



Australian Food, Beverage and Pharmaceutical Industry Sector

Annual Update 2021

IRC Skills Forecast and Proposed Schedule of Work

Prepared on behalf of the Food, Beverage and Pharmaceutical Industry Reference Committee (IRC) and Pharmaceutical Manufacturing IRC for the Australian Industry Skills Committee (AISC).



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Purpose of the Annual Update

This 2021 Annual Update to the Skills Forecast and Proposed Schedule of Work 2019 – 2022 (Skills Forecast) presents additional industry intelligence from 2021 to build on previously reported information. This Annual Update from the Food, Beverage and Pharmaceutical Industry Reference Committee (IRC) and the Pharmaceutical Manufacturing IRC includes intelligence based on national and industry data sources and input from key stakeholders. It proposes vocational education and training (VET) training package review and development work that the IRC deems necessary to meet the needs of industry. The Australian Industry and Skills Committee (AISC) considers this information and includes commissioned work in the National Schedule¹.

In 2019, the AISC changed the requirements for the annual Skills Forecast. IRCs are now required to submit comprehensive Skills Forecasts once every three years, with abridged annual updates in the intervening two years. As IRCs submitted comprehensive Skills Forecasts in 2019, the next are due in 2022. This Annual Update should be read in conjunction with the Skills Forecast and previous Annual Updates.

This document is not intended to be representative of every issue encountered across all industry sectors; it identifies and addresses the challenges and opportunities that industry has determined as 'priority' for this stage of the schedule, and is a resource for industry and associated skills, learning and accreditation bodies seeking to act upon them.

Detailed information concerning industry skills needs across all sectors covered by the Food, Beverage and Pharmaceutical IRC and the Pharmaceutical Manufacturing IRC, including information from previous Skills Forecasts and Annual Updates, can be found on the Skills Impact website:

<https://www.skillsimpact.com.au/food-beverage-and-pharmaceutical/skills-forecast/>

Method & Structure

This is an annual update to the comprehensive Skills Forecast submitted in 2019. IRCs are required to answer the questions in **Section A** to provide updates on issues such as industry skills and workforce development, and qualification utilisation. Answers provided build on and are not repetitive of information reported in previous Annual Updates.

IRC's are also permitted to propose additional training package development work projects to be included in the Proposed Schedule of Work. These will now be submitted separately to the Annual Updates.

Section B details the extensive, robust and ongoing industry consultation undertaken by IRC members and Skills Impact, including with rural, regional and remote stakeholders. In line with Skills Impact's values², this helps to ensure transparency and accountability in the process of industry research and training package development work.

This Skills Forecast and Proposed Schedule of Work is developed in line with:

- Standards for Training Packages 2012³;
- Training Package Products Policy⁴;
- Training Package Development and Endorsement Process Policy⁵.

¹ Australian Industry and Skills Committee (2021); *Australian Industry and Skills Committee*; <https://www.aisc.net.au/content/national-schedule>; viewed 13/04/2021.

² Skills Impact (2021); *About us*; <https://www.skillsimpact.com.au/about/>; viewed 13/04/2021.

³ Department of Education, Skills and Employment (2017); *Standards for Training Packages 2012*; <https://docs.education.gov.au/documents/standards-training-packages-2012>; viewed 13/04/2021.

⁴ Department of Education, Skills and Employment (2020); *Training Package Products Policy*; <https://docs.employment.gov.au/documents/training-package-products-policy>; viewed 13/04/2021.

⁵ Australian Industry and Skills Committee (2020); *Training Package Development and Endorsement Process Policy*; <https://docs.employment.gov.au/documents/training-package-development-and-endorsement-process-policy-0>; viewed 13/04/2021.

Industry Reference Committee

The Food, Beverage and Pharmaceutical IRC and Pharmaceutical Manufacturing IRC are responsible for national training package qualifications relevant to food and beverage processing and pharmaceutical manufacture. Qualifications overseen by these IRCs are in the *FBP Food, Beverage and Pharmaceutical Training Package*. The Food, Beverage and Pharmaceutical IRC and Pharmaceutical Manufacturing IRC are supported by the Skills Service Organisation, Skills Impact.

Pharmaceutical Manufacturing IRC

Name	Organisation or Area of Expertise
Mr Paul Baxter	Australian Manufacturing Workers Union (AMWU)
Ms Vasuki Paul	Australian Industry Group (AiGroup)
Mr Charles Ross	Vaxxas
Dr Dan Grant	MTPConnect
Ms Louise White	SeerPharma
Mr Paul MacLeman (Chair)	Expertise in Pharmaceutical Manufacturing
Position vacant	CSL Behring
Position vacant	Expertise in Complementary Medicine Manufacturing

Food, Beverage and Pharmaceutical IRC

Name	Organisation or Area of Expertise
Mr Brett Noy	Expertise in food processing and manufacturing (Baking)
Ms Vasuki Paul	Australian Industry Group (AiGroup)
Mr Dean Swindells	Australian Technical Millers Association
Mr Duncan Rowland	Expertise in livestock and pet feed manufacturing
Ms Fiona Fleming (Chair)	Australian Institute of Food Science and Technology Ltd (AIFST)
Dr Geoffrey Annison	Australian Food and Grocery Council (AFGC)
Mr Henrik Wallgren	South Australian Wine Industry Association
Mr Ian Curry (Deputy Chair)	Australian Manufacturing Workers Union (AMWU)
Ms Liz Newlan	Bega Cheese Limited
Ms Cathy Cook	Australian Beverages Council
Mr Graham Ellis	Carlton and United Breweries
Mr Richard Adamson	Independent Brewers Association
Mr Daniel Shipard	Australian Sugar Milling Council
Position vacant	Expertise in food processing and manufacturing

Executive Summary

The food, beverage and pharmaceutical manufacturing industries have experienced both disruption and unprecedented growth over the last year as they continue to deal with the impacts of COVID-19, drought, bushfires, and trade issues and changes in consumer demands. Domestic food and beverage supplies are encountering unprecedented levels of demand and the pharmaceutical manufacturing industry is experiencing significant increases in investment during the COVID-19 pandemic to support the development of sovereign capability in a recognised critical industry.

Since 2019, the Food, Beverage and Pharmaceutical IRC has been overseeing a major review of the *FBP Training Package* through the deletion, redevelopment and realignment of food processing qualifications and components. This work has made substantial changes to over 85% of the qualifications within the *FBP Training Package*, including streamlining, removing duplication, deleting unused qualifications and developing skill sets and specialisations within qualifications. This work is in keeping with the aims of the Australian Government's Modern Manufacturing Strategy⁶ to double the value of the food and beverage manufacturing industries through a focus on smart manufacturing, innovation, food safety and origin and traceability systems. It will be submitted to the AISC in April 2021.

Since 2019, substantial revisions have been made to 85% of food and beverage qualifications.

The effects of the current pandemic include a focus on sovereign capability within the pharmaceutical manufacturing industry and changes in trade conditions, item availability and consumer buying preferences that have all caused unexpected changes in all FBP industries. Baking and confectionery industries have experienced an increase in demand, alcohol manufacturers pivoted to making hand sanitiser while many of their sales outlets had closed, food producers were finding greater demand for food with clear provenance and traceable ingredients and there was a focus on foods and beverages as a source of health and immunity improvement.

Members of both IRCs have volunteered time, resources and industry intelligence to assist the AISC and the AISC Emergency Response Sub-Committee (ERSC), seeking industry input on skills needs and training delivery challenges for essential and surge workforces in the context of COVID-19, and have supported workforce recovery by submitting Critical Response Projects to create and promote pathways for displaced workers.

The IRCs analysed FBP units for mandatory work placements that would prove difficult during periods of social restrictions and expressed support for workplace-based education and training across these industries.

The Food, Beverage and Pharmaceutical IRC have prepared proposals for developing a training package component to address skill needs experienced in the indigenous food and beverages industry and a review of the needs of the sugar milling industry. The former is a small, emerging and important food manufacturing field that is flourishing and expanding into international markets. The latter, while a large and skilled manufacturing workforce in Australia, has experienced difficulty in accessing accredited training and the current training package components have not addressed their needs.

The Pharmaceutical Manufacturing IRC, while experiencing unprecedented change in their industry, has developed a Skill Set addressing the needs of new staff entering pharmaceutical manufacturing plants and is currently finalising a set of resources to support registered training organisations (RTOs) to implement this training.

⁶ Australian Government (2021); *Make It Happen: The Australian Government's Modern Manufacturing Strategy*; <https://www.industry.gov.au/sites/default/files/October%202020/document/make-it-happen-modern-manufacturing-strategy.pdf>

Section A: Overview

Industry Developments

Please refer to the 2020 Annual Update, which identified several trends, challenges and opportunities that are still relevant now. Additional and emerging trends include:

Economic recovery from the impacts of COVID-19

COVID-19 has disrupted every sector of the Australian food, beverage and pharmaceutical (FBP) industries. It has also highlighted the importance of planning to maintain food security, pharmaceutical supplies and associated supply chains. 'Food and beverage' is the largest employer in Australia's manufacturing sector, and directly employs 247,000 people, with many of those jobs in regional and rural areas⁷. The Australian Government is now implementing a series of initiatives to stimulate jobs growth and so secure the future of the FBP industries.

'Food and beverage' is the largest employer in the manufacturing sector, directly employing 247,000 people. (Foodmag, 2020)

In October 2020, Prime Minister Scott Morrison announced \$1.5 billion in new funding over the next four years for the *Modern Manufacturing Strategy* (as part of the JobMaker plan) to make Australian manufacturers more competitive and resilient, both locally and globally⁸. The centrepiece of the Strategy is the \$1.3 billion *Modern Manufacturing Initiative (MMI)*, through which the Government will strategically invest in projects that help manufacturers to scale up and create jobs. 'Food and beverage' and 'medical products' (which includes pharmaceutical manufacturing) are two of the six National Manufacturing Priorities for projects.

Businesses that align with these National Manufacturing Priorities will also be able to apply for grants under a second round of the Manufacturing Modernisation Fund (with \$52.8m of funding available) to enable the fast-tracking of capital investment in technology upgrades to help transform businesses.

The Government is engaging industry partners, such as the Australian Food and Grocery Council, to co-design tailored roadmaps for each of the six priority sectors to set clear goals over the next two, five and ten years, and identify the barriers and opportunities that will guide action and investment. The roadmaps are to be delivered in the first half of 2021.

Additionally, a new \$107.2m Supply Chain Resilience Initiative is intended to build a comprehensive understanding of Australia's critical goods and services, supply chain vulnerabilities and put forward solutions to address them. The Government is working with industry to identify critical products, and map capabilities and vulnerabilities for normal times and periods of surge. Initially, the focus of the initiative is on medicines and medical equipment, and this will be followed by products such as food. Funding will be available for businesses to establish or expand a capability that addresses a supply chain vulnerability.

Pharmaceutical product manufacturing

The Australian Government has been emphasising the importance of developing sovereign capability in medical manufacturing, include pharmaceutical manufacturing. Building on the October 2020 announcement relating to manufacturing priorities, a new pharmaceutical manufacturing facility specialising in cell-based, vaccine and anti-venom manufacturing was announced by the Federal Government, including a \$1 billion investment by the government, \$800 million from the manufacturer and a land grant from the Victorian Government.

⁷ Food & Beverage Industry News (2020); *Why food and beverage offers hope for an economic recovery that's Made In Australia*; <https://foodmag.com.au/why-food-and-beverage-offers-hope-for-an-economic-recovery-thats-made-in-australia/>; viewed November 2020.

⁸ Prime Minister of Australia (2020); *Transforming Australian manufacturing to rebuild our economy*; <https://www.pm.gov.au/media/transforming-australian-manufacturing-rebuild-our-economy>; viewed November 2020.

The Australian Government has announced that a free COVID-19 vaccine will be available progressively throughout 2021⁹. Following a \$1.7 billion supply and production agreement between the Australian Government and pharmaceutical companies, around 84 million vaccine doses would be manufactured in Australia. This requires cutting-edge processes and high speed to market. In March 2021, CSL Limited released 830,000 locally-made doses of the AstraZeneca COVID-19 vaccine. The release, which was ahead of schedule, followed the completion of the final stages of manufacture – known as fill and finish – and extensive quality checks at Seqirus' vaccine facilities in Parkville, Melbourne. At this time, an additional 2.5 million doses are in cold storage, undergoing the final stages of testing, approval and release. The manufacturing process is ongoing and CSL expects to release an average of one million doses per week over the course of the campaign, subject to regulatory approvals¹⁰.

On a broader level, COVID-19 is disrupting Australia's pharmaceutical manufacturing industry because of its usual reliance on imported drugs and limited domestic operations¹¹. Australian manufacturers are now enacting changes within their operating environments, including boosting domestic production and building new facilities¹², to compensate for affected supply chains involving Chinese and Indian partners.

There is anticipated to be a greater emphasis on formal training due to the pharmaceutical product manufacturing industry's sustained rate of growth. IBISWorld forecasts¹³ that most Australian industries will see their revenue contract in 2020 and 2021; however, compared to 2019 revenue, 'Pharmaceutical Product Manufacturing' is anticipated to grow by 2.5% and 3.1% respectively. This is aligned with a continuous expansion of the workforce, which employed 22% more people in May 2020 than the monthly average for 2019¹⁴. Pre-COVID-19, the number of people employed in 'Pharmaceutical and Medicinal Product Manufacturing' was projected to grow 11.3% by May 2024¹⁵. That equates to over 3,000 jobs that are likely to require trained applicants, many of whom would be new entrants to the industry. With a recent surge in demand for pharmaceutical and medicinal products, industry stakeholders now expect this figure to be higher.

As part of the AISC's efforts to ensure Australia's national training system is well positioned to address the workforce challenges presented by the COVID-19 pandemic and subsequent economic downturn, a Pharmaceutical Manufacturing Operator Induction Skill Set has been released¹⁶. Following extensive consultation with industry experts, and supported by the Pharmaceutical Manufacturing Industry Reference Committee, the skill set describes the foundation skills and knowledge used by workers entering the industry, especially those employed to work with bioprocessed products, such as vaccines and antibody testing devices. The skill set will help support displaced workers to gain new skills and build on existing skills, and will also help businesses to take advantage of opportunities that exist now and into the future.

Consumer trends shaping industry

COVID-19 is accelerating the emerging consumer focus on health and wellbeing and ethical, sustainably sourced products¹⁷, including from plant-based proteins. There is also a broader trend of caution and selectiveness towards brands that demonstrate purpose, transparency and alignment with consumers' values, including a renewed emphasis on supporting local, independent manufacturing businesses. Aligned with this, Australia's 'clean and green' identity, which is enhanced by strict biosecurity governance, and its reputation for high-quality, trusted and verifiable products is a unique advantage. This is sustained by 'country of origin' labelling, blockchain, traceability and provenance investments and initiatives that enable the industry to validate sourcing information, meet consumer demands, support smarter value chains and combat food fraud.

⁹ Prime Minister of Australia (2020); *Australia secures onshore manufacturing agreements for two COVID-19 vaccines*; <https://www.pm.gov.au/media/australia-secures-onshore-manufacturing-agreements-two-covid-19-vaccines>; viewed November 2020.

¹⁰ CSL (2021); *CSL Dispatches First Australian Made Doses of the AstraZeneca COVID 19 Vaccine*; <https://www.csl.com/news/2021/20210324-csl-dispatches-first-australian-made-doses-of-the-astrazeneca-covid-19-vaccine>; viewed March 2021.

¹¹ IBISWorld (2020); *Pharmaceutical Product Manufacturing in Australia: Industry Report C1841*

¹² Seqirus (2020); *Seqirus Will Build World-class, Next-generation \$800m Influenza Vaccine Manufacturing Facility in Australia*; <https://www.seqirus.com/news/seqirus-will-build-world-class-vaccine-manufacturing-facility>; viewed November 2020.

¹³ IBISWorld Industry Wizard

¹⁴ ABS (2020); *6291.0.55.003 - Labour Force, Australia, Detailed, Quarterly, May 2020; EQ06 - Employed persons by Industry group of main job (ANZSIC), Sex, State and Territory, November 1984 onwards (Pivot Table)*

¹⁵ Labour Market Information Portal (2019); *Occupation projections – five years to May 2024*

¹⁶ Skills Impact (2020); *COVID-19 Critical Response Project*; <https://www.skillsimpact.com.au/covid-19-critical-response-projects/>; viewed November 2020.

¹⁷ CSIRO Futures (2020); *COVID-19: Recovery and resilience*; CSIRO, Canberra; p.12

Wine export challenges

The Australian wine industry has experienced a turbulent year, with profits affected by the closure of bars, restaurants and cellar doors due to COVID-19, and South Australian winemakers experiencing much-reduced yields because of extreme heat, frost, wind, bushfires and smoke taint¹⁸. In August 2020, Wine Australia reported that, despite other industry challenges, wine exports have 'held up well'¹⁹. Exports to mainland China showed a year-on-year increase of 0.7%, culminating in an export value of \$1.1 billion and a 37% share of all wine imported by China (the highest of any country).

However, in late August, the Chinese Government launched an investigation into allegations that the Australian Government was subsidising Australian producers such that they could afford to dump wine (i.e. sell it in China below the cost of production)²⁰. The Australian Government and industry representatives have strongly refuted these claims²¹. Nonetheless, wine is amongst the products announced by the Chinese Global Times newspaper at the start of November as having an 'import suspension'²².

Interim provisional measures were implemented from late November 2021, effectively closing the China market for Australian wine. Unsurprisingly, exports to mainland China fell following the imposition of interim tariffs in November. Value declined 14% to \$1.01 billion and volume by 29% to 96 million litres (10.7 million 9-litre case equivalents)²³. It is expected that exports to China will further diminish in the next couple of months.

In late March 2021, the Chinese Government announced its final decision following investigations of anti-dumping and countervailing duties for Australian bottled wine of 2 litres or less. The combined duty payable ranges from 116.2% - 175.6% for those companies that participated in the investigations and for all other companies 218.4%. This duty amount will apply for the next five years²⁴.

While providing certainty, this effectively maintains the market will not be viable for Australian bottled wine.

These measures will have a significant impact on the Australian wine industry with 62% of wine produced in Australia being exported and China having been largest export destination (see **Error! Reference source not found.**). It is recognised by the industry that the imposition of tariffs by the Chinese Government will have a widespread impact on wine producers, whether they deal directly with China or not. Businesses will be forced

Table 1: Value of wine exports to the top 10 markets

	China Inc. HK and Macau	\$1.26b	▲ 1%
	United States	\$439m	▲ 1%
	United Kingdom	\$430m	▲ 18%
	Canada	\$196m	▲ 4%
	New Zealand	\$103m	▲ 9%
	Singapore	\$91m	▼ -1%
	Germany	\$55m	▲ 12%
	Japan	\$49m	▼ -4%
	Netherlands	\$40m	▼ -10%
	Denmark	\$38m	▲ 46%

Source: Wine Australia (2020); *Australian Wine Sector at a glance*; <https://www.wineaustralia.com/report-downloads/e511639e-f0d0-44cc-8519-d245121e4b3d>

¹⁸ ABC News (2020); *Grape yields down by up to 80pc for some South Australian wine grapegrowers but quality 'exceptional'*; <https://www.abc.net.au/news/rural/2020-04-15/sa-vintage-2020-grape-yields-down-quality-exceptional/12138146>; viewed November 2020.

¹⁹ Wine Australia (2020); *Australian wine exports holding up well*; <https://www.wineaustralia.com/getmedia/125fd0d4-7468-4602-b221-32eedf6bac65/20200804-MR-101-Australian-wine-exports-holding-up-well.pdf?ext=.pdf>; viewed November 2020.

²⁰ ABC News (2020); *How China hit Australian barley, then beef and now eyes our wine*; <https://www.abc.net.au/news/2020-08-19/china-eyes-australian-wine-export-in-latest-trade-move/12571672>; viewed November 2020.

²¹ ABC News (2020); *Fears China has cut off imports of Australian wine amid worsening trade war*; <https://www.abc.net.au/news/2020-11-16/australian-wine-exports-blocked-in-china-amid-trade-dispute/12887568>; viewed November 2020.

²² ABC News (2020); *Chinese government uses state media to confirm export suspensions as trade stoush continues*; <https://www.abc.net.au/news/2020-11-05/chinese-government-state-media-confirms-trade-export-suspension/12852314>; viewed November 2020.

²³ Wine Australia (2021); *Australian Wine Export Report, Moving Annual Total – December 2020*.

²⁴ Wine Australia (2020); *China anti-dumping and countervailing duties investigations*; <https://www.wineaustralia.com/china-anti-dumping-and-countervailing-duties>; viewed November 2020.

to seek to develop activities in other markets to try to compensate for lost income²⁵.

²⁵ ABC News (2020); *Australia's wine exports top \$3b as trade with China grows, despite allegations of dumping*; <https://www.abc.net.au/news/2020-10-29/australian-wine-exports-grow-to-3-billion-as-china-spends-more/12822958>; viewed November 2020.

The National Skills Commission and attracting new industry workers

The National Skills Commission (NSC) was created in 2019 when much of the national debate focused on skills gaps; but, with the onset of COVID-19, the focus is now firmly on managing skills surpluses and identifying training options for unemployed workers, especially young people, women and city-dwellers, who have been disproportionately affected²⁶. The food, beverage and pharmaceutical industries may be able to capitalise on the availability of people who have been displaced from their usual work and are seeking new opportunities.

As well as highlighting reskilling and upskilling options for improving the prospects of people already performing an industry role, the NSC are promoting 'skills transferability' to facilitate clearer pathways between roles in diverse industries that require similar capabilities. The IRCs note that skills transferability is an important objective that must be considered as complementary to the primary role of vocational education and training in enabling potential workers to reach competency and be job-ready. This contention recognises that specific skills are required for jobs, whether in pharmaceutical manufacturing or baking, in order to complete tasks safely and effectively.

VET Qualifications & Employment Outcomes

The data and literature references presented in the 2020 Annual Update remain relevant.

Over the last year, consultation with stakeholders has led to the identification of several key factors that lead employers not to seek or favour VET graduates, including:

- Absence of legislative, regulatory or licensing requirements governing an occupation or industry²⁷
- Lack of value assigned to VET within industry cultures and networks²⁸
- Belief that formal credentials are relevant for career establishers but not for higher level roles filled by more experienced candidates²⁹
- Dissatisfaction with the work-readiness of previously employed VET graduates³⁰, especially those whose learning did not include a workplace-based component³¹
- Abundance of alternatives to VET recognised by employers
- Worker shortages, especially within small businesses in regional, rural and remote (RRR) areas³², which leads to employers being often forced to hire candidates who do not possess the desired qualifications, but who subsequently receive informal, on-the-job training.

The IRCs note, however, there is strong evidence that exposure to and engagement with quality VET-related outcomes are indicators of the system being valued and regarded as a yardstick by employers. Data released from NCVET's survey of employers' use and views of the VET system³³ shows that, of 'Manufacturing' employers who are 'satisfied with training as a way of meeting their skill needs', 72% mandate 'vocational qualifications as a job requirement' (which is equal to the all-industry average).

There is further evidence that government-supported and -funded programs that encourage partnerships between training providers and industry raise the profile of VET – and so employers' receptiveness to hiring graduates – due to the successful outcomes facilitated for all stakeholders. A number of initiatives are successfully promoting pathways for graduates and increasing employers' engagement with VET.

²⁶ National Skills Commission (2020); *A snapshot in time: The Australian labour market and COVID-19*

²⁷ L. Wheelahan & G. Moodie (2017); Vocational education qualifications' roles in pathways to work in liberal market economies; *Journal of Vocational Education & Training* 69 (1): 10-27; p.13

²⁸ Parliament of Victoria (2012); *Inquiry into agricultural education and training in Victoria*; p.41

²⁹ A. Hall, L. Turner & S. Kilpatrick (2019); Understanding Tasmanian dairy farmer adoption of pasture management practices: a Theory of Planned Behaviour approach; *Animal Production Science*; CSIRO Publishing; <https://doi.org/10.1071/AN18321>

³⁰ National Farmers Federation (2019); *Submission to Hon Steven Joyce: Expert review of Australia's vocational education and training system*; 25 January 2019; p.10

³¹ C. Smith, S. Ferns, L. Russell, Leoni & P. Cretchley (2014); *The impact of work integrated learning on student work-readiness*; Sydney, New South Wales: Office for Learning and Teaching.

³² S. Gelade & T. Fox (2008); *Reality check - Matching training to the needs of regional Australia*; NCVET, Adelaide; p.33

³³ NCVET (2019); *Australian vocational education and training statistics: Employers' use and views of the VET system 2019*; NCVET, Adelaide.

Other Training Used by Employers

The data and literature references presented in the 2020 Annual Update remain relevant.

Enrolment Levels

The data and literature references presented in the 2020 Annual Update remain relevant.

Consultation undertaken on behalf of the IRCs throughout 2020 has identified reasons for the low use of qualifications, including:

- Unmet demand for 'flexible' training
- Negative industry perceptions of the VET system and training delivery
- Emerging preference for short courses and micro-credentials
- A lack of trainers demonstrating both pedagogical excellence and industry expertise
- RTO viability challenges, especially relating to:
 - Compliance
 - Training and assessment materials development
 - Thin markets in RRR areas
 - Government funding
 - Creating and maintaining industry partnerships

Qualifications recently reviewed/updated/created

Several FBP qualifications with few or no enrolments over the past five years have recently been reviewed and redeveloped. Demand may reasonably be expected to rise when a qualification has been significantly updated to meet industry needs (as defined through extensive consultation). Additionally, there are some qualifications in the training package that were created recently have yet to have enrolment data collected by NCVET.

Table 2: Qualifications recently reviewed/updated/created

Qualification	2015	2016	2017	2018	2019
FBP10217- Certificate I in Baking	0	0	0	0	90
FBP20418- Certificate II in Pharmaceutical Manufacturing	0	0	0	0	0
FBP40418- Certificate IV in Food Science and Technology	98	142	104	102	81
FBP40518- Certificate IV in Pharmaceutical Manufacturing	0	0	0	0	0
FBP40619- Certificate IV in Artisan Fermented Products	0	0	0	0	0
FBP50218- Diploma of Food Safety Auditing	0	0	0	0	0
FBP50319- Diploma of Artisan Cheesemaking	0	0	0	0	0

Source: NCVET VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

FBP Training Package products in project stage (commissioned by AISC)

The following qualifications are all part of current projects managed by Skills Impact, having been commissioned by the AISC on the basis of extensive industry consultation and evidence of demand for these training package products subject to their being reviewed and developed. For more information, please go to <https://www.skillsimpact.com.au/projects/>.

Table 3: FBP Training Package products in project stage (commissioned by AISC)

Qualification	2015	2016	2017	2018	2019
FBP20317- Certificate II in Food Processing (Sales)	263	27	35	19	17
FBP30217- Certificate III in Plant Baking	33	33	28	0	0
FBP30617- Certificate III in Food Processing (Sales)	369	318	148	129	98
FBP30717- Certificate III in Rice Processing	0	0	0	0	0
FBP40117- Certificate IV in Flour Milling	7	0	0	0	0
FBP40217- Certificate IV in Baking	83	111	150	89	21

Source: NCVET VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

Low industry demand at present, but future opportunities

There has been limited training delivered by VET providers for the pharmaceutical manufacturing industry in recent years. Around half of enrolments in the *Certificate III in Pharmaceutical Manufacturing* were delivered overseas in 2019. With the closing of international borders in 2020, this stream is expected to discontinue.

The outbreak of COVID-19 has created unprecedented challenges for Australia's pharmaceutical manufacturing industry, especially because of its usual reliance on supply chains that cross international borders. Australian manufacturers are having to adapt, including by expanding domestic operations. With several industry manufacturers involved in developing a COVID-19 vaccine, and others developing treatments for patients with serious complications, there are increased pressures to improve processes and speed to market, and there is anticipated to be a greater emphasis on formal training³⁴.

Table 4: Low industry demand at present, but future opportunities

Qualification	2015	2016	2017	2018	2019
FBP20418- Certificate II in Pharmaceutical Manufacturing	0	0	0	0	0
FBP30818- Certificate III in Pharmaceutical Manufacturing	67	113	118	132	103
FBP40518- Certificate IV in Pharmaceutical Manufacturing	0	0	0	0	0

Source: NCVET VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

³⁴ IBISWorld (2020); *Pharmaceutical Product Manufacturing in Australia: Industry Report C1841*

Qualifications that are used by industry outside of VET

Several stakeholders from the food, beverage and pharmaceutical industries use training package products for a variety of purposes outside of the national system. These include using qualifications to develop formal position descriptions, and for guiding internal training and professional development programs and external, non-accredited training programs for industry (not delivered or assessed by RTOs). The sugar milling qualifications are not formally delivered or assessed by any RTO but are widely used by sugar mills to develop training and define skills requirements for various operational roles. Queensland University of Technology (QUT) and the Sugar Research Institute (SRI) have recently collaborated on the development of online training programs for the sugar industry by utilising seven units of competency from the Certificate II in Sugar Milling Support. Australian sugar milling companies all have access to this Australian Sugar Industry Training (ASIT) Learning Management System (LMS)³⁵ and many are now using it for staff training.

Table 5: FBP that are used by industry outside of VET

Qualification	2015	2016	2017	2018	2019
FBP20618- Certificate II in Sugar Milling Support	0	0	0	0	0
FBP31018- Certificate III in Sugar Milling Industry Operations	0	0	0	0	0

Source: NCVET VOCSTATS, TVA program enrolments 2015-19

PLEASE NOTE: Qualification data includes enrolments in superseded versions where available

Reasons for Non-Completion

The data and literature references presented in the 2020 Annual Update remain relevant.

Workplace-Based Training & Assessment and Mandatory Work Placements

The challenges of safely accessing workplaces to deliver training are compounded by many RTOs' inability to plan and deliver viable training and assessment strategies in light of the many restrictions in place. Learner retention is compromised by increasingly expensive training delivery, staff lay-offs, social distancing requirements on-campus and restrictions on travel limiting trainers' access to relevant regional, rural and remote (RRR) locations. Generally, these issues have had more of an impact on non-completion rates than mandatory work placements, which remain strongly supported by industry where they are appropriate. Alternatives implemented by RTOs, including online delivery, have frustrated many learners, who are experiencing additional challenges associated with time, resources and connectivity (especially in RRR areas), issues which are often intensified when family members are also learning and working from home. As a result, non-completion rates are rising due to dissatisfaction with, or logistical barriers hampering, training and assessment delivery.

Another issue affecting non-completion rates is that numerous struggling businesses have been unable to continue to support apprenticeship-related employment. Manufacturing businesses are reporting fewer orders and projects in the pipeline³⁶, leading some employers to retrench staff, including those with formal VET training arrangements and existing qualifications. Not only do economic downturns increase apprenticeship and traineeship non-completions because of job loss or redundancy³⁷, research also shows that apprentices and trainees who are made redundant are also more likely than their peers to be unemployed nine months after losing their job³⁸. Due to this, displaced individuals often pursue employment and study options in other fields rather than wait for a possible resumption of an apprenticeship in their chosen industry³⁹.

³⁵ Sugar Research Institute (2016); *New SRI Sugar Tutorials website for mill training*; <https://www.sri.org.au/new-sri-sugar-tutorials-website-for-mill-training/>; viewed November 2020.

³⁶ National Skills Commission (2020); *A snapshot in time: The Australian labour market and COVID-19*; p.33

³⁷ Hurley, P. (2020); *The impact of coronavirus on apprentices and trainees*. Mitchell Institute for Education and Health Policy; Victoria University.

³⁸ Karmel, T., & Oliver, D. (2011); *Effect of the downturn on apprentices and trainees*; NCVET, Adelaide

³⁹ National Skills Commission (2020); *A snapshot in time: The Australian labour market and COVID-19*

Cross-Sector Units

The response presented in the 2020 Annual Update remains relevant. There is no additional information to add at this time.

Changes to Skill Requirements

FIAL⁴⁰ have reported that workers will need different skills for future jobs in food and agribusiness. There is projected to be strong growth in demand for people with technical, managerial and numeracy skills. Results from FIAL research suggest that, to facilitate the industry's growth and competitiveness, the workforce will need substantially stronger technical skills (+21%) by 2025. Managerial skills (+8%) and numeracy (+7%) are also becoming more important.

Furthermore, four key areas will need to be addressed to enable workforce development:

- Rebranding the sector to attract new talent
- Building closer links with educational institutions
- Radically scaling on-the-job training
- Developing flexible employment models for older workers.

Apprenticeship & Traineeship Barriers

The data and literature references presented in the 2020 Annual Update remain relevant. Likewise, barriers to VET delivery and the reasons for industry's low engagement with the system, detailed in the sections VET Qualifications & Employment Outcomes, Enrolment Levels, and Reasons for Non-Completion, should also be considered relevant here.

Industry-specific data relating to the results of the Australian Government's \$2 billion JobTrainer skills package, which includes objectives to attract new apprentices and keep existing apprentices in jobs, has yet to be released. Its design is in part a response to research⁴¹ forecasting that COVID-19 will cause apprenticeship/traineeship commencements to decrease over the next few years because they have fallen during past economic downturns, with struggling employers reluctant to commit to three- to four-year apprenticeship arrangements⁴². JobTrainer anticipates such challenges and will further be supported by industry strategies to expand apprenticeship and traineeship opportunities.

The IRCs will assess the outcomes of such initiatives as information becomes available.

⁴⁰ Food Innovation Australia Ltd. (2020); *Changing job and skill implications in Australia's food & agribusiness sector*; <https://www.fial.com.au/blogs/post/changing-job-and-skill-implications-in-australia-s-foodagribusiness-sector>; viewed November 2020.

⁴¹ Hurley, P. (2020); *The impact of coronavirus on apprentices and trainees*. Mitchell Institute for Education and Health Policy; Victoria University.

⁴² Hurley, P. (2020); *The impact of coronavirus on apprentices and trainees*. Mitchell Institute for Education and Health Policy; Victoria University.

Other Relevant Activities

The IRCs have been busy during 2020, with many responsibilities bestowed upon it, requiring extensive time and resources, for dealing with the impacts of COVID-19, workforce, industry and trade issues.

The IRCs have assisted the AISC and the AISC Emergency Response Sub-Committee (ERSC) by seeking industry input and responding to a number of requests for information. These requests have taken place in several stages.

Immediate crisis response

- Identification of immediate training issues relating to workplace and campus-based training (completed April 2020)
- Identification of skills needs and delivery challenges for essential workforces (completed May 2020)

Supporting training for worker movement and potential surge workforces to meet current needs

- Identification of existing training products and potential surge workforces (completed May 2020)
- Analysis of available infection control training (completed June 2020)

Support for workforce recovery

- Critical Response Projects to create pathways for displaced workers (submitted July 2020, in progress)
- Promotion of pathways for displaced workers (first projects submitted July 2020, under consideration)

Mandatory Work Placements Analysis and Response

- Initial analysis of units requiring mandatory work placements or assessment/training conditions that were likely to require the use of physical workspaces, most likely in workplaces (completed April 2020)
- Analysis of units within qualifications with high levels of enrolments (completed October and November 2020)

The IRCs are extremely pleased to report that the current FBP Training Package is robustly standing up to the additional logistical challenges brought about by COVID-19. Since the establishment of the IRCs, the components of the training package that have undergone review have enabled:

- Flexible options for training and assessment to meet fluid and urgent industry needs
- Coverage of the major training requirements for all industries associated with the training package
- Minimal requirements for mandatory work placements or onsite training and assessment (there are multiple delivery mode options), while recognising that many units cannot be delivered virtually or online
- Extensive and suitable options of recognised skill sets and units for use by the states that have decided to develop their own training offerings outside the national system (without IRC consultation).

The IRCs have also responded to a Ministers' request to delete units and qualifications which had zero enrolments in the years 2017 to 2019 and offered advice on the units and qualifications identified. In many cases, the relevant training package products were already under review in current projects. In other cases, there were expected enrolments in 2021, or in the near future, as a result of recent major changes made to those training package products.

The additional work detailed above has required that the IRCs meet more regularly and that members conduct many more additional "out of session" discussions and consultations than in previous years. This has been achieved without additional IRC members or secretariat support. The Chairs of the IRCs would like to express their gratitude to all IRC members and stakeholders who have given up so much of their time and energy in 2020 to complete this important work.

Section B: Ongoing Consultation

Detailed below is the industry consultation undertaken by IRC members and Skills Impact, including with rural, regional and remote stakeholders.

Engagement activities are described across four key areas:

- **Ongoing engagement** and validation with industry and stakeholders
- Collection of **industry intelligence**
- **Promotion of the VET** system
- Cultivating and maintaining **networks and partnerships** with industry including engagement in rural and regional areas.

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
3 Hungry Monkeys	Commercial Business	VIC	Yes				
4 Hearts Brewing	Commercial Business	QLD	No		✓		✓
AAS Food Technology Pty Ltd	Commercial Business	VIC	No				
ABEX Training Group	RTO private	VIC	No		✓	✓	
Access Training and Logistics	RTO private	VIC	Yes				
Accolade Wines Holding Australia Pty Ltd	Commercial Business	SA	Yes	✓	✓	✓	✓
ACCORD	Industry Association	NSW	No				
ACS Distance Education	Education Other	QLD	Yes				
Adalta	Commercial Business	National	No	✓	✓	✓	✓
ADM Australia	Commercial Business	NSW	No				
Advanced Careers College	RTO private	NSW	Yes			✓	✓
AGB Training	RTO private	VIC	No			✓	✓
Agilent Technologies	Commercial Business	VIC	Yes				
Agricultural Appointments	Commercial Business	NSW	Yes		✓		✓
Agrifood Technology	Research Organisation	VIC	Yes		✓		
Agritechnology Pty Ltd	Commercial Business	NSW	No				✓
AHA Viticulture	Commercial Business	WA	Yes	✓	✓		✓
Akasha Brewing Company	Commercial Business	NSW	No				✓
Alba Cheese	Commercial Business	VIC	No		✓		✓
Alchemy Agencies	Commercial Business	NSW	No				✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Alchemy Systems	Commercial Business	NSW	No				✓
All About Bakery Equipment	Commercial Business	QLD	No				✓
Allergy & Anaphylaxis Australia (A&AA)	Research Organisation	National	Yes		✓		✓
Allied Pinnacle	Commercial Business	National	Yes	✓	✓	✓	
Alltech	Commercial Business	National	No				
Alphapharm (Mylan)	Commercial Business	NSW	No				✓
Alpine Valley Flour Mill	Commercial Business	VIC	Yes				
ALS	Commercial Business	National	No				✓
Ambleside Distillers	Commercial Business	SA	Yes				✓
Anther Gin	Commercial Business	VIC	Yes				✓
Apex Human Resources Pty Ltd	RTO private	VIC	No			✓	✓
APOSTOLE PTY. LTD.	RTO private						
Appita Inc	Commercial Business	VIC					
Applied Training Solutions Pty Ltd	RTO private	NSW	No			✓	✓
Arcadian Organic and Natural Meat Company	Commercial Business	QLD	Yes				✓
Asahi Holdings Australia Pty Ltd	Commercial Business	National	No				✓
ASH Pty Ltd	RTO private					✓	
Ashton Valley Fresh	Commercial Business	SA	Yes	✓	✓	✓	✓
Aspen Pharmacare Australia Pty Ltd	Commercial Business	VIC	No				✓
Asset Training	RTO private	TAS				✓	
AstraZeneca Pty Ltd	Commercial Business	National	No		✓		✓
ATP Science	Commercial Business	QLD	Yes				
AusBiotech	Industry Association	National	No		✓		✓
Ausindustry	Federal Government	ACT	Yes		✓		✓
Austrade	Federal Government	National	No				✓
Australasian Medical & Scientific AMSL	Commercial Business	NSW	No	✓	✓		✓
Australian Beer Co	Commercial Business	NSW	Yes	✓	✓	✓	✓
Australian Beverages Council	Industry Association	NSW	Yes	✓	✓	✓	✓
Australian Blending Company	Commercial Business	VIC			✓	✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Australian Botanical Products ABP	Commercial Business	VIC	Yes				
Australian College of Finance	RTO private	WA	Yes			✓	
Australian Custom Pharmaceuticals	Commercial Business	NSW	No				
Australian Dairy Products Federation (ADPF)	Industry Association	VIC	Yes		✓		✓
Australian Distillers Association	Industry Association	National	No	✓	✓	✓	✓
Australian Distillers Association (ADA)	Industry Association	National	Yes		✓		✓
Australian Eggs	Industry Association	National	Yes	✓	✓		
Australian Export Grains Innovation Centre (AEGIC)	Research Organisation	National	Yes		✓		✓
Australian Food and Grocery Council (AFGC)	Industry Association	National	Yes	✓	✓		✓
Australian Industry Group Queensland	Employer Organisation	QLD	No	✓	✓	✓	✓
Australian Institute of Food Safety	Commercial Business	National	No				✓
Australian Institute of Food Science and Technology	Industry Association	National	Yes	✓	✓	✓	✓
Australian Institute of Packaging	Industry Association	National	No	✓	✓		
Australian Manufacturing Workers' Union	Union	National	Yes	✓	✓	✓	✓
Australian Mediterranean Olive Research Institute	Research Organisation	WA	Yes				✓
Australian Native Food and Botanicals	Industry Association	VIC	Yes	✓	✓	✓	✓
Australian Nut Industry Council (ANIC)	Commercial Business	National	Yes				✓
Australian Olive Association	Industry Association	National	Yes	✓	✓		✓
Australian Olive Company	Commercial Business	National	Yes	✓	✓		✓
Australian Packaging and Processing Machinery Association	Industry Association		No				✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Australian Packaging Covenant	Commercial Business	National	No		✓		✓
Australian Paper	Commercial Business	VIC					
Australian Pharmaceutical Manufacturers	Commercial Business	VIC	No				
Australian Self Medication Industry (ASMI)	Industry Association	National	No		✓		✓
Australian Skills Group Pty Ltd	RTO private	QLD	No			✓	✓
Australian Society of Baking	Industry Association	National	No	✓	✓	✓	✓
Australian Society of Viticulture and Oenology	Industry Association	SA	Yes	✓	✓		✓
Australian Specialist Cheesemakers' Association	Industry Association	National	Yes	✓	✓	✓	✓
Australian Sugar Industry Alliance	Industry Association	National	Yes				✓
Australian Sugar Milling Council	Industry Association	National	Yes	✓	✓	✓	✓
Australian Technical and Management College	RTO private		No	✓		✓	✓
Australian Technical Millers Association	Industry Association	National	Yes	✓	✓		✓
Australian Vintage	Commercial Business	SA	Yes				
AVS Organic Foods	Commercial Business	VIC	Yes				
Axial Training Pty Ltd	RTO public	QLD	Yes		✓	✓	✓
Baiada	Commercial Business	NSW		✓	✓		✓
Bakehouse Delights	Commercial Business	NSW	Yes	✓	✓		
Bakels	Commercial Business	NSW	No		✓		✓
Bakers Delight Ltd	Commercial Business	Multi State	Yes	✓	✓		✓
Bakery Hill Distillery	Commercial Business	VIC	No				
Baking Association of Australia	Industry Association	National	Yes	✓	✓	✓	✓
Ballistic Beer	Commercial Business	QLD	Yes	✓	✓	✓	
Bananacoast Hot Bake	Commercial Business	NSW	Yes		✓		
Bannister Technical Pty Ltd	RTO private	NSW	No			✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Bargara Brewing Co.	Commercial Business	QLD	Yes				✓
Barley Australia	Industry Association	SA	Yes		✓		✓
Barossa Cheese	Commercial Business	SA	Yes				
Barto's Bakehouse	Commercial Business	NSW	No				
Batchelor Institute of Indigenous Tertiary Education	RTO public	NT	Yes			✓	✓
Baxter Healthcare	Commercial Business	NSW					
Baxter Laboratories	Commercial Business	VIC					
Beer Garden Brewing	Commercial Business	SA	Yes				
Bega Cheese Co-operative Limited	Commercial Business	VIC	Yes	✓	✓	✓	✓
Bellato Gold Milling	Commercial Business	NSW	Yes				
Ben Furney Flour Mills	Commercial Business	NSW	Yes				✓
Bendigo Kangan Institute	RTO public	VIC	Yes			✓	✓
BentSpoke Brewery	Commercial Business	National	Yes	✓	✓	✓	✓
Berry's Creek Cheese	Commercial Business	VIC	Yes				
Beston Pure Foods	Commercial Business	SA	Yes				
Bethel Farm Mill	Commercial Business	NSW	Yes				
BioCeuticals	Commercial Business	NSW					
Biomebourne Network	Industry Association	VIC	No	✓	✓		✓
Biomerieux Australia	Commercial Business	NSW	No				
BioPharma Solutions	Commercial Business	Inter National					
BioProcessing Network	Industry Association	National	No				
Bioproperties Pty Ltd	Commercial Business	VIC	No				✓
BITA	Commercial Business		No				
Blue Lake Milling	Commercial Business	SA	Yes				
Bluegum Pharmaceuticals	Commercial Business	NSW					
Boehringer Ingelheim	Commercial Business	NSW					
Bon Appetit Australia Pty Ltd	Commercial Business	VIC	No				✓
Boston Institute of Technology	RTO private	VIC	No			✓	✓
Boundary Bend Olives	Commercial Business	VIC	Yes	✓	✓		✓
Box Hill Institute	RTO public	VIC	No			✓	

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Brady's Lookout Cider	Commercial Business	TAS	Yes				✓
Breadtop	Commercial Business	National	No				
Brenntag Australia	Commercial Business	VIC	No				
Breweries and Bottleyards Employees' Industrial Union of Workers of Western Australia	Industry Association	WA	No				✓
Brewers Association of Australia and New Zealand	Industry Association	National	Yes				✓
Brews News	Commercial Business	National	No				✓
Brightons Best Bakehouse	Commercial Business	TAS	Yes				
Brogan's Way Distillery	Commercial Business	VIC	No				
Brookes Beer Pty Ltd	Commercial Business	VIC	Yes	✓	✓		
Brooke-Taylor & Co Pty Ltd	Commercial Business	VIC	Yes				
Brumby's Bakeries	Commercial Business	National	Yes	✓	✓		✓
Brunswick Aces	Commercial Business	VIC	No				
Buchi Labortechnik	Commercial Business	Inter National	No				
Bulla Dairy Foods	Commercial Business	VIC	No				✓
Bundaberg Brewed Drinks	Commercial Business	QLD	Yes	✓	✓		✓
Burleigh Brewing Company	Commercial Business	QLD	Yes				✓
Bushfood Sensations	Employer Organisation	NSW	Yes				
BVAQ	Industry Association		No		✓	✓	✓
Byrne Vineyards	Commercial Business	SA	Yes				
C.A. Henschke & Co.	Commercial Business	SA	Yes		✓		✓
Calibre Training & Development	RTO public	QLD	Yes			✓	✓
Campbell Arnotts	Commercial Business	NSW	No		✓	✓	✓
Canberra Institute of Technology	RTO Public	ACT	No	✓	✓	✓	
Cape Byron Distillery	Commercial Business	NSW	Yes				
Capitol Chilled Foods (Australia) Pty Ltd	Commercial Business	ACT	Yes				
Captain Bligh's Brewery	Commercial Business	TAS	Yes				

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Career Hero Education & Training	RTO public	VIC	No			✓	✓
Carlton & United Breweries	Commercial Business	VIC	No	✓	✓	✓	✓
Casella Family Brands	Commercial Business	NSW	Yes	✓	✓	✓	✓
Catalent	Commercial Business	VIC	No				✓
CBD Bakery	Commercial Business	VIC	No			✓	
Cell Therapies Pty Ltd	Commercial Business	VIC	No				
Central Coast Industry Connect	Industry Association	NSW	Yes			✓	✓
Centre for Biopharmaceutical Excellence	Commercial Business	VIC	No				
CENTRE FOR CLIMATE SAFETY	Research Organisation	VIC	Yes				
Centre for Food Innovation University of Tasmania	Union	TAS	Yes				✓
Ceres Fair Food / CERES	Commercial Business	VIC	No				✓
Charles Darwin University	Research Organisation	NT	Yes	✓	✓		
Chemwatch	Commercial Business	VIC	No				
Chillaxed GeeGee Pty Ltd	Commercial Business	QLD	No				
Chisholm Institute	RTO public	VIC	No			✓	
Chobani Yoghurt	Commercial Business	VIC	No	✓			✓
Chr Hansen	Commercial Business	VIC	No				
City of Greater Bendigo	Local Government	VIC	Yes				
Clearlight Investments (San Remo)	Commercial Business	SA	Yes				
Clinuvel Pharmaceuticals	Commercial Business	VIC					
Coal River Farm	Commercial Business	TAS	Yes				
Coca Cola Amatil Limited	Commercial Business	National	Yes				✓
Cochlear	Commercial Business	VIC	No				
Coles Chef Fresh	Commercial Business	VIC	No		✓	✓	✓
Coles Supermarkets	Commercial Business	National	Yes		✓		✓
Colmar Brunton	Commercial Business	National	No	✓			✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Compact Services Queensland Pty Ltd	RTO public	QLD	No			✓	✓
Compact Training Services	RTO private	QLD	No		✓	✓	✓
Complementary Medicines Australia	Industry Association	National	No		✓		✓
Complementary Medicines Australia	Industry Association	ACT	No				✓
Complete Qualifications Pty Ltd	RTO private	VIC				✓	
Connell Bros	Commercial Business		No				
Cooking With Jenny	Commercial Business	VIC	No				✓
Coopers Brewery Ltd	Commercial Business	SA	Yes				✓
Core Compliance	Commercial Business	Inter National	No		✓		✓
Cornella Ridge Estate	Commercial Business	VIC	Yes				✓
Correct Food Systems	Commercial Business	NSW	No				✓
Correct Training Systems Pty Ltd	RTO public	NSW	No			✓	✓
Costa Group Pty Ltd	Commercial Business	National	No				✓
CozWine	Commercial Business	SA	Yes				✓
Craft Beer Industry Association	Industry Association	NATION AL	Yes				✓
CRC for Honey Bee Products	Research Organisation	WA	Yes	✓	✓	✓	✓
CS Executive Group	Commercial Business	VIC	No				✓
CSIRO - Commonwealth Scientific and Industrial Research Organisation	Research Organisation	National	No	✓	✓		✓
CSL Behring	Commercial Business	National	No	✓	✓	✓	✓
Cummins Milling	Commercial Business	SA	Yes				
D and C Healey Pty Ltd	RTO private					✓	
Dairy Australia	Employer Organisation	National	Yes	✓	✓	✓	✓
Dairy Food Safety Victoria	Industry Association	National	Yes	✓	✓		✓
Dairy Industry Association of Australia (DIAA)	Industry Association	VIC	Yes		✓		✓
Dairy Innovation Australia Limited (DIAL)	Industry Association	VIC	Yes		✓		✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Dalton Training Services	RTO private	WA	Yes			✓	
Dandenong Business College Ltd	RTO private	VIC	No			✓	
Darmore Pty Ltd	RTO private	QLD	Yes			✓	
Davies Bakery	Commercial Business	VIC	No	✓	✓	✓	
De Bortoli Wines Pty Ltd	Commercial Business	NSW	Yes		✓		
Deep South Distillery	Commercial Business	Inter National	Yes				
Defiance Maize Products Pty Ltd	Commercial Business	QLD	Yes				✓
Defiance Rockhampton Flour Mill	Commercial Business	QLD	Yes				
Della International College	RTO private	VIC	No			✓	✓
Deon Mahoney Consulting	Commercial Business	VIC	No		✓	✓	✓
Department of Health and Human Services (Victoria)	Local Government	VIC	No	✓			✓
Department of Health and Human Services TAS	Local Government	TAS	Yes				✓
Department of Industry, Science, Energy and Resources	Federal Government	ACT	No	✓	✓	✓	✓
Department of Jobs, Precincts and Regions VIC	State Government agency	VIC	Yes				
Department of State Development, Manufacturing, Infrastructure and Planning	State Government agency	QLD	Yes	✓	✓	✓	✓
Devondale Murray Goulburn Co-Operative Co Ltd	Commercial Business	VIC	Yes		✓		✓
Diageo Australia	Commercial Business	NSW	No				✓
Distilled Spirits Industry Council of Australia (DSICA)	Industry Association	National	No				✓
DLI Training	RTO private	VIC	No			✓	
DOME Association Inc	RTO private	SA	Yes			✓	
DOME Training	RTO private	SA	Yes	✓		✓	
Dried Fruits Australia	Industry Association	National	Yes				✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
DTS Food Assurance	Commercial Business	National	Yes	✓	✓		✓
DYNAMIC LEARNING SERVICES PTY LTD	RTO private	NSW				✓	
Eagle Bay Brewing Co	Commercial Business	WA	Yes				
Eagle Wing Education & Training Pty Ltd	RTO private	NSW				✓	
Earlee Products	Commercial Business	QLD	Yes	✓			
Earlyrise Baking Company	Commercial Business	NSW	No	✓			
Ecowize	Commercial Business		No				
Eden Valley Biodynamic Farm	Commercial Business	WA	Yes				
Edible bug shop	Commercial Business	VIC	No	✓	✓		
Education Institute Pty Ltd	RTO public	VIC	No			✓	
Ego Pharmaceuticals Pty Ltd	Commercial Business	VIC	No				
Elisa Systems	Commercial Business		No				
Elle Bee Exports Pty Ltd	Commercial Business	QLD	No				✓
Eloments Natural Vitamin Tea	Commercial Business	VIC	No				
Emma and Tom's Foods	Commercial Business	VIC	No				
Endeavour Drinks Group	Industry Association	National	Yes				✓
Enrich360	Commercial Business	NSW	No	✓			
Ensign Laboratories	Commercial Business	VIC					
Entyce Food Ingredients	Commercial Business	VIC	No				✓
Epicure	Commercial Business	Multi State	No			✓	
Eris Pharmaceuticals Pty Ltd	Commercial Business	NSW					
Essence Group	Commercial Business	NSW					
Everest Icecream	Commercial Business	VIC	No				
EXECUTIVE SECURITY TRAINING PTY. LTD.	RTO private	VIC			✓	✓	✓
Export Council of Australia	Commercial Business	National	No	✓			
EZY PEZY AUSTRALIA PTY LTD	RTO private	QLD	Yes			✓	

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
FAPIC	Commercial Business	VIC					
FB Propak	Commercial Business	VIC	No				✓
FB Rice	Commercial Business	VIC	No				
Federation Training	RTO private	VIC	Yes	✓		✓	✓
Federation University Australia	University	VIC	Yes	✓	✓	✓	✓
Fedra Olive Grove	Commercial Business	NSW	Yes				✓
Females in Food	Employer Organisation	National	No				
Ferment Monster	Commercial Business	National	Yes				✓
FermentTasmania	Research Organisation	TAS	Yes	✓	✓	✓	✓
FGB Natural Products	Commercial Business	VIC					
FGM Consultants Pty Ltd	Federal Government	VIC		✓			
Fibisol Services Australia Pty Ltd	Commercial Business		No				
Fight Food Waste Collaborative Research Centre	Research Organisation	National	Yes	✓	✓	✓	✓
Fitness Australia	Commercial Business		No				
Flavour Makers	Commercial Business	VIC	No				
Fleurieu Distillery	Commercial Business	SA	Yes				
Flick Anticimex Pty Ltd	Commercial Business	Multi State	No			✓	
Flinders Island Distillery	Commercial Business	SA	Yes				
Flowcrete Australia	Commercial Business	National	Yes				
Fonterra Australia Pty Ltd	Commercial Business	National	Yes	✓	✓		✓
Food & Agribusiness Solutions	Federal Government	ACT	No				✓
Food & Fibre Gippsland	Research Organisation	VIC	Yes	✓	✓		✓
Food & Primary Skills Victoria	State Government agency	VIC	Yes	✓	✓	✓	✓
Food Agility Cooperative Research Centre	Research Organisation	National	No		✓		✓
Food and Agribusiness Network	Industry Association	QLD	Yes				✓
Food and Beverage Development Fund	Research Organisation	SA	Yes		✓	✓	✓
Food and Beverage Importers Association (FBIA)	Industry Association	VIC	No		✓		✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Food Authority NSW	Local Government	NSW	No	✓			✓
Food Industries Association of Queensland (FIAQ)	Industry Association	QLD	Yes	✓	✓	✓	✓
Food Innovation Limited Australia (FIAL)	Research Organisation	National	Yes	✓	✓		✓
Food Labelling and Safety Pty Ltd	Commercial Business		No				
FOOD SAFETY OPERATIONS (QLD). PTY LIMITED	RTO private	QLD				✓	
Food South Australia	Industry Association	SA	Yes	✓	✓	✓	✓
Food South Australia Inc.	Industry Association	SA	Yes	✓			
Food Standards Australia New Zealand (FSANZ)	Industry Association	National	Yes	✓			✓
Food, Fibre & Timber Industries Training Council (WA)	Commercial Business	WA	No	✓	✓	✓	✓
Foodservice Suppliers Association Australia (FSAA)	Industry Association	National	No				✓
Formation Training	RTO Private	QLD	No	✓		✓	✓
Fosseys Gin	Commercial Business	VIC	Yes	✓	✓		
Four Leaf milling	Commercial Business		Yes				
Four Pines Brewery	Commercial Business		Yes				
FPM Cereal Milling Systems	Commercial Business		Yes				
Franke Hyland	Commercial Business	NSW	No				
Freedom Foods	Commercial Business	NSW	Yes	✓			✓
Fresh Food Industries	Commercial Business	WA	Yes				✓
Fresh Select	Commercial Business		Yes				✓
Freshfield Grove	Commercial Business	TAS	Yes				
Frutex	Commercial Business	NSW	No				
FS Alliance	RTO public	QLD	No			✓	
Fuse Recruitment	Commercial Business		No				
Futurum Australia	RTO Private	VIC	No			✓	✓
Gage Roads Brewing Co Ltd	Commercial Business	WA	Yes	✓	✓		✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Gateway Training Academy Pty Ltd	RTO private	NSW			✓	✓	✓
GBMA	Commercial Business	ACT					
GD Pharma	Commercial Business	SA	Yes				
Geelong Ethnic Communities Council Inc	RTO private	VIC	Yes			✓	
Geelong Manufacturing Council	Commercial Business	VIC	Yes				✓
General Mills Australia	Commercial Business	NSW	No				✓
Generic and Biosimilar Medicines Association (GBMA)	Industry Association	ACT	Yes	✓			
Generic Partners	Commercial Business	VIC					
Geotechnical Laboratories	Commercial Business	VIC	No				✓
Givaudan	Commercial Business		No				
GlaxoSmithKline Australia	Commercial Business	VIC	Yes				✓
GMP Pharmaceuticals	Commercial Business	NSW					
Golden 8	Commercial Business	VIC	Yes	✓		✓	
Golden Grain	Commercial Business		Yes				
Golden Harvest Health Food Company	Commercial Business	NSW					
Goodman Fielder	Commercial Business	VIC	No		✓		✓
Goulburn Ovens Institute of TAFE	RTO public	VIC	Yes	✓	✓	✓	✓
GrainCorp	Commercial Business	National	Yes				✓
Grains and Legumes Nutrition Council	Industry Association	National	Yes				✓
Grandvewe	Commercial Business	TAS	Yes	✓	✓		✓
Grape and Wine Research and Development Corporation	Industry Association	SA	Yes	✓			
Grape and Wine Research and Development Corporation	Industry Association	SA	Yes				
Gre8 Pty Ltd	Commercial Business		Yes				
Green Beacon Brewing Co	Commercial Business	QLD	No			✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Greenfield Education Pty Ltd	RTO Private	NSW	Yes	✓		✓	
Griffith Hack	Commercial Business		No				
GS1	Commercial Business	National	No				✓
GSK	Commercial Business	National	No				
Gumnut Patisserie Pty Ltd	Commercial Business	NSW	Yes	✓			
Gutsy Ferments	Commercial Business	QLD	Yes	✓	✓		✓
Haarslev Industries	Commercial Business	VIC	No				
Halcyon Proteins Pty Ltd	Commercial Business	VIC	No	✓	✓		✓
Hamilton Secondary College	RTO public	VIC	Yes			✓	✓
Hawkins Watts Australia	Commercial Business		No				
Health Department ACT	State Government agency	ACT	Yes	✓			✓
Health Department NT	State Government agency	NT	Yes	✓			✓
Health Department SA	State Government agency	SA	Yes	✓			✓
Health Department WA	State Government agency	WA	Yes	✓			✓
Health Life Pharmaceuticals	Commercial Business	NSW					
Health Protection Branch, Prevention Division, Department of Health QLD	State Government agency	QLD	No		✓		✓
HealthStar Training	RTO private	QLD	No			✓	
Heart Foundation	Research Organisation	National	No	✓			
Heather Brae Ltd	Commercial Business	VIC	Yes				
Heinz Wattie's Pty Ltd	Commercial Business	Inter National	Yes	✓	✓		
Helen's Hill Estate	Commercial Business	VIC	Yes				
Hemingways Brewing Company	Commercial Business	QLD	Yes	✓	✓		✓
Henscke	Commercial Business	Multi-state		✓	✓	✓	✓
Heta Incorporated	RTO public	SA	Yes			✓	
Hindmarsh Valley Dairy	Commercial Business	SA	Yes				
HiViz Ed - Get Noticed	RTO public	VIC					

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Holmesglen Institute	RTO private	VIC	No			✓	✓
Homart	Commercial Business	NSW					
Home Economics Institute of Australia (TAS) Inc.	RTO private	TAS	Yes			✓	
Homestyle Bake	Commercial Business	QLD	Yes				
Hop Temple	Commercial Business		No				
Hope Estate Winery and Brewery	Commercial Business	NSW	Yes				
Hungie Fangs Artisan Bakery	Commercial Business		No				
ICH Logistics	Commercial Business		No				
IDT Australia Limited	Research Organisation	VIC	No				✓
Illuminate Education Australia	Education Other	TAS	Yes		✓		✓
In Vitro Technologies	Commercial Business	VIC	No		✓		✓
Independent Brewers Association	Industry Association	National	Yes	✓	✓	✓	✓
Independent Institute of Food Processing	RTO Private	SA	Yes	✓		✓	✓
IndigiGrow	Commercial Business	NSW	Yes				
Industry Skills Advisory Council, NT ISACNT	State Government agency	NT	Yes	✓	✓		✓
IndustryEdge Pty Ltd	Union	VIC					
Innner Northern LLEN	State Government agency	VIC	No				
Insight Training Group Australia Pty Ltd	RTO private	WA	Yes			✓	
Institute of Brewing & Distilling – Asia Pacific	Industry Association	VIC	No				
Institute of Brewing and Distilling	Commercial Business	Inter national	No				
International Feed Industry Federation	Industry Association	Inter national	Yes	✓			
International Institute of Training	RTO private	VIC				✓	
Intervet Australia (MSD Animal Health Australia)	Commercial Business	VIC	Yes				
Intuitive Food Solutions	Commercial Business	QLD	No				
Invita Australia Pty Ltd	Commercial Business		No				
IPS Institute	RTO private	QLD	No			✓	

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
J2S Training Solutions Pty Ltd	RTO private	NSW	Yes		✓	✓	✓
Jacob's Bakery	Commercial Business	QLD	Yes				✓
Joblink Plus Training	RTO public	NSW				✓	
Joe White Malting	Commercial Business	TAS	Yes				
Jurgens Swiss Breads Co	Commercial Business	VIC	No				
Kagome Foods	Commercial Business	VIC	Yes				✓
KALAMATTA PTY. LTD.	RTO private	VIC				✓	
Kangan Institute	RTO Public	VIC	No	✓	✓	✓	✓
Karena Menzies	Commercial Business	VIC	No		✓	✓	✓
Kellogg's	Commercial Business	National	Yes				✓
Kerry Ingredients	Commercial Business	Other	No		✓		✓
Keystone Foods	Commercial Business		No				
Kialla Pure Foods	Commercial Business	QLD	Yes	✓	✓		✓
Kimchi Club	Commercial Business	SA	Yes	✓			✓
King River Brewing	Commercial Business	VIC	Yes				✓
Kingston Estate Wines	Commercial Business	SA	Yes				
Know Why Consulting	Commercial Business		No				
Kordon Institute of Technology	RTO Private	VIC	No			✓	
Kordon Training Management Systems Pty Ltd	RTO private	VIC				✓	
Kraft Heinz	Commercial Business	VIC	No		✓		
Laboratory Technician Training (LTT)	RTO private	VIC	No			✓	✓
Labtech Training Victoria Pty Ltd.	RTO private	VIC	No		✓	✓	✓
Lake House	Commercial Business	VIC	Yes				
Langi Ghiran Wines	Commercial Business	VIC	Yes	✓	✓	✓	✓
LaTrobe Business School	University	VIC	No	✓			
Laucke Flour Mills	Commercial Business	Multi State	Yes	✓			✓
Laucke Flour Mills 1	Commercial Business	VIC	Yes				✓
Laurent	Commercial Business	National	No				
Lavida Pharmaceutical	Commercial Business	NSW					

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Lawley	Commercial Business	WA	Yes				
Lawrenny Estate Distillery	Commercial Business	TAS	Yes				
Leadership Management Australia Pty Ltd	RTO private	VIC				✓	✓
Leap Cricket Protein	Commercial Business	NSW	No		✓		
Lewelmo Pty Ltd	RTO private	NSW				✓	
Lianrick Pty Ltd	RTO private	VIC				✓	
Lion Beer	Commercial Business	NSW	No		✓		✓
Lion Dairy & Drinks	Commercial Business	Multi State	No	✓	✓	✓	
Lion Pty Ltd	Commercial Business	National	Yes	✓	✓		✓
LionCo	Commercial Business	Multi state	No	✓	✓	✓	✓
Lipa Pharmaceuticals	Commercial Business	NSW					
Lirah Vinegar	Commercial Business	QLD	Yes	✓	✓		✓
Little Creatures Brewery	Commercial Business	WA	Yes				
Little Rippa Brewing	Commercial Business	SA	Yes				
Lord Nelson Brewery	Commercial Business	NSW	No				✓
Louttit Bay Bakery	Commercial Business	VIC	Yes				
Lovedale Brewery	Commercial Business	NSW	No				
LuinaBio	Commercial Business	QLD	No	✓	✓	✓	
Lupins for Life	Commercial Business	NSW	Yes				
MADEC Australia	RTO private	VIC	Yes		✓	✓	✓
Maggie Beer Holdings	Commercial Business	SA	Yes				
Maltra Foods	Commercial Business	VIC	No				
Managed Corporate Outcomes Pty Ltd	RTO Private	QLD	No			✓	✓
Manildra Group	Commercial Business	NSW	Yes	✓	✓		✓
Manufacturing Skills Australia	Education Other	NSW	No				
Maralong Milling	Commercial Business	QLD	Yes				
Marananga Cheese Barossa	Commercial Business	SA	Yes				✓
Margaret River Dairy Co	Commercial Business		Yes				
Marley Spoon	Commercial Business	VIC	No				
Masons of Bendigo	Commercial Business	VIC	Yes			✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Mauri ANZ	Commercial Business		Yes		✓		✓
Mayne Pharma	Commercial Business	SA	Yes				
McCain Foods Australia	Commercial Business	National	Yes	✓	✓		✓
McCormick Foods	Commercial Business	National	No				
McGuigan Wines	Commercial Business	NSW	Yes				
McLaren Vale Grape Wine & Tourism Association	Industry Association	SA	Yes				
McLean Farms	Commercial Business	QLD	Yes				
McWilliams Wine	Commercial Business	NSW	Yes	✓	✓		✓
Medical Developments International	Commercial Business	VIC					
Medical Technology Association of Australia	Industry Association	National	No				✓
Medicines Australia	Industry Association	National	Yes				✓
MediPham Labs	Commercial Business	VIC	Yes	✓	✓		✓
Melbourne Polytechnic	RTO Public	VIC	No	✓	✓		✓
Melbourne Quality Assurance	Commercial Business	VIC	No				✓
Melbourne's North Food Group	Employer Organisation	VIC	No				
Merck Australia	Commercial Business	NSW					
Merieux NutriSciences	Commercial Business		No				
Meru Miso	Commercial Business	TAS	Yes				
microgenetix	Commercial Business		No				
Milawa Bread	Commercial Business	VIC	Yes				✓
Millers Foods	Commercial Business	WA	Yes	✓			
Milne Agrigroup	Commercial Business		No				
Milton Pharmaceuticals	Commercial Business	VIC					
Mojo Kombucha	Commercial Business	SA	Yes				
Monash Food Innovation Centre	Research Organisation	VIC	No	✓	✓		✓
Moo Brew	Commercial Business	TAS	Yes	✓	✓		✓
Mortar and Pestle Brewery	Commercial Business	NSW	No				
MSD	Commercial Business	NSW					
MTPConnect	Research Organisation	National	No	✓	✓	✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Murray Valley Winegrape Industry Development Committee	Industry Association	VIC	Yes		✓		✓
Murray Valley Winegrowers Inc	Industry Association	VIC	Yes		✓		✓
Mylan	Commercial Business	NSW					
National Allergy Strategy	Research Organisation	National	No				
National Association of Testing Authorities	Industry Association	Multi State	No		✓		
National Baking Industry Association (NBIA)	Industry Association	National	Yes	✓	✓	✓	✓
National Blood Service	Research Organisation	National	Yes	✓			
National Dairy Education Centre	Research Organisation	VIC	Yes				
National Food Institute	RTO Private	VIC	Yes	✓	✓	✓	✓
National Training Organisation Pty Ltd	RTO public	NSW			✓	✓	✓
National Training Services Pty Ltd	RTO private	VIC			✓	✓	✓
National Union of Workers	Union	National	No	✓	✓	✓	✓
National Workplace Training	RTO Private	VIC	No				✓
Naturally Good Products	Commercial Business		No				
Neil Smith, Food Safety Auditor	Commercial Business		No				
Nestle	Commercial Business	National	No	✓	✓	✓	✓
New South Wales Wine Industry Association	Industry Association	NSW	Yes	✓			✓
Newskills Ltd	RTO Private	VIC	No			✓	✓
Nimbin Valley Dairy	Commercial Business	NSW	Yes			✓	✓
Noisette	Commercial Business	VIC	No		✓	✓	✓
Norco Co-Operative Limited	Commercial Business	NSW	Yes				✓
Notleys Bakery Automation Solutions	Commercial Business	NSW	Yes	✓			
Nova Pharmaceuticals	Commercial Business	NSW					
Novartis	Commercial Business	NSW					
Nowchem	Commercial Business	NSW					

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
NSW Treasury	State Government agency	NSW	No		✓		✓
NSW Wine Industry Association	Employer Organisation	NSW	Yes		✓		✓
Nutraregs Pty Ltd	Commercial Business		No				
Nutrition Australia	Industry Association	Multi State	No				✓
Nutrition Care Pharmaceuticals	Employer Organisation	VIC					
Oceania Dairy	Commercial Business	International	No				
Ochre Nation	Commercial Business		Yes				
Office of The Training and Skills Commission, Department for Innovation and Skills (SA)	State Government agency	SA	Yes	✓			✓
Oleapak Olive Oil Sales & Packaging	Commercial Business	SA	Yes				
OlivesInFact (Pty) Ltd	Commercial Business	Other	No				✓
OMIC Australia	Commercial Business	VIC	No				✓
One Harvest Pty Ltd	Commercial Business	QLD	Yes	✓			
Options Training Services / Stride Learning	RTO Private	NSW	No			✓	✓
Organic and Raw Trading Co.	Commercial Business	SA	Yes				
Orora Group	Commercial Business	VIC	No				✓
Osborne Richardson	Commercial Business	QLD	No				
Outback Bakery	Commercial Business	NT	Yes	✓			
Outback Chef	Commercial Business	VIC	Yes	✓	✓	✓	✓
Oz Tukka	Commercial Business	NSW	Yes				
Parexel BioTech	Commercial Business		No				
Parmalat Australia Pty Ltd	Commercial Business	National	Yes	✓			
Path4Food	Commercial Business	QLD	Yes	✓	✓	✓	✓
Patheon Biologics	Commercial Business	QLD	No				
Perfection Fresh	Commercial Business		No		✓		✓
PerkinElmer	Research Organisation		No				

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Pernod Ricard Pacific Holding Pty Ltd	Commercial Business	SA	Yes	✓	✓		✓
Perrigo Pharmaceuticals	Commercial Business	WA	Yes				
Pet Food Industry Association of Australia	Industry Association	National	Yes	✓	✓		✓
Peters Food Group Ltd	Commercial Business	VIC	No	✓			✓
Peters Ice Cream	Commercial Business	VIC	No				
Pfizer Australia Holdings Pty Ltd	Commercial Business	SA	Yes	✓	✓		✓
Pharma Cosmetics	Commercial Business	NSW					
Pharmaceutical Benefits Advisory Committee (PBAC)	Industry Association	National	Yes	✓	✓	✓	✓
Pharmaceutical Packaging Professionals	Commercial Business	VIC					
Pharmaceutical Plant Company	Commercial Business	VIC					
Phebra	Commercial Business	NSW					
Phillippa's Richmond	Commercial Business	VIC	No	✓	✓	✓	✓
Phoenix Life Sciences International	Commercial Business		No				✓
Pinewood River Pty Ltd	RTO private	VIC				✓	
Pinnacle Bakery & Integrated Ingredients	Commercial Business	NSW	Yes	✓			
Pirate Life Brewing	Commercial Business	SA	Yes				
Pivotal Training & Development Pty Ltd	RTO Private	NSW	No	✓	✓	✓	
PM Fresh	Commercial Business		No				
Pocket Herbs and Produce	Commercial Business	NSW	Yes	✓	✓	✓	✓
Portavin	Commercial Business	SA	Yes	✓	✓		✓
Powlett Hill	Commercial Business		Yes				
Poynton Associates Pty Ltd	Commercial Business	VIC	No		✓		✓
Prestige Foods	Commercial Business		No				
Primary Industries and Regions SA	State Government agency	SA	Yes				✓
Pro-Active Training and Assessments Pty Ltd	RTO private		No			✓	
Probiotec	Commercial Business	VIC					

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Propharma	Commercial Business	VIC					
PTI Pacific	Commercial Business	VIC	No				✓
Puratos Australia New Zealand	Commercial Business	NSW	No				✓
Pyengar Dairy	Commercial Business	TAS	Yes				
Quayle Milling	Commercial Business	NSW	Yes				
Queensland Alliance for Agriculture and Food Innovation (QAAFI)	Research Organisation	QLD	No				✓
Queensland College of Wine Tourism	RTO Private	QLD	No			✓	✓
Queensland Craft Brewing Strategy Working Group	Local Government	QLD	No				✓
Queensland Distillers Association	Industry Association	QLD	No				✓
Queensland Health	Federal Government	QLD	No		✓		✓
Queensland Sugar Ltd	Industry Association	QLD	No		✓		✓
Queensland Sugar Ltd	Industry Association	QLD	Yes	✓	✓		
Queensland Wine Industry Association	Industry Association	QLD	Yes		✓		✓
Quest Pharmaceuticals	Commercial Business	VIC					
Rainforest Bounty	Commercial Business	QLD	Yes	✓			✓
R-biopharm	Commercial Business	NSW	No				
Real Pet Food Company	Commercial Business	NSW	Yes				
Red Brick Road Cider	Commercial Business	TAS	Yes	✓	✓		✓
Redland City Council (QLD)	Local Government	QLD	No		✓	✓	✓
Regional Development Australia (RDA) Sydney	Industry Association	NSW	Yes	✓	✓	✓	✓
Restaurant and Catering Industry Association	Industry Association	SA	No				
Retail Food Group	Industry Association	QLD	Yes	✓			
Revel Brewing Co.	Commercial Business	QLD	No	✓	✓		✓
Ridley	Commercial Business	National	Yes	✓	✓		✓
River Murray Training	RTO private	SA	Yes	✓	✓	✓	✓
Riverina Wine Grapes Marketing Board	Industry Association	NSW	Yes	✓	✓		✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Riverina Winemakers Association	Industry Association	NSW	Yes		✓		✓
Roche Australia	Commercial Business	NSW					
Rocky Ridge Brewing Co	Commercial Business	WA	Yes				
Rookwood Brewing and Distilling	Commercial Business	NSW	Yes				
Rosborough Services Pty Ltd	RTO Private	QLD	Yes	✓	✓		✓
Rowe Scientific Pty. Ltd.	Commercial Business		No				
RVO Enterprises	Commercial Business	NSW	No				✓
RVO Enterprises	Commercial Business	NSW	Yes	✓			
Safe Food QLD	Local Government	QLD	No	✓	✓		✓
SAI Global	Employer Organisation		No		✓	✓	✓
Sandoz	Commercial Business	NSW	No		✓		
Sanitarium	Commercial Business	National	Yes	✓			✓
Sanofi-Aventis Australia Pty Ltd	Commercial Business	NSW	Yes	✓			
Sara Lee Group (Australia) Pty Ltd	Commercial Business	VIC	No				✓
Sarina Russo Institute	RTO public	QLD	Yes		✓	✓	
Scientific and Regulatory Solutions	Commercial Business	National	No				✓
SeerPharma	Commercial Business	VIC	No	✓	✓		✓
Sensory Solutions	Commercial Business		No				
Seqirus (CSL)	Commercial Business	VIC	No	✓	✓		✓
SGS Australia Pty Ltd	Commercial Business	VIC	No		✓		✓
Shaw River Buffalo Cheese	Commercial Business	VIC	Yes				✓
Sherlock Food Allergen Risk Management Pty Ltd	Commercial Business	QLD	No	✓	✓		✓
Sherwood Institute of Australia	RTO Private	VIC		✓		✓	✓
Shimadzu Australasia	Commercial Business		No				
Siebel Institute of Technology	Commercial Business	Other	No		✓		
Sigma Healthcare	Commercial Business	VIC					
SILK Education and Training	RTO Private	VIC	Yes	✓		✓	

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Simplot Australia Pty Ltd	Commercial Business	National	Yes	✓	✓		✓
Sirromet Wines	Commercial Business		Yes		✓		✓
Six String Brewing Company	Commercial Business	NSW	Yes				✓
SixTwelve Brewing	Commercial Business		Yes				
Skills Tasmania	State Government agency	TAS	Yes	✓	✓		✓
Smiling Samoyed Brewery	Employer Organisation	SA	Yes				✓
Snack Brands Australia	Commercial Business		No				
Somerville Egg Farm	Commercial Business	VIC	Yes				
Sonic Food and Water Testing	Commercial Business	NSW	Yes				✓
South Australian Dairyfarmers Association (SADA)	Industry Association	SA	Yes	✓	✓	✓	✓
South Australian Wine Industry Association Inc	Industry Association	SA	Yes	✓	✓	✓	✓
South Metropolitan TAFE	RTO Public	WA	Yes	✓	✓	✓	✓
South Regional Tafe	RTO Public	WA	Yes			✓	
South West TAFE	RTO Public	VIC	Yes	✓	✓	✓	✓
Southern Bay Brewery	Commercial Business	VIC	No	✓			✓
Soy Products	Commercial Business		No				
Sparkke Brewery	Commercial Business	SA	Yes	✓			✓
SPC Ardmona	Commercial Business	VIC	Yes	✓	✓		✓
Sphere Healthcare	Commercial Business	NSW					
Spotless	Commercial Business	National	No				✓
Stahmann Farms	Commercial Business	QLD	No				✓
Starward Distillery and Bar	Commercial Business	VIC	No	✓			✓
Staves Brewery	Commercial Business		Yes				
Steggall Nutrition	Commercial Business		No				
Steinys Traditional Mettwurst	Commercial Business	SA	Yes	✓	✓		✓
Steinys Traditional Mettwurst	Commercial Business	SA	Yes	✓	✓		✓
Stirling Institute of Australia Pty Ltd	RTO Private	VIC	No			✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Stock Feed Manufacturers' Council of Australia	Industry Association	National	Yes	✓	✓	✓	✓
Strategix Training Group Pty Ltd	RTO Private	QLD	No			✓	✓
Sugar Research Institute	Industry Association	National	Yes				✓
Sugar Terminals Ltd	Industry Association	QLD	No				✓
Sugar Terminals Ltd	Industry Association	QLD	Yes	✓			
Sullivan's Cove Distillery	Commercial Business	TAS	Yes	✓	✓		✓
Summerfruit Australia Ltd	Commercial Business	NSW	Yes	✓			
Sunraysia Institute of TAFE (SuniTAFE)	RTO Public	VIC	Yes	✓	✓	✓	✓
SunRice	Commercial Business	NSW	Yes	✓	✓		✓
Sunshine College of Management Pty Ltd	Commercial Business	VIC	Yes	✓			
Sunshine Sugar	Commercial Business	NSW	Yes				✓
Supply Chain Squared	Commercial Business	VIC	No				✓
Suprema Bakeries	Commercial Business	NSW	No	✓	✓	✓	✓
Suraj Continental Flour Mill	Commercial Business		No				
Sureway Skills Training	RTO private	NSW	No			✓	
Susan Day Cakes	Commercial Business	VIC	Yes				✓
Sutton Grange Organic Farm	Commercial Business	VIC	Yes	✓	✓	✓	✓
Symbio Laboratories	Commercial Business		No				
Symons Organic Dairy	Commercial Business	VIC	Yes				
Sypharma	Commercial Business	VIC	No	✓			
Syrinx Pharmaceuticals	Commercial Business	VIC					
TAFE NSW	RTO Public	NSW	No	✓	✓		✓
TAFE NSW - Hunter Institute	RTO public	NSW	Yes			✓	
TAFE NSW - Western Sydney Institute	RTO public	NSW	No			✓	
TAFE Queensland	RTO Public	QLD	No	✓	✓	✓	✓
TAFE Queensland East Coast	Federal Government	QLD	Yes	✓	✓	✓	✓
TAFE Queensland North	RTO public	QLD	Yes	✓	✓	✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
TAFE Queensland Skills Tech	Federal Government	QLD	No	✓	✓		✓
TAFE SA	RTO Public	SA	Yes	✓	✓	✓	✓
TAFE SA Regency Campus Brewery	RTO public	SA	Yes			✓	
Takeda	Commercial Business	NSW					
Taltarni	Commercial Business	SA	Yes	✓			✓
Tamar Valley Dairy	Commercial Business	TAS	Yes				
Tarac Technologies	Commercial Business	SA	Yes				
Tarn Food Consulting	Commercial Business	National	No	✓	✓	✓	✓
Tasmania Alkaloids	Commercial Business	TAS	Yes		✓		✓
Tasmanian Botanics	Research Organisation	TAS	Yes				
Tasmanian Flour Mills	Commercial Business	TAS	Yes				
Tasmanian Minerals, Manufacturing and Energy Council	Employer Organisation	TAS	Yes		✓		✓
Tasmanian Stockfeed Services	Commercial Business	TAS	Yes				
Tasmanian Whisky and Spirits Association	Industry Association	TAS	Yes				
Tasmanian Whisky Producers Association	Industry Association	TAS	Yes				
TasTAFE	RTO public	TAS	Yes	✓	✓	✓	✓
Tatura Milk Industries Ltd	Commercial Business	VIC	Yes	✓			✓
Tauondi Aboriginal College	RTO Private	SA	Yes			✓	✓
Technical and Further Education Commission (NSW TAFE)	RTO public	NSW	No			✓	
TEC-NQ	Commercial Business	QLD	No				
Telstra Health	Commercial Business		Yes				
Temptation Bakeries	Commercial Business		No		✓		
Teva Pharma Australia	Commercial Business	NSW					
TexSkill Ltd	RTO Private	VIC	No			✓	✓
The Allergen Bureau	Industry Association	National	Yes	✓	✓		✓
The Australian Industry Group (AI Group)	Industry Association	VIC	Yes	✓	✓		✓
The Australian Superfood Co	Commercial Business	VIC	No	✓	✓	✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
The Crafty Pint	Commercial Business	National	Yes	✓	✓		✓
The Drinks Association	Industry Association	National	Yes	✓	✓		✓
The Examiner - Launceston	Commercial Business	TAS	Yes		✓		✓
The Fermentary	Commercial Business	VIC	Yes				
The Gin Joint	Commercial Business	VIC	No	✓	✓		
The Institute of Beer	Commercial Business		Yes				
The Learning Collaborative Pty Ltd	RTO private	Multi state	No			✓	
The Malka Group Pty Ltd	RTO Private	VIC	No	✓		✓	✓
The Oven Door Bakery	Commercial Business	WA	Yes				✓
The Pharmacy Guild of Australia	Industry Association	National	No				✓
The Pharmacy Guild of Australia	Industry Association	National	Yes	✓			
The Shiraz Republic	Commercial Business	VIC	Yes	✓	✓		✓
The Source Bulk Foods	Commercial Business		Yes				
The Tassie Beer Dr.	Commercial Business	TAS	Yes	✓			✓
The Van Diemen Project	Commercial Business	TAS	Yes				
The Yield	Commercial Business		No				
Therapeutic Goods Administration	Regulator	National	Yes	✓	✓		✓
Therapeutic Goods Administration	Regulator	ACT	No	✓	✓		✓
Therapeutic Innovation Australia (TIA)	Commercial Business		No				
Think Perform Pty Ltd	Federal Government	VIC		✓			
Timboon Railway Shed Distillery	Commercial Business	VIC	Yes	✓	✓		✓
Time Education and Training	RTO private	SA	Yes			✓	
Tip Top Bakeries	Commercial Business	Multi state	No				
TLC Training Solutions	RTO private	QLD	No			✓	
Tr4in Right	RTO Private	VIC	No			✓	✓
Train N Trade	RTO Private	VIC	No			✓	✓
Training Practical Solutions Consultancy Pty Ltd	RTO Private	VIC	No		✓	✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Training Solutions For Life Pty Ltd	RTO private					✓	
Training Synergies Pty Ltd	RTO Private	VIC	No			✓	✓
Training Unlimited	RTO Private	WA	Yes	✓		✓	
Treasury Wine Estates Ltd	Commercial Business	SA	Yes	✓	✓		✓
Treetops Plantation	Commercial Business	VIC	No				
Tribe Breweries	Commercial Business	NSW	No				
Trisco Foods	Commercial Business	QLD	Yes	✓	✓		✓
Tropico Fruits	Commercial Business	QLD	Yes				✓
Troy Laboratories	Commercial Business	NSW					
Tru Blu Beverages	Commercial Business	NSW	Yes				✓
True Foods	Commercial Business	VIC	Yes	✓	✓		✓
Tuerong Farm	Commercial Business	VIC	Yes				
Tullawong State High School	RTO public	QLD	Yes			✓	
Uncle Bobs Bakery	Commercial Business	QLD	Yes	✓	✓	✓	✓
UniGrain Pty Ltd	Commercial Business		Yes				
Unilever Australia (Holdings) Proprietary Limited	Commercial Business	National	Yes	✓			
United Transport Solutions	RTO Private	NSW	Yes	✓		✓	
United Voice	Union	National	Yes	✓	✓		✓
United Workers Union	Union	VIC	No	✓	✓		✓
University of Southern Queensland (USQ)	Industry Association	QLD	Yes	✓	✓		✓
University of Technology Sydney	University	NSW					
V2Food	Commercial Business	NSW	No		✓		
Van Dieman Brewing	Commercial Business	TAS	Yes	✓	✓		✓
Van Dieman Project	Commercial Business	TAS	Yes				
Van Styn Ventures	Commercial Business		No				
Vaxxas	Commercial Business	QLD	No	✓	✓		✓
VERTO Ltd	RTO public	NSW				✓	
Vifor Pharma	Commercial Business	VIC					
Virbac Australia Pty Ltd	Commercial Business	NSW	Yes	✓	✓		✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Visy Industries	Commercial Business	VIC					
Vitex Pharmaceuticals	Commercial Business	NSW					
Viticulture Society of the Canberra District	Industry Association	ACT	Yes		✓		✓
VOCA	RTO public	VIC	No			✓	
W & P Reedy	Commercial Business	NSW	No				
Wailes & Associates	Commercial Business	VIC	No				✓
Warburn Estate	Commercial Business	NSW	Yes		✓		✓
Warragamba Flour Mills	Commercial Business	NSW	Yes				
Warrnambool Cheese and Butter	Commercial Business	VIC	Yes	✓	✓		✓
Webster	Commercial Business	NSW		✓	✓		
Weis Frozen Foods	Commercial Business	QLD	Yes	✓	✓		
Well and Good	Commercial Business	VIC	No				
Western Australian Aviation College	RTO private	WA	Yes			✓	
Westmead Children's Hospital	Commercial Business	NSW	No	✓	✓		
Wicked Cheese	Commercial Business	TAS	Yes				
William Angliss Institute	RTO public	VIC	No	✓	✓	✓	✓
Wilmar Sugar Mills	Commercial Business	QLD	Yes	✓	✓	✓	✓
Windsor and Williams Pty Ltd	RTO private	VIC	No			✓	
Wine Australia Corporation	Industry Association	SA	Yes	✓	✓		✓
Wine Grape & Olive Oil Growers Australia	Commercial Business		Yes		✓		✓
Wine Grape Council of South Australia	Industry Association	SA	Yes	✓	✓		✓
Wine Grape Growers Australia	Industry Association	SA	Yes	✓	✓		✓
Wine Grapes Marketing Board	Industry Association	NSW	Yes	✓	✓		✓
Wine Tasmania	Industry Association	TAS	Yes	✓	✓		✓
Wine Victoria	Industry Association	VIC	Yes	✓	✓		✓
Winemakers' Federation of Australia	Industry Association	National	Yes	✓	✓		✓
Wines of WA	Industry Association	WA	Yes	✓	✓		✓
Wiseman Institute of Applied Learning	RTO Private	VIC	No			✓	✓

Entity Name	Sector	State	Rural/ regional/ remote	Ongoing engagement	Industry Intelligence	Promotion of VET	Networks & Partnerships
Wiseman Institute Pty Ltd	RTO private	NSW				✓	
Wodonga TAFE	RTO Public	VIC	Yes	✓	✓	✓	✓
Wolf Blass	Commercial Business	SA	Yes				
Woods Organic Farm and Flour Mill	Commercial Business		Yes				
Woolworths	Commercial Business	National	Yes	✓	✓		
Woolworths Group Limited	Commercial Business	NSW	Yes		✓		✓
Work & Training Limited	RTO Private	TAS	Yes	✓		✓	
Workout Meals	Commercial Business		No				
Workplace Training Strategies	RTO Private	VIC	No	✓	✓	✓	✓
WR & D Wells	Commercial Business		No				
Write Design Solutions Pty Ltd	Commercial Business		No				
Yadhaa Connect	Research Organisation	NSW	Yes				
Yalumba Wine Company	Commercial Business	SA	Yes	✓	✓		✓
Yanchep Beach Joint Venture	Commercial Business	WA	Yes				
Yarra Valley Wine Growers Association	Industry Association	VIC	No				
Young Henry's Brewing Company	Commercial Business	NSW	No				
Zoetis	Commercial Business	VIC	No	✓	✓		

IRC Sign-Off

This IRC Skills Forecast and Proposed Schedule of Work Annual Update was agreed as the result of a properly constituted IRC decision.

Signed for and on behalf of the two Industry Reference Committees by their appointed Chairs:

Food, Beverage and Pharmaceutical IRC



Fiona Fleming

Date: 28 April 2021

Pharmaceutical Manufacturing IRC



Paul MacLeman

Date: 28 April 2021

Section C: Proposed New Work

2020–2021 Project Details

Project 1: Indigenous Food Skills

Description

Indigenous food is a rapidly expanding sector in both local and global markets. Given that only a small proportion of native foods have received food safety certification so far, there is plenty of room for further growth. New job roles are emerging, requiring specific skills for working in Aboriginal communities and remote locations, harvesting and processing wild food, and exporting products according to strict regulations.

The Case for Change

Rationale for change

This Case for Change proposes the creation of a qualification specialisation or skill set to describe the skills necessary for working in the burgeoning Australian indigenous bush foods industry.

What has changed

There is growing demand from domestic and international consumers for products made with native ingredients due to their nutritional value and 'storied' provenance. New businesses are opening across Australia, particularly in rural, regional and remote (RRR) areas, to supply indigenous food products to nurseries, retailers, wholesalers, restaurants and food, beverage and cosmetics manufacturers. This has seen the value of the industry rise from \$5 million in 2005 to \$81.5 million in 2020⁴³. Industry expansion is likely to continue given that only 18 out of 6,400 varieties of native foods have so far received food safety certification for commercial production⁴⁴.

The indigenous food industry in Australia has grown from \$5 million to \$81.5 million in 15 years. (Laurie, 2020)

New job roles in the native foods industry require specific skills for working with and in Aboriginal and remote communities, wild food harvesting and processing, and exporting 'exotic' products with strict food safety regulations. While many native food production skills are articulated in existing units of competency, their proposed packaging is a strategy to support job creation in an emergent industry. This will allow graduates from across multiple training package sectors (FBP, AHC, SIT, MEM, AMP and BSB) to upskill for work in the industry and establish businesses that sustainably produce and sell bush food.

Implications of not making this change

Agriutures describes a lack of training opportunities as indicative of the general under-capitalisation that prevents the industry from scaling up production and commercialising new varieties, leaving businesses unable to meet customer demand or enter new markets. Currently, industry employees learn on the job, through informal short courses or through non-dedicated VET qualifications, e.g. *Certificate III in Food Processing*. The absence of a focussed training package product for equipping workers with the comprehensive skills needed is an impediment to the growing professionalisation and capacity of the industry.

⁴³ Laurie, S. (2020); *Australian native foods and botanicals – 2019/20 market study*, ANFAB; p.6

⁴⁴ <https://www.abc.net.au/news/2019-11-17/native-bush-foods-australian-bush-tucker-going-global/11658008>

This absence puts the indigenous food industry at risk of being under-prepared for complying with domestic and international regulations associated with food safety, transport and biosecurity; of developing formal governance and business structures; of establishing efficient and sustainable ways to grow and harvest crops; of inconsistent and unreliable plant material (yield variability, attrition rates, etc.); of low economic returns to businesses due to high production costs and limited markets; of poor product development and marketing; of undermining the social, cultural and economic significance of native foods to Indigenous communities; of not valuing the participation of Indigenous Australians, who, according to Ninti One, are under-represented in an industry reliant upon the plants and knowledge of which they are owners and custodians⁴⁵.

Evidence for change

Evidence of industry growth, new businesses and raised investment levels

There is clearly a growing appetite – and market – for indigenous foods. Specific employment data is unavailable due to the recent emergence of the industry; however, there are many examples of organisations, communities and entrepreneurs embracing bush foods for their social and economic potential, evidence for which is covered in research and national media, and confirmed by educators, small businesses and key industry associations engaged by Skills Impact.

- Research by ANFAB and University of Sydney values the industry at \$81.5m and forecasts it to reach \$160m by 2025 due to exponential growth in global and local demand for products such as Davidson plum, production levels for which have increased six-fold since 2011⁴⁶.
- 87% of indigenous food businesses project that they will expand over the next five years, with 37% aiming to be more than twice their current size⁴⁷.
- Approximately 38% of indigenous food businesses currently export products⁴⁸.
- World-renowned restaurants such as Attica in Melbourne, Orana in Adelaide (owned by MasterChef judge Jock Zonfrillo), and Quay in Sydney are promoting native ingredients within their menus.
- Multi-national companies are embracing indigenous foods, with Peter's Ice Cream launching an Australian native collection of the Connoisseur range⁴⁹.
- Two bush fruit-infused drinks won bronze medals at the San Francisco World Spirits competition⁵⁰.
- Demand for native foods has led foragers to begin large-scale greenhouse cultivation⁵¹.
- A native food grower in South Australia's Riverland is tripling production volumes to keep up with demand⁵².
- Enngonia, in far western New South Wales, harvests bush tomatoes, munyeroo and marsdenia. The community is expanding its production of such 'superfoods', providing much-needed employment and empowerment in this remote area⁵³.
- Strong demand for bush food is helping to curb Indigenous unemployment in WA's South West⁵⁴.
- Horticulture courses and short introductory courses that address skills for producing and processing bush foods are popular across the country with ongoing enrolments and demand for further training.

This project meets the requirements as routine priority for training product development.

⁴⁵ Woodward, E., Jarvis D. and Maclean K (2019); *The Traditional Owner-led bush products sector: An Overview*; CSIRO, Australia; p.37

⁴⁶ Laurie, S. (2020); *Australian native foods and botanicals – 2019/20 market study*; ANFAB

⁴⁷ Laurie, S. (2020); *Australian native foods and botanicals – 2019/20 market study*; ANFAB; p.7

⁴⁸ Laurie, S. (2020); *Australian native foods and botanicals – 2019/20 market study*; ANFAB; p.8

⁴⁹ <https://www.connoisseuricecream.com.au/the-story/>

⁵⁰ <https://www.abc.net.au/news/2020-05-30/native-australian-fruits-to-create-national-spirit/12299478>

⁵¹ <https://www.abc.net.au/news/rural/2019-08-05/native-bush-food-greenhouse-research-nutrition/11191090>

⁵² <https://www.abc.net.au/news/2019-05-22/supply-of-indigenous-foods-not-meeting-demand-pub-wed-am/11131048>

⁵³ <https://www.abc.net.au/news/2018-06-15/native-bush-food-helping-remote-nsw-community-thrive/9870698>

⁵⁴ <https://www.abc.net.au/news/2020-11-22/bush-food-demand-helps-curb-indigenous-unemployment/12896372>

Support for industry growth

There is significant support for the development of Indigenous-led bush products enterprises, including from social ventures, Indigenous-led research entities, Aboriginal Corporations and Land Councils, and entrepreneurs and businesses willing to act in mentoring roles. For example, Australian Native Foods and Botanicals (ANFAB), the peak national body representing the sector, support industry growth by facilitating ethical engagement with Traditional Owners, developing market access for native foods, and identifying opportunities for new primary production. Also, the not-for-profit Orana Foundation (whose partners include Lipman Karas law firm), which aims to 'revolutionise Australian food culture through combining the preservation of Indigenous knowledge and practice with contemporary methods and innovation', assists 'Indigenous communities by stimulating Indigenous enterprise through supporting communities to research, document, commercialise and promote native Australian foods'⁵⁵. The South Australian Government provided the foundation with a \$1.25m grant to establish a native food database (which will help protect Indigenous Knowledge IP) and cultivation projects, including a community packing shed on the Dampier Peninsula in WA, which acts as a 'harvesting enterprise hub' for collecting and storing bush foods⁵⁶.

There are also prominent federal government policies, strategies and business support mechanisms, such as Closing The Gap, the Indigenous Advancement Strategy and Indigenous Business Australia, that encourage the uptake of education as a means of supporting Indigenous entrepreneurship and employment growth. The Federal government strategy for developing northern Australia, guided by the White Paper *Our North, Our Future*⁵⁷, includes objectives for working with Indigenous communities to harness natural assets and create educational, job creation and economic development opportunities for Indigenous people. State-based initiatives have also supported the expansion of Indigenous-led bush products enterprises; for example, WA's Department of Primary Industries and Regional Development commissioned the project 'Dedicated supply chains for Noongar branded food products', which highlights promising business opportunities for Noongar produce, particularly in premium food markets⁵⁸.

Consideration of existing products

The proposed training package products (skill set or qualification specialisation) will consider the collation of existing units from several Training Packages which can be delivered to industry entrants new to VET or as an upskilling opportunity for graduates of related qualifications. Gaps identified will be addressed through the development of new units of competency. This is expected to be two or three units, at most. During stakeholder consultation, units suggested for consideration in the qualification specialisation or skill set could be sourced from any of the following training packages:

- AHC Agriculture, Horticulture and Conservation and Land Management Training Package
- AMP Australian Meat Processing Training Package
- FBP Food, Beverage and Pharmaceutical Training Package
- MEM Metal and Engineering Training Package
- SIT Tourism, Travel and Hospitality Training Package

Note: many of the units that have been suggested to date will be reviewed for suitability but the proposed Training Package product may be a qualification specialisation or skill set containing no more than eight individual units.

⁵⁵ Blackwell, B.D., Bodle, K., Hunt, J., Hunter, B., Stratton, J. and Woods, K. (2019); *Methods for Estimating the Market Value of Indigenous Knowledge*; report commissioned by IP Australia, Canberra; p.52

⁵⁶ <https://www.theaustralian.com.au/nation/master-chef-jock-zonfrillo-in-a-stew-over-bushfood-charity-the-orana-foundation/news-story/66d26a38748b8ae6af04aecabc7f3f3f>

⁵⁷ Australian Government (2015); *Our North, Our Future: White Paper on Developing Northern Australia*

⁵⁸ <https://www.agric.wa.gov.au/dedicated-supply-chains-noongar-branded-food-products>

Approach to Streamlining and Rationalisation of the Training Products Being Reviewed

This project recommends creating only two or three new units to address identified skills gaps and packaging existing products that can be contextualised for delivery and assessment relevant to the emerging bush foods industry. Hence, the proposed Training Package product will recognise and support the distinctiveness of this industry's job roles but is not inconsistent with streamlining and rationalisation objectives.

Stakeholder Consultation

Stakeholder consultation undertaken in the development of Case for Change

In addition to identifying stakeholders through desktop research, the IRC recommended industry specialists to be consulted during the development of this Case for Change. Existing contacts of IRC members were approached first, and those individuals facilitated introductions to other interested parties (a 'snowballing' sampling method), such as industry organisations, special interest groups, independent and university research centres, training providers and members of Indigenous communities and organisations involved in the production and marketing of native foods. Several of these groups have expressed support for the proposed qualification specialisation or skill set and have registered their interest in contributing to further consultation activities.

Because of the social, cultural and economic significance of bush foods for Aboriginal and remote communities, and the under-representation of Indigenous people in the existing industry workforce, special efforts have been made to contact and involve Indigenous Australians. This project will actively seek consultation with Aboriginal communities, organisations and individuals, and will ensure adherence to guidelines for ethical engagement and consultation. This includes stakeholders being provided with opportunities to guide the project, express concerns and to share in the benefits of developing the bush foods industry.

Evidence of Industry Support

Industry support for the proposed qualification specialisation or skill set was elicited through extensive email and telephone contact with a wide range of stakeholders, many of whom have stated their support for this project and willingness to contribute further.

Proposed Stakeholder Consultation Strategy for Project

IRC members and Skills Impact will continue to identify and target stakeholders for participation through existing and new networks. Gatekeepers of organisations, enterprises and training providers will also be identified so that they may assist with promoting the opportunity to contribute, perhaps through internal and external media such as intranet portals and newsletters.

During COVID-19 restrictions, consultation will be limited to telephone, email and teleconference contact. Every effort will be taken to reach those in RRR areas where there may be poor connectivity. If and when appropriate, face-to-face consultation will be arranged with Aboriginal stakeholders (and others).

Representatives from small, medium and large bush foods enterprises, along with representatives from training organisations and Indigenous communities will form a Subject Matter Expert Working Group. Draft materials will be presented for public consultation and promoted by the IRC, Skills Impact and interested parties. Stakeholders will be invited to contribute feedback before the final draft is presented for validation.

Licensing or Regulatory Linkages

Food Safety regulations covering the learner's jurisdiction will be addressed within a unit selected for inclusion in the qualification specialisation or skill set and will not need to be addressed separately.

Project Implementation

Prioritisation Category

It is proposed that this product development is progressed as a *routine project*. While there is a clear need for the formalisation and professionalisation of skills for this industry's workforce, this is partially being met through a range of non-accredited, informal and ad-hoc training methods. The proposed qualification specialisation or skill set will facilitate greater industry recognition and comprehensive skills development; however, this is neither urgent nor complex.

Project Milestones

Months	Activity
1-3	Project planning and briefing, identification of experts and consultation with IRCs
4-5	Workshops with subject matter experts including research and workforce functional analysis
6-8	Public Consultation National public consultation of draft qualifications, skill sets and units (Including national workshops)
9	Review of public consultation and Equity Review
10-11	National public validation of final draft qualifications, skill sets and units
12	Approval of Case for Endorsement to IRCs and submission to AISC

Summary of Components

Component	To be reviewed	To be updated	To be deleted	To be created
Units				Up to 3
Qualifications	3	Up to 3		
Skill Sets				Up to 1

Delivery or Implementation Issues

RTOs may experience delivery issues when servicing thin markets with dispersed clientele, especially in RRR locations. Recognising this, and given the nature of the industry and its significance to Aboriginal communities, RTO/industry partnerships are likely to be important for promoting the proposed qualification specialisation or skill set and encouraging enrolments.

Implementing the Skills Minister's Priority Reforms for Training Packages (2015 and October 2020)

The training system better supports individuals to move more easily between related occupations

Combining units from several Training Packages to address skills that are traditionally categorised within separate industries, this qualification specialisation or skill set will facilitate the upskilling and transfer of graduates and workers from within food processing, horticulture, hospitality or other related industries to work in a variety of roles within the indigenous foods industry. This will enable transferability of qualifications and skills into related jobs and will facilitate the movement of individuals into new, expanding job markets.

Improved efficiency of the training system through units that can be owned and used by multiple industry sectors

The proposed qualification specialisation or skill set could be used by people in and for multiple industries to increase the employability of graduates of qualifications relating to agriculture, horticulture, food and beverage processing and manufacture, hospitality, cookery and catering operations, packaging, marketing and business administration.

Foster greater recognition of skill sets

This project proposes a skill set that already has the support of numerous stakeholders in the indigenous food industry. This will increase the recognition of skill sets in general, as well as promote the value and relevance of Skill Sets as upskilling opportunities for the existing workforce, for graduates of other programs and of individuals with no prior VET experience. In particular, this skill set will create greater recognition within Australian Aboriginal communities through prioritising consultation activities within these communities.

More information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed choices

The development of this qualification specialisation or skill set and selection of units will provide future guidance to the industry and to training providers about the skills required to work within this industry. This will assist the industry and those supporting the development of skills to target efforts and funding to ensure nationally agreed, transferable and relevant training and skills development.

This Case for Change was agreed to by the Food, Beverage and Pharmaceutical IRC

Name of Chair
Signature of Chair

Fiona Fleming

27 April 2021

Date

Project 2: Pharmaceutical Good Manufacturing Practice

Description

Good manufacturing practice (GMP) systems are used by the pharmaceutical manufacturing industry to ensure that products are consistently produced and controlled according to quality standards. Three Pharmaceutical Manufacturing qualifications currently contain GMP units that industry recommends are reviewed and updated so that appropriate training in these critical practices can be accessed, as well as ensuring that each unit aligns with its designated Australian Qualifications Framework (AQF) level. In addition, business units within the Certificates III and IV in Pharmaceutical Manufacturing have been superseded and should be replaced with the current versions so that training delivery reflects current practices.

The Case for Change

Rationale for change

With the advent of COVID-19, Australian Federal and State Governments have increased investment and support of domestic pharmaceutical manufacturing on an unprecedented scale as they look to develop sovereign capability and realise the lucrative potential of servicing Pacific Markets. This Case for Change is to ensure existing units of competency comprehensively cover Good Manufacturing Practice (GMP) compliance across all work processes. GMP describes a set of principles and procedures that, when followed, ensures pharmaceutical and bioprocessed products meet high quality standards. Australian pharmaceutical manufacturers are required to hold a production licence, which can only be obtained with evidence of maintaining compliance with relevant GMP codes. Australia's strategy for pharmaceutical manufacturing expansion, therefore, depends on fit-for-purpose training and resources for upskilling the growing workforce.

The Pharmaceutical Manufacturing IRC proposes to review, update and rewrite four units of competency that appear across the *Certificates II, III and IV in Pharmaceutical Manufacturing*. This will include realigning the *FBPPHM3001- Apply Good Manufacturing Practice* requirements so that its required knowledge is more appropriate to the AQF level III qualification in which it appears (at present it is excessively complex and detailed). The Certificates III and IV will also be updated because they contain core units from the *BSB Training Package* that are superseded (one in the III, two in the IV). By reviewing these units and qualifications (including BSB unit supersessions), the suite of Pharmaceutical Manufacturing qualifications will be updated to the satisfaction of this critical industry all in one new release of the training package.

Implications of not making the change

If the four GMP-related units are not reviewed, compliance and validation of critical tasks will potentially be overlooked in training and assessment and, therefore, pharmaceutical manufacturing businesses may not have sufficiently skilled employees as a foundation for industry growth. GMP validation ensures that processes are completely reproducible in manufacturing settings in order for any new products to be deemed safe and ready to enter the market. GMP validation also entails verifying that the staff involved in the manufacturing process are appropriately trained and that any new equipment is adequately tested – if GMP is not guaranteed, it can compromise entire operations. Not proceeding with the proposed project will risk gaps in GMP learning and misalignments between units and their designated AQF level, with potential issues for RTOs' learner retention due to inappropriate training complexity.

Evidence for change

Due to the huge growth in domestic support and funding for Pharmaceutical Manufacturing during COVID-19, the industry has shown a much higher than average annual employment growth rate for prominent occupations such as 'Other Machine Operators' (12.5% compared to the average, 8.3%)⁵⁹. The National Skills Commission defines this occupation as one of the most resilient in the Australian economy⁶⁰. IBISWorld, meanwhile, projects the number of industry enterprises will rise from 452 in 2020-21 to 500 in 2025-26, suggesting that there will be great demand for skilled workers who are competent in GMP-related processes⁶¹.

Consideration of existing products

During recent training package development for bioprocessing skills and the FBPSS00051 Pharmaceutical Manufacturing Operator Induction Skill Set, Subject Matter Experts noted that the task of validating pharmaceutical manufacture processes with consideration of GMP is increasingly critical. Following consultation with relevant industry experts and training providers, the Pharmaceutical Manufacturing IRC determined that four units and three qualifications need to be upgraded to better reflect the needs of industry, now and into the future. Modifications likely to be proposed after full industry consultation will constitute major changes to all three qualifications.

Approach to Streamlining and Rationalisation of the Training Products Being Reviewed

Rather than proposing to develop new units of competency or a qualification, this project will review existing products that can be modified to better meet the needs of the burgeoning pharmaceutical manufacturing industry. As these products are reviewed, streamlining and rationalisation objectives will be taken into account.

Stakeholder Consultation

Stakeholder consultation undertaken in the development of Case for Change

IRC members reviewed the proposed training package development work and have confirmed their support for modifying the four units. Further consultations were held with SMEs who were involved in reviewing the Pharmaceutical Manufacturing qualifications several years ago, plus those who engaged in projects for Pharmaceutical BioProcessing and the recent *FBPSS00051 Pharmaceutical Manufacturing Operator Induction Skill Set*. Further industry stakeholders were identified through desktop research and recommendations from the IRC, including from public and private training providers and representatives of large and small pharmaceutical manufacturers.

Evidence of Industry Support

Industry support for the proposed changes to these units was elicited through email and telephone contact with stakeholders, including representatives of RTOs, manufacturers and IRC members. These stakeholders have stated their support for this project and willingness to contribute further.

Proposed Stakeholder Consultation Strategy for Project

IRC members and Skills Impact will continue to identify and target stakeholders for participation through existing and new networks. Gatekeepers of organisations, enterprises and training providers will also be identified so that they may assist with promoting the opportunity to contribute, perhaps through internal and external media such as intranet portals and newsletters. During COVID-19 restrictions, consultation will be limited to telephone, email and teleconference contact.

⁵⁹ Australian Government Department of Education, Skills and Employment (2020); *Prioritisation Framework*

⁶⁰ National Skills Commission (2021); *Occupation Resilience Framework, August 2020 quarter*

⁶¹ IBISWorld (2020); *C1841 Pharmaceutical Product Manufacturing in Australia Industry Report*

Licencing or Regulatory Linkages

- Australian pharmaceutical manufacturers are required to hold a licence to manufacture, which can only be obtained with evidence of maintaining compliance with relevant GMP codes.
- The GMP-related units proposed for review reference other regulatory requirements, including Therapeutic Goods Regulations, the Therapeutic Goods Act, National Medicines Policy, Manufacturing Principles and Therapeutic Goods Orders. In reviewing the highlighted units these regulatory linkages will be revised and updated if necessary.

Project Implementation

Prioritisation Category

- FBP20418 - Certificate II in Pharmaceutical Manufacturing is categorised as 'Flagged for deletion'
- FBP30821 - Certificate III in Pharmaceutical Manufacturing is categorised as 'Monitor'
- FBP40518 - Certificate IV in Pharmaceutical Manufacturing is categorised as 'Flagged for deletion'

The Pharmaceutical Manufacturing qualifications have all been updated within the last three years. RTOs have expressed interest in placing the training on scope and this work is continuing. There is an expectation that enrolments will occur during 2021.

It is proposed that this product development is progressed as a *fast-track project* with a maximum period of eight months.

Project Milestones

Months	Activity
1	Project planning and briefing, identification of experts and consultation with IRCs
2-3	Workshops with subject matter experts including research and workforce functional analysis
4	Development of draft documents in preparation for public consultation
5	Public Consultation (including national workshops)
6	Review of public consultation and Equity Review
7	Validation and Quality Assurance, final consultation for STA
8	Approval of Case for endorsement to IRCs and submission to AISC

Summary of Components

Component	To be reviewed	To be updated	To be deleted	To be created
Units	4	Up to 4		
Qualifications	3	Up to 3		
Skill Sets	1	Up to 1		Up to 1

Delivery or Implementation Issues

None identified.

Implementing the Skills Minister's Priority Reforms for Training Packages (2015 and October 2020)

More information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed choices

Reviewing and updating the units and qualifications proposed in this project will ensure that learners, training providers and the industry have a shared understanding of the skills and knowledge required of Good Manufacturing Practice compliance and validation processes. The required skills will be unambiguously described in these units, and there will be better alignment with the Australian Qualifications Framework so that industry's expectations of graduates is clarified.

Ensure the training system better supports individuals to move more easily between related occupations

By ensuring graduates are fully competent in up-to-date GMP requirements, it allows them to develop their professionalism with greater confidence and authority, thus nurturing their potential for utilising transferable skills, such as planning, validating and checking complex procedures, across occupations.

Improve the efficiency of the training system by creating units that can be owned and used by multiple industry sectors

Good Manufacturing Practice units can potentially be utilised by multiple industry sectors due to their being reflective of the Pharmaceutical Manufacturing industry's emphasis on compliance, validation, and exactly replicating processes and products in controlled environments.

Foster greater recognition of skill sets and work with industry to support their implementation

A GMP Skill Set may be considered during this project in order to introduce new entrants to the industry and upskill existing workers on the latest compliance and validating requirements.

This Case for Change was agreed to by the Pharmaceutical Manufacturing IRC

Name of Chair
Signature of Chair

Paul MacLeman



Date

28 April 2021

Project 3: Sugar Milling

Description

Sugar milling qualifications are widely used in sugar mills to develop training and define skills requirements for various roles, but are not formally delivered or assessed by any RTO. Recently, various industry skills standards have changed because of technological advancements and the adoption of practices from other industries. This proposed project is to review current sugar milling qualifications and redesign training options to reflect the skills shared across industry job roles, and to encourage use of sugar milling units within the VET system.

The Case for Change

Rationale for change

This proposed Case for Change is in response to a request submitted by major employers in the sugar industry to update training package products to keep up with evolving manufacturing technologies and the changing regulatory environment. Employers approached the FBP IRC, the Queensland State Training Authority (STA) and the relevant Queensland Industry Training Advisory Body (ITAB) to seek support for the development of training package products, including by streamlining current qualifications and units, for better utilisation by industry to prepare people for relevant job roles and functions. Employers reported that the current *Certificate II in Sugar Milling Support* and *Certificate III in Sugar Milling Industry Operations*, as well as a number of associated *FBPSUG* units, are no longer fit for purpose. The intended outcome is for these qualifications to be deleted, and for sugar milling specialisations to be incorporated into the *Certificates II and III in Food Processing*. This, along with streamlined *FBPSUG* units, will reduce the number of qualifications and units in the VET system. It will also help learners develop broader core skills and so increase their transferability across industry and job roles.

The two 'sugar milling' qualifications were initially included on the AISC's list of 'low enrolment' training package products to be deleted; but, in February 2021, the AISC agreed to a request from the Queensland STA to retain those two qualifications and associated *FBPSUG* units. The STA's request was in recognition of several employers seeking the opportunity to help update existing *FBPSUG* units to cover the complex skills that their workforce requires. With updated *FBPSUG* units, employers expect that they, and other industry stakeholders, will more actively promote formal training and engage with the VET system and providers to generate enrolments. Updated and streamlined *FBPSUG* units are intended to be included as electives in the *Certificates II and Certificate III in Food Processing*, while the *FBPSS00017 Sugar Lab Skill Set* (which contains three *FBPSUG* units) will be analysed and potentially modified to better meet industry needs.

Evidence for change

The Australian Sugar Milling industry employs 23,000 people, contributes \$4 billion to the economy and requires a diverse array of skills, including for operating machinery, following complex processes, working compliantly in laboratories and driving large vehicles. The National Skills Commission (NSC) defines 'Food and Drink Factory Workers' as one of the most resilient occupations in the Australian economy, with a 5/5 rating for COVID-19 labour demand recovery. The NSC's Internet Vacancy Index data shows there were 126 vacancies across Australia in late 2020, evidencing that there is, and will be, high demand for skilled workers, especially given Australian retailers' reports of sugar shortages during COVID-19 lockdowns.

Members of the Australian Sugar Milling Council (ASMC) and representatives from Wilmar Sugar, AI Group, Queensland Agriculture Workforce Network, and MacKay Sugar recently established a working group to define and implement a strategy to facilitate the Sugar Milling industry's participation in funded accredited Sugar Milling training. The group has been advocating for training package products within the *FBP Training Package* to be modified to better meet industry needs.

Consideration of existing products

The *Certificate II in Sugar Milling Support* and the *Certificate III in Sugar Milling Industry Operations* were considered for deletion due to lack of enrolments. The relevant qualifications and units (as well as the *MSL30118 Certificate III in Laboratory Skills*) were described by industry stakeholders as inadequate due to their being too inflexible for different businesses' skill requirements to be delivered. The dissatisfaction of industry resulted in RTOs, without expected financial returns, being unwilling to risk undertaking scope applications and training and assessment materials development.

The *FBPSUG* units will be reviewed and considered for modification or inclusion in alternative training products. For example, the units will be considered for inclusion in the *FBP20117 Certificate III in Food Processing* (where they may constitute a specialisation) and the effectiveness of the *FBPSS00017 Sugar Lab Skill Set* will be analysed and possibly modified to better meet industry needs. Other training packages' qualifications, such as *MSL30118 Certificate III in Laboratory Skills* are also being considered, with options to add *FBPSUG* units as electives.

At this stage it is not envisaged that new units will be developed, but major changes to existing ones are likely..

Approach to Streamlining and Rationalisation of the Training Products Being Reviewed

All of the existing training products have been identified as no or low enrolment products, and therefore substantial streamlining is expected. The two existing 'sugar milling' qualifications will be deleted and the required learning will be incorporated into the *Certificates II and III in Food Processing*. In addition, there is likely to be a substantial reduction in the number of *FBPSUG* units. As all of these units and qualifications are being addressed, issues of low enrolments will be considered throughout the process.

Stakeholder Consultation

Stakeholder consultation undertaken in the development of Case for Change

Stakeholders were identified through desktop research and the recommendations of the IRC, including the Queensland ITAB (AIGroup). IRC members support the proposed review and modification of the *FBPSUG* units.

Evidence of Industry Support

Members of the ASMC and representatives from Wilmar Sugar, AI Group, Queensland Agriculture Workforce Network, and MacKay Sugar recently established a working group to define and implement a strategy to facilitate the Sugar Milling industry's participation in funded accredited Sugar Milling training. The group has been advocating for training package products within the *FBP Training Package* to be modified to better meet industry needs. The group have been provided with information on industry-specific units and have requested to modify the *FBPSS00017 Sugar Lab Skill Set* so that it can be delivered through an RTO.

Proposed Stakeholder Consultation Strategy for Project

IRC members and Skills Impact will continue to identify and target stakeholders for participation through existing and new networks. Gatekeepers of organisations, enterprises and training providers will also be identified so that they may assist with promoting the opportunity to contribute, perhaps through internal and external media such as intranet portals and newsletters.

As the majority of Australia's sugar mills are located in North Queensland, AI Group, acting as the Qld ITAB for this industry, will be a key contact for connecting the IRC with influential industry stakeholders and the existing working group will be key stakeholders in the consultations.

The ASMC is an organisational member of the FBP IRC, and representatives from Wilmar Sugar, which holds over 50% of market share in sugar manufacturing, attend IRC meetings regularly and will be central to ongoing consultation. Other sugar refineries and stakeholders will be consulted during this project.

During COVID-19 restrictions, consultation will be limited to telephone, email and teleconference contact although with lifting restrictions, some face-to-face engagement may be possible during 2021-2022.

Licensing or Regulatory Linkages

No occupational licensing, legislative or certification requirements apply to the products under review.

Project Implementation

Prioritisation Category

It is proposed that this product development is progressed as a *standard project*.

Both 'sugar milling' qualifications and 33 *FBPSUG* units in the project were marked for deletion by virtue of their low enrolment figures.

Several stakeholders have identified the need to review and modify the *FBPSUG* units so that current activities can progress towards the delivery of nationally accredited training. Any changes to *FBPSUG* units or the *Sugar Lab Skill Set* that are proposed following consultation will focus on aligning the units more closely to current industry processes and skill needs that are both complex and urgent.

Project Milestones

Months	Activity
1-3	Project planning and briefing, identification of experts and consultation with IRCs
4-5	Workshops with subject matter experts including research and workforce functional analysis
6-8	Public Consultation National public consultation of draft qualifications, skill sets and units (Including national workshops)
9	Review of public consultation and Equity Review
10-11	National public validation of final draft qualifications, skill sets and units
12	Approval of Case for Endorsement to IRCs and submission to AISC

Summary of Components

Component	To be reviewed	To be updated	To be deleted	To be created
Units	41	Up to 41	Up to 36	
Qualifications	4	Up to 2	Up to 2	
Skill Sets	1	Up to 1		

Delivery or Implementation Issues

FBPSUG units are not currently being delivered by RTOs. The aforementioned working group led by the ASMC and sugar refinery enterprises are collaborating on a plan to organise enough people to enrol in appropriate sugar-related training package products, thus offering an attractive proposition to a local RTO.

Implementing the Skills Minister's Priority Reforms for Training Packages (2015 and October 2020)

Ensure that more information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed course choices

The proposed project will result in the deletion of two qualifications and a substantial number of units of competency, while ensuring relevant units are updated and incorporated into broader training.

Ensure the training system better supports individuals to move more easily between related occupations

The FBPSUG units will take account of broader manufacturing processes, ensuring learners are equipped with transferable skills for other occupations.

Improve the efficiency of the training system by creating units that can be owned and used by multiple industry sectors

FBPSUG units will be reviewed to maximise skills transferability across multiple industry sectors while servicing the distinctive needs of sugar manufacturers.

Foster greater recognition of skill sets and work with industry to support their implementation

This project will review the current *Sugar Lab Skill Set* with a view to it potentially being modified to provide greater value to industry in lieu of current qualifications.

This Case for Change was agreed to by the Food, Beverage and Pharmaceutical IRC

Name of Chair

Fiona Fleming

Signature of Chair



Date

27 April 2021

Attachment A: Training package components to change

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 1:	Indigenous Food Skills	Unit		The identification of wild and farmed ingredients and other food and beverage products categorised as Australian indigenous food		New
Project 1:	Indigenous Food Skills	Unit		The application of cultural rights and expectations relating to indigenous intellectual property relating to managing and processing indigenous foods		New
Project 1:	Indigenous Food Skills	Unit		To be confirmed		New
Project 1:	Indigenous Food Skills	Skill set	TBC	Indigenous Food Skill Set (will comprise up to six units from a range of different industries and training packages)		New

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 1:	Indigenous Food Skills	Qualification	FBP20117	Certificate II in Food Processing	23/01/2018 (Updated to meet Standards for Training Packages. Packaging rules clarified to reflect delivery of this qualification for processing of food for non-human and human consumption. Imported units updated or deleted). Qualification currently under review with an expected AISC provisional endorsement date of June 2021. (New units to be inserted as elective options or a specialisation)	Update
Project 1:	Indigenous Food Skills	Qualification	FBP30117	Certificate III in Food Processing	23/01/2018 (Updated to meet Standards for Training Packages. Packaging rules clarified. Imported units updated or deleted)	Update
Project 1:	Indigenous Food Skills	Qualification	FBP40318	Certificate IV in Food Processing	18/12/2018 (Updated to meet Standards for Training Packages. Updated core and elective units. Updated packaging rules)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Unit	FBPPHM3002	Operate a pharmaceutical production process	18/12/2018 (establishment)	Update

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 2:	Pharmaceutical Good Manufacturing Practice	Unit	FBPPHM3001	Apply Good Manufacturing Practice requirements	18/12/2018 (Updated to meet Standards for Training Packages. Additional elements and performance criteria. Code changed to reflect AQF alignment)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Unit	FBPPHM2001	Follow work procedures to maintain Good Manufacturing Practice requirements	18/12/2018 (Updated to meet Standards for Training Packages. Additional elements and performance criteria. Code changed to reflect AQF alignment)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Unit	FBPPHM4001	Monitor and maintain Good Manufacturing Practice requirements	18/12/2018 (Updated to meet Standards for Training Packages. Additional elements and performance criteria. Code changed to reflect AQF alignment)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Qualification	FBP20418	Certificate II in Pharmaceutical Manufacturing	18/12/2018 (Updated to meet Standards for Training Packages. Changes to packaging rules, core and elective units)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Qualification	FBP30821	Certificate III in Pharmaceutical Manufacturing	21/01/2021 (Updated unit codes in core and elective bank of packaging rules)	Update

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 2:	Pharmaceutical Good Manufacturing Practice	Qualification	FBP40518	Certificate IV in Pharmaceutical Manufacturing	18/12/2018 (Updated to meet Standards for Training Packages. The number of units to achieve the qualification reduced from 21 to 16. Changes to packaging rules, core and elective units)	Update
Project 2:	Pharmaceutical Good Manufacturing Practice	Skill set	FBPSS00051	Pharmaceutical Manufacturing Operator Induction Skill Set	25/09/2020 (establishment)	Update
Project 3:	Sugar Milling	Qualification	FBP20618	Certificate II in Sugar Milling Support	18/12/2018 (Update)	Delete
Project 3:	Sugar Milling	Qualification	FBP31018	Certificate III in Sugar Milling Industry Operations	18/12/2018 (Update)	Delete
Project 3:	Sugar Milling	Qualification	FBP30117	Certificate III in Food Processing	This qualification is currently under review and is expected to be submitted for endorsement in April 2021. This proposed modification is expected to add a specialisation and electives to the qualification	Update
Project 3:	Sugar Milling	Qualification	FBP20117	Certificate II in Food Processing	This qualification is currently under review and is expected to be submitted for endorsement in April 2021. This proposed modification is expected to add a specialisation and electives to the qualification	Update
Project 3:	Sugar Milling	Skill Set	FBPSS00017	Sugar Lab Skill Set	18/12/2018 (establishment)	Update

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 3:	Sugar Milling	Unit	FBPSUG1001	Install pre-ballast	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG1002	Undertake shunting operations	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG1003	Move cane bins in a marshalling yard	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG1004	Check a cane sample for extraneous matter	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG1005	Manually clean and maintain housekeeping standards	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2001	Lay sleepers for cane rail systems	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2002	Lay rails for cane rail systems	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2003	Lay skeleton track for cane rail system	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2004	Operate tamping equipment	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2005	Construct turnouts	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2006	Collect and prepare samples	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2007	Conduct cane weighbridge operations	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2008	Operate a tipping station	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2009	Operate an extraction station	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2010	Operate a juice clarification process	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2011	Operate a mud filtration process	18/12/2018 (update)	Update/ Delete

Project number	Project name	Qualification/ unit / skill set	Code	Title	Details of last review (endorsement date, nature of update transition, review, establishment)	Change required
Project 3:	Sugar Milling	Unit	FBPSUG2012	Chemically clean equipment	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2013	Operate a pan station	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2014	Operate a low grade fugal station	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2015	Operate a high grade fugal station	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2016	Operate a crystalliser station process	18/12/2018 (update)	Update/ Delete
Project 3:	Sugar Milling	Unit	FBPSUG2017	Undertake simple fabrication	18/12/2018 (update)	Update/ Delete