The Welsh Food & Drink Skills Project

Executive Summary

delivering skills for future growth

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Executive Summary

Introduction

- The food and drink supply chain (FDSC) comprises four key industries[1]; primary production, food and drink manufacturing, hospitality and retail. The FDSC is very important to the Welsh economy in terms of employment, income and the contribution it makes to tourism.
- The aim of this research project was to assess the supply and demand for vocational education and training across the supply chain on behalf of the four Sector Skills Councils (SSCs) (Lantra, Improve, Skillsmart Retail and People 1st) responsible for the FDSC. This research, which was funded through the Welsh Government's Sector Priorities Fund Pilot, marks the starting point for collaboration between SSCs by identifying emerging skills needs across the chain.
- The research is based on a representative sample of approximately 2,000 businesses across Wales which was collated through a large scale telephone survey and a series of qualitative interviews and workshops, which also included industry stakeholders, employers, learning providers and students.
- Firstly, this research considers current employers' perceptions of the demand for current and future skills needs in their businesses and secondly, this research identifies the current supply of training by considering levels of provision, methods and barriers. Consequently, suggestions for potential future actions are provided.

Overview

- The FDSC in Wales **employs approximately 230,000 people**, which accounts for 5.7% of the entire UK FDSC workforce.
- As a whole, the FDSC **makes up approximately 18% of the total Welsh workforce**. The FDSC in Wales generated approximately £6.5bn[2] of sales revenue in 2010, performing well despite the recession.
- By highlighting the importance of the FDSC to the Welsh economy and by establishing robust findings into the current and future skills needs of the FDSC, **the report aims to provide the consortia of SSCs with sufficient knowledge to be able to put in place the delivery mechanisms necessary to ensure the workforce has sufficient skills to drive the FDSC forward**.
- It is in recognition of the sector's important contribution to the economy of Wales that the Welsh Government have recently announced that food and farming is to be recognised as a priority sector in the Welsh Government Economic Renewal Policy.

[1] A proportion of the wholesale industry contributes to the FDSC but is not included in the scope of this research, however a degree of overlap occurs where parts of wholesale are included in the footprints of Improve and Skillsmart retail which are included in the research scope.

[2] Mid-point weighted turnover estimates, Inter Departmental Business Register 2010.

Setting the scene

The FDSC in Wales employs approximately 230,000 people, which accounts for 5.7% of the entire UK FDSC workforce. As a whole, the FDSC makes up approximately 18% of the total Welsh workforce. The FDSC in Wales generated approximately £6.5bn[3] of sales revenue in 2010, performing well despite the recession.

Sector	Number of employees[4]	Number of businesses[5]	Turnover (£millions)[6]
Primary Production	56,600	13,790	1,752
Manufacturing	21,200	560	467
Wholesale	8,800	695	567
Retail	62,500	3,805	1,440
Hospitality	77,800	8,665	2,292
FDSC	**226,900**	**27,515**	**6,518**

2011 research into the FDSC in Wales

- In all sectors there are skills gaps at a strategic business level, which have links with leadership and management. In many of the sectors – particularly so for primary production businesses, a need for better understanding of costs of production and pricing is necessary.
- The most important skills listed by businesses across the FDSC were: operating and maintaining equipment, waste awareness, environmental awareness and practice, sales and merchandising and manual handling. Food technology and handling raw materials were also included, as more specialist skills, in that they were ranked highly important, but for a smaller proportion of the workforce.
- Within individual sectors, sales and merchandising skills were especially important for retail, waste awareness and environmental awareness for retail and hospitality, and management of raw materials for hospitality and manufacturing. In the primary production sector, operating and maintaining equipment, and business and administration skills were particularly important. Analysis of future skills needs revealed that on the whole, sales and merchandising skills would be the most important over the next 3 years.
- In terms of skills gaps, 22% of survey respondents indicated that there had been an occasion when their workforce as a whole has not had the necessary skills to carry out the needs of the business. This equates to approximately 14,000 workers with skills deficiencies in the FDSC in Wales.
- Forty-five percent of businesses interviewed stated that there was a technical skills gap among their workforce, primarily relating to business, sales and merchandising skills, food technology and operating and maintaining equipment. Within individual sectors and cross-sector, skills gaps were primarily as follows:

Primary Production

- Business skills, such as:
  - Negotiating with contractors
  - Understanding your customer and products
  - Understanding costing and pricing
  - Understanding and taking part in basic accounting and record keeping.

[3] Mid-point weighted turnover estimates, Inter Departmental Business Register 2010.

[4] Source: ONS 2009 Business Register and Employment Survey.

[5] Source: Number of local units of VAT and/or PAYE based enterprises in 2010 (IDBR 2010).

[6] Source: IDBR 2009/10, mid-point turnover estimates using FDSC SIC (2007) codes.

- Sales and marketing skills such as:
  - Product presentation
  - Branding
  - Promotion and PR.
- Other key skill needs included operating and maintaining equipment and the need for information on the development of renewable energy.

Manufacturing

- Sales and merchandising / retail skills are becoming important – in particular understanding the customer and branding / marketing / retail presentation of products
- Food safety legislation is driving skills needs – in particular, food technologists are needed
- Business and management skills – in particular, process control skills such as lean management, stock control and the management of information
- Environmental awareness.

Hospitality

- Sales and merchandising skills are one of the sector's key skill needs – restaurateurs feel that selling the story behind the food and using local or seasonal goods are important to meet consumer demand
- Environmental awareness and waste awareness are also important skills
- People management is an essential skill for many hospitality providers.

Retail

- Sales and merchandising including:
  - Electronic point of sale (EPOS)
  - Online retailing and database management
  - Marketing awareness and pricing strategies
  - Retail presentation skills – for example product ranges, product displays and store layout.
- Environmental awareness and waste awareness are also important skills.

Cross-sector

- Analysis of technical skills needs revealed a degree of commonalities across the FDSC. In terms of general management skills, sales and merchandising featured as an important skill in each sector and in most cases, the underlying issue was a need for a better understanding of the market. A common link between the sectors was the promotion of 'sense of place' which is seen as an important aspect of both customer service and competitive advantage.
- In terms of skills shortages, one quarter of respondents who recruited last year experienced a difficulty. The main reasons given were either that applicants did not have either the right attitude (42%) or the right skills (39%). The qualitative research supported these findings with many employers stating that employability skills, such as having the right attitude for work were lacking among applicants. This was particularly the case for employers in the hospitality sector.
- Further comments received through qualitative fieldwork related to applicants not having sufficient communication skills or even more fundamentally, sufficient interpersonal skills at the most basic level. When employers are faced with skills shortages, the typical response is to try to train and develop existing staff, as evidenced by two thirds of survey respondents. Thus the issue of a skills shortage becomes one of a skills gap in the current workforce.

Supply of training

In general, the FDSC suffers from poor career perceptions. Furthermore, the primary production and hospitality sectors are characterised by an ageing workforce and short term temporary labour respectively. The level of training varies greatly across the supply network, with some sectors suffering from widespread apathy towards training. These are fundamental issues that need to be addressed to ensure this important element of the Welsh economy has the workforce it needs to take it forward.

- In 2010, approximately 35,000 students were enrolled in FDSC related FE learning across Wales and a further 2,500 were enrolled in HE learning. During the qualitative research, numerous comments regarding the disjoint between industry needs and the FE sector were recorded. Several businesses commented that they felt the FE sector was not equipping students with the skills their business needed. A significant amount of training is known to take place in the FDSC through private providers although a detailed understanding of the extent of such training is largely unknown.
- The preferred method of training across the FDSC as a whole is 'on the job training with employers' and particularly so for semi and unskilled labour. Training with an external provider appears to be more suited to businesses in the primary production and manufacturing sectors. For the majority of businesses interviewed, the main reason for the preference of training was based on its cost and being able to minimise the loss of staff time.
- Across the FDSC as a whole, more than a third (37 %) of all businesses stated that they are involved in some form of diversification or expansion activity which could mean expanding their product range / services, or becoming involved in new activities - for example diversifying into different sectors. This highlights that there is a high level of optimism and entrepreneurialism among businesses in the FDSC but as the report has also shown, a significant amount of skills are required to drive it forward.

Conclusions and Recommendations

- The FDSC is important to the Welsh economy, but it needs to add more value to compete with the rest of the UK. This will include taking advantage of the opportunities offered through a whole supply chain approach, considering where transferable skills exist and where joint initiatives on training and business development can either be identified from existing provision or through bespoke development.
- Ensuring that the Welsh workforce has the necessary skills to drive the FDSC forward is the responsibility of the SSCs and this research provides a robust evidence base from which they can develop strategies and secure the necessary funding needed to achieve this aim.

Considering the FDSC as a whole, there are two main sources of cross-sectoral skills needs:

- Where skills are common to more than one sector – for example, customer service, sales and merchandising or butchery skills
- Where individual businesses have diversified into another sector and so have developed additional skills needs as a result.

Based on the research findings set out in the Welsh Food & Drink Skills Project report, the following five key recommendations are suggested:

1. Raise awareness and develop understanding of cross-sectoral skills in the FDSC
2. Increase the profile and understanding of the FDSC as a potential career
3. Develop a greater understanding of non-accredited training
4. Improve links between education and industry
5. Enhance conditions which enable cross-sectoral business to take place

Recommendation aim	Suggested actions
Raise awareness and create an understanding of FDSC cross-sectoral skills	Consider the development of a **FDSC training and support hub**, to allow information exchange, collaborative working and joint training /business development initiatives across the FDSC. **Raise awareness of existing cross-professional modules** in technical skills, leadership & management, and generic skills relevant to the FDSC. **Develop bite-sized CPD materials** to take forward the cross-professional core content. The approach could include **best practice sharing / business mentoring**, for example arranging for cross-sectoral visits, along the lines of the Agrisgôp demonstration farms – to allow stakeholders from different parts of the FDSC to understand issues around sourcing, production, distribution and consumer demand from other parts of the chain.
Increase the profile and understanding of the FDSC as a potential career	Raise awareness of the importance of the FDSC by **liaising with the Welsh Government now that Food and Farming has been recognised as a priority sector**. **Promote industry-wide careers in** the FDSC, with options for individual sectors: 'Food: Growing it, Making it, Selling it, Serving it'. **Identify funding opportunities to develop an FDSC apprenticeship** or a shared apprenticeship between sectors where diversification is high – for example retail and manufacturing.
Develop a greater understanding of non-accredited training	The FDSC needs to **develop a common data capture system** that records (where possible) much of the non-accredited training currently delivered through Farming Connect, Supply Chain Efficiency, Process and Marketing Grant Scheme and Axis 3 and 4 etc. Consider **working with CQFW to accredit a greater proportion of this learning**, as part of an aspirational programme aiming to recognise the professionalism of the FDSC.
Improve links between education and industry	**Convene a working party** to improve and articulate links between the needs of FDSC industries and the curriculum in FEIs. This should include study visits to leading edge restaurants and other establishments to understand their skills needs. **Instigate a shift from 'entry' training to CPD delivery** among FEIs, to capitalise on the developing skills of those in the workplace and to better meet the needs of employers. **Influence training providers** to include headline skills needs identified in this research in future provision. For example, local sourcing and 'selling the story'.
Enhance conditions which enable cross-sectoral business to take place	**Create opportunities for businesses** in different sectors to meet and to develop business links. In particular, links between sectors currently overlapping should be targeted, as well as developing potential links.

For full report and appendices go to:

www.foodanddrinkskills.co.uk

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Prosiect Sgiliau Bwyd a Diod Cymru

Crynodeb Gweithredol

darparu sgiliau ar gyfer twf yn y dyfodol

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Hydref 2011

Mae'r prosiect hwn yn cael ei gefnogi gan raglen Arbrofol Cronfa Blaenoriaethau Sector Llywodraeth Cymru sydd hefyd yn cael cymorth ychwanegol gan Gronfa Gymdeithasol Ewrop (CGE)

Crynodeb Gweithredol

Cyflwyniad

- Mae pedwar diwydiant allweddol yn rhan o'r gadwyn gyflenwi bwyd a diod (FDSC)[1]; cynhyrchu cynradd, gweithgynhyrchu bwyd a diod, lletygarwch a manwerthu. Mae'r FDSC yn bwysig iawn i economi Cymru yn nhermau cyflogaeth, incwm a'r cyfraniad a wneir i dwristiaeth.
- Nod y prosiect ymchwil hwn oedd asesu'r cyflenwad a'r galw am hyfforddiant ac addysg alwedigaethol ar draws y gadwyn gyflenwi ar ran y pedwar Cyngor Sgiliau Sector (SSC) (Lantra, Improve, Skillsmart Retail a People 1st) sy'n gyfrifol am yr FDSC. Mae'r gwaith ymchwil hwn, a gafodd ei ariannu drwy Gynllun Peilot Cronfa Blaenoriaethau Sector Llywodraeth Cymru, yn nodi man cychwyn ar gyfer cydweithio rhwng yr SSCau trwy nodi anghenion sgiliau sy'n dod i'r golwg ar draws y gadwyn.
- Mae'r ymchwil yn seiliedig ar sampl gynrychioliadol o oddeutu 2,000 o fusnesau ar draws Cymru a gasglwyd ynghyd trwy gyfrwng arolwg ffôn ar raddfa fawr a chyfres o gyfweliadau ansoddol a gweithdai, a oedd hefyd yn cynnwys rhanddeiliaid o'r diwydiant, cyflogwyr, darparwyr hyfforddiant a myfyrwyr.
- Yn gyntaf, mae'r ymchwil yn ystyried argraffiadau cyflogwyr cyfredol ynghylch y galw am anghenion sgiliau yn eu busnes, nawr ac yn y dyfodol, ac yn ail, mae'r ymchwil yn nodi'r cyflenwad hyfforddiant a geir ar hyn o bryd trwy ystyried lefelau'r ddarpariaeth, y dulliau a'r rhwystrau. O ganlyniad, rhoddir awgrymiadau ar gyfer camau gweithredu posib i'r dyfodol.

Trosolwg

- Mae'r FDSC yng Nghymru **yn cyflogi yn fras 230,000 o bobl**, sy'n cyfateb i 5.7 % o'r gweithlu cyfan yn yr FDSC yn y Deyrnas Unedig.
- Yn ei chyfanrwydd, mae'r FDSC **yn cyfateb i tua 18% o weithlu Cymru gyfan**. Er gwaethaf y dirwasgiad fe wnaeth yr FDSC yng Nghymru berfformio'n dda ac esgor ar oddeutu £6.5bn[2] o refeniw gwerthiant yn 2010.
- Trwy amlygu pwysigrwydd yr FDSC i economi Cymru a thrwy sefydlu casgliadau cadarn ynghylch anghenion sgiliau'r FDSC, nawr ac yn y dyfodol, **mae'r adroddiad yn ceisio darparu digon o wybodaeth i'r consortia o SSCau fel y gallant sefydlu'r mecanweithiau cyflwyno angenrheidiol er mwyn sicrhau bod digon o sgiliau gan y gweithlu i yrru'r FDSC yn ei blaen**.
- Cydnabyddiaeth o gyfraniad pwysig y sector i economi Cymru yw fod Llywodraeth Cymru wedi cyhoeddi'n ddiweddar y bydd bwyd a ffermio yn cael ei gydnabod yn sector blaenoriaeth ym Mholisi Adferiad Economaidd Llywodraeth Cymru.

[1] Mae cyfran o'r diwydiant cyfanwerthu yn cyfrannu at yr FDSC ond ni chafodd hyn ei gynnwys yn rhychwant yr ymchwil hon, fodd bynnag y mae rhywfaint o orgyffwrdd yn digwydd lle bo rhannau o'r cyfanwerthu yn cael eu cynnwys yn olion troed Improve a Skillsmart Retail a gynhwysir yng nghwmpas yr ymchwil.

[2] Amcangyfrifon trosiant canolbwynt pwysol, Cofrestr Ryngadrannol o Fusnesau 2010.

Gosod y cefndir

Mae'r FDSC yng Nghymru yn cyflogi yn fras 230,000 o bobl, sy'n cyfateb i 5.7% o'r gweithlu cyfan yn yr FDSC yn y Deyrnas Unedig. Yn ei chyfanrwydd, mae'r FDSC yn cyfateb i tua 18% o weithlu Cymru gyfan. Er gwaethaf y dirwasgiad fe wnaeth yr FDSC yng Nghymru berfformio'n dda ac esgor ar oddeutu £6.5bn[3] o refeniw gwerthiant yn 2010.

Sector	Nifer gweithwyr[4]	Nifer busnesau[5]	Trosiant (£miliynau)[6]
Cynhyrchu Cynradd	56,600	13,790	1,752
Gweithgynhyrchu	21,200	560	467
Cyfanwerthu	8,800	695	567
Manwerthu	62,500	3,805	1,440
Lletygarwch	77,800	8,665	2,292
FDSC	**226,900**	**27,515**	**6,518**

Ymchwil 2011 i'r FDSC yng Nghymru

- Ym mhob sector mae bylchau sgiliau ar lefel fusnes strategol, sydd â chysylltiadau gydag arweinyddiaeth a rheolaeth. Mewn llawer o'r sectorau – yn enwedig felly ar gyfer busnesau cynhyrchu cynradd, y mae angen gwell dealltwriaeth o gostau cynhyrchu a phrisio.
- Y sgiliau mwyaf pwysig a restrwyd gan fusnesau ar draws yr FDSC oedd: gweithredu a chynnal cyfarpar, ymwybyddiaeth o wastraff, ymwybyddiaeth ac arferion amgylcheddol, gwerthu a masnachu a thrin â llaw. Cafodd technoleg bwyd a thrin deunyddiau crai eu cynnwys hefyd, fel sgiliau mwy arbenigol, o ran eu bod yn cael eu hystyried yn sgiliau pwysig iawn, ond bod hynny ar gyfer cyfran lai o'r gweithlu.
- O fewn sectorau unigol, roedd sgiliau gwerthu a masnachu yn hynod bwysig ar gyfer manwerthu, ymwybyddiaeth o wastraff ac ymwybyddiaeth amgylcheddol ar gyfer manwerthu a lletygarwch, a rheoli deunyddiau crai ar gyfer lletygarwch a gweithgynhyrchu. Yn y sector cynhyrchu cynradd, roedd gweithredu a chynnal cyfarpar, a sgiliau busnes a gweinyddu yn arbennig o bwysig. Wrth ddadansoddi anghenion sgiliau'r dyfodol gwelwyd mai sgiliau gwerthu a masnachu, ar y cyfan, fyddai'r mwyaf pwysig dros y tair blynedd nesaf.
- Yn nhermau bylchau sgiliau, nododd 22% o'r rhai a ymatebodd i'r arolwg y bu achlysur pryd y gwelwyd nad oedd y sgiliau angenrheidiol gan eu gweithlu yn ei gyfanrwydd er mwyn cyflawni anghenion y busnes. Mae hyn yn cyfateb yn fras i 14,000 o weithwyr gyda diffygion sgiliau yn yr FDSC yng Nghymru.
- Dywedodd pedwar deg pump y cant o'r busnesau a gafodd eu cyfweld fod bwlch sgiliau technegol ymysg eu gweithlu, yn bennaf yn ymwneud â sgiliau busnes, gwerthu a masnachu, technoleg bwyd a gweithredu a chynnal cyfarpar. O fewn sectorau unigol ac ar draws sectorau, dyma'r bylchau sgiliau pennaf:

Cynhyrchu Cynradd

- Sgiliau busnes, megis:
  - Negydu gyda chontractwyr
  - Deall eich cwsmeriaid a'ch cynhyrchion
  - Deall costio a phrisio
  - Deall a chymryd rhan mewn gwaith sylfaenol o ran cyfrifo a chadw cofnodion.

[3] Amcangyfrifon trosiant canolbwynt pwysol, Cofrestr Ryngadrannol o Fusnesau 2010.

[4] Ffynhonnell: ONS 2009 Arolwg y Gofrestr Busnesau a Chyflogaeth.

[5] Ffynhonnell: Nifer yr unedau lleol o fentrau seiliedig ar TAW a/neu PAYE yn 2010 (IDBR 2010).

[6] Ffynhonnell: IDBR 2009/10, amcangyfrifon trosiant canolbwynt gan ddefnyddio codau FDSC SIC (2007).

- Sgiliau gwerthu a marchnata megis:
  - Cyflwyno cynnyrch
  - Brandio
  - Hyrwyddo a Chysylltiadau Cyhoeddus.
- Ymhlith yr anghenion sgiliau allweddol eraill yr oedd gweithredu a chynnal cyfarpar a'r angen am wybodaeth ynghylch datblygu egni adnewyddadwy.

Gweithgynhyrchu

- Mae sgiliau gwerthu a masnachu / manwerthu yn dod yn bwysig – yn enwedig deall y cwsmer a brandio / marchnata / cyflwyno cynnyrch ar gyfer manwerthu
- Mae deddfwriaeth diogelwch bwyd yn gyrru'r angen am sgiliau – yn arbennig, mae angen technolegwyr bwyd
- Sgiliau busnes a rheoli – yn arbennig, sgiliau rheoli proses megis rheolaeth ddarbodus, rheoli stoc a rheoli gwybodaeth
- Ymwybyddiaeth amgylcheddol.

Lletygarwch

- Sgiliau gwerthu a masnachu yw un o'r anghenion sgiliau allweddol yn y sector – mae perchnogion bwytai yn teimlo bod gwerthu'r stori y tu cefn i'r bwyd a defnyddio nwyddau lleol neu dymhorol yn bwysig er mwyn bodloni gofynion defnyddwyr
- Mae ymwybyddiaeth amgylcheddol ac ymwybyddiaeth o wastraff yn sgiliau pwysig hefyd
- Mae rheoli pobl yn sgil hanfodol i lawer o ddarparwyr lletygarwch.

Manwerthu

- Gwerthu a masnachu gan gynnwys:
  - Systemau electronig yn y man gwerthu (EPOS)
  - Rheoli cronfeydd data a manwerthu ar lein
  - Ymwybyddiaeth o'r farchnad a strategaethau prisio
  - Sgiliau cyflwyno manwerthu – er enghraifft ystodau cynhyrchion, arddangos cynnyrch a gosodiad siopau.
- Mae ymwybyddiaeth amgylcheddol ac ymwybyddiaeth o wastraff yn sgiliau pwysig hefyd.

Traws-sector

- Wrth ddadansoddi'r anghenion sgiliau technegol, dangoswyd elfen sy'n gyffredin ar draws yr FDSC. O ran sgiliau rheoli cyffredinol, roedd gwerthu a masnachu yn ymddangos yn sgil pwysig ym mhob sector ac yn y rhan fwyaf o achosion, y mater wrth wraidd hyn oedd angen i fod â gwell dealltwriaeth o'r farchnad. Dolen gyffredin rhwng y sectorau oedd hyrwyddo 'synnwyr o le' a ystyrir yn agwedd bwysig ar y gwasanaeth i gwsmeriaid yn ogystal ag o ran mantais gystadleuol.
- O ran prinder sgiliau, nododd chwarter yr ymatebwyr a fu'n cyflogi y llynedd y cawsant anhawster wrth wneud hynny. Y prif resymau a roddwyd oedd naill ai nad oedd gan yr ymgeiswyr ddim mo'r agwedd gywir (42 %) neu'r sgiliau cywir (39 %). Roedd yr ymchwil ansoddol yn cefnogi'r casgliadau hyn gyda llawer o gyflogwyr yn dweud bod diffyg sgiliau cyflogadwyedd ymysg ymgeiswyr, megis bod â'r agwedd gywir at waith. Roedd hyn yn arbennig o wir ar gyfer cyflogwyr yn yr sector lletygarwch.
- Roedd sylwadau pellach a gasglwyd trwy waith maes ansoddol yn ymwneud ag ymgeiswyr heb sgiliau cyfathrebu digonol neu hyd yn oed yn fwy sylfaenol, heb ddigon o sgiliau rhyngbersonol ar y lefel fwyaf sylfaenol. Pan fydd cyflogwyr yn wynebu prinder sgiliau, yr ymateb nodweddiadol yw ceisio hyfforddi a datblygu staff presennol, fel y nododd dau draean o'r ymatebwyr i'r arolwg. Felly mae mater prinder sgiliau yn troi'n fater o fwlch sgiliau yn y gweithlu cyfredol.

Cyflenwi hyfforddiant

Yn gyffredinol mae argraffiadau pobl yn wael o ran yr FDSC a gyrfaoedd. At hynny, mae'r sectorau cynhyrchu cynradd a lletygarwch yn cael eu nodweddu gan weithlu sy'n mynd yn hŷn a llafur dros dro tymor byr, yn y drefn honno. Mae lefel yr hyfforddiant yn amrywio'n fawr ar draws y gadwyn gyflenwi, gyda rhai sectorau'n dioddef oherwydd difaterwch cyffredin tuag at hyfforddiant. Mae'r rhain yn faterion sylfaenol y mae angen rhoi sylw iddynt er mwyn sicrhau bod yr elfen bwysig hon o'r economi Gymreig â'r gweithlu angenrheidiol er mwyn bwrw ymlaen i'r dyfodol.

- Yn 2010, roedd oddeutu 35,000 o fyfyrwyr wedi cofrestru ar gyrsiau Addysg Bellach (AB) yn gysylltiedig â'r FDSC ledled Cymru a 2,500 arall wedi cofrestru mewn Addysg Uwch. Yn ystod yr ymchwil ansoddol, cofnodwyd sylwadau niferus ynghylch y datgysylltiad rhwng anghenion y diwydiant a'r sector AB. Dywedodd nifer o fusnesau eu bod yn teimlo nad oedd y sector AB yn arfogi myfyrwyr gyda'r sgiliau oedd yn angenrheidiol ar gyfer eu busnes. Mae'n hysbys fod swm sylweddol o hyfforddiant yn digwydd yn yr FDSC trwy ddarparwyr preifat er nad oes ddealltwriaeth fanwl o hyd a lled hyfforddiant o'r fath.
- Y dull hyfforddi a ffefrir ledled yr FDSC gyfan yw 'hyfforddiant wrth y gwaith gyda chyflogwyr' ac yn enwedig felly ar gyfer gweithwyr di-grefft a lled-grefftus. Mae'n ymddangos fod hyfforddiant gyda darparwr allanol yn fwy addas ar gyfer busnesau yn y sectorau cynhyrchu cynradd a gweithgynhyrchu. I'r mwyafrif o fusnesau a gafodd eu cyfweld, y prif reswm dros ffafrio hyfforddiant penodol oedd ei gost a'r gallu i golli cyn lleied â phosib o amser y staff.
- Ar draws yr FDSC yn ei chyfanrwydd, dywedodd rhagor na thraean (37 %) o'r holl fusnesau eu bod yn ymwneud â rhyw fath o arallgyfeirio neu weithgarwch ehangu a allai olygu ehangu eu hamrediad o gynhyrchion / gwasanaethau, neu ddod yn rhan o weithgareddau newydd – er enghraifft arallgyfeirio i sectorau gwahanol. Mae hyn yn amlygu fod yna lefel uchel o optimistiaeth ac entrepreneuriaeth ymysg busnesau yn yr FDSC ond fel y dangosodd yr adroddiad hefyd, y mae angen cryn dipyn o sgiliau er mwyn gyrru hyn yn ei flaen.

Casgliad ac Argymhellion

- Mae'r FDSC yn bwysig i economi Cymru, ond mae angen iddi ychwanegu mwy o werth er mwyn cystadlu â gweddill y DU. Bydd hyn yn cynnwys manteisio ar gyfleoedd a gynigir trwy ymdriniaeth cadwyn gyflenwi gyfan, gan ystyried ble mae yna sgiliau trosglwyddadwy a ble y gellir nodi mentrau ar y cyd o ran hyfforddi a datblygu busnes naill ai trwy edrych ar y ddarpariaeth bresennol neu trwy eu datblygu o'r newydd.
- Cyfrifoldeb y cynghorau SSC yw sicrhau fod y sgiliau angenrheidiol gan y gweithlu Cymreig i yrru'r FDSC yn ei blaen ac mae'r gwaith ymchwil hwn yn rhoi sylfaen tystiolaeth cadarn y gellir ei ddefnyddio er mwyn datblygu strategaethau a sicrhau'r ariannu sydd ei angen er mwyn cyflawni'r nod hwn.

O ystyried yr FDSC yn ei chyfanrwydd, mae dau brif fan lle mae yna anghenion sgiliau traws-sector:

- Lle bo sgiliau yn gyffredin i fwy nag un sector – er enghraifft, gwasanaeth i gwsmeriaid, gwerthu a masnachu neu gynllunio busnes
- Lle bo busnesau unigol wedi arallgyfeirio i sector arall ac felly wedi datblygu anghenion sgiliau ychwanegol o ganlyniad i hynny.

Ar sail casgliadau'r ymchwil a ddisgrifir yn adroddiad Prosiect Sgiliau Bwyd a Diod Cymru, awgrymir y pum argymhelliad allweddol canlynol:

1. Codi ymwybyddiaeth a datblygu dealltwriaeth o sgiliau traws-sector yn yr FDSC
2. Codi proffil a dealltwriaeth o'r FDSC fel gyrfa bosib
3. Datblygu gwell dealltwriaeth o hyfforddiant nad yw'n achrededig
4. Gwella cysylltiadau rhwng addysg a diwydiant
5. Gwella'r amodau sy'n caniatáu i fusnes traws-sector ddigwydd

Nod Argymhelliad	Camau a awgrymir
Codi ymwybyddiaeth a datblygu dealltwriaeth o sgiliau traws-sector yn yr FDSC	Ystyried datblygu **canolfan** (*hub*) **hyfforddiant a chefnogaeth FDSC**, ar gyfer cyfnewid gwybodaeth, gweithio ar y cyd a mentrau datblygu busnes / hyfforddiant ar y cyd ar draws yr FDSC. **Codi ymwybyddiaeth o fodiwlau traws-broffesiynol presennol** mewn sgiliau technegol, arweinyddiaeth a rheolaeth, a sgiliau generig sy'n berthnasol i'r FDSC. **Datblygu defnyddiau CPD byrion** er mwyn bwrw ymlaen â'r cynnwys creiddiol traws-broffesiynol. Gallai'r ymdriniaeth gynnwys **rhannu arfer da / mentora busnes**, er enghraifft trefnu ymweliadau traws-sector, ar batrwm grwpiau trafod Agrisgôp – er mwyn i randdeiliaid o wahanol rannau'r FDSC ddeall materion ynghylch canfod ffynonellau, cynhyrchu, dosbarthu a galw gan ddefnyddwyr mewn rhannau eraill o'r gadwyn.
Codi proffil a dealltwriaeth o'r FDSC fel gyrfa bosib	Codi ymwybyddiaeth o bwysigrwydd yr FDSC trwy **gydgysylltu â Llywodraeth Cymru nawr bod Bwyd a Ffermio wedi'i gydnabod yn sector blaenoriaeth**. **Hyrwyddo gyrfaoedd ledled y diwydiant** yn yr FDSC, gydag opsiynau ar gyfer sectorau unigol: 'Bwyd: Ei dyfu, Ei wneud, Ei werthu, Ei weini'. **Nodi cyfleoedd ariannu er mwyn datblygu prentisiaeth FDSC** neu brentisiaeth wedi'i rhannu rhwng sectorau lle ceir llawer o arallgyfeirio – er enghraifft manwerthu a gweithgynhyrchu.
Datblygu gwell dealltwriaeth o hyfforddiant nad yw'n achrededig	Mae ar yr FDSC angen **datblygu system gasglu data cyffredin** sy'n cofnodi (lle bo modd) llawer o'r hyfforddiant heb ei achredu sy'n digwydd ar hyn o bryd trwy Gyswllt Ffermio, Arbedion yn y Gadwyn Gyflenwi, Cynllun Grant Prosesu a Marchnata ac Echel 3 a 4 ac ati. Ystyried **gweithio gyda CQFW i achredu cyfran fwy o'r dysgu hwn**, fel rhan o raglen ddyheadau gyda'r nod o gydnabod proffesiynolrwydd yr FDSC.
Gwella cysylltiadau rhwng addysg a diwydiant	**Cynnull gweithgor** i wella a mynegi cysylltiadau rhwng anghenion diwydiannau'r FDSC a'r cwricwlwm mewn sefydliadau Addysg Bellach. Dylai hyn gynnwys ymweliadau astudio â bwytai a sefydliadau eraill ar flaen y gad er mwyn deall eu hanghenion sgiliau. **Ysgogi symudiad oddi wrth hyfforddiant 'mynediad' at gyflwyno CPD** ymysg sefydliadau Addysg Bellach, er mwyn manteisio ar sgiliau datblygol y rhai sy'n y gweithle a llwyddo'n well i fodloni gofynion y cyflogwyr. **Dylanwadu ar ddarparwyr hyfforddiant** i gynnwys anghenion sgiliau amlwg a nodwyd yn y gwaith ymchwil hwn mewn darpariaeth yn y dyfodol. Er enghraifft, canfod ffynonellau lleol a 'gwerthu'r stori'.
Gwella'r amodau sy'n caniatáu i fusnes traws-sector ddigwydd	**Creu cyfleoedd ar gyfer busnesau** mewn gwahanol sectorau i gwrdd a datblygu cysylltiadau busnes. Yn arbennig, dylid targedu cysylltiadau rhwng sectorau sydd eisoes yn gorgyffwrdd, yn ogystal â datblygu darpar gysylltiadau.

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