

AGRI-BUSINESS IN TUSCANY

How the sector operates

Agri-business includes all activities relating to agricultural products, from crop production, transportation, processing (when needed), to the marketing of the finished goods. Tuscany has a strong, diversified traditional vocation, and firms distributed all over the territory; the food industry represents about 18% of the region's manufacturing sector.

Specifically, in the Grosseto province the primary sector has a specialization index three times higher than the regional average, in terms of added value and number of firms. However, the Grossetan Maremma has experienced several difficulties, partly due to population decline and aging, so that in the 1990s a new development path was undertaken (also by establishing the Rural District of Maremma), in which the concept of "rural" is reversed, representing no more poverty and exclusion but a paradigm of sustainable development. The focus group has worked on dynamic firms located in the south of Tuscany: the main actors are individual entities, for the most part family-run businesses in agricultural products and processes (fruits and vegetables, cereals, vines and olives), fishing and fish processing, livestock and meat processing (sheep, goats and pigs), and food manufacture (bread, biscuits).

The crisis has affected local firms at different degrees, hitting hard on the upstream businesses that deal with strong intermediaries. The competitive response strategies have mainly focused on the reorganization of (firm and network) processes to increase added value by offering peculiar local products and services, and on production control improvement, from crop growing to marketing for end consumers. Today, the agro-food business relies more on quality and local traditions than on large-scale crops, and on the mounting promotion of connections with tourism, given that the typical Tuscan product can well gain international market shares.

Skill needs: strategic competencies and job profiles

Despite decreased hiring due to the crisis, the progressive specialization of activities has widened the range of skills required, and thus of training courses including protracted farm experience. The preparation of students from the local Technical and Professional Institutes is still considered insufficient, and the younger generation has distanced itself from the more traditional jobs – particularly as employed – in agriculture, livestock and fisheries. Consequently, firms have difficulties in finding **fishers, cellarmen, oil mill operators, cheese technicians**, especially with the more advanced and specific training now required. The same is true of staff for **seasonal work harvesting** or **unskilled tasks** on the **factory floor**, at the **packing, warehouse** and **shipping** departments of processing enterprises. Learning skills in the workplace belongs to a past when people started working much younger than today.

Given the agro-food vocation of the area, there is a stronger demand for highly educated professionals, such as **livestock vets** and **nutritionists, agronomists** well acquainted with the local territory and organic farming, **food chemists** and **scientists**. **Marketing** and **distribution experts** are also required to increase sale and market shares, as well as accommodation experts to consolidate the links between agri-business and tourism.

The training of **entrepreneurs** takes up a special role in bringing the new generation closer to the agro-food sector, promoting growth and stability, introducing innovation and cooperative strategies among the local enterprises, predominantly small and very small-sized firms. The local training system – Technical and Professional Institutes in different areas, a Higher Technical Institute, centre of excellence in agro-food

studies, some branches of the Siena University, and several specialized training agencies – could well coordinate a project with the partnership of local enterprises, based on the shared idea of a territorial specialization in hospitality, and high-quality, short supply chain food.

A taxonomy of the required professional qualifications

The table below combines data from three sources: the mandatory employment notices from firms to job centres, introduced in 2008; the IRPET survey on the training needs of the Tuscan firms having recorded higher-than-average turnover and employment rates after the crisis; the focus groups with firms belonging to strategic sectors for regional growth. The quantitative and qualitative data collected were used to classify occupations by employment capacity (number of newly employed), and job stability (combination of days worked and contract type).

Overview of the most sought-after and in-demand agri-business jobs

		Job stability	
		Medium-high	Medium-low
Employment capacity (number of newly employed)	Medium-large	Farmers, horticultural, nursery, flower and ornamental plant growers, specialists in protected horticultural and market gardens Artisan bakers and pastry cooks Artisan confectionery, ice-cream and preserve makers Packaging equipment operators and industrial packaging workers Butchers, fishmongers and related workers Food preparation, cooking and serving workers	Farm labourers Woody crop farmers and field workers Mixed-crop farmers and field workers Skilled forestry workers Open-field farmers and workers Farm tractor drivers Non-qualified industrial workers and related workers Bakery- and confectionary-products machine operators Unskilled forestry workers Olive processing equipment operators
	Medium-small	Industrial winery and brewery operators, operators of equipment for the preparation of liqueurs, and soft and carbonated drinks Non-qualified animal care workers Forestry plant operators Heavy-truck and lorry drivers Cattle and horse breeders and skilled farmers Artisanal processing of dairy-products makers and skilled workers Biochemical technicians and related workers Agronomy and forestry technicians Production planning technicians Cereals-, spices- and cereal-products (pasta and similar) processing-machine operators	Food production and preparation technicians Automated and semi-automated machine-tool operators Agriculture and livestock equipment operators Composite products assemblers Dairy-products machine operators Automated-assembly-line operators Drivers of harvesting and reaping machines, agricultural shredders and pressers

The analysis of recruitment capacity resulted in two occupation groups (medium-large and medium-small), depending on the number of newly employed (larger/smaller than the median value). The analysis of job stability resulted in two occupation groups (medium-high and medium-low), depending on the value of the composite indicator (higher/lower than the median value).