who would focus primarily on the meat they sell, rather than the sale itself. Having said this, Godfreys place a lot of importance on the meat quality.

There were a number of stores in London, and other parts of the UK, who offered fast country-wide delivery of meat ordered through their website. This is possible because there are a large number of refrigerated courier services available. Using a courier increases the cost for the customer, but reduces the cost to the butcher. It also allows for deliveries to wider areas.

Godfreys also has a shop front in a nearby suburb. The image of the store strongly reflects the images portrayed by the website and the mail-order side of the company. The front of shop is staffed mostly by women who have been trained in selling meat, but have limited or no knife skills. When a customer wants something sliced or prepared further, the assistant will take the meat to the back room, where two or three butchers work. The butchers are not allowed in the front of the store. All communication with the customer is conducted by the trained service staff. This was a surprising difference to Australian stores where customers generally buy from independent butchers as they like the experience

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of talking to, and buying from a real butcher. The presence of the butcher at the counter has long been a point of differentiation between butcher shops and supermarkets.



Godfreys shop front ©Godfreys



Dry-aged beef at Godfreys

Both the shop and processing plant have special dry-aging facilities for meat. They do their own carcass break up and then store the primals in the dry-aging room for 21 days before selling. The shop uses its own dry-aging room, but also draws on meat from the plant when stock is low.

Dry-aging was extremely popular in London. All independent butchers, and some high-end food halls visited sold dry-aged beef. Even the tiny one-man shop in Holland Park, with virtually no meat in his cabinet at all, sold dry-aged beef and lamb.

The Godfreys shop sold very little value-added product compared to high-end Australian stores. This was evident across many of the independent stores in London. Value-added and heat and serve meals are the domain of the supermarkets. Value-adding is also renowned for using cheaper cuts/poorer

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qualities of meat. Customers shopping in an independent butcher shop in London are looking for high quality meat for gourmet cooking. They mostly shopped on Saturdays with the independent butcher when they were preparing fancier meals for guests and bought every-day meals from the supermarket.



Godfreys cabinet

This shopping preference for good quality meat on weekends was also obvious through the lack of attention to window displays midweek. Butchers cut a small amount of meat for trays, and trays and once the trays are empty they are not refilled. A number of butchers commented that their Saturday window was much better than the one they had on that day. This was not the case in Lidgates in Holland Park who had a stunning display of fresh meat, pies, game and value-added products.

Lidgates⁹ sell more value-added products than seen elsewhere and are also widely known for their pies and selection of cheeses. The gourmet pies are made in store by a trained chef. Lidgates have been employing trained chefs who are interested in learning or improving butchery skills.



Lidgates



Lidgates game meats

9 Lidgates: www.lidgates.com

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Since returning from Europe, the Fellow met with the owner of Lidgates in Sydney where they discussed the differences between Sydney and London butchers. In contrast to other London stores, Lidgates is very interested in value-added products and is keen to try some Australian-style products in their shop in the future.

The other significant product range evident in all London stores visited, was game meat. The UK has a strong tradition in hunting and shooting and therefore a higher preference for game meats. All stores stocked at least some of the following poultry products: pheasant; grouse; pigeon; quail; poussin; and duck. Most stores also stocked rabbit and venison.

All the independent stores in London promoted where their meat was sourced, and how it was reared. Most provided leaflets or brochures on free-range pork that was used in their stores. They tended to use one particular producer for all their pork products, for example, Allens stocked and promoted free range pork from Beadon Farm, as seen in the brochure below. Another store promoted Blythburgh pigs and another had an entire promotional folder for Plantation Pigs' free-range farm. Lidgates also promoted their beef as coming from farms known for good animal welfare practices, displaying a massive banner across the front counter, showing happy cows relaxing in green pastures.



Free range pork promotion



Free range pork promotion



Free range pork promotion



Promoting good animal welfare practices

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The other aspect of promotion that seemed important in London was region of origin. This was evident in independent butcher shops, food halls and supermarkets. There was a lot of emphasis on where the meat was grown and processed, with most cuts labelled Scotch, Welsh or British, but elsewhere labels would include traceability information further down the label, for example, “slaughtered in UK, minced in UK, produced in the UK from British beef”.

The focus on region of origin was very evident in London-based independent stores, but not as common elsewhere in the UK. All the shops the Fellow visited in London were very high-end foodies' stores.



Region of origin ticketing



Region of origin ticketing



Free range eggs

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One shop provided customers with a whole folder of marketing resources for customers advertising lamb and deer from South Downs. The marketing materials promote the various farmers in the region, as well as what the region is known for, why it is a great place to raise sheep and so on. It creates a whole back story about the meat that customers are buying.

Some of this marketing is driven by producers, to encourage the consumer and butcher to favour their livestock over other regions, but the butchers also commented that consumers want to know this information and that when the economy is good, then decisions on what and where to buy are heavily influenced by the information the store provides about where and how the livestock are raised.

The region of origin labelling stemmed from the outbreak of BSE and Foot and Mouth disease in the UK and Europe a decade ago. Traceability became very important to customers and a lack of good traceability systems drove the need for clear Region of Origin labelling on all meat products.

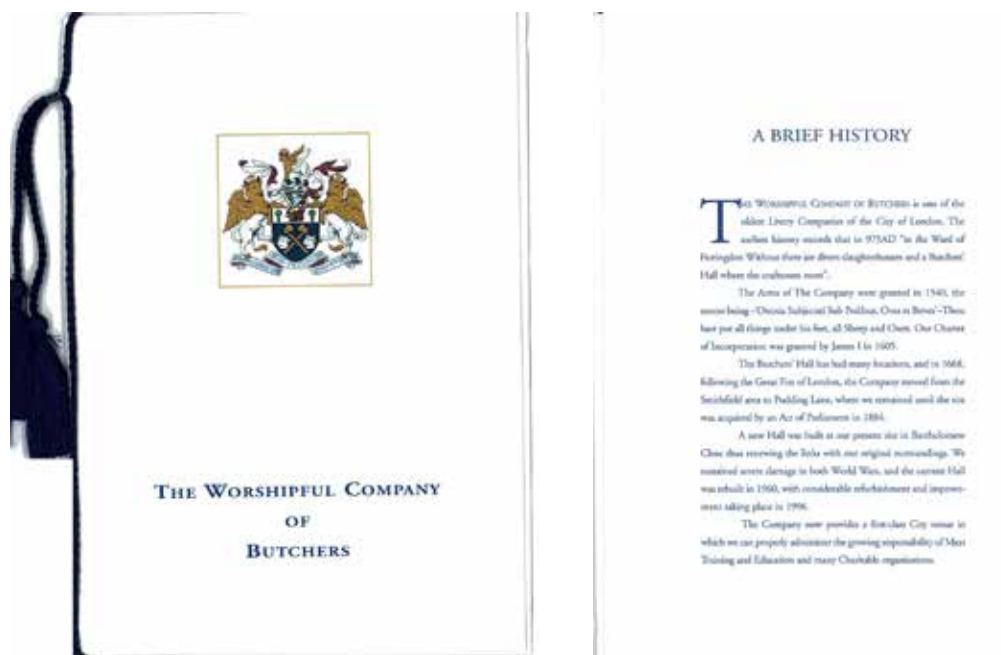
The promotion of good animal welfare practices is encouraged by the European Union (EU). The EU drives good animal welfare practices to a much higher degree than the Australian government or Australian consumers do. An example of this is the recent EU ban on all battery cages for egg production. As of 2012 all UK poultry farmers have complied with the EU directive, and eliminated conventional battery cages, though 43% of eggs are still produced in 'enriched' cages. Whilst many EU egg producers are still acting unlawfully and keeping hens in battery cages, large retail chains in the UK have put in place strict QA procedures to ensure these eggs do not make it to the market place¹⁰.

There is a huge move in the UK of customers wishing to know more about the food they eat. There are numerous butchers offering butchery classes to customers around London, including Lidgates, Godfreys, Allens of Mayfair and Ginger Pig. M.E.A.T. Ipswich, the training company, also provides a butcher class for the general public. There are now a number of butchers in Sydney offering similar classes. This would be a very good revenue raising activity for TAFEs in Australia that do not use class rooms on weekends.

¹⁰ UK Department of Environment, Food and Rural Affairs: www.defra.gov.uk/news/2011/12/06/higher-welfare-eggs

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Day 3: The Worshipful Company of Butchers



Worshipful company of butchers menu

Worshipful company of butchers menu



Graham, Jodie Hummerston, Mary Fisher and Keith Fisher at the Butchers Hall



Keith, Mary and Graham in the banquet hall

The Fellow was invited to attend the monthly luncheon at the Worshipful Company of Butchers in Smithfield, London with Keith Fisher, CEO of The Meat Institute and BPEX, and Mary Fisher, CEO of the Meat Training Council.

The Worshipful Company of Butchers was granted its charter in 1605. It is one of the oldest guilds in London. Its true original purpose was to act as a trade barrier for non London-based butchers. To trade in meat in London city, a butcher must be a guild member. This ensured that guild liverymen maintained a stronghold on the London market.¹¹

¹¹ The Worshipful Company of Butchers: www.butchershall.com

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The Company today has more of a role in networking and charity than any true representation of the butchers of London. However it is an important role for upholding the sense of tradition and profession of the meat industry.

What was evident, being at the monthly guild luncheon, was the great respect the liverymen had for their industry and for their peers. The luncheon was an extremely formal affair, which showed their high regard for the guild's 400 hundred years of tradition and history. This sense of place, respect and profession seemed missing from the Australian industry.

The banquet hall seats 160 people. It is difficult to get tickets for non-liverymen, as it is such a popular event every month. Liverymen and their guests start out in the entrance hall, sipping champagne and mingling. During this time, Keith Fisher assisted Jane Dale from Ipswich M.E.A.T (a private training organisation for butchery apprentices) complete the formalities of becoming a liveryman. This involved first attending the City Hall to become a Freeman of the City of London, followed by an interview with the court of the Worshipful Company of Butchers to be granted the status of liveryman of the guild. Jane was dressed in cloaks and medallions for photographs before returning to the entrance hall.

At 12.30 the Beadle rang a gong and in a booming voice announced that everyone should proceed to the banquet hall for lunch. The banquet was on the third floor. It was a large formal hall furnished with three long tables down the middle of the floor with a fourth table along one end for the court, masters and official guests.

Diners found their allocated seats, but did not sit until the Beadle welcomed the Master, court and guests to the hall. The liverymen and their guests ceremoniously applauded the court as they made their way through the hall to the head table. Grace was said before everyone took their seats. The meals were sponsored by members of the guild. The sponsors are recognised by the group and on the menu.

Throughout dinner Liverymen and guests toasted the queen and crown prince, the master of the company, the royal family and all the guests. Two members of the court spoke to the diners, followed by Jane Dale, who was required to give a speech as a new liveryman, and then two guest speakers were invited to address the group. The first was a Commander of the Royal Navy, the second, a world famous journalist, Trevor McDonald.

At the conclusion of the formalities, the three course meal and a glass of port, the Master and court were again applauded as they left the banquet hall. At this point, all diners retired to a lower hall for tea or port before leaving. The whole occasion was full of tradition, pomp and ceremony, but it highlighted the importance of the industry to society and instilled a sense of pride in their jobs, that is lacking in Australia.

Upon leaving the hall, many of the diners made their way to the local pub for an afternoon of drinking and networking. It was only here that ties were finally loosened and formalities dropped.

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Day 4: Sainsbury's

The Fellow met Julian Pursglove, the Product Technologist for Meat for Sainsbury's. The intention for the day was to visit a number of Sainsbury's stores to learn about their meat trade. Unfortunately, Julian was required at the last minute to meet with suppliers and graphic designers to proof their new meat tray labels. Instead of cancelling the day altogether, the Fellow was invited to join the group and view the sign-off of new labels.

The group met in Peterborough, about one hour from Kings Cross Station. There was a representative from both of the major suppliers, Julian, from Sainsbury's and two graphic designer staff. The task for the day was to proof every beef and lamb label for every product sold in all Sainsbury's stores across the United Kingdom.

This provided a good deal of insight into customer preferences and marketing techniques for the supermarket sector.

Again, the region of origin was heavily promoted. It was part of the product name and accompanied by a flag or symbol elsewhere on the label to identify to origin. The product journey was described on the back label and accompanied by a Stock Keeping Unit (SKU) number that recorded complete traceability of the product in the case of a health issue. This is a requirement of the EU. Often, there were two or three versions of the same product label with different regions and SKUs. The supplier needs to ensure that the meat they are packing on any given day has the correct region on the label.

Julian believed that region of origin labelling and traceability was customer driven trend, however the MLA representative in Brussels believed it was more regulation driven and unlikely to be a future trend in the Australian industry as the traceability systems are better. The Fellow believes that customers in Australia may still be interested in this labelling as they become more environmentally conscious in the future. Knowing what distance livestock and then meat has travelled to get to the consumer, could become an important factor in decisions on what to buy or where to buy, especially considering the massive distances in Australia. On the other hand, this is not something that supermarkets or independent butchers are likely to want to promote.

Sainsbury's also included a nutrition wheel to provide quick and simple to follow advice on all their food products.



Sainsbury's nutrition wheel



Sainsbury's meat labelling

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The Sainsbury's website explains the system as follows:

“ Sainsbury's traffic-light labelling on the front of food and drink tells you if it has high (red), medium (amber) or low (green) amounts of fat, saturated fat, salt, sugar and calories. It takes into account the type of food. For example, the calories segment for a croissant with 188 calories will be red but for a ready meal with 188 calories it will be green, as a ready meal makes up a greater proportion of your diet”¹².

¹² Sainsburys: www2.sainsburys.co.uk

6. The International Experience

Day 5: Westminster Kingsway College, Cooking School

Day 5 was spent with Jose Souto, a lecturer at the Westminster Kingsway College¹³ Food and Hospitality section.

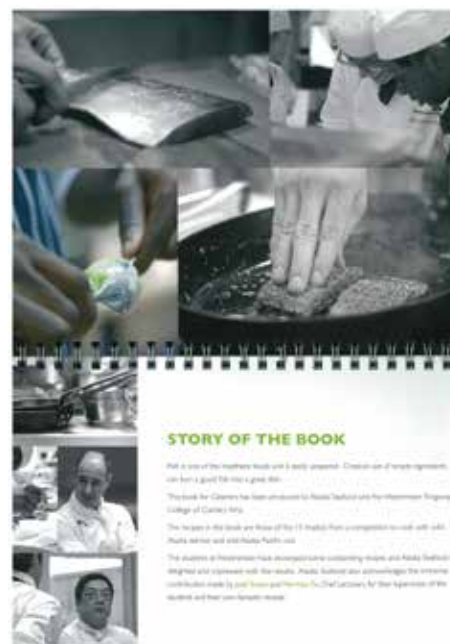
The school has been operating for over 100 years. It is renowned throughout the UK and Europe for the quality of training provided to chefs. They run apprenticeship programs, international student programs, vocational programs for school students and school leavers, and post trade training for chefs already in the industry.

The school is government funded, but also supplements the Government funding with a large number of fee-for-service extra-curricular programs and industry sponsorship.

The extra curricula clubs provide an opportunity for students to visit farms, international schools and try a range of alternative cooking experiences that allow them to learn more beyond their schooling. Activities included using army ration packs and outdoor cooking facilities to create innovative menus with simple and limited ingredients. Students wanting to take part in these extra-curricular activities pay to join the club and then pay for the various activities they attend. The club membership contributes a limited amount of extra funding for the cooking school.

The lecturers at Westminster Kingsway College have set up partnerships with various industries for provision of ingredients and equipment at reduced prices, or at times free-of-charge. One large manufacturer has just provided the college with entirely new kitchens: ovens, stovetops etc. By providing equipment to the college, they are promoting their equipment to new chefs who, in the future will be setting up their own restaurant kitchens. These new chefs will become familiar with their equipment over other brands and may therefore be more inclined to install it down the track.

Souto also set up an arrangement with a salmon company for the school. The salmon company provided salmon for students for the whole term, and in return, the school set up a competition for the students to create a range of recipes using the salmon, which were then provided to the company for marketing purposes. The recipes were published into a book by the Alaskan Seafood Company.¹⁴



Outcome of partnership between Westminster Kingsway college and Alaska Seafood



Outcome of partnership between Westminster Kingsway college and Alaska Seafood

¹³ Westminster Kingsway College: www.westking.ac.uk

¹⁴ Alaskan Seafood. Recipes for caterers. Alaskan Seafood Marketing Institute: London. available from www.alaskaseafood.org

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Large Round Fish							
Fish Species 1 st Choice	Sea Trout ³ West Coast/ Scotland <u>Farmed</u>	Atlantic Cod ² <u>North East</u> <u>Baltic Sea</u>	Pacific Cod ² <u>Eastern</u> <u>North</u> <u>Pacific</u> <u>Alaska</u>	Pollock ² NE Atlantic	Alaska Pollock ² Eastern, North Pacific Alaska	Haddock ² NE Atlantic	European Hake ³ <u>NE Atlantic</u>
Fish Species 2 nd Choice	Rainbow Trout ² UK <u>Pond Farmed</u>	Coley ² NE Atlantic	Coley ² NE Atlantic	Coley ² NE Atlantic	Coley ² NE Atlantic	Coley ² NE Atlantic	Hoki ³ New Zealand
Fresh water Fish							
Fish Species 1 st Choice	Trout Rainbow ² UK <u>Farmed</u>	Salmon ² Scotland <u>Farmed</u>	Brown Trout Wild ² Loch Neagh, Ireland	Carp	Pike	Wild Salmon ² <u>Alaska</u>	Arctic Char ¹ Ireland
Fish Species 2 nd Choice	-	-	Rainbow Trout ² UK <u>Farmed</u>	-	Zander	Wild Salmon ² <u>Scottish</u>	Rainbow Trout ² UK <u>Farmed</u>
Shell Fish 1							
Fish Species 1 st Choice	Cockles ² SE Coast <u>Hand Picked</u>	Carpet Clams ² SW Coast <u>Hand Picked</u>	Mussels ¹ Scotland <u>Rope grown</u> <u>Hand Picked</u>	Scallops Live ² Scotland <u>Diver</u>	Brown Crab live & meat ³ SW Coast Eastern Channel NE Atlantic		
Fish Species 2 nd Choice	Carpet Clams ² <u>Hand Picked</u>	Cockles ² <u>Hand Picked</u>	Mussels ³ <u>Dredged</u>	Scallops Dry Tub ³ Dredged	-		
Shellfish 2							
Fish Species 1 st Choice	Lobster ³ <u>European</u>	Prawns Sandwich QF ² NE Atlantic	Crayfish Live	Raw Tiger Prawns ² 30-40 S E Asia S/ America Madagascan	Langoustine ³ NE Atlantic		
Fish Species 2 nd Choice	-	-	Crayfish frozen / Tub	-	-		

Westminster Kingsway College's sustainability chart

Souto had a strong ethos in sustainability. He has developed systems for his students to ensure they only order sustainable produce. Students must also understand and apply knowledge of seasonality of produce when ordering stock and planning menus. He spoke very passionately about this topic. He insisted that all his students understood the value of the meat products and that all meat products should be treated with respect when cooking. He encourages them to think about all wastage in terms of an animal giving up their life to be food. All waste means waste of a life, not just money.

Souto believes that the issues of animal welfare, traceability and sustainability are important to a consumer. He teaches his chefs to be completely aware of product traceability and be able to tell the whole story of how the product came to be on the plate. Foraging is a new trend for British foodies. They want to find their own food in the wild, learn the butchery process and cook meals from scratch. If in a restaurant the same consumers want to know the history of the food on the menu in order to make informed choices.

Just as the Butchers Hall instilled a sense of professionalism through tradition, this ethos instilled a sense of professionalism through responsibility.

Souto also discussed the examination process for the college. He explained how exams are set by the guild, as is also the case in the meat industry in the UK. The guild determines exactly what dishes are to be prepared and how and provides external assessors for every practical exam.

6. The International Experience

Day 6: Birmingham with Martin Anderson, Harper Adams University

Walter Smith's, Birmingham



Walter Smiths

leave Walter Smiths and look for a new role, they need to continue learning to continue to earn higher wages. When they complete the level two training and progress up the ranks, the company will enrol them into level three training to prepare for a supervisory role. Throughout the training programs, regardless of the level they are at, apprentices and trainees are required to provide evidence of self evaluation for every activity and every Unit.

Walter Smith's are proud of their high retention rate for apprentices. They believe this retention rate is closely linked to their training culture and the method of training and assessment.

Walter Smith's also employ a number of school students on weekends and after hours. They try to instil the same training ethos in these students, encouraging them to focus on maths and English skills at school to prepare for an apprenticeship later.

They also discussed the content of the qualifications, but this will be addressed in the mapping of international qualifications later in the report.

The trainers showed an example of the assessment portfolios they use for their apprentices. The observation notes were extremely detailed, several paragraphs long and with photographs. This is very strong evidence of competency and is a great model to follow.

The Fellow, together with Martin Anderson, a lecturer at Harper Adams University visited Walter Smith's ¹⁵Fine Foods butcher shop and training room in Birmingham and met with Paul Cadman, and a trainer from Crosby Management Training.

Walter Smiths has been a butcher shop for over 100 years. It now has a number of stores across the West Midlands. The stores have a strong training culture, employing a number of apprentices across their stores in National Vocational Qualification (NVQ) levels two and three. They have provided their own training room for their apprentices to allow them to attend off the job training, but ensured they had the facilities necessary for practicing skills as well as learning underpinning knowledge. The accredited training is delivered by Crosby Management Training, but also uses company trainers and supervisors.

Walter Smiths try to instil a culture of lifelong learning in their staff. They start with the level two training in butchery. During this first training program, they teach the apprentice that wages are generally linked to professionalism and skill, which comes from continued learning. So even if they

¹⁵ Walter Smith Fine Foods Ltd.: www.waltersmith.co.uk

6. The International Experience

Day 7: Harper Adams University

Harper Adams University¹⁶ was founded in 1901 as a rural college. Its courses focus on rural skills, and food technology. Anderson, a lecturer in Food Science provided the Fellow with a tour of the facility and a discussion of the meat industry courses the university provides.

There are a range of courses available for meat industry managers, including:

- Level 4 Certificate in Meat Quality
- Level 5 Intermediate Diploma in Meat Quality
- Postgraduate Certificate in Meat Business Management
- Postgraduate Diploma in Meat Business Management and Improvement
- MSc in Meat Business Management and Improvement.

The level four and five qualifications are new programs that have been designed for meat retail managers and meat processing managers. However, looking at the units, they are more suited to the processing industry, or large scale retail stores.

As with other NVQs in the UK, there are several awards available within each level, depending on the number of units attained.

The level four qualifications include the following units:

- Animal welfare
- Red meat quality in the slaughterhouse
- Red meat quality in cutting and packing
- Red meat quality in processed and added value products
- Primal muscle recognition
- Retail butchery techniques
- Managing hygiene and disinfection
- Developing new products.

The level five qualifications are made up of these units:

- Quality management systems
- Food safety and microbiology
- Managing teams
- Improving yields and efficiencies
- Refrigeration and thermal processing
- Improving quality on the line.

The majority of units are delivered in three to five days face to face. The final unit, Improving quality on the line requires a workplace project and dissertation.

In 2011-12, the government contributed over half the cost of the course, however in 2012-3, they cut the funding altogether. It is now entirely user pays. The student fee per unit has increased from £495 to £1125. The minimum cost for a qualification at either level would be £4500.

The higher-level courses are postgraduate courses more suited to processing and manufacturing.

¹⁶ Harper Adams University: www.harper-adams.ac.uk

6. The International Experience

Harper Adams University is collaborating with the Danish Meat Trade College in Roskilde, Denmark on an exchange program for meat processing trainees. Martin discussed the possibility of setting up a similar exchange program for butchers between Australia and the UK. This same concept was discussed with a number of training providers and butchers in both the UK and Denmark.

This concept will be discussed further later in the report.

Stand up for British Bangers, BPEX



Plating up



Judging the cooked sausage



Checking the consistency



Scoring

6. The International Experience

The remainder of the day was spent with Keith Fisher, from the Institute of Meat¹⁷ and BPEX¹⁸, at the National Sausage Competition. Fisher, together with a representative from the pork industry and four pig producers' wives judged over 400 pork sausages to find the best sausage in several different categories. They judged every tray of sausages based on:

- Consistency of size
- Consistency of colour and ingredients
- Texture
- Visual appeal
- Cooked appearance – points were deducted for split skins, air bubbles, or oozing sausage meat
- Taste.

The winners of the competition were announced in British Sausage Week 2012, which is held from 5-12 November.

Discussions with Fisher over lunch were mostly about the Trans Tasman Butchery Competition, for which he was a judge in 2011 and the Fellow was Australia's team captain. The competition is a team-based butchery competition that has been held the past two years between Australia and New Zealand. In 2013 the UK will also be entering a team. The 2014 competition will be held in the UK as part of an Agricultural Show. This means viewing will also be open to the public. MLA confirmed in October that Australia will again participate in the competition next year with a new team.

Day 8: Meat and Livestock Australia, Brussels Belgium

The Fellow met with Jason Strong from Meat and Livestock Australia in the office in Brussels. The discussion focused mostly on the Fellow's observations to date in the UK, in particular region of origin labelling, traceability labelling and dry-aging of meat. Strong was a good sounding board, having in-depth knowledge of both the European and Australian industries.

Region of origin and traceability both stem from outbreaks of Bovine Spongiform Encephalitis (BSE) or mad cow disease and Foot and mouth disease (FMD) in the UK. Consumers wanted to know that the meat they were eating was not from affected regions. The EU also created regulations to ensure that all meat products could be traced right back to the farm. Including traceability on the packaging ensures consumers have this information to make informed purchasing decisions and that meat retailers are complying with regulations. Strong's belief is that traceability systems in Australia are more effective than in the EU and as such consumers have a great deal more trust in Australian meat products. Therefore product traceability labelling will not become a trend in Australia.

When discussing the prevalence of dry-aged meat in London, Strong made the observation that the quality of meat is better in Australia and the MSA grading system means that dry-aging is not necessary for good product quality. However consumer purchasing decisions for premium products, such as dry-aged beef are not always based on quality and value for money, but on prestige and image. As such it is possible that dry-aging will become more popular in Australian butcher shops in the future. Since returning to Australia, The Fellow has noticed that several new stores have added dry-aged beef to their product lines. The Fellow believes it would be advisable to adding units to the Training Package on dry-aging to ensure the training is available should the trend spread.

¹⁷ Institute of Meat: www.instituteofmeat.co.uk

¹⁸ BPEX: www.bpex.org.uk

6. The International Experience

Day 10: Kulmbach Technical College for Food Technology



Thomas Eberle in the meat classroom



Kulmbach college food processing



Hand and foot washer at Kulmbach college

6. The International Experience

The College for Food Technology, Kulmbach¹⁹ provided a list of units delivered in each year of their three-year course. There are significant differences between the qualifications in Australia and Germany. German vocational colleges place a much greater focus on mathematics and chemistry than the Australian training provides.

There are two streams of training available at the college:

- Skilled worker for meat – this qualification includes making sausages, selling, party services, producing deli products and salads, breaking carcasses etc
- Shop assistant specialised in meat – this qualification includes selling, cooking, slicing and packing meat and meat products, there is also some training in catering included for shop assistants.

Much of the theory in each of the qualifications was the same, but the skilled workers were required to do significantly more sausage making and cutting. Sausage making is around 50 per cent of a German butcher's work load and takes as much time in the training. Sausage making is delivered in each year of the qualification, moving from over viewing sausage making, including hygiene, cleaning, nutrition, casings, ingredients etc and making cooked sausages in year one, to chemistry and pH in year two, then making scalded sausages and curing meat, making deli products, salamis and raw fermented meat products in year three.

Other subjects in the three year course include selling, merchandising, breaking carcasses, anatomy, nutrition, specifications, preservation, canning, cooking, buying meat and livestock, diseases etc. Apprentice butchers are also required to fully understand the slaughtering process, but are not expected to practice the skills as part of their training. There are also compulsory social courses included in every qualification including, German, social studies, sports, religion etc.

On completion of the skilled worker for meat qualification, graduates are considered trade butchers.

The shop assistant specialised in meat trainees focused more on customer service, cooking, slicing and packing meat products. The course is shorter and trainees do not qualify as butchers on completion of their course.

Meat and poultry training is generally delivered at the college in block release. In the college at Kulmbach, apprentices attend the college for one week per month (for ten weeks in total) each year.

Each week of the program is broken into 39 lessons, of which 27 are theory-based meat subjects, six to eight are practical lessons and the remaining are non-meat subjects.

When apprentices are not at college, they work full time in a butcher shop, practicing their skills.

There is also a vocational course, which is two years full time, for students who don't yet have a job in the industry. This course covers much of what the three-year course covers but also includes additional secondary-education subjects. These students do not have a job so it is necessary to increase the number of practical lessons in the course.

There is no cost for training for the students or employers. The state government pays for all vocational training. Students from other EU countries are also eligible for free training, under the EU agreement. The state pays for the training and reclaims the costs from the EU. Tuition fees for students from other German states are paid by the student's state government.

The college also has a strong international food engineering program. The program is for industrial butchers and food processors and is project based. The students undertake study and carry out a project on behalf of an external company. The projects can be focused on machinery development, product development or enhancement, or process improvements. The lecturer for this program is well

¹⁹ College of Food Technology, Kulmbach: www.fleischportal.de

6. The International Experience

known in industry and has developed some significant industry partnerships which have provided the college with the latest equipment and technology, produce and projects and student placement. The lecturer is held in high esteem for his contribution to the college.

The college in Kulmbach seemed to have more of a sense of pastoral care than RTOs in Australia. They have traditions and programs in place to encourage inter-year mixing and a sense of belonging to the college. First year students are welcomed into the college when the second year students put on a BBQ and drinks one evening in September, just before classes commence for the term. In return, two years later, when the older group are graduating, the younger group organise and cater the formal graduation dinner. The Fellow was invited to the welcome party. Only a small number of faculty members attend the party. The students take care of the entire evening including food preparation, cooking, ordering drinks and cleaning post-party. It is an excellent way for students from different forms to meet and build relationships, which they will later be able to draw on during their studies or careers.

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Day 11: Danish Meat Trade College, Roskilde, Denmark



Butchery at the Danish Meat Trade College



Salad and cooked meal preparation in the college shop



The meat counter in the college butcher shop



Complimentary products on sale in the college butcher shop

MINTRAC has a long relationship with the Danish Meat Trade College²⁰, following a previous international study tour in 2006²¹.

The college is the only training provider for meat industry training in Denmark, and also hosts a number of international students. It is based in Roskilde, approximately 35 kilometres from Copenhagen.

There are several meat industry qualifications on offer at the college, including slaughtering, boning (or industrial butchery) and retail butchery. They also offer various supervisor and management level training courses.

The retail butchery qualification is delivered in three and a half years, but with a significant amount of time at the college. It includes the following subjects:

- Safety and hygiene
- Deboning

²⁰ Danish Meat Trade College: www.ucr.dk

²¹ MINTRAC, 2006. Report of the MINTRAC Meat Industry International Study Tour. MINTRAC: Sydney

6. The International Experience

- Kitchen
- First aid and fire fighting
- Shop service
- Danish language
- Sales and customer service
- IT
- Environmental issues
- Sausage making
- Health and science
- Business economy
- Product development
- Delicatessen
- Calculation
- Sausage making (special line)
- Presentation/customer service (special line)
- Party service(special line)
- Optional subjects.

The college has very new facilities that are of an exceptional quality. They have their own slaughtering facilities for pigs in which industrial butcher trainees slaughter around 120 pigs per week. Trainees undertaking boning and slicing, or retail butchery qualifications break up the carcasses. This is completed in the school's butchery hall. The hall is also used for teaching some value-adding tasks.

The school also runs its own butcher shop in a separate building. The shop is staffed by students learning customer service skills. A small amount of the pork, which is slaughtered, boned and sliced on site, is sold through the school's shop. Local butcher shops and supermarkets sell the remaining meat. Beef, lamb and poultry is bought in for preparation and sale in the school's store. They also sell an abundance of complimentary products, such as gourmet sauces, marinades, jams and wines, which provides trainees with authentic work experience.

The students also learn cooking in the shop and there is a back room where hot meals and heat and serve meals can be prepared. They also make and sell salads, as would be expected in a local butcher shop.

The school participates in a number of international projects to develop free online training resources, new programs, international exchanges and various resources for the college.

The hallways of the college are currently undergoing significant change based on the latest research into learning styles, by a Danish educational research Sven Erik Schmidt²². There will be learning activities all around the halls: on the walls, floors and steps to engage learners as they move between classrooms and enter and exit the school. The project takes into account the needs of visual and kinaesthetic learners and will aid in memory recall as they walk past the same information every day for the duration of their study.

Trainees undertake a literacy assessment on commencement. This information is used to identify trainees who will need assistance. These trainees are provided with an 'IT backpack' for the duration

²² Sven Erik Schmidt website: www.svenderikschmidt.dk

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of their training. They carry the backpack whenever they undertake training or practice. When there are reading and writing tasks, they use the resources in the backpack to assist them. The backpack contains a laptop or notebook computer that is pre-loaded with all the training resources required for the course. The computer also has text to voice software, which allows them to listen to someone reading out the text; and voice to text to allow the student to complete written tasks without having writing skills.

This is a good start to assisting learners with LLN issues, but does not actually support LLN skill development.

SlagterFrimann (Roskilde butchery)

Karen Wahlgreen, the department head at the college, accompanied the Fellow to a local Roskilde butcher shop, SlagterFrimann.²³

Independent butchers sell only five per cent of all meat products sold in Denmark. The majority of meat is sold through supermarkets.



Roskilde butchery: SlagterFrimann | ©SlagterFrimann, www.slagterfrimann.dk

The butcher shop was more similar to Australian butchers than seen in London or Germany. There is significantly more value-adding in the store than was evident in London. However cooked, re-heatable meals are much more prevalent in Denmark. The college prepared their trainees well for this aspect of the trade. The shop had a number of different preparation areas for the variety of product they produced.

Directly behind the counter, butchers prepare fresh meat products for sale. There is a hot kitchen area and a room specifically set up for preparation of sausages, including a smoke oven for smallgoods.

Wahlgreen and the Roskilde butcher were keen to develop a student exchange program between Denmark and Australia. There was much excitement about the prospect. Aside from the language barriers for Australian butchers to operate in Denmark, the industry is similar enough that butchers could adapt and work efficiently in either country. Yet, there are sufficient differences between Danish and Australian stores to make the exchange beneficial to participants.

²³ SlagterFrimann: www.slagterfrimann.dk

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SlagterFrimann salads and antipasto



Slagter Frimann sausage room



SlagterFrimann meat counter

The butcher was keen to be involved in any exchange program and offered to host an Australian apprentice or butcher and send his own staff to Australia.

A similar program is being established between the Danish Meat Trade College and Harper Adams University in the UK. They also sent two slaughters to Australia on work experience in 2011. The slaughterers are working at a meat processing plant in South Australia.

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Roskilde butchery museum

Nearby SlagterFrimann, is an old butcher shop, which was donated to the Roskilde museum. It has been returned to its 1920s state as a historical museum. The shop is furnished with old butchery equipment inside and carts and cobblestones in the back yard. According to Karen, the shop was still in operation until a few years ago when the owner retired. He donated the shop to the museum, rather than selling it as an ongoing concern.

To learn more about the museum, visit their website: www.roskildemuseum.dk.



Roskilde butchery museum | ©www.visiteastdenmark.dk



Roskilde butchery museum



Roskilde butchery museum | ©www.visitdenmark.dk

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Day 13: Aarhus, with Marc Kristensen, Hilton Foods

Hilton Foods

The Fellow met with Marc Kristensen, the Commercial Manager from Hilton Foods,²⁴ a multi-national meat packing and distribution company. In the morning, Marc provided a tour of the Hilton factory. The meat packing and distribution centre is a fully automated plant. Meat is weighed, sliced, packed in portion controlled packs and despatched to supermarkets across Denmark, with very little human labour used in the process. The company are looking to expand operations to Australia in the future. The tour of the factory provided a lot of insight into how the supermarkets will likely prepare and sell meat in the future in Australia.

There are around three butchers working in the factory, however they are employed in managerial, product development or QA roles. This type of plant provides an alternative career path to butchers, however these roles are limited and draw more on a butcher's knowledge than their knife skills.

The factory tour provided a sense of where the pre-packed meat industry is heading in Australia. The role of in store supermarket butchers is likely to change significantly in the future.

Aarhus butchers and supermarkets

Kristensen also took the Fellow on a tour of butcher shops and supermarkets in Aarhus, Denmark's second largest city. He reiterated that butcher shops are few and far between, with only five per cent market share. The supermarkets hold the remaining 95 per cent. There are a number of different supermarket chains, catering for different classes of consumers, as is also the case in the UK. There are hypermarkets, which don't yet exist in Australia, supermarkets and discount markets. Hypermarkets sell grocery items as well as clothing, books, electrical, furniture etc. They are similar to Walmart in the USA. The discount markets include Aldi and a similar brand, Lidl.

The supermarkets and hypermarkets include large meat departments, with a number of rows of pre-packed meat cabinets. In addition, many of them also have a butchery counter in store. The butcher has a complete range of butchery skills, including breaking carcasses, meal preparation and party services. They prepare self service trays of meat as well as serve customers over the counter. The supermarkets also stock meat in modified atmospheric packaging from distribution companies such as Hilton or Danish Crown (Hilton's competitor). The same meat cuts or products are regularly both prepared in store and bought in from Hilton or Danish Crown. The theory behind this is that some customers are still loyal to the butchery trade and want to feel that they are buying something prepared by a real butcher. Others want the benefit of extended shelf life packaging, at a cheaper cost that is prepared in facilities they know to be extremely sanitary. They trust meat packed by Hilton or Danish Crown more than they trust meat prepared by a supermarket butcher.

The in store butcher also prepares cooked meals for the lunch-time trade and for time-poor customers to reheat for an evening meal. This is a significant part of the butchery trade in Europe.

There were only a small number of butcher shops to visit, most sold a range of value-added, pre-cooked meals, salads and also some dry-aged product. They all sold the famous smørrebrød (open sandwich), prepared in store, for the lunchtime trade.

²⁴ Hilton Food Group head office website: www.hiltonfoodgroupplc.com

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Day 14: Edinburgh to Perth butchers and supermarkets

On day 11, the Fellow visited a number of Scottish butchers in Edinburgh, Kinross and Perth with Douglas Scott, CEO of the Scottish Federation of Meat Traders (SFMT)²⁵ who is also the CEO of the Scottish Meat Training company.

The Scottish butcher shops were vastly different to those in London. The front of shop was much larger; they seemed busier, with more butchers in store than in London. The product range was also very different. There was a large range of traditional Scottish meats, such as Haggis and black pudding, white pudding, and skinless sliced sausages. They also had more value-added products than the stores in London.

There was very little promotion of region of origin or animal welfare standards in any of the stores, though most sold Scotch beef, and had the Scotch beef logo somewhere on display. It seemed more of a given that butchers would sell locally produced meat. One store in Kinross, a small country village, commented that they only buy meat produced locally, but spread their business around the various farms in the area. This was a community-focused decision. By buying locally, they are supporting local economics. By spreading their business they maintain good relationships with all the local farmers. To promote their local buying ethos, they display a notice board behind the counter telling customers where they sourced that day's meat.

Tom Court's in Cowdenbeath is situated directly in front of the supermarket in a small village. They identified a lack of cafes and delis in the area so expanded their butcher shop to include a sandwich bar, pastry cabinet and coffee shop to keep locals shopping in the village. The fresh meat section of the store still takes up a large area, so they have not sacrificed their meat range for the other services. There are two groups of workers in the store – those that handle only ready to eat product and those that handle fresh meat product. Each group is dressed in different aprons and uniforms to identify which area they belong to. If anyone was to switch counters to assist with overflow of customers, they would change their aprons and hats and wash their hands before switching sides. This is to help reduce cross contamination, but also provides a message to customers that they are a clean and hygienic business.

Simon Howie²⁶ has two stores in Scotland and was the Scottish 'Independent Retailer of the Year' in 2011. They are an innovative company that sells direct to the public and to supermarkets throughout Scotland. The Simon Howie brand is very distinct. They promote a traditional country butcher image on a supermarket brand. Their supermarket products include a breakfast range, a bacon range and haggis. Until very recently they also sold heat and serve meals through the supermarkets. All the products sold in supermarkets can also be purchased in the independent stores.



Simon Howie supermarket range

This store, along with a number of others in the UK, also sell 'goodie bags' or hampers of meat. Simon Howie advertises their £10 goodie bags on their website, changing the contents each week. They also provide cooking instructions on the website for each of the products in the goodie bag. The following cooking instructions were copied from the Simon Howie website in November 2012²⁷.

²⁵ Scottish Federation of Meat Traders: www.sfmta.co.uk

²⁶ Simon Howie: www.simonhowiefoods.co.uk

²⁷ Simon Howie: www.simonhowiefoods.co.uk

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Product	Method	Instruction
Beef Bourguignon Pies	Oven Bake	Conventional Oven: Pre-heat oven to 180°C Remove the pies from the packaging and place on an oven proof tray. Bake for approx 25 minutes.
Chicken Kiev	Oven Bake	Preheat oven to 190°C /Gas Mark 6. Remove film. Place on an oven proof tray and cook for 30 minutes.
Pork & Beef Meatballs With Tomato Sauce	Oven Bake	Conventional Oven: Preheat oven to 180.C Remove film from tray, pour the tomato sauce over the meatballs, cover with tinfoil, place on a baking tray in the middle of the oven and bake for approx 20 minutes
Breaded Ham & Maple Patties	Pan Fry / Grill	Pan Fry: Remove from the tray. Heat 1-2 tablespoons of vegetable oil in a frying pan. Add the product and fry over a medium heat for 10 minutes, turn frequently to achieve golden colour. Grill: Place under a preheated grill for 10-12 minutes, turning frequently.

www.Simonhowiefoods.co.uk

6. The International Experience

They offer a variety of weekly packs for different budgets. There are also Christmas meat packs at different prices advertised on their website.

THE WEE CHRISTMAS LUNCH - £46 (for 4-6people)

4-4.5 Whole Turkey OR 2Kg Rolled Turkey Breast Joint

500g Apple & Cranberry Stuffing

500g Unsmoked Back Bacon

1 Tub of Homemade Turkey Gravy

500g or Pork Chipolatas Wrapped in Streaky Bacon

THE WEE TRIMMINGS PACK - £13 (for 4-6people)

500g Apple and Cranberry Stuffing

500g Unsmoked Back Bacon

1 Tub of Homemade Gravy

500g Pork Chipolatas Wrapped in Streaky Bacon

THE BIG CHRISTMAS LUNCH - £65 (for 8-10people)

5-5.5Kg Whole Turkey OR 3Kg Rolled Turkey Breast Joint

1 x 500g Apple and Cranberry Stuffing

1 x 500g Pork Sausage meat Stuffing

1 x 500g Unsmoked Back Bacon

2 Tubs of Homemade Turkey Gravy

2 x 500g Pork Chipolatas Wrapped in Streaky Bacon

THE BIG TRIMMINGS PACK - £25 (for 8-10people)

1 x 500g Apple & Cranberry Stuffing

1 x 500g Pork Sausage meat Stuffing

2 x 500g Unsmoked Back Bacon

2 Tubs of Homemade Turkey Gravy

2 x 500g Pork Chipolatas Wrapped in Streaky Bacon

www.Simonhowiefoods.co.uk

Their website does not offer ordering facilities. Customers check the website weekly for the goodie packs then purchase them in store.

Hunters of Kinross²⁸ is owned by Iain Hunter and his wife, Pamela. They previously owned a traditional Scottish butcher shop in Melbourne, Australia. They specialise in Scottish meat products such as haggis and black pudding and traditional British sausages. Iain Hunter is also a professional singer; he has performed around the world, including Las Vegas. He provided the Fellow with a sample CD.

²⁸ Hunters of Kinross: www.huntersofkinross.co.uk

6. The International Experience



Iain Hunter's CD



Douglas Scott and Pamela Hunter at Hunters of Kinross

Similarly to Australian butchers, every shop visited in Scotland sold a range of complimentary products in store. Curiously, every butcher also stocked Walkers Scottish shortbread. Walkers even advertised in the Scottish Meat Traders Federation newsletter on a regular basis. This seemed a strange product to sell with meat, but most of the butchers insisted that stocking Walkers was a must, even though they also admitted that it didn't sell that well.

The Fellow also visited a Garden Centre on the outskirts of Edinburgh. The Garden Centres are a fairly recent phenomenon in the UK. They were originally set up to sell nursery products, but have continued to expand, to sell a limited selection of a wide range of products, from books, to clothes, to gourmet food. There is also a huge bistro in the centre.

The butcher shop in the garden centre was a small outlet for a larger independent store. There is usually one butcher on site, whose responsibilities are generally limited to stacking cabinets and providing advice to customers. There is very little slicing or preparation done in store. The product range is extremely limited, and generally expensive.

The Fellow visited a number of supermarkets to compare the product range. Alongside their own brands, the supermarkets sold meat products produced and packaged by local Scottish butchers, such as Simon Howie. There were a significant number of heat and serve meals, as was the case elsewhere in the UK. Many of the heat and serve meals were displayed in take-away style packaging, which differentiated between a special meal and the other heat and serve meals which were sold as the everyday home-cooked meal. Whilst they were essentially the same products, the take-away style packaging looked more luxurious and special, and the price attached suggested the same. In this way, supermarkets were competing with both the butchers and the restaurant and catering industry.

National Federation of Meat Traders/Scottish Meat Training

The Fellow visited the SFMT²⁹ and Scottish Meat Training³⁰ office in Perth. The role of the SFMT is similar to the role of AMIC. They are an employer body who lobby the government on behalf of the industry and also provide advice to industry on occupational health and safety and industrial relations issues and negotiate with leading industry suppliers on behalf of employers.

²⁹ Scottish Federation of Meat Traders: www.sfmtd.co.uk

³⁰ Scottish Meat Training: www.meattraining.net

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The SFMT is also the meat training organisation for Scotland, providing almost all the apprenticeships in Scotland and also servicing Northern Ireland. The Scottish Meat Training is more involved in assessment than training. They negotiate training plans and funding, but then do not deliver the training at all. The employers are responsible for all training and Scottish Meat Training come in every few months just to conduct assessment. They commented on the struggles they have with employers not carrying out the required training with the apprentice and the numbers of apprentices who are not keeping up with the assessment schedules.

The SFMT has created a Craftsman Certificate, a qualification that sits outside the National Vocational Qualifications framework. Students enrolling in the Craftsman Certificate must have already completed a level two NVQ qualification in meat and poultry, yet the Craftsman Certificate appears to replicate the training. The intent of the Craftsman Certificate is to provide a qualification that butchers understand. There is a strict number of Units included in the program, with no electives. When a butcher is issued with a Craftsman Certificate, an employer can be sure the butcher is skilled and competent in a particular range of skills, without delving deeper into the qualification to determine what skills they have. Whilst this award obviously fills a need in the industry, it seems to be a need that should have been fixed through better training of the level two NVQ awards and better regulating of the NVQ training providers. The Australian meat industry is in the process of establishing new awards for butchers to promote high level traditional skills. MINTRAC has been advising AMIC to tie the award to an already existing national qualification, such as the Certificate IV in Meat Processing (General).

Day 15: Leeds City College – Thomas Danby Campus

Leeds City College³¹ is one of only two facilities in the UK with meat retail training rooms that cater for the whole industry. The other is M.E.A.T Ipswich. The college offers level two and three training with block release. Apprentices attend the college one day every week for the duration of their apprenticeship, with the rest of their week spent working in a butcher shop.

The college has their own butcher shop on campus where apprentices can practice customer service skills. However the college also employs two full time apprentices who run the butcher shop when there are no students available. This shop allows them to sell much of the meat that is produced on campus.

The college has good relationships with industry, which provide meat product and equipment from time to time.

Chris Moorby, the head of the meat department, was also interested in the possibility of an exchange program for young butchers or apprentices.

³¹ Leeds City College: www.leedscitycollege.ac.uk

7. Knowledge Transfer: Applying the Outcomes

Skill deficiency 1: Need for changes to Australian qualifications for meat retail apprentices to meet greater range of meat retail businesses and job roles.

There is a greater acknowledgement of the variety of job roles in the meat retail sector in training in Europe. In the UK the qualifications are extremely flexible, meaning that customer service staff with extensive meat product knowledge can achieve the same qualification as a traditional butcher, focused on meat cutting, breaking, sausage making and pie making. They could also do a smaller number of units and still achieve a full qualification as there are different qualifications within the same level (award, certificate and diploma).

In Germany there are separate qualifications for butchers and meat customer service specialists. Denmark also has separate qualifications.

The Food Services qualification in the MTM11 Australian Meat Industry Training Package has been designed as a flexible meat industry qualification that can be adapted to a number of different sectors or job roles. Unfortunately, the number of units in the qualification is very limited and trainees cannot mix units from levels II and III. This makes the qualification unsuitable for many customer service roles in butcher shops and supermarkets. The Certificate III in Meat Processing (Retail Butcher) qualification is not flexible enough to suit the variety of roles in meat retail outlets. It seems that the Australian meat retail industry either needs to develop a second qualification to suit the variety of roles now available in a meat retail store, or make the existing qualification more flexible.

The qualifications from each country visited form Attachment 1 of this report.

MINTRAC, the National AMIC Retail Council and the two major supermarkets are currently discussing the potential of adding a second Certificate III for workers in the meat retail sector.

Skill deficiency 2: Lack of insight into future trends for the Australian meat retail sector.

The trends the Australian industry, MINTRAC, AMIC, MLA and APL should be cognisant of are as follows.

Dry-aging

Dry-aging is a process whereby meat is kept unwrapped in a dehumidified cool room, for at least 21 days to dry and dehydrate the meat, allowing the enzymes in the meat to break down the protein and fat strands, thus improving the tenderness and flavour.

Jason Strong, the MLA representative in Brussels feels that Australian meat is good enough not to need dry-aging. The MSA program encourages butchers to wet-age the product (i.e. age the meat in the vacuum bag in a standard cool room). However, according to chefs such as Neil Perry¹, wet aging preserves the meat without changing the tenderness and flavour. There are already a number of butchers in Australia that offer dry-aged beef as a point of difference. If the process is not set up correctly and carefully monitored, the meat will go off, rather than dry-age. It can be a costly mistake to butchers with a lot of wasted product if processes are not correctly controlled. There is no training available in any level of meat retail training qualifications on dry-aging meat, but it appears to be an increasing trend here and in Europe.

¹ Perry, N. 2011. 'Neil Perry and dry-aged beef' in The Australian Way. QANTAS http://travelinsider.qantas.com.au/neil_perry_and_dry-aged_beef.htm

7. Knowledge Transfer: Applying the Outcomes

In-store cooking

The UK supermarkets are full of pre-prepared meals. The UK consumer takes home a pre-cooked meal that all they need to do is put in the oven/microwave to heat up. For customers who like vegetables with their main dish, everything is already done for them too. It is possible to buy pre-peeled, and sliced vegetables that just need to be steamed, mash potato, pre-baked potatoes and mushy peas to be microwaved, etc. This eliminates all meal preparation for the consumer. Pre-prepared meals are also becoming increasingly popular in butcher shops around the UK.

Australian butchers sell large quantities of uncooked value-added products, such as pre-marinated stir fries, pastry covered meat, etc. However the UK have gone a step further and actually pre-cooked the product in store. For the consumer, this would offer significant time savings as the consumer only needs to re-heat the meal, rather than cook it from scratch.

This trend was also common in Denmark, in both supermarkets and independent butcher shops. Danish butchers all sold smørrebrød (open sandwiches), which are a common lunch time meal all around the country. This was in addition to roasts, pies, rissoles, schnitzels and salads. Cooking for sale and making salads are a part of the butchery training in Denmark. The butchers also offer 'party services' or catering in both Denmark and Germany, and this is also included in the qualifications for butchers.

Supermarkets in Denmark offered a range of meat products, cuts and qualities, with both in-store butchers and large distribution centres providing meat trays for sale. The butchers in store also prepare cooked meats and salads for retail sale, the trays being sold both over the counter and from refrigerated self-serve cabinets.

Cooking is a likely future trend in Australia also, as already a small group of butchers are offering these services to customers. Cooking and selling cooked product from the same premises as raw product turns a business from a low food safety risk to high food safety risk. As such, this is an important trend to monitor.

Whilst the existing Certificate III qualification for retail butchers includes a cooking unit, it is more about understanding cooking processes and techniques to provide advice to customers than about cooking in store for sale. The unit does not cover the food safety risks of in store cooking etc. It would be advisable to develop Units of Competency or Skills Sets around cooking and selling cooked meat.

This is possibly an avenue that MLA's or APL's marketing departments could look into as future workshops for the industry members.

Game meat

It was interesting to observe the popularity of game meats in the UK. Most butcher shops stocked small amounts of rabbit and game birds, such as Poussin, pheasant, grouse, pigeon goose, duck etc. Game meat and hunting seasons are a long standing tradition in the UK. Australian stores already sell Australian game meat, such as kangaroo and emu, but not the traditional English species. Since returning to Australia, the Fellow has observed that supermarkets are now selling whole rabbit carcasses, a species that has not been seen in stores for a long time. It is worth monitoring this trend in Australia in the future. Whilst there is no need for a change to existing qualifications, it might be worth considering an update of training resources to include more information on game meat.

7. Knowledge Transfer: Applying the Outcomes

Electronic marketing and online sales

UK butcher shops are much further advanced in electronic marketing and online selling. Many of the butchers with websites offer delivery across the country, often overnight. Consumers in the UK have been using mail-order shopping for many years and are accustomed to having shopping delivered. The butchers and supermarkets have capitalised on this and offer good, fast delivery services for online shopping.

Most of the butcher shops visited have a website. Some offer online ordering, whilst others are just a point of reference. They still offer phone orders and even email or fax orders, but not online.

Many of the butchers who sell online and offer delivery use a courier for deliveries. This increases the cost for the customer, but reduces the cost to the butcher. However, using a courier allows for deliveries to wider areas. UK butchers, such as Godfreys, offer delivery across the UK. Whilst this might be impractical for Australian butchers, there is opportunity to investigate the practicality of state-wide deliveries using courier companies.

Australian consumers are very new to online shopping. There isn't a long history of mail order shopping here as there has been in the UK. There is still a very low percentage of consumers in Australia who order grocery items, including fresh food, online. However, pre-ordering over the phone is a long standing tradition for butchers, and as such online ordering should be a natural progression. MINTRAC is investigating the need for units of competency and training programs in online marketing and will include a session on online marketing in the 2012 meat retail trainers' conference.

Since returning to Australia, the Fellow has noticed that MLA is also promoting training courses in online marketing for their members.²

Supermarkets

Supermarkets in Denmark, Germany and the UK are reintroducing butchers into the stores. There are different approaches to using butchers in supermarkets.

In the UK, the stores with a meat counter generally employ 'meat specialists', rather than fully qualified butchers. The meat specialists can slice meat for a customer, but are mostly there for theatre. Having someone behind a meat counter dressed as a butcher serving a small selection of meats from the non-self service cabinets provides a 'fresh food' image for the customer. The customer, whether they buy meat from the counter or from the cabinet is given the impression that the meat offered by the store is cut and packed by the store butcher. Customers who would usually buy their meat at an independent store can be persuaded to buy their meat in the supermarket because they can still talk to and see the butcher in the supermarket. In food halls of high-end department stores there was a mix of 'meat specialists' and 'butchers' employed. Where there is a meat counter, but no self-service cabinets, they tend to employ butchers. Where there are self-service cabinets as well as a meat counter, the counter is manned by 'meat specialists'. These counters sell high quality meat, such as wagyu and dry-aged cuts and sometimes even halal meat (from a separate cabinet). The meat specialists were very knowledgeable and had decent cutting skills.

In Denmark, many of the supermarkets employ fully qualified butchers cutting and preparing meat in store for sale from the self serve cabinets. The store-prepared meat is placed on trays and cling wrapped. The same cuts, supplied by large distribution centres such as Hilton, are sold from the same cabinets in modified atmospheric packaging. The in store butcher also prepares salads and cooked meals, which can be bought hot at lunch time or cold in the afternoon for reheating for evening meals.

² MLA: www.mla.com.au

7. Knowledge Transfer: Applying the Outcomes

Butchers, or meat specialists, were employed by supermarkets in very different capacities across the three countries. It will be important to monitor trends in supermarkets in Australia to ensure the training package continues to meet the needs of this sector. Both major supermarket chains in Australia have recently reintroduced meat counters into some of their stores. They plan to upskill customer service staff to cut and slice meat, rather than employ fully qualified butchers. They also plan to increase their use of large meat packing and distribution centres to stock their self service cabinets.

Skill deficiency 3: Need for greater understanding of who should pay for apprenticeship training.

There were no real answers to this issue available.

Across the EU, Governments are responsible for paying for vocational training. This has been the case in Australia until recently, when state governments have had very reduced budgets. EU citizens pay significantly greater taxes than in Australia, making it possible for Governments to provide fully funded training programs.

Skill deficiency 4: Unmet opportunities for post-trade training for butchers to improve career pathways and develop higher-skilled industry leaders (as noted in the 2011 Environmental Scan of the AgriFood industry) and facilitate workforce development.

There was much more take-up of higher level training across the EU.

UK Level 3 National Vocational Qualification

As previously mentioned, the UK NVQ for butchers is level two. The Units of Competency in this level were similar to those in the Australian Certificate II in Meat Processing (Meat Retailing) with some meat cutting units which are included in Certificate III in Australia.

The level three NVQs are suited to butchers moving into supervisory roles in large processing facilities and management roles in small businesses. The units in this level include some of the units in the Australian Certificate III, such as managing stock and calculating yields. They also contain Product Development, Retail and Manufacturing, Production Management, Risk Assessments and HACCP. The level three qualification is known as an 'Advanced apprenticeship'.

Level three NVQs for butchers, addressing supervisory and management skills are widely delivered across the UK, usually by the same training providers who deliver the level two qualifications for butchers. Depending on which qualification within level three a learner chooses, there are a different number of units required to complete. Therefore the duration of the course can be between 18 and 24 months. Crosby Management Training, M.E.A.T Ipswich and Leeds City College all deliver the qualification face to face. Generally, training is delivered in three day face to face blocks, four times a year. Alternatively, the course can be delivered part time, on campus. Students attend the college for a full day once a week for 36 weeks. Scottish Meat Training delivers the course by distance.

Level 4 and post graduate qualifications in the UK

Harper Adams University, an agricultural and food technology university in Birmingham, offers a range of higher level qualifications for the meat industry:

7. Knowledge Transfer: Applying the Outcomes

- Level 4 Certificate in Meat Quality
- Level 5 Intermediate Diploma in Meat Quality
- Postgraduate Certificate in Meat Business Management
- Postgraduate Diploma in Meat Business Management and Improvement
- MSc in Meat Business Management and Improvement.

The training programs are delivered face to face in either three or five day residential blocks, depending on the unit.

The SFMT offers a Craftsman Certificate, a qualification outside the National Vocational Qualifications framework.

In Germany, post-trade level training is essential for every business. At least one person in a butcher shop must be a master butcher. The master butcher training program takes 18 months and is delivered face to face one day per week.

The Danish Meat Trade College offers a management training program for local and international students. The course is a one week residential program at the college.

It appears that Australia is lagging behind the EU in higher level training for butchers. One of the issues that training providers have faced in Australia with high level training is how to deliver to butchers who own or manage small businesses, work six days a week and have limited time for additional training and assessment. Butchers in the EU work under the same conditions, but there are a number of training providers who have been able to profitably run such programs. It seems that face to face residential programs may be the best model for such training in Australia as well.

The other barrier to higher level training in Australia is the traditional view that butchers' training finishes at Certificate III, when they earn their trade papers. There needs to be a cultural change in the industry to promote the value of continued learning.

AMIC is looking at two different awards for butchers to promote their level of skills to consumers. Both awards are going to require butchers to undertake further training. They will drive the need for higher level qualifications. MINTRAC will engage with AMIC to develop suitable skills sets and delivery models for training and/or assessment.

Other opportunities

Worldskills

In both Denmark and the UK there was discussion around creating more opportunities for apprentice butchers to compete in international competitions. The college in Denmark is developing a European competition for butchers which will commence in the next two years. They were also interested in creating a Worldskills competition, however neither Denmark or the UK currently have a regional or national Worldskills competition for butchers, which would first need to be established before an international competition could be negotiated.

There is a requirement to have at least eight countries participating in Worldskills to get a particular trade included. This is something that MINTRAC should participate in the future to ensure an international competition for butchery is added.

7. Knowledge Transfer: Applying the Outcomes

Student exchange programs

The meat trade college in Denmark allow their trainees to carry out international work experience during their butchery or slaughtering training. Generally, this is done in other European countries; however there have been two slaughterers who have undertaken their work experience in an Australian abattoir. The college suggested that a reciprocal exchange program for butchers could be set up with Australia. Several butchers in Denmark also commented that this would be a great opportunity for rewarding apprentices and improving long term retention of staff. There is enough similarity in shops in Denmark to Australian shops that this could work, but also enough differences to make it a worthwhile learning experience.

The issues that will be faced are with selecting the appropriate time for an apprentice to travel. In Denmark, they undertake 20 weeks of on campus training each year, followed by industry experience. The time for an overseas exchange program is built into their training. In Australia, work experience and training are undertaken simultaneously. Any trip overseas to work would disrupt the training and assessment process and generally suspend progress on their apprenticeship. It would be most logical to offer an exchange to an apprentice on completion of their training. However this would mean that the Australian employer would receive a Danish apprentice still learning, whilst the Danish employer would get a trade qualified butcher in return. This would, no doubt, create tension for the Australian employer.

There would be a number of benefits to the Australian butcher shop manager.

- The exchange program would promote international exchanges of ideas. Apprentices would be able to bring back ideas for new products, marketing ideas, different skills etc.
- The exchange would provide huge incentives for apprentices to work harder in their training, give them a good reason to complete the training and continue in the industry. This would be a great reward system for employers too. There would be little cost to the employer, they could allow the apprentice to go on the exchange and get a butcher in return to take up the vacancy left by their apprentice.
- This aspect of the program would also benefit butchers whose employees are likely to quit in order to do a year's travel overseas. They would have a replacement worker for that time and also be able to provide a job for the apprentice upon their return. An apprentice who was given such an opportunity is more likely to stay on with that employer in the future.

A continuing exchange program with the Danish Meat Trade College will also foster continuing collaboration between them and MINTRAC, which could lead to a greater exchange of ideas.

This idea was later discussed in the UK with training providers. They too were very interested in setting something like this up. It is definitely an idea that should be followed up.

Professionalism of the industry

Butchers who are part of the Butchery guild in London are immensely proud of their industry. There is a sense of respect for such an old traditional profession in the UK that is lacking in Australia. It would be interesting to set up something similar in Australia for butchers to regularly network, meet and feel part of a proud industry. The guild operates as a charitable organisation now, regularly raising funds for particular charities around London.

Whilst it would be impossible to achieve the same sense of tradition in Australia, given the guild in London has been in existence for 400 years, it could be a great way to increase the reputation and respect for the profession of butchery, thus encouraging recruitment into the industry in the future.

AMIC could utilise the gold or master butcher awards to establish a network of butchers and some form of professional association. This will be discussed with the AMIC in the future.

7. Knowledge Transfer: Applying the Outcomes

Literacy and learning styles

The Danish Meat Trade College had some very interesting solutions to the literacy problems faced by their students. They created an IT backpack which allowed trainees with problems to use text to voice programs to read training resources to them. Whilst this is not the solution to developing skills, only a bypass to the issue, there is some merit in the idea. If students with issues were provided with a tablet pre-loaded with text to voice programs, training resources that would communicate with the text to voice programs, and additional training resources, such as the Chopping Board³ to help improve their skills, calculators, conversion charts and other resources to help with numeracy or literacy tasks, it could be very useful in building literacy and numeracy skills and reduce the number of withdrawals from training. This could offer some support to apprentices who do not have access to language, literacy and numeracy support due to their locations.

The Danish Meat Trade College was also doing extensive work in using a variety of learning styles to help apprentices learn. They were turning their corridors, stairs, walls and floors into interactive learning tools. The project came about from a Danish educational researcher, Sven Erik Schmidt. Unfortunately, he only writes in Danish and no translation of his papers seems to be available online. Also, this project is still in early development stages at the college so there are no statistics to show whether it is successful as yet.

Internationally there is a much higher focus on foundation skills than is currently in the Australian qualifications. The meat retail qualifications in Australia include one mathematics unit in level 1 and no other units focused solely on literacy or numeracy. These skills are embedded in the qualification, but not explicit. There is a recent Government push for foundation skills to be included in vocational qualifications in Australia. The new foundation skills training package may provide industry with the opportunity to deliver extra training in literacy and numeracy, however it is not yet evident whether this would be at the expense of vocational skills or as an add on to a qualification.

The issue Australian trainers in the meat retail industry will face is that they are not in regular contact with the apprentices to deliver foundation skills units in an appropriate way. It was interesting that Australian vocational education and training was behind in this area in comparison to the three places visited.

³ MINTRAC. 2011. The chopping board. Commonwealth of Australia: Sydney

8. Recommendations

Recommendation 1: Include a Unit or Skills Set on dry-aging in the MTM11 Australian Meat Industry Training Package.

There are a number of butchers in Australia already offering dry-aged beef in their current product range. This is a trend that is likely to continue in the future as a point of differentiation between butchers and supermarkets. It would be beneficial to include specific units to cover the set up of a dry-aging room, the food safety aspects and the process of dry-aging in the training package. The units should be electives and a Skills Set may be made up of units from a range of levels.

MINTRAC will take this recommendation to the AMIC National Retail Council for consultation.

Recommendation 2: Develop a Unit or Skills Set on cooking meals for retail sale in the MTM11 Australian Meat Industry Training Package.

Whilst there is a unit in the Certificate III in Meat Processing (Retail Butcher) qualification on basic methods of meat cookery, this unit is focused more on home cooking. The aim of the unit is to learn how to cook with various meat cuts in order to be able to advise customers on how to cook meat products. An additional unit or skills set, on how to prepare pre-cooked meals for customers to take home from the store, reheat and eat, is needed for shops that sell cooked meat alongside raw meat. This trend was evident in butcher shops in the UK, Denmark and Germany. The German and Danish qualifications already include cooking Units. Australian shops are starting to provide these services, but without any specific training. This service takes a butcher shop from being a low food safety risk to a high risk and, as such, should have supporting training to ensure food safety is maintained. Apprentices should also learn cooking procedures as part of their trade training if they are going to be engaging in these activities in their workplace.

MINTRAC will present this recommendation to the AMIC National Retail Council for consultation.

Recommendation 3: Implement a face to face residential delivery model for Certificate IV in Meat Processing (General) for post trade training for butchers.

Post trade-level training is offered to butchers in the UK, Denmark and Germany. They all deliver the training in residential blocks face to face. Numbers of enrolments are sufficient to keep the courses running each year.

The Australian qualification has recently been broken into a variety of skills sets which will soon be endorsed and included in MTM11 Australian Meat Industry Training Package. Trainees can then undertake shorter training courses that are relevant to their needs rather than undertaking the full qualification in one hit. This will help change the existing culture and ease butchers back into training.

MINTRAC needs to support registered training organisations to develop delivery models for these skills sets.

Recommendation 4: Split the Certificate III in Meat Processing (Retail Butcher) into two separate qualifications.

One Certificate III qualification should maintain the rigidity to ensure a traditionally skilled butcher outcome. However, a second qualification that is more flexible, with an increased number of elective Units and decreased compulsory Units should be developed to allow a greater range of skills sets to meet the diversity of needs of meat retailers. This would allow customer service staff, supermarket butchers, value-adding butchers and butchers who cook product in store to undertake a qualification that is more suited to their workplace.

8. Recommendations

This recommendation is currently being discussed by MINTRAC, AMIC and the two major supermarket chains. A new qualification is likely to be endorsed in the first half of 2013.

Recommendation 5: Develop a professional organisation for retail butchers to socialise and network.

The Australian Meat Industry is represented by two separate marketing bodies – Red Meat, through MLA, Pork, through Australian Pork Limited. MLA have established a Red Meat Networking Club, which puts on workshops, provides marketing materials and runs tours around Australia for butchers to visit other shops to share ideas. They also hold a formal dinner once a year in each state for butchers and their wives to attend.

The Australian Meat Industry Council represents independent butchers on legal and political matters. They have a state council of butchers in each state and a national council made up of representatives from each state council. Once a year they have an awards night for their members in each state. This is a formal occasion.

What is missing is a professional association event for everyone in the industry, which goes beyond BBQs, workshops and once a year dinners and brings butchers, suppliers and wholesalers together on a regular basis to share ideas and network, as was provided by the monthly luncheons at the Worshipful Company of Butchers. The luncheon treated butchers like professionals; they provided speakers on topics well outside of butchery. This is what is lacking in the Australian organisations. The focus of every workshop, dinner and meeting is butchery. The attitude of hundreds of butchers in Australia is that they are 'just butchers'. The organisations representing them treat them the same way. Something like the Worshipful Company of Butchers is needed to lift the profile of butchery in Australia.

The Fellow will discuss this idea further with other meat industry organisations, such as AMIC, MLA and APL.

Recommendation 6: Introduce an apprentice/young butcher exchange program

There is a great opportunity to exchange ideas between countries and expand the skill set of butchers in Australia through a student exchange program.

Young Australians often want a gap year trip to the UK or Europe, where they work part time and travel part time. They leave their jobs in Australia, and may or may not return to them in a year's time. The industry could capitalise on the gap year trend by engaging in an exchange program. The young butcher doesn't need to quit their job in Australia. The manager receives a replacement butcher whilst their butcher is overseas and upon their return, they pick up a whole lot of new ideas. In addition, the Australian butcher learns new ideas from their international employee.

The exchange program would also lift the profile of butchers in Australia and be a great selling point in recruitment. There are several schools in the UK and Denmark who would like to be part of such a program and also a number of butchers who have shown interest in the idea.

The Fellow has contacts in Rotary in Australia who already organise vocational exchange programs that could provide the immigration knowledge required to establish such a program. It may be possible to offer the first exchanges through Rotary, capitalising on their existing expertise in managing exchange programs.

There would need to be funding available to MINTRAC to develop the program if it is agreed that this is within MINTRAC's scope. Different organisations in Australia will have different views on how the program ought to be run and extensive consultation would need to take place before any such program could be implemented.

8. Recommendations

MINTRAC needs to discuss this concept with Rotary, AMIC, APL and MLA. They will also need to consult with RTOs to develop an exchange program that will work with the apprentices' training and assessment schedules.

Recommendation 7: Develop a club for extra curricula activities for apprentice butchers

A significant number of apprentices withdraw from their apprenticeship due to the difficulties experienced in literacy and numeracy. Since returning from the Fellowship, MINTRAC has applied for Commonwealth funding to develop a mentoring program to help at risk apprentices through their training.

This program could be expanded for other apprentices to offer alternative butchery experiences and networking solutions. The Westminster Kingsway College in London has an outstanding extra curricula club for chefs in training to experience more of their field away from the college and their workplaces. They attend tours and camps to learn additional skills or apply their skills to a range of new situations. MINTRAC, or the registered training organisations themselves, should look into developing a similar club, which would again help to retain existing apprentices and also build professional networks for apprentices that they will need to draw on in their later careers.

9. References

UK Butchers

Allens of Mayfair: www.allensofmayfair.co.uk

Ginger Pig: www.thegingerpig.co.uk

Godfreys: www.Godfreys.co

Hunters of Kinross: www.huntersofkinross.co.uk/

Lidgates: www.lidgates.com

Simon Howie: www.simonhowiefoods.co.uk

Walter Smith Fine Foods Ltd.: www.waltersmith.co.uk

Smithfield Markets: www.smithfieldmarket.com

UK Training organisations

Crosby Management Training: www.crosby-ryton.co.uk

Harper Adams University: www.harper-adams.ac.uk

Leeds City College: www.leedscitycollege.ac.uk

M.E.A.T Ipswich: www.meatipswich.co.uk

Scottish Meat Training: www.meattraining.net

The Institute of Meat: www.instituteofmeat.co.uk

Westminster Kingsway College: www.westking.ac.uk

UK Supermarkets

Marks and Spencers: www.marksandspencer.com

Sainsbury's: www.sainsburys.co.uk/ www2.sainsburys.co.uk

TESCO: www.tesco.com

Waitrose: www.waitrose.com

UK Meat Organisations

BPEX: www.bpex.org.uk

National Federation of Meat and Food Traders: www.nfmft.co.uk

Scottish Federation of Meat Traders: www.sfmfta.co.uk

Worshipful Company of Butchers: www.butchershall.com

German training organisations

College of Food Technology, Kulmbach: www.fleischportal.de

Danish training organisations

Danish Butcher shop museum: www.visitdenmark.com/en-usa/danmark/o-lunds-eftf-butchers-shop-

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Hilton Foods: www.hiltonfoodgroupplc.com

SlagterFrimann, Roskilde: www.slagterfrimann.dk

Belgium

Meat and Livestock Australia: www.mla.com.au

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UK Department of Environment, Food and Rural Affairs: www.defra.gov.uk/news/2011/12/06/higher-welfare-eggs

10. Attachments

Attachment 1

UK National Vocational Qualifications for Butchery

Level 2 Certificate for Proficiency in Meat and Poultry Industry Skills (QCF) (600/0640/7) (GA8D54)

Qualifications purpose

The level 2 Certificate for Proficiency in Meat and Poultry Industry Skills is designed for people working in the meat and poultry industry. It covers a broad range of skills from handling of livestock, primary meat processing, secondary processing/butchery and butchery sales and service. It offers you the opportunity to develop skills and knowledge required to prove competence at work. It is also suitable if you are already competent in meat processing activities and are looking for ways of developing your existing skills and knowledge, perhaps to support multi-skilling or increase productivity at work.

The qualification offers a unique mix of

- occupational skills and knowledge units covering processing, service and support competences combined with
- detailed knowledge units relevant to the meat industry

The flexible choice of units, allows you to select units that are most relevant to their own employment, learning and progression requirements. The choice of units also reflects the wide variety of jobs which people do in different types of companies in the meat industry.

The Units have been combined into three groupings:

Group A contains:

- Livestock Handling and Welfare Units
- Primary Processing Units
- Secondary Processing and Butchery Units
- Butchery Sales and Service Units
- Support Operation Units.

Group B contains:

- Common Operations Units

(The Common Operations units offer you the opportunity to take competencies which are generic to the whole food and drink industry, such as food safety, working with others and quality).

And **Group C** contains:

Meat Industry Knowledge Units

10. Attachments

To achieve the full level 2 Certificate, you must achieve a minimum of 27 credits, comprising of the following combination of credits from each of the three unit groups:

Group A – a minimum of 21 credits

Group B – it is not mandatory to take any credits from Group B, but up to 4 credits can be achieved

Group C– it is not mandatory to take any credits from Group C, but up to 6 credits can be achieved

Group A –At least 21 credits must be achieved from this group:

Livestock Handling and Welfare Units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
D/502/7709	FH38 54	Receive livestock in food operations	2	2	10
R/502/7710	FH39 54	Understand how to receive livestock in food operations	2	3	17
Y/502/7711	FH3A 54	Receive poultry in food operations	2	2	11
D/502/7712	FH3C 54	Understand how to receive poultry in food operations	2	3	20
H/502/7713	FJ3L 54	Contribute to Bio-security in livestock holding in food operations	2	2	9
K/502/7714	FH3E 54	Understand how to contribute to bio-security in livestock holding in food operations	2	2	14
M/502/7715	FH3F 54	Maintain reception and holding areas for livestock in food operations	2	2	10
T/502/7716	FJ3M 54	Understand how to maintain reception and holding areas for livestock in food operations	2	2	11
A/502/7717	FH3H 54	Care for livestock pre-slaughter in food operations	2	1	7
F/502/7718	FH3J 54	Understand how to care for livestock pre-slaughter in food operations	2	2	13
J/502/7719	FH3K 54	Care for poultry pre-slaughter in food operations	2	1	9
A/502/7720	FH3L 54	Understand how to care for poultry pre-slaughter in food operations	2	2	14

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
F/502/7721	FH3M 54	Prepare and monitor feed and water supplies to livestock in food operations	2	2	12
J/502/7722	FH3N 54	Understand how to prepare and monitor feed and water supplies to livestock in food operations	2	2	14

Primary Processing Units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
H/502/7730	FH3P 54	Carry out manual stunning of poultry	2	2	12
T/502/7733	FH3R 54	Understand how to carry out manual stunning of poultry	2	2	12
J/502/7736	FH3T 54	Carry out manual stunning of red meat species	2	2	12
R/502/7738	FH3V 54	Understand how to carry out manual stunning red meat species	2	2	12
Y/502/7739	FH3W 54	Operate an electric stunning system for poultry	2	2	10
R/502/7741	FH3X 54	Understand how to operate an electric stunning system for poultry	2	2	9
Y/502/7742	FH3Y 54	Operate a gas stunning system for poultry	2	2	10
H/502/7744	FJ3N 54	Understand how to operate a gas stunning system for poultry	2	2	11
K/502/7745	FH41 54	Operate a stunning system for red meat species	2	2	12
M/502/7746	FH42 54	Understand how to operate a stunning system for red meat species	2	2	11
T/502/7747	FH43 54	Carry out manual bleeding operations	2	2	11
A/502/7748	FH44 54	Understand how to carry out manual bleeding operations	2	2	11

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
L/502/7754	FH45 54	Operate a poultry bleeding system	2	2	13
R/502/775	FH46 54	Understand how to operate a poultry bleeding system	2	2	12
H/502/7761	FH47 54	Carry out religious slaughter	2	2	11
K/502/7762	FH48 54	Understand how to carry out religious slaughter	2	2	11
M/502/7763	FH49 54	Carry out bleeding operations for Halal meat	2	2	11
F/502/7766	FH4A 54	Understand how to carry out bleeding operations for Halal meat	2	2	10
R/502/7772	FH4C 54	Operate a meat carcass shackling system	2	1	7
A/502/7782	FH4D 54	Understand how to operate a meat carcass shackling system	2	1	7
R/502/7786	FH4E 54	Carry out skinning of meat carcasses	2	1	6
Y/502/7756	FH4F 54	Understand how to carry out skinning of meat carcasses	2	1	10
K/502/7759	FH4G 54	Operate a poultry plucking system	2	1	8
M/502/7794	FH4H 54	Understand how to operate a poultry plucking system	2	1	8
Y/502/7787	FH4J 54	Operate a de-hairing system	2	1	5
D/502/7788	FH4K 54	Understand how to operate a de-hairing system	2	1	5
J/502/7803	FH4L 54	Carry out rodding and clipping of meat carcasses	2	1	7
R/502/7805	FH4M 54	Understand how to carry out rodding and clipping of meat carcasses	2	1	6
Y/502/7806	FH4N 54	Carry out splitting of meat carcasses	2	1	7
H/502/7808	FH4P 54	Understand how to carry out splitting of meat carcasses	2	1	7
K/502/7809	FH4R 54	Remove specified risk material in meat processing	2	1	9

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
J/502/7817	FH4T 54	Understand how to remove specified risk material in meat processing	2	1	10
L/502/7818	FH4V 54	Control automated meat/poultry processing operations	2	2	10
R/502/7819	FH4W 54	Understand how to control automated meat/poultry processing operations	2	2	9
D/502/7810	FH4X 54	Carry out manual evisceration of poultry carcasses	2	1	9
K/502/7812	FH4Y 54	Understand how to carry out manual evisceration of carcasses for Kosher meat	2	1	8
M/502/7813	FH50 54	Understand how to carry out manual evisceration of poultry carcasses	2	1	8
H/502/7811	FH51 54	Carry out manual evisceration of red meat carcasses	2	1	9
T/502/7814	FH52 54	Understand how to carry out manual evisceration of red meat carcasses	2	1	8
A/502/7815	FH53 54	Operate a carcass electrical stimulation system	2	1	7
F/502/7816	FH54 54	Understand how to operate a carcass electrical stimulation system	2	1	9

Secondary Processing and Butchery Units

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
M/502/7830	FH55 54	Sort waste by-products and edible co-products in meat processing	2	1	8
T/502/7831	FH56 54	Understand how to sort poultry waste by-products and edible co-products	2	1	9
F/502/7833	FH57 54	Understand how to sort red meat waste by-products and edible co-products	2	1	9

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
R/502/7836	FH58 54	Process waste by-products and edible co-products in meat processing	2	1	8
Y/502/7885	FH59 54	Understand how to process poultry waste by-products and edible co-products	2	1	9
D/502/7838	FH5A 54	Understand how to process red meat waste by-products and edible co-products	2	1	9
Y/502/7840	FH5C 54	Carry out primal cutting in meat processing	2	2	12
K/502/7843	FH5D 54	Understand how to carry out primal cutting in poultry processing	2	2	9
T/502/7845	FH5E 54	Understand how to carry out primal cutting in red meat processing	2	2	9
F/502/7847	FH5F 54	Carry out boning in meat processing	2	3	14
J/502/7848	FH5G 54	Understand how to carry out boning in poultry processing	2	2	12
L/502/7849	FH5H 54	Understand how to carry out boning in red meat processing	2	2	12
L/502/7852	FH5J 54	Carry out seaming or filleting in meat processing	2	2	12
F/502/7850	FH5K 54	Understand how to carry out seaming or filleting in meat processing	2	2	10
R/502/7853	FH5L 54	Carry out trimming in meat processing	2	2	14
Y/502/7854	FH5M 54	Understand how to carry out trimming in meat processing	2	2	12
D/502/7855	FH5N 54	Carry out primal butchery of red meat in sales operations	2	2	12
H/502/7856	FH5P 54	Understand how to carry out primal butchery of red meat in sales operations	2	2	14
M/502/7858	FH5R 54	Carry out secondary butchery of red meat in sales operations	2	2	12
T/502/7859	FH64 54	Understand how to carry out secondary butchery of red meat in sales operations	2	2	15

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
K/502/7860	FH65 54	Carry out poultry butchery in sales operations	2	2	11
M/502/7861	FH66 54	Understand how to carry out poultry butchery in sales operations	2	2	15
T/502/7862	FH67 54	Carry out wild game butchery in sales operations	2	2	11
A/502/7863	FH68 54	Understand how to carry out wild game butchery in sales operations	2	2	15
L/502/7866	FH69 54	Produce portion controlled raw meat products	2	2	8
R/502/7867	FH6A 54	Understand how to produce portion controlled raw meat products	2	1	8
Y/502/7868	FH6C 54	Carry out flavour enhancement in meat processing	2	2	11
D/502/7869	FH6D 54	Understand how to carry out flavour enhancement in meat processing	2	2	12
R/502/7870	FH6E 54	Operate a meat injection system	2	2	12
Y/502/7871	FH6F 54	Understand how to operate a meat injection system	2	2	12
D/502/7872	FH6G 54	Cure meat products	2	2	11
H/502/7873	FH6H 54	Understand how to cure meat products	2	2	10
K/502/7874	FH6J 54	Carry out massaging in meat processing	2	2	14
M/502/7875	FH6K 54	Understand how to carry out massaging in meat processing	2	2	12
T/502/7876	FJ3P 54	Produce sausages	2	2	10
A/502/7877	FH6M 54	Understand how to produce sausages	2	1	8
R/601/4675	FC45 54	Fill or extrude meat and meat based mixtures	2	2	8
D/601/4677	FC46 54	Understand how to fill or extrude meat and meat based mixtures	2	2	16

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
F/502/7878	FH6N 54	Produce batch meat preparations and products	2	2	9
J/502/7879	FH6P 54	Understand how to produce batch meat preparations and products	2	1	10
A/502/7880	FH6R 54	Oven cook batched meat and meat products	2	2	12
F/502/7881	FH6T 54	Understand how to oven cook batched meat and meat products	2	2	12
J/502/7882	FH6V 54	Fry poultry products	2	2	8
L/502/7883	FH6W 54	Produce added value meat products in sales operations	2	2	12
R/502/7884	FH6X 54	Understand how to produce added value meat products in sales operations	2	2	14
L/602/1706	FF50 54	Prepare sauces and marinades by hand in food manufacture	2	3	22
R/602/1707	FF51 54	Understand how to prepare sauces and marinades by hand in food manufacture	2	2	8
K/601/4570	FC22 54	Prepare ingredients and store fillings and toppings in food manufacture	2	3	25
H/601/4616	FC23 54	Understand how to prepare ingredients and store savoury fillings and toppings in food manufacture	2	2	14

Butchery Sales and Services Units

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
L/601/8305	FC27 54	Sell food products in a retail environment	2	2	14
R/601/8306	FC28 54	Understand how to sell food products in a retail environment	2	3	20
F/502/7864	FH6Y 54	Display meat and meat products in sales operations	2	2	8

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
J/502/7865	FH70 54	Understand how to display meat and meat products in sales operations	2	2	12
D/602/4576	FH71 54	Serve on a specialist food retail counter	2	2	16
H/602/4577	FH72 54	Understand how to serve on a specialist food retail counter	2	2	14
A/601/4573	FC24 54	Bake-off food products for sale	2	2	15
J/601/4575	FC25 54	Understand how to bake-off food products for sale	2	2	13
D/601/4615	FC2Y 54	Assemble and process products for food service	2	2	13
M/601/4618	FC30 54	Understand how to assemble and process products for food service	2	2	11
D/601/4582	FC2J 54	Prepare to operate a counter/take away service in food operations	2	2	4
J/601/4589	FC2L 54	Understand how to prepare to operate a counter/take away service in food operations	2	2	10
F/601/4591	FC2M 54	Operate a counter/take-away service in food operations	2	2	4
D/601/4596	FC2N 54	Understand how to operate a counter/take-away service in food operations	2	2	12
M/601/4599	FC2P 54	Prepare to operate a table/tray service in food operations	2	2	4
H/601/4602	FC2R 54	Understand how to prepare to operate a table/tray service in food operations	2	2	12
M/601/4604	FC2T 54	Operate a table/tray service in food operations	2	2	4
T/601/4605	FC2V 54	Understand how to operate a table/tray service in food operations	2	2	12
A/601/8297	FC3E 54	Produce product packs in food operations	2	3	10
F/601/8298	FC3F 54	Understand how to produce product packs in food operations	2	3	25

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
R/601/4580	FC26 54	Produce individual packs by hand in food operations	2	3	14
A/502/7443	FF69 54	Understand how to produce individual packs by hand in food operations	2	3	15
J/502/7820	FH73 54	Label food products by hand in food operations	2	1	5
L/502/7821	FH74 54	Understand how to label food products by hand in food operations	2	1	5
R/502/7822	FH75 54	Prepare food product orders for customers in food operations	2	1	6
Y/502/7823	FH76 54	Understand how to prepare food product orders for customers in food operations	2	1	6
M/602/1715	FF6J 54	Prepare orders for despatch in food operations	2	3	19
M/602/1696	FF6K 54	Understand how to prepare orders for despatch in food operations	2	3	20

Support Operation Units

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
F/601/8303	FC31 54	Monitor food hygiene standards using rapid test methods in operations	2	3	19
J/601/8304	FC32 54	Understand how to monitor food hygiene standards using rapid test methods in operations	2	2	12
T/602/1702	FF4F 54	Control weighing in food manufacture	2	2	10
Y/601/4631	FC3T 54	Control temperature reduction in food manufacture	2	3	20
D/601/4632	FC3V 54	Control wrapping in food manufacture	2	3	17
R/601/4613	FC1X 54	Control slicing in food manufacture	2	3	17

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
Y/601/4614	FC1Y 54	Understand how to control processes in food manufacture	2	4	26
J/602/1705	FF4Y 54	Control defrosting in food manufacture	2	2	15
D/601/4663	FC3Y 54	Understand how to control defrosting in food manufacture	2	3	19
T/601/4653	FC3W 54	Slice and bag individual food products	2	2	15
R/601/4658	FC3X 54	Understand how to slice and bag individual food products	2	2	15
M/601/4666	FC41 54	Control washing and drying machinery in food operations	2	3	16
T/601/4670	FC42 54	Understand how to control washing and drying machinery in food operations	2	2	12
Y/601/2944	FC3M 54	Contribute to problem diagnosis in food manufacture	2	2	10
D/601/2945	FC3N 54	Understand how to contribute to problem diagnosis in food manufacture	2	2	15
H/601/2946	FC3P 54	Contribute to problem resolution in food manufacture	2	3	13
K/601/2947	FC3R 54	Understand how to contribute to problem resolution in food manufacture	2	2	18
H/601/8309	FC3J 54	Carry out product changeovers in food manufacture	2	2	11
Y/601/8310	FC3L 54	Understand how to carry out product changeovers in food manufacture	2	2	16
D/502/7449	FF6E 54	Palletise and wrap products in food operations	2	3	21
R/502/7450	FF6F 54	Understand how to palletise and wrap products in food operations	2	2	6
R/601/4627	FC3G 54	Pack orders for despatch in food operations	2	1	6
Y/601/4628	FC3H 54	Understand how to pack orders for despatch in food operations	2	1	6

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
A/601/4623	FC39 54	Store goods and materials in food operations	2	3	24
F/601/4624	FC3A 54	Understand how to store and organise goods and materials in food operations	2	4	25
T/601/8301	FC33 54	Lift and handle materials safely in food operations	2	2	10
A/601/8302	FC34 54	Understand how to lift and handle materials safely in food operations	2	2	15
J/601/4625	FC3C 54	Supply materials for production in food operations	2	3	18
L/601/4626	FC3D 54	Understand how to supply materials for production in food operations	2	3	17
J/601/8299	FC43 54	Control hygiene cleaning in food operations	2	3	23
K/601/5184	FF6L 54	Carry out disinfection in food operations	2	2	8
T/601/5186	FF6M 54	Understand how to carry out disinfection in food operations	2	2	15
M/601/8300	FC44 54	Understand how to control hygiene cleaning in food operations	2	3	28
T/602/0632	FH77 54	Sharpen cutting tools for use in food operations	2	2	7
F/602/0634	FH78 54	Understand how to sharpen cutting tools for use in food operations	2	2	14
T/601/2921	FC37 54	Contribute to the maintenance of plant and equipment in food operations	2	3	30
A/601/2922	FC38 54	Understand how to contribute to the maintenance of plant and equipment in food operations	2	3	20
D/601/8311	FC62 70	Carry out sampling for quality control in food operations	3	2	8
H/601/8312	FC48 70	Understand how to carry out sampling for quality control in food operations	3	3	26

10. Attachments

QCF Ref	SQA CODE	Unit Title	Level	Credit	GLH
Y/601/2927	FC49 54	Organise and improve work activities for achieving excellence in food operations	2	3	13
D/601/2928	FC4A 54	Understand how to organise and improve work activities for achieving excellence in food operations	2	3	14
K/601/2933	FC4C 54	Contribute to the application of improvement techniques for achieving excellence in food operations	2	3	12
M/601/2934	FC4D 54	Understand how to contribute to the application of improvement techniques for achieving excellence in food operations	2	3	18
A/601/2919	FC35 54	Contribute to environmental safety in food operations	2	2	5
M/601/2920	FC36 54	Understand how to contribute to environmental safety in food operations	2	2	11
L/601/2925	FC4E 54	Contribute to sustainable practice in food operations	2	2	3
R/601/2926	FC4F 54	Understand how to contribute to sustainable practice in food operations	2	2	14

Group B - Up to 4 credits can be taken from this group:
Common Operations units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
H/601/2896	FC4G 54	Work effectively with others in food operations	2	2	15
K/601/2897	FC4H 54	Understand how to work effectively with others in food operations	2	2	18
T/601/2899	FC4J 54	Maintain product quality in food operations	2	2	5

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
H/601/2901	FC4M 54	Understand how to maintain product quality in food operations	2	2	11
K/601/2902	FC4N 54	Maintain workplace food safety standards in operations	2	2	16
M/601/2903	FC4P 54	Understand how to maintain workplace food safety standards in operations	2	2	20
M/601/2917	FC4R 54	Maintain workplace health and safety in food operations	2	2	4
T/601/2918	FC4T 54	Understand how to maintain workplace health and safety in food operations	2	2	18
H/601/2929	FC4V 54	Contribute to continuous improvement for achieving excellence in food operations	2	3	14
Y/601/2930	FC4W 54	Understand how to contribute to continuous improvement for achieving excellence in food operations	2	2	12
K/601/8313	FC4X 54	Clean in place (CIP) plant and equipment in food operations	2	3	19
M/601/8314	FC4Y 54	Understand how to prepare for and conduct cleaning in place (CIP) of plant and equipment in food operations	2	2	12
T/601/8315	FC50 54	Understand how to avoid contamination and complete cleaning in place (CIP) of plant and equipment in food operations	2	2	13
A/601/8316	FC51 54	Carry out task hand-over procedures in food manufacture	2	2	10
F/601/8317	FC52 54	Understand how to carry out task hand-over procedures in food manufacture	2	1	7

10. Attachments

Group C - Up to 6 credits can be taken from this group:

Knowledge units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
M/502/7844	FH79 70	Principles of breed and pre-slaughter selection of meat and poultry species	3	3	27
H/502/7842	FH7A 54	Principles of slaughtering for Halal meat	2	2	13
D/502/7841	FL3X 54	Principles of slaughtering for Kosher meat	2	2	13
H/502/7839	FJ3R 54	Principles of butchery	2	2	12
Y/502/7837	FH7E 54	Principles of curing meat	2	2	12
L/502/7835	FH7F 54	Principles of a specialist raw meat and poultry sales service	2	2	11
J/502/7834	FH7G 54	Principles of a specialist cooked meat and poultry sales service	2	2	11
A/502/7832	FH7H 54	Principles of a specialist cheese service	2	2	11
A/502/7829	FH7J 54	Principles of chilling and freezing meat and poultry	2	2	12
T/502/7828	FH7K 54	Principles of frying poultry products	2	2	11
M/502/7827	FJ3T 70	Principles of classification of meat and poultry carcasses	3	3	21
K/502/7826	FH7M 54	Principles of technology in meat processing	2	2	15
A/502/7846	FJ3V 70	Principles of adding value to meat and poultry products	3	3	24
H/502/7825	FJ3W 70	Principles of animal waste and by-product removal and processing of edible co-products	3	3	24
A/602/4505	FF83 70	Principles of weights and measures in food technology	3	4	30
F/602/4506	FF89 70	Principles of freezing methods in food technology	3	4	30
T/602/4566	FJ3X 70	Principles of food labelling in food operations	3	4	30

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
D/502/7824	FH7T 54	Principles of modified atmosphere and vacuum packaging in food technology	2	2	13
H/502/7436	FF76 54	Principles of food processing operations	2	1	7
M/502/7357	FF7L 54	Principles of instrumentation and control systems in food operations	2	3	16
Y/600/2382	FF1F 70	The Principles of HACCP for food manufacturing	3	3	20
F/601/2954	FC60 70	Principles of continuous improvement techniques (Kaizen) in food operations	3	3	15
L/601/2701	FF1E 70	Principles of sustainability in food operations	3	4	34

* GLH - Guided Learning Hours are defined as the time when a member of staff is present to provide specific guidance towards the learning aim being studied.

Assessment Requirements

The Level 2 Certificate for Proficiency in Meat and Poultry Skills Industry Skills must be assessed in the workplace, so is only suitable if you are employed in the meat and poultry industry. The assessment requirements for this qualification are detailed in Improve's (the Sector Skills Council for Food and Drink Manufacturing) Proficiency Assessment Strategy 2010 and in SQA's Assessment Guidance for the Certificate in Meat and Poultry Industry Skills. These documents can be downloaded from SQA's website www.sqa.org.uk.

Progression

On completion of the Level 2 Certificate for Proficiency in Meat and Poultry Industry Skill, you may depending on your job role, have opportunities to progress to the Level 3 Certificate for Proficiency in Meat and Poultry Industry Skills, or generic management qualifications at level 3.

Further Information

For further information on the level 2 Certificate for Proficiency in Meat and Poultry Industry Skills, please phone our Customer Contact Centre on 0845 279 1000 or e-mail us at customer@sqa.org.uk

Level 3 Certificate for Proficiency in Meat and Poultry Industry Skills (QCF)

Qualifications purpose

The level 3 Certificate for Proficiency in Meat and Poultry Industry Skills is designed for people who are working in the meat and poultry industry. It covers a broad range of skills from the monitoring of livestock, meat processing/butchery and butchery sales and service. It offers you the opportunity to develop skills and knowledge required to prove competence at work. It is also suitable if you are already competent in meat processing activities and are looking for ways of developing your existing skills and knowledge, perhaps to support multi-skilling or increase productivity at work.

The qualification offers a unique mix of

- occupational skills and knowledge units covering processing, service and support competences combined with
- detailed knowledge units relevant to the meat industry

The flexible choice of units, allows you to select units that are most relevant to your own employment, learning and progression requirements. The choice of units also reflects the wide variety of jobs which people do in different types of companies in the meat industry.

The Units have been combined into three groupings:

Group A contains:

- Meat and Poultry Processing Units
- Retail and Service Units
- Support Operations Units

Group B contains:

- Common Operations Units

(The Common Operations units offer you the opportunity to take competencies which are generic to the whole food and drink industry, such as food safety, working with others and quality.)

And **Group C** contains:

- Meat Industry Knowledge Units

To achieve the full level 3 Certificate, you must achieve a minimum of 27 credits, comprising of the following combination of credits from each of the three unit groups:

Group A – a minimum of 21 credits

Group B – it is not mandatory to take any credits from Group B, but up to 4 credits can be achieved

Group C – it is not mandatory to take any credits from Group C, but up to 6 credits can be achieved

10. Attachments

Group A –At least 21 credits must be achieved from this group.

Meat and Poultry Processing Units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
A/502/8009	FH80 70	Arrange transport scheduling for the delivery of livestock in food operations	3	2	8
M/502/8010	FH81 70	Understand transport scheduling for the delivery of livestock in food operations	3	2	12
T/502/8011	FH82 70	Monitor and control the reception of livestock in food operations	3	2	9
D/502/8018	FH83 70	Understand how to monitor and control reception of livestock in food operations	3	2	12
H/502/8019	FH84 70	Monitor the health and welfare of livestock pre-slaughter in food operations	3	2	9
Y/502/8020	FH85 70	Understand how to monitor the health and welfare of livestock pre-slaughter in food operations	3	2	12
D/502/8021	FH86 70	Maintain lairage and ante-mortem facilities in food operations	3	2	10
H/502/8022	FH87 70	Understand how to maintain lairage and ante-mortem facilities in food operations	3	2	12
M/502/8024	FH88 70	Monitor bleeding for Kosher meat	3	2	8
T/502/8025	FH89 70	Understand how to monitor bleeding for Kosher meat	3	2	14
A/502/8026	FH8A 70	Monitor slaughter operations in meat processing	3	3	21
J/502/8028	FH8C 70	Understand how to monitor slaughter operations in meat processing	3	2	11
L/502/8029	FH8D 70	Monitor carcase operations in meat processing	3	3	22
F/502/8030	FH8F 70	Understand how to monitor carcase operations in meat processing	3	2	12

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
J/502/8031	FH8J 70	Monitor carcase compliance and holding in meat processing	3	3	20
L/502/8032	FH8K 70	Understand how to monitor carcase compliance and holding in meat processing	3	2	12
R/502/8033	FH8L 70	Monitor an automated meat/poultry processing system	3	3	17
Y/502/8034	FH8M 70	Understand how to monitor an automated meat/poultry processing system	3	2	12
D/502/8035	FH8N 70	Classify meat or poultry carcasses	3	3	12
H/502/8036	FH8P 70	Monitor the recovery of by-products and disposal of waste in meat processing	3	3	24
K/502/8037	FH8R 70	Understand how to monitor the recovery of by-products and disposal of waste in meat processing	3	2	15
M/502/8038	FH8T 70	Monitor the recovery of co-products and disposal of waste in meat processing	3	3	24
T/502/8039	FH8V 70	Understand how to monitor the recovery of co-products and disposal of waste in meat processing	3	2	15
K/502/8040	FH8W 70	Monitor primal butchery in meat processing	3	3	17
M/502/8041	FH8X 70	Understand how to monitor primal butchery in meat processing	3	2	13
T/502/8042	FH8Y 70	Monitor secondary butchery in meat processing	3	3	17
A/502/8043	FH90 70	Understand how to monitor secondary butchery in meat processing	3	2	13
J/502/8045	FH91 70	Monitor butchery in sales operations	3	3	19
L/502/8046	FH92 70	Understand how to monitor butchery in sales operations	3	2	15

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
R/502/8047	FH93 70	Monitor the manufacture of meat products/preparations	3	3	15
Y/502/8048	FH94 70	Understand how to monitor the manufacture of meat products/preparations	3	2	13
D/502/8049	FH95 70	Monitor treatment operations in meat processing	3	3	16
R/502/8050	FH96 70	Understand how to monitor treatment operations in meat processing	3	2	15
Y/502/8051	FH97 70	Monitor the slicing and wrapping of meat/meat products	3	3	15
J/502/8059	FH98 70	Understand how to monitor the slicing and wrapping of meat/meat products	3	2	13

Meat and Poultry Sales and Service Units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
J/602/4569	FE9H 70	Plan and co-ordinate bake-off operations in food manufacture	3	3	15
A/602/4570	FE9J 70	Understand how to plan and co-ordinate bake-off operations in food manufacture	3	3	14
D/601/5280	FC2D 70	Maximise sales in a food retail environment	3	4	20
R/601/5292	FC2C 70	Understand how to maximise sales of food products in a retail environment	3	3	24
D/601/5294	FE9T 70	Understand how to plan to maximise sales of food products in a retail environment	3	3	22
M/602/4579	FE9V 70	Set up and maintain food retail operations	3	3	20
H/602/4580	FE9W 70	Monitor effectiveness of food retail operations	3	2	12

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
K/602/4581	FE9X 70	Understand how to co-ordinate food retail operations	3	2	14
M/602/4582	FE9Y 70	Plan and co-ordinate food services	3	3	18
A/602/4584	FF00 70	Understand how to plan and co-ordinate food services	3	3	25
F/602/4585	FF01 70	Set up and maintain food service operations in food operations	3	2	14
J/602/4586	FF02 70	Monitor effectiveness of food service operations	3	2	14
L/602/4587	FF03 70	Understand how to set up and maintain food service operations	3	2	16
F/602/4571	FE9K 70	Organise the receipt and storage of goods and materials in food operations	3	3	15
J/602/4572	FE9L 70	Understand how to organise the receipt and storage of goods and materials in food operations	3	3	18
Y/602/1708	FE9M 70	Monitor and maintain storage conditions in food operations	3	3	14
Y/602/4575	FE9N 70	Monitor stored goods and materials in food operations	3	2	11
D/601/5179	FE9P 70	Monitor and maintain storage systems and procedures in food operations	3	2	10
D/601/5182	FE9R 70	Understand how to monitor and maintain storage systems and procedures in food operations	3	2	10

10. Attachments

Support Operations Units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
D/602/5811	FF06 70	Maintain plant and equipment in food operations	3	4	26
K/602/5830	FF07 70	Understand how to maintain plant and equipment in food operations	3	3	23
J/601/5225	FF08 70	Interpret and communicate information and data in food operations	3	3	18
L/601/5226	FF09 70	Understand how to interpret and communicate information and data in food operations	3	3	14
A/602/4701	FF0A 70	Control energy efficiency in food operations	3	3	13
R/602/5627	FF0C 70	Contribute to continuous improvement of food safety in operations	3	3	20
Y/602/5628	FF0D 70	Understand how to contribute to continuous improvement of food safety in operations	3	4	30
D/601/8311	FC62 70	Carry out sampling for quality control in food operations	3	2	8
H/601/8312	FC48 70	Understand how to carry out sampling for quality control in food operations	3	3	26
J/601/9680	FF0E 63	Report on compliance with food safety requirements in operations	4	4	26
L/601/9681	FF0F 63	Understand how to report on compliance with food safety requirements in operations	4	4	20
F/602/5834	FF0G 70	Control and monitor safe supply of raw materials and ingredients in food operations	3	1	6
J/602/5835	FF0H 70	Understand how to control and monitor safe supply of raw materials and ingredients in food operations	3	3	20
A/502/7412	FH99 70	Evaluate and improve production in food manufacture	3	3	6

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
F/502/7413	FH9A 70	Understand how to evaluate and improve production in food manufacture	3	2	15
J/502/7414	FH9C 70	Plan production schedules in food manufacture	3	3	21
L/502/7415	FH9D 70	Understand how to plan production schedules in food manufacture	3	2	14
Y/602/5838	FF0M 70	Contribute to optimising work areas in food manufacture	3	3	26
D/602/5839	FF0N 70	Understand how to contribute to optimising work areas in food manufacture	3	3	15
A/602/4617	FF0P 70	Diagnose problems in food operations	3	3	14
F/602/4618	FF0R 70	Understand how to diagnose problems in food operations	3	3	16
J/602/4619	FF0T 70	Resolve problems in food operations	3	3	16
A/602/4620	FF0V 70	Understand how to resolve problems in food operations	3	4	22
F/602/4697	FF0W 70	Monitor and control throughput to achieve targets in food operations	3	2	9
J/602/4698	FF0X 70	Understand how to monitor and control throughput to achieve targets in food operations	3	3	15
M/602/5831	FF11 70	Set up and maintain picking and packing orders in food operations	3	3	18
T/602/5832	FF12 70	Monitor effectiveness of picking and packing operations in food operations	3	2	12
A/602/5833	FF13 70	Understand how to coordinate picking and packing orders in food operations	3	2	14
D/502/8052	FH9E 70	Monitor wrapping and labelling of products in food operations	3	2	10

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH*
H/502/8053	FH9F 70	Understand how to plan and co-ordinate wrapping and labelling in food operations	3	2	12
M/502/8055	FH9G 70	Monitor effectiveness of despatch and transport in food operations	3	2	10
T/502/8056	FH9H 70	Understand how to co-ordinate despatch and transport of orders in food operations	3	2	10

Group B –Up to 4 credits can be taken from this group:

Common Operations units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
H/602/5826	FF14 70	Monitor food safety at critical control points in operations	3	1	5
Y/602/1692	FF15 70	Monitor product quality in food operations	3	3	20
T/602/5829	FF16 70	Understand how to control product quality in food operations	3	2	10
K/602/5827	FF17 70	Monitor health, safety and environmental systems in food operations	3	2	12
M/602/5828	FF18 70	Understand how to monitor health, safety and environmental management systems in food operations	3	3	20
L/602/5075	FF19 70	Manage organisational change for achieving excellence in food operations	3	4	21
R/602/5076	FF1A 70	Understand how to manage organisational change for achieving excellence in food operations	3	3	17
M/602/6302	FF1C 70	Develop working relationships with colleagues in food operations	3	3	15

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
A/602/6304	FF1D 70	Understand how to develop working relationships with colleagues in food operations	3	2	12

Group C –Up to 6 credits can be taken from this group:

Meat and Poultry Knowledge units

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
M/502/7844	FM1D 70	Principles of breed and pre-slaughter selection of meat and poultry species	3	3	27
F/602/6224	FH9J 63	Principles of rearing and welfare of meat species	4	5	37
A/502/8057	FH9K 70	Principles of butchery	3	3	24
F/502/8058	FH9L 70	Principles of curing meat	3	3	22
A/502/8060	FH9M 70	Principles of a specialist raw meat and poultry sales service	3	3	23
F/502/8061	FH9N 70	Principles of a specialist cooked meat and poultry sales service	3	3	23
M/502/8007	FH9P 70	Principles of a specialist cheese sales service	3	3	23
M/502/7827	FJ3T 70	Principles of classification of meat and poultry carcasses	3	3	21
R/602/6227	FH9R 63	Principles of microbiology and parasitology in meat production	4	3	24
D/602/6229	FH9T 63	Principles of anatomy and physiology of meat species	4	5	37
Y/602/6276	FH9V 63	Principles of pathology of meat species	4	5	37
T/502/8008	FH9W 70	Principles of technology in meat processing	3	3	21
D/602/6277	FH9X 63	Principles of meat science	4	5	37
A/502/7846	FJ3V 70	Principles of adding value to meat and poultry products	3	3	24

10. Attachments

QCF Ref	SQA Ref	Unit Title	Level	Credit	GLH
H/502/7825	FJ3W 70	Principles of animal waste and by-product removal and processing of edible co-products	3	3	24
A/602/4505	FF83 70	Principles of weights and measures in food technology	3	4	30
F/602/4506	FF89 70	Principles of freezing methods in food technology	3	4	30
R/602/4512	FH9Y 70	Principles of gelatine biochemistry in food science	3	4	35
M/602/4548	FJ00 70	Principles of lipid functionality in food science	3	4	35
K/602/4550	FJ01 70	Principles of protein functionality in food science	3	4	32
T/602/4566	FJ3X 70	Principles of food labelling in food operations	3	4	30
Y/600/2382	FF1F 70	The Principles of HACCP for food manufacturing	3	3	8
F/601/2954	FC60 70	Principles of continuous improvement techniques (Kaizen) in food operations	3	3	15
L/601/2701	FC61 70	Principles of sustainability in food operations	3	4	34
T/602/4566	FJ3X 70	Principles of Food Labelling in food Operations	3	4	30

* GLH - Guided Learning Hours are defined as the time when a member of staff is present to provide specific guidance towards the learning aim being studied.

Assessment Requirements

The Certificate for Proficiency in Meat and Poultry Industry Skills must be assessed in the workplace, so is only suitable if you are employed in the Meat and Poultry Industry. The assessment requirements for this qualification are detailed in Improve's (the Sector Skills Council for Food and Drink Manufacturing) Proficiency Assessment Strategy 2010 and in SQA's Assessment Guidance for the Certificate for Proficiency in Meat and Poultry Industry Skills. These documents can be downloaded from SQA's website www.sqa.org.uk.

Progression

On completion of the Level 3 Certificate for Proficiency in Meat and Poultry Industry Skills, you may depending on their job role, have opportunities to progress to more generic food qualifications such as the Certificate in Food Manufacturing Excellence or generic management qualifications at level 4.

10. Attachments

Further Information

For further information on the level 3 Certificate for Proficiency in Meat and Poultry Industry Skills level 2, please phone our Customer Contact Centre on 0845 279 1000 or e-mail us at customer@sqa.org.uk

10. Attachments

Attachment 2

German butchery course - National College of Food Technology, Kulmbach

Year 1

Overview of the meat industry

Occupational Health and Safety:

- machines and equipment
- personal safety

Overview of traineeships and industry organisations

Basic microbiology and hygiene and sanitation

- Personal Protective Equipment (for hygiene)
- Plant hygiene

Hygiene and sanitation:

- slaughtering
- selling
- transporting

Environmental management

Meat Products in retail

Meat parts:

- pork
- veal
- beef
- lamb

Sausages: casings

- types
- packaging

Nutrition

- protein and fat
- carbohydrates
- vitamins
- minerals
- water
- digestion
- metabolism

Slaughtering trade:

Meat Inspection

Assessing livestock before slaughter

By-products from slaughter

Anatomy

Cooked sausages:

- recipes
- theory
- practical

1st year mathematics

- addition
- subtraction
- multiplication
- division
- fractions
- percentages – profit margins
- interest
- calculations including capital and time
- nutritional values

Year 2

Chemistry of meat:

- water binding
- pH value
- acids and salts
- changes of meat after slaughter
- maturation of meat

Mince meat:

- regulatory requirements
- raw meat
- frozen meat

10. Attachments

- shelf life
- labelling
- handling

Food law and inspection

Spices

- different categories
- mixtures
- preparation
- effects on meat
- storage requirements

Pork

- categories of pigs
- specifications
- cuts
- regional/special names for pork cuts
- carcass parts and appropriate cooking methods

Beef

- categories of cattle
- specifications
- cuts
- regional/special names for cuts
- carcass parts and appropriate cooking methods

Breaking carcasses

Veal and lamb

- categories
- specifications
- cuts
- regional/special names for cuts
- carcass parts and appropriate cooking methods

Vacuum packing

Laws for labelling

- Sausage making:
- scalded sausages
- theory

- practice

2nd year mathematics

- nutrition
- percentages and algebra
- changing recipe amounts
- weight loss during processing
- calculating measures for sausage making
- weight loss between live animal and meat for sale
- calculations involved in buying meat
- assessing different carcass parts for different value

Year 3

Curing

Cooked ham

- practical
- guidelines

Raw ham

- practical
- guidelines

Further processing

- jellies etc.
- food laws relating to further processing

Chemical changes of meat during cooking, frying and sterilisation

Producing and treating canned meat

- practical
- guidelines

Deli, party services and salads

- guidelines

Cooking methods

Merchandising meat and meat products

Raw sausage production

Sliceable and spreadable sausage production

Fermented raw sausages

10. Attachments

Attachment 3

Danish Meat Trade College, Roskilde

Meat Retail qualification

3½ years vocational training programme

First module - Basic programme 20 weeks.

Following the first module, apprentices need to take up a contract with a butcher shop before they can continue their training.

First module includes the following subjects:

- Safety and hygiene
- Deboning
- Kitchen
- First aid and Fire fighting
- Shop
- Danish language
- Sales and customer service
- Information Technology
- Environmental issues
- Sausage making
- Health and science

In total 658 lessons

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Second module for continuing students(Main course)

Main course four modules of 5+4+2x3 weeks

The main course includes the following subjects:

- Business economy
- Product development
- Delicatessen
- Deboning
- Calculation
- Sausage making (special line)
- Presentation/costumer service (special line)
- Party service (special line)
- Optional subjects

For all modules, exams are carried out and final examination is conducted with an external sensor.