

2024 Investment advice to TEC

Part two - Mix of provision



MUKA TANGATA
People, Food and Fibre
Workforce Development Council

Purpose

This paper sets out Muka Tangata investment advice to the Tertiary Education Commission (TEC). It includes our expectations of how we want the provider sector to work with us; our pan-sector advice, which builds on the ‘theme’ advice we gave to TEC in December 2022; and details our specific advice for our 14 industry groupings that make up the food and fibre sector.

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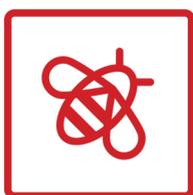
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Muka Tangata

is the Workforce Development Council (WDC) for the food and fibre sector.

We work on ways to enhance vocational education and training (VET) to meet the needs of industry, iwi and hapū Māori, ākonga (learners), and kaimahi (workers), and support them to flourish.

Our sector is made up of 14 industry groupings:



Apiculture



Arable



Dairy Farming



Equine, Greyhounds
and Racing



Forestry



Fruit



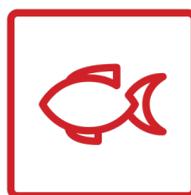
Grapes and Wine



Nursery, Turf and
Gardening



Poultry, Pigs and
other livestock



Seafood



Sheep, Beef, Deer
and Wool



Support Services



Vegetables



Veterinary

Please see [our website](#) for more information on our industry groupings.

At a glance

The food and fibre sector of Aotearoa, New Zealand



287,663 people

We counted **287,663** people in the food and fibre workforce in 2020.

16% Māori workforce



16% of the workforce identified as Māori in 2020. The proportion of people who identify as Maori is higher in the food and fibre sector than in the general working age population (**13.2%**).

36% female

36% of the food and fibre workforce in 2020 were women.

6% of Pacific peoples

6% of Pacific peoples worked in the food and fibre sector in 2020.

6% of tangata whaikaha

In 2021, tangata whaikaha (people with disabilities) made up **3.6%** of the working age population and **2%** of the labour force. Of these, **6%** worked in agriculture, forestry, fishing and mining industries.



Basis of our advice

Our advice is based on the work we have undertaken to develop our Workforce Development Plans for our 14 industry groupings.

Our Workforce Development Plans (WDPs) capture the key industry, workforce and learner information about each sector, identify the issues facing the sector, and outline the roadmap of actions that Muka Tangata will undertake in partnership with industry, iwi and hapū Māori, and education providers to address those issues.

mukatangata.workforceskills.nz

I'm interested in **Dairy farming** and exploring **An overview**

Let's go

An overview
Trends and analysis
Key opportunities
Roadmaps

Industry
Insights for Industry about trends in economic performance indicators.

Workforce
Insights on the workforce, including; size, ethnicity, age, regional distribution, and gender.

Learners
Insights about learners, including trends in enrolments and mix of provision.

The WDPs are based on engagement across our industries and with our partners and stakeholders; reviewing key industry publications such as strategies, action plans, and workforce development plans; and data, research and analysis, including Ministry for Primary Industries (MPI), Ministry of Business, Innovation, and Employment, and Statistics New Zealand Integrated Data Infrastructure (IDI) workforce data, MPI and IBISWorld industry and labour market analysis, and Tertiary Education Commission Ngā Kete learner data.

These plans are intended as a starting place for further engagement with our industries. They are dynamic and will evolve as our understanding grows and as industries change.

Our advice here provides the high-level detail of our recommendations. For more in-depth analysis, research and data see our industry-specific WDPs. These can be accessed online through our [Workforce Development Plan web portal](#).

Overarching advice

Funding micro-credentials

Our industries want shorter, targeted, and flexible training. To address this need we are developing a number of micro-credentials. This is likely to be a feature across all sectors, not just food and fibre, and we want to ensure that sufficient funding is available to meet demand.

Monitoring the impacts of funding policy changes

The removal of the fees-free policy and access of migrant workers to domestic fees is likely to have an impact on learner numbers, with flow on effects to industries.

Effective and timely monitoring will be required to ensure that those policy changes are achieving their desired outcomes.

Changes to meet emerging needs over the next year

The recent weather events have highlighted the potential to respond to specific skill needs. It is too early for these to be identified but could mean short training to upskill new or existing workers. As these become more apparent, we will work with TEC and others to ensure that industries have the skills to support recovery.

Looking to the future

Our Workforce Development Plans have identified a number of cross-cutting sector issues that were common across many industries. These cross-cutting issues relate to many of the future focused challenges and opportunities for the whole sector, including climate responsiveness and developing and maintaining healthy and productive soils, water, plants, and animals. The skills required to address those issues will form a fundamental consideration as we develop our qualifications.

Simplifying and improving speed to market: from qualification development to programme availability

Muka Tangata is streamlining its qualification review and development processes with the aim of having learners able to enrol a year after the qualification review begins. Under our new processes, we will be partnering with industry, iwi Māori and vocational education providers to review and develop qualifications, standards, micro-credentials and programmes in parallel.

We will be keeping TEC informed, so that funding will be available when programmes have been endorsed. We indicate in our industry-specific advice below where we are undertaking qualification suite reviews.

Pan-sector advice

What our industries are looking for from providers

For December 2022, TEC sought 'theme' advice from WDCs to inform the broader priorities for investment in tertiary education and inclusion in Plan Guidance 2024. The broader priorities needed to be applicable across the tertiary sector and, as such, were not industry specific.

We have further refined our December advice and set out here our guidance on the things our industries expect TEC to take into account when assessing programmes for funding.

Our industries are looking for programmes that:

- incorporate mātauranga Māori (Muka Tangata has published [Te Whakatōnga](#) which outlines a bespoke approach to deliberately incorporating mātauranga Māori and te ao Māori values, including embedding pastoral care)
- deliver for Māori and underserved learners
- recognise workplace learning as the delivery mode of choice for 'be' and 'do' skills in vocational programmes and micro-credentials at levels 2-4 on the New Zealand Qualifications Framework
- meet the seasonality requirements of industries
- are flexible in their mix of provision, including meeting the needs of rural / geographically dispersed learners and the changing circumstances of the learner – for example, a learner who loses their job may go into full time education, or vice versa, and continue their programme
- do not require learners to repeat unnecessary training
- prioritise pastoral care for learners with programmes that is appropriate to the modes of delivery
- use skill standards in programmes when they become available and use unit standards in new programmes where they are available for at least the work-based assessment components
- use assessment methods that recognise the challenges of working and learning at the same time and prioritises utilising all forms of evidence - for example, naturally occurring evidence, workplace documents, videos, photographs, and verification / attestation.

Our expectation is that providers will engage early with us when planning to develop and revise programmes so that we can provide support and advice around industry / sector / Muka Tangata needs.

Support the cross-sector micro-credentials being developed by Muka Tangata

From our WDPs we have identified specific and technical skills which would benefit the entire sector. We are developing micro-credentials in the following areas:

- Critical decision making and agritech
- Irrigation operation and troubleshooting
- Freshwater management and regulation
- Environmental regulations
- Biosecurity

Increase workforce diversity

- **Support programmes that improve the participation of women:** Across the food and fibre sector women are underrepresented in the workforce. We have noted in our industry-specific advice the industries that have particularly low participation, but all industries (bar one, Veterinary Services) could improve.
- **Support programmes that improve the participation of people with disabilities (tangata whaikaha):** Across all sectors, not just food and fibre, people with disabilities are underrepresented. We note and support that this group is already a focus for TEC.

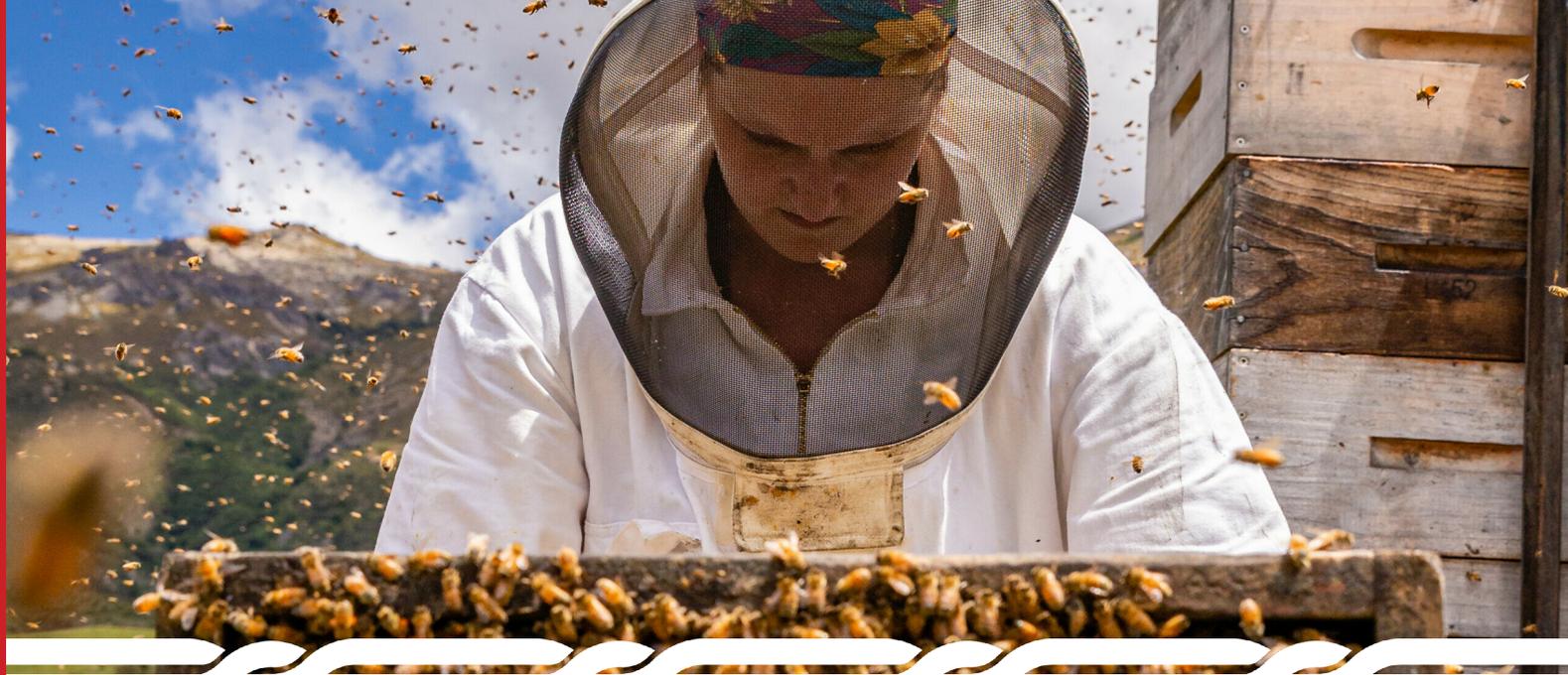
Specific investment advice

for each of our industry groupings

In general, the food and fibre sector is experiencing labour and skill shortages and declining numbers of learners. In that context, we are looking for, at a minimum, current levels of funding to be maintained.

For each of our industries we provide priority areas for focus and potential increase.





Apiculture

Prioritise work-based learning

A combination of high honey stocks, labour shortages, increased input costs and the uncertainty of future demand has led to a reduction in the number of commercial and semi-commercial beekeepers and a reduction in the number of hives.

At the same time learner numbers have increased significantly, driven by a leap in students enrolled with providers. We suspect that this represents hobbyist beekeepers taking up training.

A greater focus on work-based training is more likely to meet industry needs and we have recently recommended to Te Pūkenga that learning outcomes are aligned more closely with the practical outputs required in beekeeping.



Arable

Support programmes at Level 2 that are arable focussed or have a high component of arable-specific learning

The arable workforce has been slightly increasing, but has been aging, with 38% aged 55 or over in 2020. At the same time, learner numbers for arable-specific programmes has plummeted, only starting to track back up in the last few years. However, these are still less than half of what they were in 2011.

Supporting Level 2 programmes provides an entry point into the industry.

Number of places	Context
Fund another 100 places (for a total of 555)	<p>We have identified a range of qualifications that are relevant to Arable including broader level 2 Agriculture, Primary Industry and Farming Skills programmes / qualifications since arable-specific programmeFd information is not available.</p> <p>In 2022, 490 learners, all trainees, enrolled themselves in these level 2 qualifications. There was a significant decrease in the number of learners between 2015 and 2018, with numbers dropping from 2,640 to just 20. The number of these learners saw a slight recovery after 2018, but there was still a significant 61% decline in the overall number of learners since 2011...</p>

Number of places	Context
Fund another 100 places (for a total of 555)	Most of the qualifications do not currently have programmes being offered. We have therefore based our estimate on the New Zealand Certificate - Primary Industry Skills - Horticulture (Level 2) and New Zealand Certificate - Primary Industry Skills - Agriculture (Level 2).

Increase workforce diversity – support programmes that improve the participation of Māori

Māori only formed 9% of the arable workforce in 2020.



Dairy farming

The Dairy industry has produced the 'Great Futures in Dairying' plan in response to existing workforce challenges. It calls for more investment in careers, embracing new technology and working models; work-life balance; and increasing diversity.

Support a set of micro-credentials designed to address new and technical-based skills

The Dairy farming industry wants shorter, targeted, and flexible training. Ahead of a major review of the agriculture qualifications suite next year, Muka Tangata is developing a set of micro-credentials targeting identified skills gaps. These are:

- On-farm application of biosecurity plans
- Dairy grazing
- GHG emissions
- Calf rearing

Support programmes that provide transferable skills

The Dairy farming industry faces labour shortages. It recognises that having a workforce with transferable skills means that workers can move across the sector, opening up the labour pool for industries and providing options to workers for career paths.

Support work-based programmes that recognise the peaks and troughs of workloads in a seasonal industry

Work-based training needs to fit with the seasonal calendar of the Dairy industry, for example calving.

Support programmes across all levels that provide leadership / people management skills

Workforce retention is a key area of focus for the Dairy farming industry. Leadership skills, especially people leadership / management skills, are seen as a crucial component to fostering workplaces that retain staff, particularly when the industry is made up of small work teams. Training for these skills is usually reserved for higher level programmes (for example Level 5), but these concepts should be introduced earlier.

Support programmes that provide cultural competency skills

As the Dairy farming workforce becomes more diverse, cultural competency skills are essential. This will also help with staff retention.

Support programmes that provide health, wellbeing, communication, and self-awareness skills

Dairy farming is often solo or small team work in isolated workplaces. The industry is increasingly recognising the need for its workforce to have tools, techniques, and skills, such as communication and self-awareness, to maintain their own and other workers' good health and wellbeing.



Equine, Greyhounds, and Racing

Support the Thoroughbred industry's new training model

New Zealand Thoroughbred Racing have identified deficiencies in the current training model, resulting in a poorly trained workforce. In addition, a lack of clear career pathways is seen to be negatively affecting attraction and retention.

The industry is developing a new training model, starting with pre-employment and apprenticeship training (Levels 2-4) with part-time and full-time training and education options. This will be based on a combination of classroom-based training and education, work-based training, including work experience with a diverse range of employers from the thoroughbred industry. This will provide opportunities for learners to experience and consider a wide variety of career pathways within the industry.

Increase workforce diversity - support programmes that improve the participation of Māori

Māori only formed 9% of the equine, greyhounds, and racing workforce in 2020.



Forestry

Support the New Zealand Certificate in Forestry Leadership (Level 5) and associated micro-credentials

Industry identified a gap in progression in Forestry qualifications and a skills gap around leadership and succession planning. The New Zealand Certificate in Forestry Leadership (Level 5), which can also be undertaken as three stackable micro-credentials, provides the Forestry industry with people who have knowledge and skills to provide leadership and supervise others. The forestry industry will benefit by having people with leadership capabilities to enhance operational performance.

Support new qualifications and resulting programmes from the planned 2023 review of the Forestry qualifications suite

The Forestry industry is struggling to attract and retain staff at a time when changing technology and potential regulation changes are increasing the need for new skills. A lack of clear career pathways makes it difficult to attract people into the industry, and there is a need for leadership skills. Pastoral care that considers the needs of the whole person has also shown to impact positively on learner achievement.

Building on the new New Zealand Certificate in Forestry Leadership (Level 5), we have planned a review of the suite of forestry qualifications. We will be working with industry, providers, iwi and other stakeholders to develop a suite of forestry qualifications that provide clear career pathways; provide the skills needed for a changing industry and enable movement across the industry.

We anticipate new programmes to be available by June 2024.

Support programmes that have a focus on ‘earn as you learn’ training

Industry has told us that the existing delivery and assessment of Forestry industry qualifications don't fit learner needs, and the way in which learners are taught and assessed on the job makes it challenging for employers to support learners, both financially and in terms of time.

Alongside the Forestry qualifications review, Muka Tangata will be supporting providers to develop, deliver, and assess programmes, exploring different ways in which programmes can be delivered that meet the diverse needs of learners and employers. This includes ensuring programmes enable workers to undertake hands-on learning on the job and that suitable assessment methods, including the use of naturally occurring evidence, company Standard Operating Procedures (SOPs) and verification, are available to support or replace current largely bookwork assessments.

Increase workforce diversity – support programmes that improve the participation of women

Women only formed 22% of the Forestry workforce in 2020, and were only 6% of learners in 2021, the lowest participation rate in the food and fibre sector.



Fruit

Support programmes that are targeted towards upskilling large quantities of seasonal workers in specific tasks and a short time-frame; and for work-based training, support programmes that recognise the peaks and troughs of workloads in a seasonal industry

Work in the Fruit industry is highly seasonal, with different fruit having different seasonal peaks. This puts pressure on how to train the workforce. Industry has called for programmes that can upskill workers at scale and in a short period of time. It also wants delivery that fits in with the seasonal calendar.

Support programmes that provide transferable skills that enable seasonal workers to be used across sectors

The Fruit industry faces labour shortages. It recognises that having a workforce with transferable skills means that workers can move across and between sectors, opening up the labour pool for industries and providing options to workers for career paths.

Support work-based training that is collaborative across multiple businesses and involve employers contributing their expertise – particularly in the emerging technology space

For work-based training, the industry wants a collaborative practice across multiple businesses that involves employers contributing their expertise. This is particularly important for bringing workers up to speed with emerging technologies.

Support programmes that enable the adoption of emerging technologies

There is a lack of skills to support technological changes around production for some parts of the Fruit industry.

Support programmes at Levels 2, 3 and 4 in Fruit Production and Postharvest

Industry has identified fruit production and postharvest programmes as priorities for its general workforce.

Number of places	Context
Fund another 100 places (for a total of 670)	In 2022, the number of learners in relevant programmes related to fruit production and post-harvest was 570. The number of learners between 2011 and 2022 has shown an increasing trend which plateaued in recent years.

Support programmes at Level 3 and 4 for supervision skills, including programmes targeted at upskilling seasonal work supervisors in cultural competency, emotional awareness and behaviours

The Fruit industry is ethnically diverse and heavily reliant on a migrant workforce, with 29% of the workforce being on work and work holiday visas.

The industry has identified leadership training as a key issue to support employees who are responsible for leading seasonal worker teams (especially in the Kiwifruit industry).

Number of places	Context
Fund another 25 places (for a total of 50)	<p>New Zealand Certificate in Horticulture Production (Level 4), Strand in Fruit Production offered by Te Pūkenga Toi Ohomai has supervisory components.</p> <p>Specifically, some relevant supervisory topics covered include:</p> <ul style="list-style-type: none"> ● Supervisory skills for horticulture ● Supervise a crop harvest



Grapes and Wine

Support the New Zealand Certificate in Horticulture (Wine Growing) (Level 3)

Qualifications relating to Grapes and Wine were updated in 2021. In response to industry calling for a horticulture qualification targeted at grapes, rather than general horticulture, a wine growing strand was incorporated into the Level 3 Certificate in Horticulture.

Number of places	Context
Fund 50-100 places	The wine growing strand of this qualification is new and, as such, we do not have a track record of enrolments and the data we have available from Ngā Kete does not allow us to identify previous enrolments that may have related to wine growing.

Increase workforce diversity – support programmes that improve the participation of Māori

Māori only formed 8% of the grapes and wine workforce in 2020.



Nursery, Turf and Gardening

The Nursery, Turf and Gardening industry grouping has indicated that the existing qualifications do not align with the skills required on the job. The industry is currently undertaking work to change training, but these will not be ready for this investment round.

Engagement with the Nursery industry has told us that qualifications with a greater botany focus are required, as there is a perception that the current generation of botanists in the industry are retiring, and they are not being replaced at the same rate; the industry is interested in shifting to more apprenticeships and on the job training to fill this gap.

Significant changes to amenity programmes are currently underway, with the intent of giving learners more choice and a greater emphasis on botany, rather than the current narrower focus on management, and ensuring the qualifications are achievable.

Sports Turf are planning a new apprenticeship, but this may require changes to the existing level 3 and level 4 qualifications.



Poultry, Pigs and other livestock

The Poultry, Pigs and Other Livestock workforce numbers have been steady, but Pork and Poultry in particular have struggled to attract staff. Learner numbers have fluctuated, with Pork and Poultry both generally having a low uptake of qualifications compared to other industries with a similar workforce size.

The industry grouping faces international competition and regulatory change, which may require new skills for its workforce.

We need to undertake further research to understand why this is before we make more definitive investment advice. In the first instance a new programme is being developed to support the skills needed in the Poultry sub-industry.

Support programmes delivering the New Zealand Certificate in Poultry Production Strands: Poultry Egg Production, Poultry Hatchery, and Poultry Rearing (Level 3)

The Poultry sub-industry is developing a programme to deliver the Level 3 New Zealand Certificate in Poultry Production Strands: Poultry Egg Production, Poultry Hatchery, and Poultry Rearing.



Seafood

Support new qualifications and resulting programmes from the planned 2023 review of the Seafood qualifications suite

The total Seafood workforce has been relatively stable over the last five years, but the industry is reliant on migrant labour and struggles to attract and retain a New Zealand-based workforce. Learning numbers have been dropping since 2014, with a sharp decline in 2019, and only a slight increase again in 2021.

Industry has told us that the existing qualifications are not flexible enough to meet industry need and more flexible delivery models are required.

Muka Tangata has begun a review of the suite of seafood qualifications planned. We anticipate new programmes to be available by June 2024.

Support programmes that provide more flexible delivery and assessment

More flexible delivery and assessment may assist with attraction and retention. Alongside the seafood qualifications review, Muka Tangata will be supporting providers to develop, deliver, and assess programmes, exploring different ways in which they can be delivered that meet the diverse needs of learners and employers with an aim to improving success.



Sheep, Beef, Deer and Wool

Attraction and retention are key issues for the Sheep, Beef, Deer, and Wool industry. A lack of clear pathways for new entrants remains a challenge for the industry, alongside qualifications not keeping up with changing technology.

The industry has an ageing workforce, with 43% of the workforce aged 55 or over in 2020. Employers need more support to help them better navigate working in an intergenerational environment.

The vocational education system has not been flexible and nimble enough to meet changing industry need.

Support a new training system for wools – Wool Harvesting qualifications

The Wool sub-industry has not had a functioning training system for the last decade. Muka Tangata is working with industry to broker a new flexible and responsive training system for wool harvesting.

Support residential / group training for pre-employment

An ageing workforce places greater attention on attracting new workers. The industry considers residential and/or group training models to be highly effective in providing a pathway for new entrants into the workforce.

Support a set of micro-credentials designed to address new and technical-based skills

The Sheep, Beef, Deer, and Wool industry wants shorter, targeted, and flexible training. Ahead of a major review of the agriculture qualification suite next year, which is shared with the Dairy farming industry, Muka Tangata is developing a set of micro-credentials targeting identified skills gaps. These are:

- Planning / organising / project management / business planning
- Grazing management
- Regenerative agriculture
- Land use change
- GHG emissions
- Body Condition Scoring

Support programmes across all levels that provide leadership / people management skills

Workforce retention is a key area of focus for the industry. Leadership skills, and especially people leadership / management skills, are seen as a crucial component to fostering workplaces that retain staff, particularly when the industry is made up of small work teams. Training for these skills is usually reserved for higher level programmes (for example Level 5), but these concepts should be introduced earlier.

Support programmes that provide transferable skills

The industry faces labour shortages. It recognises that having a workforce with transferable skills means that workers can move across the sector, opening up the labour pool for industries and providing options to workers for career paths.

Support programmes that provide health, wellbeing, communication, and self-awareness skills

Sheep, Beef, Deer, and Wool farming is often solo or small team work in isolated workplaces. Industry is increasingly recognising the need for its workforce to have tools, techniques, and skills, such as communication and self-awareness, skills to maintain their own and other workers good health and wellbeing.

Support programmes that support geographically spread learners via flexible modes of delivery, including online and face-to-face

Isolated workplaces make it difficult for learners to undertake their training. More hybrid models that may include online, but also enable learners to also meet face-to-face in small groups, are required.

Support programmes that train accredited rural professionals

Rural professionals are an increasingly integral part of the industry, transferring new techniques and knowledge to farmers. More formal training is required to increase and upskill the labour pool.



Support Services

Support Services is an industry grouping that provides services for a range of our other industries, including labour contractors for fruit, vegetables and arable; hunting and trapping; aerial crop dusting; landscape construction; fencing; and agricultural product wholesaling.

Muka Tangata needs to undertake further work to understand the range of skills needed by these sub-industries. This includes looking to develop qualifications, standards and credentials that are flexible, depending on the specific needs of the workforce, and that, where applicable, are transferrable across the sub-industries and the wider food and fibre sector.

In the first instance we are focussing on some micro-credentials to target and enhance specific skills.

Support Groundspreading micro-credentials

Industry has identified qualification gaps for spreading fertiliser. We are working with the industry, and alongside Hanga-Aro-Rau WDC, which has responsibility for other parts of the fertiliser sub-industries, to develop groundspreading micro-credentials.

Support Pest control-related micro-credentials

We are supporting Toi Mai WDC and Toitu te Waiora WDC in their work in relation to pest control so that there is a common view for a workforce that spans sectors. Toi Mai WDC is reviewing two Parks unit standards and exploring a Conservation micro-credential.



Vegetables

Support programmes at Levels 2, 3 and 4 in Indoor Crop Production, Outdoor Crop Production, and Postharvest and field roles

The Vegetables industry has identified indoor crop production, outdoor crop production, and postharvest as priorities for its general workforce.

Number of places	Context
Fund another 120 places (for a total of 270)	<p>In 2022, the number of learners in relevant programmes related to Vegetable Indoor Crop Production, Outdoor Crop Production, and Postharvest was 150.</p> <p>Looking at the trends over time, enrolment numbers have remained fairly stable with some year on year variation except for a larger peak in enrolments in 2017</p>

Support programmes that enable the adoption of emerging technologies.

There is a lack of skills to support technological changes around production.

Support programmes at Level 5 and above, focussing on management / leadership, including programmes targeted at upskilling seasonal supervisors in emotional awareness and behaviours

The Vegetable workforce is the most ethnically diverse of all Muka Tangata industries. The industry has identified leadership training as a key issue. The pathway into leadership roles is unclear, with not enough skilled leadership staff in the industry. Non-formal learning is currently being used to support employees to move into leadership roles.

Number of places	Context
Fund another 20-30 places (for a total of ~220)	<p>In 2022, the number of learners in Level 5 and above Horticulture programmes was 190. From 2011 to 2016, the number of learners enrolled in Horticulture programs at Level 5 and above fluctuated slightly from year to year.</p> <p>From 2016, there has been a steady increase in the number of learners enrolled, with a peak of 195 in 2021.</p> <p>The number of level 5 and above Horticulture learners (who were all enrolled as students) has more than doubled since 2011.</p>



Veterinary Services

Support the New Zealand Diploma in Veterinary Nursing (Level 6)

The Veterinary Services Industry has been steadily growing, as have learner numbers, however, industry reports nursing shortages. There are also moves in the industry to increase the ratio of veterinarians to nurses from 1:1 to 1:3. This will increase the need for nurses.

Increase workforce diversity - support programmes that improve the participation of Māori, Pacific peoples, and men

Māori only formed 6% of the veterinary services workforce in 2020, and men were only 19% – these are the lowest participation rates for these groups in the food and fibre sector. Pacific peoples were less than 1% of the workforce.



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