Labour market, employment and training situation within the meat industry

National Report: Germany

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Phase 2 Analysis of the training offer
and the professional profiles, WP 4
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1. Background information on the meat industry in Germany: Production, consumption, import and export of meat

2.1. Meat production

Meat production has slightly increased in the last years, which is mainly related to the increase of beef consumption; pork consumption has only increased little, while consumption in the other sorts of meat have fallen (see Table 1).

Table 1: Meat production in Germany (2001-2004)

	2001	2002	2003	2004	Development 2001-2004 (%)
Beef and veal	9.9	12	12.5	12.6	27.3
Pork	54	54.0	54.7	54.5	0.9
Sheep and goat	1.1	1.0	1.0	1	-9.1
Horse	0.1	0.1	0.1	0	-100
Bowels	3	2.5	2.2	1.7	-43.3
Paultry	18.2	17.2	17.6	17.8	-2.2
Other meat	1.6	1.4	1.4	1.3	-18.8
Meat altogether	87.9	88.2	89.5	88.9	1.1

Source: Hans Böckler Foundation 2006: 19.

2.2. Consumption

As Table 2 shows, meat consumption in Germany has constantly diminished since 1999. The reason for this lies in the BSE crisis. Especially the drop of 2001 as well as the re-increase of the meat consumption can be related to beef consumption. However, beef consumption has not reached the level it had before the crisis. There is an ongoing increase of fowl consumption, which has lately been interrupted due to bird influenza.

Table 2: Meat consumption in Germany (1999-2004)

	1999	2001	2002	2003	2004	Development 1999-2004 (%)
Beef and veal	10.4	9.6	6.8	8.6	8.7	-16.3
Pork	41.4	39.1	38.9	39.5	39.3	-4.4
Sheep and goat	0.8	0.8	0.7	0.7	0.7	-12.5
Horse	0	0	0.1	0	0	0
Bowels	1.1	1.0	0.8	0.6	0.4	-63.6
Paultry	9.1	9.5	10.8	10.5	10.6	16.5
Other meat	1.0	1.0	1.0	0.9	0.9	-10.0
Meat altogether	63.5	61.0	59.1	60.8	60.6	-4.3

Source: Hans Böckler Foundation 2006: 20.

2.3. Sales productivity and development of wages

The development of sales productivity per hour of activity has increased from 56% in 1995 to 56% in 2005. Since 1999 it has risen continuously (except in 2002); stronger than in the food industry in general.

As a parallel process, the share of wages among the turnover has dropped; as Table 3 indicates, it was at approximately 8.5% in 2005 (compared to 10.3% in the food industry) while in 2000 the percentage was 10.9%. The gross salary has increased only very little since 2000.

Table 3: Development of turnover and salary in the meat industry

Year	2000	2001	2002	2003	2004	2005
Turnover in mio.€	21.720	23.265	23.133	23.448	26.335	27.998
Gross salary in mio.€	2.363	2.272	2.341	2.345	2.363	2.375
Relativ	10,88%	9,77%	10,12%	10,00%	8,97%	8,48%

Source: NGG 2006: 6.

2.4. Import and export of beef and pork in Germany

2.4.1. Beef

In Germany, export of beef exceeds beef import. However, import has slightly risen from 2002 (103,000 tons) to 2004 (109,000 tons) and will furthermore increase and it is expected that the effects of the agronomic reform will . At the same time, beef and veal exports have strongly decreased in these years (2002: 200,000 tons, 2004: 130,000 tons) (Hans Böckler Foundation 2006: 34f.). Beef is primarily being exported within the EU, primarily to Italy and the Netherlands; only 18% are exported outside the EU, mainly to Russia, however with a falling tendency. Living animals are predominantly exported to Lebanon and France.

2.4.2. Pork

When it comes to pork meat German imports more meat than it exports (2004: import of 840,000 tons, export of 622,000 tons), mainly from Denmark (325,185 tons), Belgium (2004: 328,062 tons) and the Netherlands (2004: 170,190 tons). This is related to relatively high prices for slaughtering pigs in Germany. However, there has been a decrease of imports in Germany (2002: 900,000 tons, 2004: 840,000 tons) and an increase of exports (2002: 537,000 tons, 2004: 622,000 tons), the new EU member states playing a key role as importers of German pork meat.

2.5. Future Trends

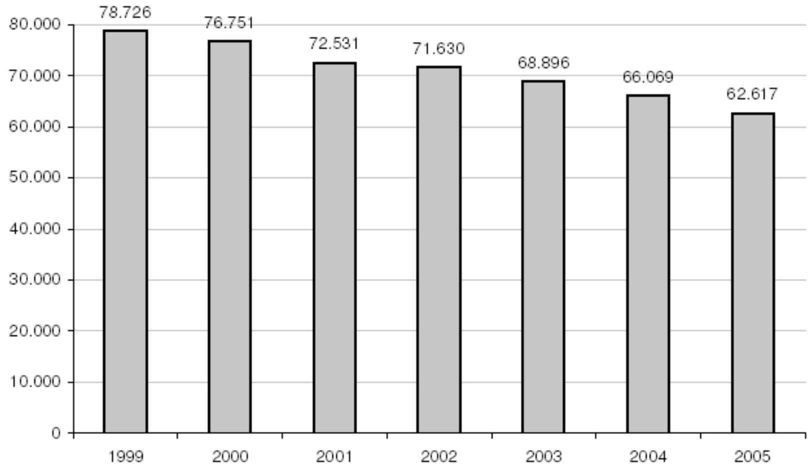
In Germany beef consumption per person – different from most other EU states – will not reach the level from before the BSE crisis in the next years; however, compared to today's level, it will rise. As regards the expected concentration processes and falling import restrictions the German share of beef on the European market will sink. German export profits will decrease. Import will become more important just like in the whole EU.
Pork consumption will remain on a very high level in Germany; however, import will remain fairly unimportant. Against the background of missing growth perspectives in the EU-15, the German pork industry will have to focus more on exporting to East European states and in the future also to China and Japan. The increase of export of pork will remain rather low though; recent cases of swine fever also having an impact.
The market and consumption development in Germany suggests that growth potentials are few and that efforts have to be made to maintain the production on the existing level of today.

3. Employment structure in the meat industry in Germany

3.1. Current employment situation

The German meat industry consists of 1,285 companies and employs 107,415 people (including part time staff). The structure of the German meat industry is still predominantly characterised by small and medium enterprises. Accordingly, two third of all employees are working in companies with less than 100 employees. As a result of the BSE-crisis at the end of the 1990s, especially smaller slaughterhouses and meat processing companies (1-19 employees) have disappeared since 1999; altogether 3,000 of the former 16,263 companies were shut down or merged with bigger companies (Graph 1).

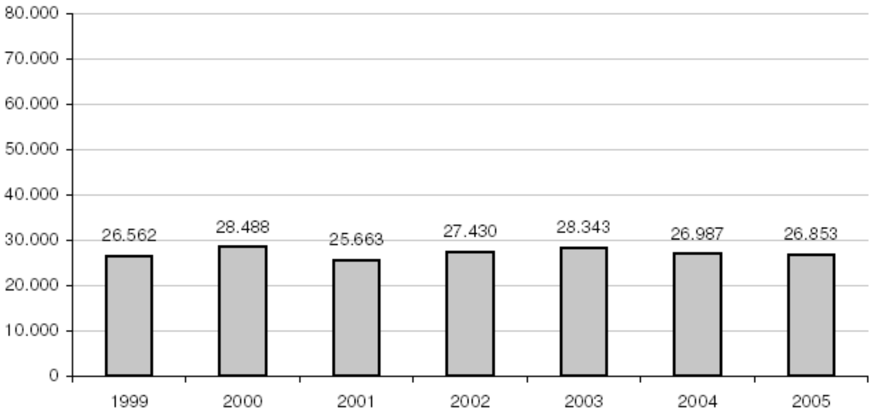
Graph 1: Employment subject to social insurance contributions in companies with less than 20 employees – Slaughtering and meat processing 1999-2005



Source: Federal Statistical Office Germany (2006), based on graph in : Hans Böckler Foundation (2006: 64).

In contrast, the number of bigger companies with 250 employees and more has remained the same (63). As Graph 3 indicates, the number of employees working in these companies within a position subject to social insurance contributions have remained relatively constant since 1999 (about 27,000).

Graph 3: Employment subject to social insurance contributions in companies with more than 250 employees – Slaughtering and meat processing 1999-2005



Source: Federal Statistical Office Germany (2006), based on graph in : Hans Böckler Foundation (2006: 65).

Taken all companies together, it appears that the majority of work place reductions from 1999 to 2005 (22,000), 72%, affected smaller companies.

Due to concentration processes and the extension of capacities within large-scale companies employment numbers were expected to rise in these companies. However, as statistics consider solely positions that are subject to social insurance contributions and as companies in the meat industry increasingly started to outsource activities and to work with people falling out of the social insurance system, employment numbers encompassing the entire sector are missing.

Only 14% of the enterprises in the meat industry are located in East Germany, which encompass 19% of all employees in positions subject to social insurance contributions in Germany. East German Länder were confronted with recent reductions of working places more heavily than their Western counterparts (21% of all work places in this sector were reduced compared to 10% in West Germany; in fact, 35% of all reductions took place in East Germany).

Due to the cutback of smaller companies and to merger, cooperation and concentration processes resulting from a structural crisis in the meat industry (increasing competition, pricing pressure, struggle for a market share), it was expected that the number of employees would be reduced in the meat industry – also among the administrative staff. However, the reduction of jobs was not strongly visible among the professions – except for the butchers. The reduction of jobs in this profession is so due to the fact that production lines such as slaughtering and cutting have increasingly been sourced out to foreign firms.

In relation to the latest EU enlargement in 2004, companies increasingly contract foreign firms on the basis of the working conditions in their country. As a consequence the permanent staff was reduced in the German slaughterhouses and a great part of the slaughtering and cutting activities are now being carried out by cheaper workforce from Eastern Europe (with wages of 3 to 5 € per hour). Total numbers are not available but in some companies the share of foreign workers that are now contracted via foreign firms amounts to 40 to 50 per cent. In pork slaughterhouses the number of offers provided to external service providers and contractual workers has increased stronger than in beef slaughterhouses (Hans Böckler Foundation 2006: 74, 88).

As a consequence, every fifths working place has been reduced among the butchers since the end of the 20th century (1999: 72,000; 2005: 59,000) (Hans Böckler Stiftung 2006). When it comes to the meat and sausage processing companies, the number of positions has dropped within the last six years as well but this was less the case than for the butchers: of 40,000 positions in 1999, 34,000 could be kept until 2005.

Due to the acceleration of production procedures and the increasing requirements of supermarket chains, large-scale clients and fast-food restaurants, enterprises as well as employees have increasingly become under pressure. This trend is reinforced by the fact that the market share of discounter has risen; 2004 it was at 13% for pork and beef, for poultry and sausages even at 40%. At the same time, classical super markets had to reduce their prices for meat – in order to be able to compete – and the effect was that there was a decline of prices of minus 5% in case of pork and beef, of minus 6% for poultry and of minus 7% for sausages (Hans Böckler Foundation 2006: 32).

3.2. Future employment trends

In the future, no more than a maximum number of five companies will play a key role in the German meat industry. Concentration, consolidation and automatisation processes as well as the closing down and taking over of smaller-scale companies and the focus on large-scale enterprises are expected to continue. The trend will remain: either to expand or to find oneself a niche. Internationality and marketability will also play a key role. Against this background, job safety and stability will not be characteristic for the sector in the next years (Hans Böckler Foundation 2006: 87).

It is difficult to foresee whether for companies working on the basis of contracts for 50% of the staff, the trend of increasingly outsourcing activities and cutting jobs will remain. From the trade union’s perspective the overall tendency to do so is most probably going to continue; it is expected that without the introduction of a minimum wage in the meat industry, up to 20,000 positions that are currently subject to social insurance contributions will be reduced until 2012 (Hans Böckler Foundation 2006: 10, 88).

4. Vocational training and education in the German meat industry

4.1. System and trends of vocational training in Germany

In Germany, vocational training is strictly regulated based on a statutory order (Vocational Training Act: BBiG 2005). The training duration, the specific knowledge and skills to be acquired in the training as well as the examination requirements are all laid down in the training regulations. Apprentices undertaking a vocational training programme go through a probation period of one to four months (BBiG 2005 § 20). After usually three years the vocational training is terminated by a final exam based on an examination regulation (BBiG 2005 § 37).

The typical starting age for apprentices is 16 to 17. Access requirements vary, depending on the field of activity. For instance, a secondary school degree is required for the vocational training as clerk (“Kauffrau/mann für Bürokommunikation”) while there is no such requirement for the vocational training as distributor (“Berufskraftfahrer/in“).

The Vocational Training Act provides an opportunity for trainees to undergo part of their vocational training abroad. It also covers the transferability of vocational school credits based on an inter-Länder agreement in order to facilitate mobility in Germany.

The dual system is still the predominant provider of vocational training in Germany. Apprentices are being trained in two independent places: the company and the vocational school. The responsibility of the company is to provide all practical knowledge and skills required in a comprehensive professional training programme and in accordance with the training regulations. The vocational school systematically provides all the theoretical knowledge expected in the profession, equally based on the training regulations. The training is divided into in specific learning fields (e.g. representation of the own company, maintaining vehicles, loading goods etc. in case of the training as distributor) for which the year of the training as well as the time required is indicated in the framework curriculum.

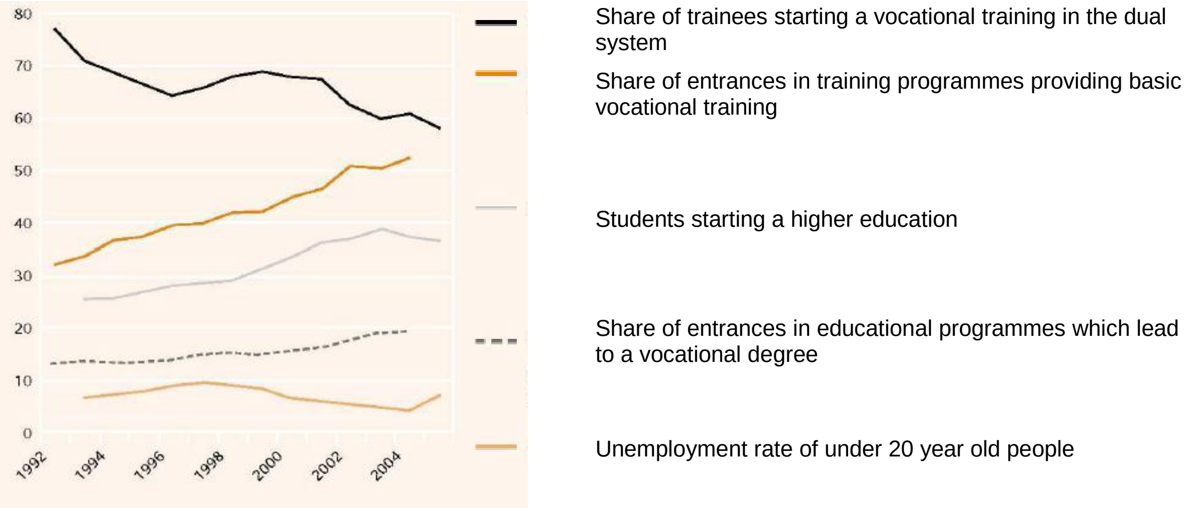
After hearing of the Länder Committees for vocational training the governments of the German Länder can decide through legal regulation that the former education of a trainee (attendance of a training course, a vocational school or a vocational training in another institution) will be credited partially or completely within the training period. The regulation may foresee that the acknowledgement of credits requires both a proposal of the trainees and the trainers (BBiG 2005 § 7). Based on a proposal of the trainee and the trainer the committee can decide upon a potential reduction of the vocational training duration or on the extension if the trainee submits a proposal (BBiG 2005 § 8 (3)).

Individuals who have not participated in the vocational training but who can demonstrate that they have been working in the profession or in a related field for at least one and a half times the time prescribed for the vocational training duration or individuals who can certify by documents that they are qualified for the activity, can also admitted to take the vocational training exam (admittance to examination in exceptional cases: BBiG 2005 § 45). This means that informal learning acquired through labour market experience is being recognised.

Unlike the initial vocational education and training, continuing vocational education and training is characterised by a pluralism of providers and a comparatively low degree of regulation by the state, which plays a subsidiary role at most, by voluntary participation and by multi-functionality. The state regulation concern only the formal certification of acquired qualifications, that is, regulations for the final examination.

In recent years, there has been a decline of the number of trainees starting a vocational training in the dual system. The number of training offers does not cover the number of applicants anymore and as many young people have difficulties in finding a suitable training place the number of youth in alternative educational programmes has risen.

Graph 3: Development of educational participation (1992 to 2005)



Source: BERUFSBILDUNGSBERICHT 2006: 8.

About two-third of all apprentices in the dual system undertake their training in small and medium-sized enterprises, which is still the main training provider.

4.2. Vocational training in the meat industry

4.2.1. Vocational training in the meat industry

Since the 1980s the number of trainees in vocational training programmes in the field of slaughtering and meat processing has decreased considerably. While there were 23,000 trainees in the sector in 1985, there were only 11,000 trainees in the mid 1990s and the number has further dropped to 8,700 trainees until 2006. 3285 new vocational training contracts were signed in 2004; in 2005 merely 2899 (http://www.fleischerhandwerk.de/front_content.php?idart=339). In fact, the large offer of training places in comparison to the demand side is rather exceptional for the German vocational training situation, which is generally characterised by a high demand contrasted by low numbers of offers (BMBF 2006).

Most slaughterhouses do not offer vocational training in the butchery profession as they do not process meat and cannot offer the variety of training components. Companies that are specialised only in one line have the opportunity to offer vocational training in cooperation with other companies complementing each other.

Large-scale companies mostly offer vocational training in wholesale and export trade and for experts in nutrition technology. Altogether, more the majority of apprentices in the meat industry, 60%, is being trained in the administrative and commercial field (Hans Böckler foundation).

4.2.2. Vocational training as butcher

In 2005, approximately 8,000 trainees took part in vocational training programmes as butcher. The number of training offers exceeds the number of training seekers (2006: 2622 applicants against 2954 training offers) (http://www.bmwi.de/BMWi/Navigation/root,did=61890.html), reflecting that it has become more and more difficult to recruit new people willing to become trained in this profession. The number of trainees with a lower secondary school degree (“Hauptschulabschluss”) is among the highest (approximately 42%) compared with other professions (BMBF 2006: 213).

The vocational training regulation of 23 März 2005 flexibilised the vocational training as butcher in order to be able to meet the specific needs of the company in which the apprentice is being (e.g. butchery, slaughterhouse, meat wholesale, nutrition industry) (BMWI 2006). Accordingly, the trainee can choose several out of the following qualifications:

- Slaughtering
- Processing of meat and sausages
- Making of food
- Event services
- Customer service and sales
- Packaging of products.

4.2.3. Vocational training as sales agent in the meat industry

Even more so than for the vocational training as butcher and of all professions in the meat industry, the he disproportion between training offers and trainees seeking a training place is the highest for the vocational training as sales agent in the meat industry. The job has become less and less unpopular in recent years and it is difficult to recruit new trainees in Germany. There are more vocational training offers available than persons seeking a vocational training. From October 2005 to September 2006 training offers were almost five times as high as the number of youth seeking a traineeship in the field of sales (http://www.fleischerhandwerk.de/front_content.php?idart=339).

The large majority of trainees is female; trainees of the vocational training “sales agent in the field of nutrition” to which the sales agents in the meat industry belong are to 93.9% women (2005). Here, one can find the highest share of trainees with a lower secondary school degree (“Hauptschulabschluss”) of all professions: 66,6% (BMBF 2006: 213).

One of the reasons for the lacking interest of young people to become trained in this job is that the payment for apprentices and the salary of employees are rather low (on average 466€ in West Germany and 343€ in East Germany compared to 623€ and 529€ respectively, as an average salary of all apprentices) (Federal Statistical Office Germany in: BIBB – data sheet 661104 and data sheet 996000). Based on the agreed wages, the average (basic) salary of an employee is 1385 EUR gross. Besides the low salary perspectives, career chances are rather poor and there are not many opportunities to enhance ones position in this profession.

The profession is accessible also for people with the minimum requirements. The exam at the end of the vocational training is not very difficult from a theoretical point of view and the success rate is rather high (88.2% of all apprentices in the vocational training as sales agent in the field of nutrition pass the first test; among those who failed, 96.7% pass the second exam) (Federal Statistical Office Germany in: BIBB – data sheet 661104).

Irrespective of the high share of applicants, labour market experts report of difficulties in finding suitable candidates (INBAS/IWAK 2006). When positions are assigned on the basis of written applications, candidates with a lower secondary school degree (“Hauptschule”) and/or poor grades have lower chances of accessing the profession, especially in large-scale companies which receive the majority of applications. The job requires high communication skills, service-orientation, patience and a diplomatic attitude towards clients. Also, employees have to respect the opening hours and also have to work at weekends.

However, an evaluation of the situation of trainees in this profession shows that many interviewees are not satisfied with their situation. Most points of criticism concern an unfavourable atmosphere in the company, insufficient personnel management and a bad attitude towards trainees. Working hours on the weekend, a lack of career challenges and difficulties with having to see dead animals were further negative aspects. In contrast, the contact to clients, the constant exchange with people of all ages and social fields were named as the positive parts of the job. Of 29 people interviewed, two-third would like to change their position, e.g. through attending a further training programme or a vocational training in another field (INBAS/IWAK 2006).

The profession sales agent in the meat industry has clear future perspectives due to the increase of job vacancies and the reduction of unemployment. In fact, around 30% of all companies offering vocational training report that there is an increase in the number of employees in this profession. However, the profession suffers from a bad image. Information campaigns are needed to increase the image of the job and to shed light on the spectrum of the activities (e.g. including catering and decoration activities) (INBAS/IWAK 2006).

4.2.4. Vocational training as clerk

The training as clerk is rather popular in comparison with other professions in the meat industry reflected by the larger number of applicants in comparison to the training offers (2003: only 64 vacancies against 100 applicants). In relation to the popularity of the profession and the fact that the majority of apprentices, 20.3%, have a higher secondary school degree ("Realschulabschluss") which is above the minimum access requirement (a lower secondary school degree; "Hauptschulabschluss"), it has gotten very difficult for people in Germany to enter the profession below that educational level.

The training is also typically undertaken by women but the female share is lower than for the sales agent in the meat industry (81.2%). Reasons why the profession is considered attractive by young people is that trainees and employees in this profession get a relatively high salary (679€ for an average trainee in West Germany; the basic salary for employees is below average, 1974€ gross, but still higher than in over jobs), fulfil a variety of activities, have comparably good career perspectives and relatively higher chances for qualified work (e.g. compared with the profession as sales agent) (INBAS/IWAK 2006: 181ff).

People working as a clerk require language skills, communicative and social skills as well as an affinity for organisational, planning and administrative tasks. In respect to the large number of orders and requests, the frequency of social contacts and the respective discontinuity of work they need to be flexible and able to work under pressure. The requirements candidates have to fulfil are comparably higher than for the sales agent described above. The rate for passing the vocational training exam is 78.7% and 89.9% for those trying a second time (BIBB – data sheet 780306).

4.3. Raising the attractiveness of vocational training in the meat industry

Stronger efforts in training promotion, public relations and awareness rising have to be made in order to enhance interest among potential trainees and to rise the attractiveness of professions (e.g. butcher, sales agent) (German Butcher Association 2006). It is assumed that the new vocational training regulation flexibilising the training as butcher will have a positive effect on the youth (http://www.fleischerhandwerk.de/front_content.php?idart=339).

5. Arguments of the trade unions in Germany

The share of employees organised in trade unions is rather low in the meat industry in Germany and there has also been a downward trend. In 2005, only 70% of all employees in positions that are subject to social insurance contributions are being paid based on a collective wage agreement while the share was at 76% in 1998. In East Germany the percentage is only at 54% (2005), having dropped from 63% in 1998 (Hans Böckler Foundation 2006: 75).

The opportunities for exertion of influence on the meat industry are rather low for the German trade union for nutrition, consumption and gastronomy NGG (abbreviation for "Nahrung-Genuss-Gaststätten") as negotiation partner are often missing. The agreement on wages in the fields of slaughtering and meat processing fails due to the absence of employer organisations at the Länder level with whom collective wage agreements could be settled. Instead of collective wage agreements that are valid in the entire meat industry in Germany, NGG has so far only been able to make on individual wage agreements with companies or company groups (Hans Böckler Foundation 2006: 75).

In order to fight against wage dumping in the meat industry, the NGG claims for the introduction of minimum wages in the meat industry. Together with the German trade union for services ver.di NGG has launched the “initiative minimum wages” advocating a minimum wage of 7.50€ per hour, which should gradually be elevated to 9€ per hour (equivalent to a gross salary of 1250 and 1500 EUR per month respectively). After several years of discussion, DGB now argues for a minimum wage of 7.50€ in case that agreed wages are below this level. It is still uncertain in which way this claim will have chances to be brought into practice. The opinion on minimum wages is not completely indisputable among other trade unions in Germany. Some argue that the introduction of minimum wage means an encroachment of collective bargaining and prefer agreed wages (Hans Böckler Stiftung 2006: 76ff.). At present, based on the divided wage agreement landscape a national minimum wage agreement appears improbable (Hans Böckler Foundation 2006: 75).

NGG fights against the illegal work and has sued various slaughtering houses contracting foreign workers without a working permission and who are paid badly. Representatives from German firms argue that it has become more and more difficult to recruit suitable German staff as the meat industry suffer from a bad image and that they are being obliged to find foreign personnel instead. Due to the increasing reduction of wages in recent years a discussion was launched on minimum wages.

Against the background of meat scandals, lacking transparency and control, insufficient social safety as well as lacking qualifications of employees in the meat industry, the NGG claims for a collective agreement which guarantees qualification of the employees. Also, NGG claims that persons giving hints on control and security deficiencies – so-called “whistleblowers” – should be legally protected.

In sum, the claims of the NGG in respect to preventing further wage dumping, to securing the quality of meat products and to offering a future to employees in the meat industry, encompass the following aspects (NGG 2005):

- Integration of employees as regards self-control measures of their companies
- Measures of vocational training and further training of the employees regulated by collective agreement
- Legally guaranteed information security for employees, spreading information about illegal practices in their company
- State-regulated cachet must take into consideration production and employment conditions. In respect to processing meat, working conditions of people must play a role too (not only animal welfare)
- Introduction of a minimum wage in the meat industry. Competition must be based on quality and innovation on the market – not on blackmailing employees
- Increasing positions of food inspectors
- Need for a consumer information act to strengthen preventive consumer control
- Ban of sales below acquisition prices.

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List of useful links

- Association of the Meat Economy (Verband der Fleischwirtschaft): http://www.v-d-f.de/.
- Federal Institute for Vocational Education and Training (BIBB): http://www.bibb.de.
- Federal Ministry of Food, Agriculture and Consumer Protection (Bundesministerium für Ernährung, Landwirtschaft und Verbraucherschutz): www.verbraucherministerium.de.
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List of abbreviations

BBiG	Berufsbildungsgesetz (vocational training act)
bfw	Berufsfortbildungswerk des DGB GmbH (institute for vocational and advanced training)
BIBB	Bundesinstitut für Berufsbildung (Federal Institute for Vocational Education and Training in Germany)
BMBF	Bundesministerium für Bildung und Forschung (Federal Ministry of Education and Research in Germany)
DGB	Deutscher Gewerkschaftsbund (German Confederation of Trade Unions with eight member unions, the biggest ones as to numbers of members being IG-Metall (35.1%) and the trade union for services ver.di (34.8%))
INBAS	Institut für berufliche Bildung, Arbeitsmarkt- und Sozialpolitik GmbH (Institute for vocational training, labour market and social issues)
IWAK	Institut für Wirtschaft, Arbeit und Kultur (Institute für economics, work and culture)
NGG	Nahrung-Genuss-Gaststätten (trade union for nutrition, consumption and gastronomy)

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