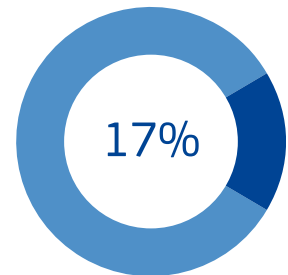


ANALYTICAL HIGHLIGHT

PROSPECTS FOR
Food, wood and garment processing craft workers

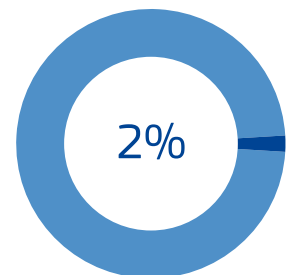
- This small but diverse occupational group relates to craft workers who turn the raw materials from the agriculture and fisheries sector into food and other products (or repair these products) – such as cabinet-makers, tailors and food processing workers.
- The occupational group has declined over the long-term. Over one million food, wood and garment processing craft jobs were lost across the EU-28 in the decade up to 2013, and this pattern is set to continue.
- However, there are recruitment difficulties for jobs as diverse as sewing and embroidery, butchers and fishmongers, bakers and confectionary makers, partly because employers see a lack of technical skills.
- Many occupations within this group are highly-skilled in particular production methods, materials and tools. In addition, workers operating in certain sectors, especially the food sector, have to meet stringent health and hygiene standards.

▼ Figure 1a – Food, wood and garment processing craft workers share of craft and related trades workers occupational group, EU-28, 2013



Source: Cedefop forecasts (2014)

▼ Figure 1b – Food, wood and garment processing craft workers share of total employment, EU-28, 2013



Source: Cedefop forecasts (2014)

WHAT DO THEY DO?

Food, wood and garment processing craft workers¹ treat and process raw materials from the agricultural and fisheries sector into food and other products. They also produce and repair goods made of wood, textiles, fur, leather, or other materials. The work is carried out by hand using hand-pow-

ered and other tools. These are used to reduce the amount of physical effort and time required for specific tasks, as well as to improve the quality of the products².

Food, wood and other related trades workers are a sub group of the wider occupational group craft and related traders workers³.

Occupations associated with this group include: food processing and related trades workers; wood treaters, cabinet-makers and related trades workers; tailors and garment related trades workers; as well as other craft and related workers, such as workers who mould, slice, grind and polish optical lenses.

Employment outlook

In 2013, there were around 4.3 million food, wood and garment processing craft workers across the EU-28. This equated to 2% of the total EU-28 employment (see Figure 1a and 1b). Over one million food, wood and garment processing craft jobs disappeared in the decade up to 2013, reflecting long-term decline in many specialised trades.

Cabinet makers were among the top-25 occupations for employment decline across the EU-28 during 2011 and 2012⁴. Similarly, food processing trades workers were one of the top-25 occupations for hiring decline over the same period. Declining employment has been apparent in most EU-28 countries, most notably in relation to cabinet makers in Belgium, garment workers in Portugal, and other trades in Italy.

Whilst employment levels have fallen, recruitment difficulties are reported in a number of food, wood and garment processing craft occupations⁵. Sewing and embroidery, butchers and fishmongers, and bakers and confectionary makers were reported as occupations with recruitment difficulties each in at least three countries. Low salaries and a lack of both technical and 'soft' skills are reported as the main causes of these recruitment difficulties.

In 2013, two thirds of food, wood and garment processing craft workers were employed in the manufacturing sector. A further 16% of workers were employed in distribution and transport. Most sectors experienced double-digit decline in the number of food, wood and garment processing craft workers from 2003 to 2013. The only exception was the arts, recreation and other activities sector where employment rose by over 5% over the same period.

Food, wood and garment processing craft workers are the lowest-qualified group within the wider craft and related trades occupations. However, in line with other craft occupations, the share of food, wood and garment processing craft workers holding low level qualifications has steadily declined over the last decade (from 45% of all workers in 2003 to under 36% in 2013). There has been concurrent growth in the share of these workers holding medium level qualifications.

▼ **Table 1 – Share of Food, wood and garment processing craft workers by qualification level compared to all occupations, EU-28, 2013**

	Low	Medium	High
Food, wood and garment processing craft workers	35.6%	59.3%	5.1%
All occupations	21.2%	48.1%	30.7%

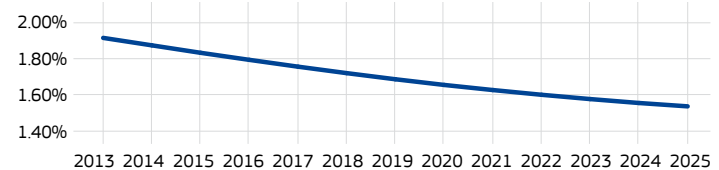
Source: Cedefop forecasts (2014)

A look into the future

The share of food, wood and garment processing craft workers within the overall EU-28 workforce is forecast to fall to 2% by 2025 (see Figure 2). This represents almost a halving in their share of total EU-28 jobs since 2003. The overall size of the food, wood and garment processing craft workforce is anticipated to fall by a further 17% from 2013 to 2025.

This decline in employment is expected in every major employment sector and subsector. The only exceptions are construction and the business and other services sector, both of which will nearly double their share of food, wood and garment processing craft employment. In 2003, these two sectors accounted for around 8% of all food, wood and garment processing craft jobs across the EU-28. By 2025, they are expected to account for nearly 25% of all jobs.

▼ **Figure 2 – Future share of Food, wood and garment processing craft workers, EU-28**



Source: Cedefop forecasts (2014)

The anticipated decline in the overall number of food, wood and garment processing craft workers will be more than offset by the need to replace people who leave their jobs due to retirement or for other reasons. This means that there are still anticipated to be nearly 900,000 job openings for food, wood and garment processing craft workers from 2013 to 2025.

The overall size of the workforce is forecast to decline in every EU-28 country except for France, Lithuania and the United Kingdom. However, in every country, except Poland, there are forecast to be job openings due to the need to replace existing staff. Figure 3 shows that in Austria, Lithuania, Latvia and Greece, food, wood and garment processing craft job openings form a relatively higher share of all job openings.

The share of food, wood and garment processing craft workers holding low level qualification is set to continue to fall. However, in the next period it is expected that the expansion will be in jobs requiring high level qualifications (set to double to nearly 10% of all food, wood and garment processing craft workers).

Skills challenges

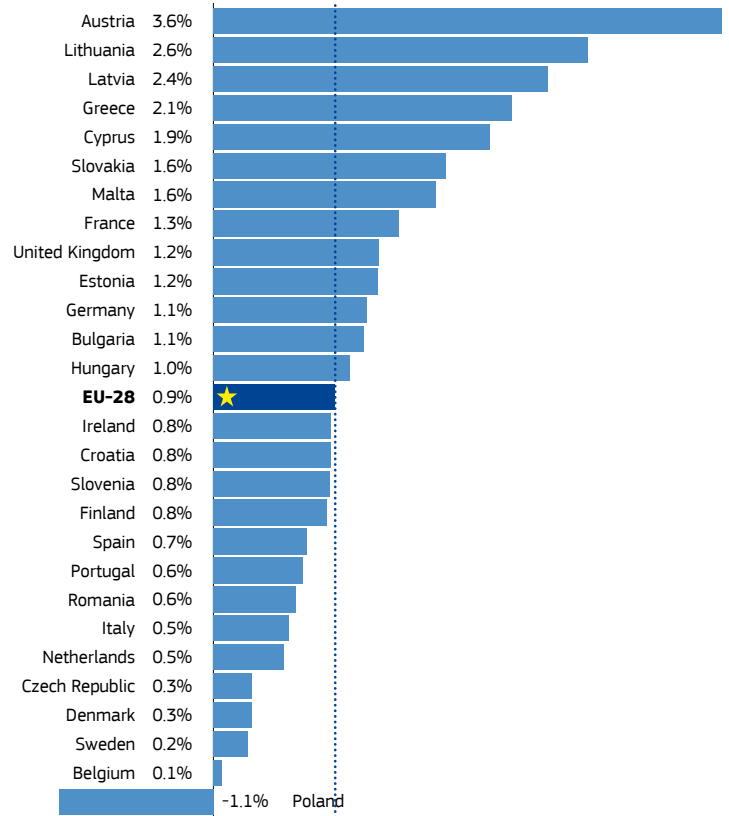
Some food, wood and garment processing craft workers are required to have high levels of knowledge of specific materials (e.g. wood and textiles). Many jobs are in highly regulated sectors, particularly food processing, where knowledge of hygiene, occupational health and safety regulations are essential. Other jobs require high levels of creativity, and tailoring materials and processes to specific situations, such as, garment trades. In addition to these skills, food, wood and garment processing craft workers also require^{7 8 9}:

- **Problem solving, judgement and decision making skills:** Identifying the strengths and weaknesses of different approaches, and determining appropriate solutions.
- **Design skills:** Understanding design principles, techniques and their application; developing, designing, enhancing and creating products and processes.
- **Monitoring and quality assurance:** Assessing the performance of people and manufacturing processes; quality assurance and control of final products.
- **Production, processing and technology skills:** Utilising and applying technological developments in materials, tools and production processes.
- **Active learning, listening and comprehension:** Understanding oral and written information, its correct interpretation and implications.
- **Numeracy skills:** For analysis and processing of information and data, as well as time management.

Environmental concerns and the regulation of ecological and recycled products are impacting substantially on some food, wood and garment processing craft workers. The use of non-traditional materials and more efficient production methods are important determinants of skills development in these occupations^{10 11}.

The technology used in the production and maintenance of food, wood and textiles products is also rapidly evolving. Increased specialisation in the use of materials, tools, processes and designs is a consequence both of technological opportunities and the globalised market. The need to serving niche and bespoke markets for some wood and garment products increases the focus on customer service skills and design skills^{12 13 14}. ■

▼ Figure 3 – Share of Food, wood and garment processing craft workers in total job openings by country, EU-28, 2013-2025



Source: Cedefop forecasts (2014)⁶

- 1 Defined as ISCO-08 Group 75 Food processing, wood working, garment and other craft and related trades
- 2 International Labour Organization (2012), International standard classification of occupations structure, group definitions and correspondence tables: ISCO-08 Volume 1
- 3 ISCO Major Occupational Group 7 – craft and related trades workers
- 4 European Commission (2014), European vacancy and recruitment report
- 5 European Commission (2014), Mapping and analysing bottleneck vacancies in EU labour markets: Final overview report
- 6 Luxembourg excluded due to data restrictions
- 7 Expert Group on Future Skills Needs and Forfá (2009), Future skills requirements of the food and beverage sector
- 8 O*Net
- 9 ETUC (2013), Furniture
- 10 ETUC (2013), Furniture
- 11 Forum for the Future (2010), Fashion Futures 2025: Global scenarios for a sustainable fashion industry
- 12 Proskills UK (2010), The sector skills assessment 2010 for the process and manufacturing sector
- 13 Expert Group on Future Skills Needs and Forfás (2012), Key skills for enterprise to trade internationally
- 14 Forum for the Future (2010), Fashion Futures 2025: Global scenarios for a sustainable fashion industry



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