

Contents

Contents.....	2
Muka Tangata	3
Context.....	4
Qualification investment advice	6
Qualifications and credentials planned and under development	17
Other system advice.....	19
Appendix A: How we derived our advice.....	20
Industry Engagement	20
MPI Forecasts	20
GDP and Occupation Forecasting	21
Skills Forecasting – Interactive Training Demand Model for the Food and Fibre sector	21
Appendix B: Assessment of the full set of qualifications for each industry	22
Pan-sector	22
Fruit	23
Vegetables.....	24
Grapes and Wine.....	25
Nursery, Turf and Gardening	27
Apiculture.....	29
Dairy	30
Sheep, Beef, Deer and Wool	32
Arable	34
Pork, Poultry and Other Livestock.....	35
Equine, Dogs and Racing	36
Veterinary Services.....	37
Seafood	38
Forestry	40
Support Services	42

Muka Tangata

is the Workforce Development Council for the food and fibre sector.

We represent 14 industry groups that make up the food and fibre sector.

- Apiculture - **Te tiaki whare pī, mahi mīere hoki**
- Arable - **Whenua whakatipu kai**
- Dairy farming - **Pāmu miraka kau**
- Equine, Greyhounds and Racing - **Hōiho, kuri me te Rērehi**
- Forestry - **Mahi ngahere**
- Fruit - **Huarākau**
- Grapes and Wine - **Ngā Karepe me te Waina**
- Nursery, Turf, and Gardening - **Whakatipu rākau, karaike, me te mahi māra**
- Poultry, Pigs, and other livestock farming - **Whakatipu heihei, poaka, kararehe hoki**
- Seafood - **Kaimoana**
- Sheep, Beef, Deer, and Wool farming - **Whakatipu hipi, pīwhi, tia hoki**
- Support Services - **Ratonga Tautoko**
- Vegetables - **Huawhenua**
- Veterinary Services and Animal Care - **Rata kararehe**

Context

Most of our industries have experienced a period of workforce growth during the five years leading into COVID. Learner numbers have been falling over that period. Combined with low retention rates this means that the 'supply' pipeline has not kept up with demand for skilled workers.

MPI workforce forecasts predict increases in many of our industries' workforces through to 2032. In particular, they expect the mix of skills required to change with an increased need for more highly skilled workers, especially managers and semi-autonomous roles (including in industries where workforces may not be increasing).

The Government has set a target of doubling the value of exports over the next 10 years. The food and fibre sector currently accounts for over 80% of the value of merchandised exports and will, therefore, play a significant part in achieving Government's goal.

This will require both more workers and more productive workers. Skills acquisition and training is key to raising productivity. This will require building the skills of the existing workforce and not just focusing on training new people for jobs.

Our skills forecast modelling indicates that, all things being equal, if current training levels are only maintained, there will not be enough trained people to meet the skills demand from industry to meet current needs, let alone Government's export target.

The food and fibre sector has relatively high levels of workers with no qualifications and generally the distribution of qualifications skews towards lower-level qualifications. This means that while we need to raise the overall skills level, we also need to feed the skills pipeline and increase the flow of learners at those lower levels.

More skilled kaimahi Māori will be important for achieving the Government's goal to double the value of exports over the next ten years. Given that, by 2040, about one quarter of the potential workforce under 40 will be Māori, the ways in which the VET system works for ongoing Māori training and skill development is essential. The percentage of ākonga Māori has remained steady at around 23% of all ākonga enrolled in Muka Tangata qualifications over the past few years.

For more detailed information on Māori in the food and fibre sector, please have a look at Te Haumako – our Māori Workforce Development Plan which we published in June 2024. We have developed quite a few new micro-credentials across the sector over the past year. This aligns with our commitment in Te Haumako to explore more flexible ways to deliver and assess learning, especially through micro-credentials and other shorter qualifications which fit around seasons of work.

Since developing our investment advice for 2025, we have continued building our evidence base for our advice for 2026, including GDP, occupation and skills forecasting. We have also undertaken specific consultation with our industries on our draft advice for 2026. Appendix A outlines the evidence base. We are happy to talk TEC's data scientists and analysts through our evidence base and/or provide further detail on that evidence base.

Our further analysis and engagement have largely confirmed the advice we gave for 2025. Where we have revised our advice, we have noted this in the template.

We have not been specific about mode at a qualification level. In general, we recommend a preference for workplace training as part of the mix of the provision across all of our industries. This could include both work-based training and campus-based learning that include a strong component of practical 'on job' experience in a workplace setting.

We have used 2022 learner enrolment numbers as our baseline.

To provide context for our advice, Appendix B is our assessment of the full set of our qualifications for each industry, detailing each industry's situation, skills and workforce needs, and industry's prioritisation of qualifications. Note that there will be variances between what an individual industry has prioritised and our final advice in Section B, which takes a sector prioritisation.

Qualification investment advice

Which specific qualifications and credentials do you want to see investment change?

Qualification or credential	Mode*	Change you are seeking	Scale of workforce shortage / skills shortage	Evidence status	Sector prioritisation
* We have not been specific about mode at a qualification level. In general, we recommend a preference for workplace training as part of the mix of the provision across all of our industries. This could include both work-based training and campus-based learning that include a strong component of practical 'on job' experience in a workplace setting.					
New Zealand Certificate in Animal Care (Level 3): Companion Animals, Equine, and Rural Animals [2487]		Decrease		Engagement with industry	
New Zealand Certificate in Horticulture (General) (Level 3) [2677]		Decrease		Same advice as 2025	
New Zealand Certificate in Agriculture (Level 4) [Stranded] [2212]		Increase	240 learners	Same advice as 2025	High Priority
New Zealand Certificate in Primary Industry Skills (Level 2): Optional strand in Self-Management and Employability Skills [2218]		Increase	200 learners	Same advice as 2025	High Priority
New Zealand Certificate in Forest Harvesting Operations (Level 4): Cable Extraction, Ground Based Extraction, Mobile Cable Yarder, Head Breaker Out, Loading, Log		Increase	80 learners	Same advice as 2025	High Priority

Making, Mechanised Felling, Mechanised Processing, Spotting, Swing Yarder Extraction, and Tree Felling [2327]					
New Zealand Certificate in Forest Industry Operations (Planning and Monitoring) (Level 4): Harvesting, and Silviculture [2330]		Increase	20 learners	Same advice as 2025	High Priority
New Zealand Certificate in Horticulture Services (Level 4): [Stranded] [2674]		Increase	80 learners	Engagement with industry (Arboriculture in particular have asked for an increase in this qualification).	High Priority
New Zealand Certificate in Sports Turf (Level 5) [2675]		Increase	We are not in a position to give a specific increase. We do not expect numbers to be significant.	Engagement with industry	High Priority
New Zealand Certificate in Horticulture Production (Level 4) [Stranded] [2676]		Increase	60 learners	Same advice as 2025	High priority
New Zealand Certificate in Horticulture (Level 3) [Stranded] [2678]		Increase	120 learners	Engagement with industry (Arboriculture in particular have asked for an increase in this qualification).	High Priority
New Zealand Certificate in Poultry Production (Level 3): Poultry Egg Production, Poultry Hatchery, and Poultry Rearing [2932]		Increase	Currently no provision: any enrolments would be small	Same advice as 2025	High Priority

New Zealand Certificate in Aquaculture (Level 4): Hatchery, Fish, Shellfish, and Aquaculture Diving [3134]		Increase	We are not in a position to give a specific increase.	Low uptake in 2022, but new Complex Apprenticeship has seen uptake in 2023. We expect this to increase, but we are not in a position to give a specific increase.	High Priority
New Zealand Certificate in Aquaculture (Level 3): Hatchery, Fish, and Shellfish [3135]		Increase	We are not in a position to give a specific increase.	Low uptake in 2022, but new Complex Apprenticeship has seen uptake in 2023. We expect this to increase, but we are not in a position to give a specific increase.	High Priority
New Zealand Certificate in Agriculture (Level 3) [3869]		Increase	75 learners	Same advice as 2025	High Priority
New Zealand Certificate in Forest Harvesting Operations (Level 4) [4175]		Increase	100 learners	Same advice as 2025	High Priority
New Zealand Certificate in Pork Production (Management) (Level 4): Optional strand in Pig Farm Production Planning [4222]		Increase	15 learners	Same advice as 2025	High Priority
New Zealand Certificate in Animal Healthcare Assisting (Level 4): Companion Animal Healthcare, Equine Healthcare, and Rural Animal Healthcare [4388]		Increase	We are not in a position to give a specific increase.	Replaces 2490 and has only been offered since 2023. The level 5 qualification is not being offered and it is expected that learners will take this level 4 instead. Growth	High Priority

				expected but cannot specify amount of increase needed.	
New Zealand Diploma in Veterinary Nursing (level 6): Companion Animal Veterinary Nursing, and Equine Veterinary Nursing [4389]		Increase	50 learners	Same advice as 2025	High Priority
New Zealand Certificate in Forest Harvesting Operations (Level 3): Basic Machine Operation, Breaking Out - Cable, Landing Operations, and Tree Felling [2326]		Increase	70 learners	Same advice as 2025	High Priority
New Zealand Certificate in Primary Industry Production Management (Level 5) [Stranded] [2211]		Increase	60 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Primary Industry Operational Skills (Level 3): Optional strands in Specialist Equipment, and Infrastructure [2215]		Increase	150 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Agriculture (Farming Systems) (Level 3) [2220]		Increase	50 learners	Same advice as 2025	Medium Priority
New Zealand Diploma in Primary Industry Business Management (Level 5) [2221]		Increase	60 learners	Same advice as 2025	Medium priority

New Zealand Certificate in Forestry Operations (Level 3): Basic Machine Operations, Mensuration, Production Thinning, Planting, Pruning, and Thin to Waste [2334]		Increase	60 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Tree Felling and Clearing (Non-Production) (Level 3): Optional strand in Hazardous Tree Felling [2336]		Increase	70 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Pest Operations (Level 3): Rural Pest Control, Rural Pest Monitoring, and Urban Pest Control [2443]		Increase	80 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Pest Management (Level 4): Pest Animal, and Pest Plant [2444]		Increase	15 learners	Same advice as 2025	Medium Priority
New Zealand Diploma in Horticulture Production (Level 5) [Stranded] [2666]		Increase	40 learners	Same advice as 2025	Medium Priority
New Zealand Diploma in Arboriculture (Level 6) [2669]		Increase	30 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Arboriculture (Level 5): Supervisory Operations, and Technical Operations [2670]		Increase	30 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Seafood Processing (Level		Increase	50 learners	Same advice as 2025	Medium Priority

3): Fish and Fish Products, Live Holding, Cleaning and Sanitation, and Seafood Logistics [3130]					
New Zealand Certificate in Seafood Processing (Level 4) [3131]		Increase	30 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Rural Servicing (Level 4) [3520]		Increase	20 learners	Same advice as 2025	Medium Priority
New Zealand Certificate in Forest Operations (Level 4): Mechanised Land Preparation, and Mechanised Thinning [4174]		Increase	20 learners	Same advice as 2025	Medium Priority
New Zealand Diploma in Rural Animal Veterinary Technology (Level 6) [4391]		Increase	We are not in a position to give a specific increase.	Industry has identified a need for more veterinary technicians. 2023 was first year of enrolments and we have seen an increase in year to June 2024.	Medium Priority
New Zealand Certificate in Forestry Leadership (Level 5) [4826]		Increase	20-30 learners - to fill gap in Māori leadership. Currently no provision in place	Engagement with industry	Medium Priority
New Zealand Certificate in Equine Skills (Level 2) [2375]		Increase	20 learners	Same advice as 2025	Low Priority
New Zealand Certificate in Assistant Trainer (Level 4) [4825]		Increase	30 learners	Same advice as 2025	Low Priority

New Zealand Diploma in Forest Management (Level 6) [2329]		Increase	20 learners	Same advice as 2025	Low Priority
New Zealand Diploma in Horticulture Production (Level 6): Process Improvement, and Product Development [2667]		Increase	30 learners	Same advice as 2025	Low Priority
New Zealand Diploma in Landscape (Level 5) with strands in Construction, and Design [2888]		Increase	20 learners	Same advice as 2025	Low Priority
New Zealand Certificate in Agrichemical Application (Level 4) with strands in Aquatic, Broadacre, Tree and Vine Horticultural, Targeted Weed Control, and Total Vegetation Control [3984]		Increase	50 learners	Same advice as 2025	Low Priority
New Zealand Certificate in Poultry Management (Level 4): Poultry Egg Production, Poultry Hatchery, and Poultry Rearing [2933]		No provision: any enrolments to be small.	No provision: any enrolments to be small.	Same advice as 2025	Low Priority
Forestry Operations: Log Scaling (Micro-credential) (Level 4) [4925]		New development		New qualification developed with industry to meet industry need	High Priority
Maintenance and Rehabilitation of Forestry Roads (Micro-Credential) (Level 3) [4976]		New development		New qualification developed with industry to meet industry need	High Priority

Core Forestry Leadership (Micro-Credential) (Level 5) [4977]		New development		New qualification developed with industry to meet industry need	High Priority
Operational Forestry Leadership (Micro-Credential) (Level 5) [4978]		New development		New qualification developed with industry to meet industry need	High Priority
Business Forestry Leadership (Micro-Credential) (Level 5) [4979]		New development		New qualification developed with industry to meet industry need	High Priority
Irrigation - Full pipe water measurement device verification (Micro-credential) (Level 5) [5002]		New development		New qualification developed with industry to meet industry need	High Priority
Irrigation - Water measurement telemetry system installation and commission (Micro-credential) (Level 5) [5003]		New development		New qualification developed with industry to meet industry need	High Priority
Irrigation - Full pipe water measurement device installation and commission (Micro-credential) (Level 5) [5004]		New development		New qualification developed with industry to meet industry need	High Priority
Introduction to Seafood Processing (Micro-Credential) (Level 2) [5035]		New development		New qualification developed with industry to meet industry need	High Priority

Introduction to Aquaculture (Micro-credential) (Level 2) [5036]		New development		New qualification developed with industry to meet industry need	High Priority
Emerging Leadership in People, Food and Fibre Industries (Micro-credential) (Level 4) [5044]		New development		New qualification developed with industry to meet industry need	High Priority
Introduction to Commercial Fishing (Micro-credential) (Level 2) [5052]		New development		New qualification developed with industry to meet industry need	High Priority
Wool Pressing Skills (Micro-credential) (Level 3) [5065]		New development		New qualification developed with industry to meet industry need	High Priority
Shearing Essentials (Junior) (Micro-credential) (Level 3) [5066]		New development		New qualification developed with industry to meet industry need	High Priority
Wool Handling Fundamentals (Micro-credential) (Level 3) [5067]		New development		New qualification developed with industry to meet industry need	High Priority
Introduction to Shearing (Micro-credential) (Level 3) [5068]		New development		New qualification developed with industry to meet industry need	High Priority
Forestry Road Pavement (Micro-Credential) (Level 3) [4973]		New development		New qualification developed with industry to meet industry need	Medium Priority

Forestry River Crossing Construction (Micro-credential) (Level 3) [4974]		New development		New qualification developed with industry to meet industry need	Medium Priority
Forestry Earthworks Plant Operation (Micro-Credential) (Level 3) [4975]		New development		New qualification developed with industry to meet industry need	Medium Priority
Core Construction of Forestry Roads (Micro-Credential) (Level 3) [4980]		New development		New qualification developed with industry to meet industry need	Medium Priority
Forestry Deadman Installation (Micro-credential) (Level 3) [4981]		New development		New qualification developed with industry to meet industry need	Medium Priority
Geotextile Installation in Forestry Infrastructure (micro-credential) (Level 3) [4982]		New development		New qualification developed with industry to meet industry need	Medium Priority
Assess and manage risks to freshwater from horticultural production (Micro-credential) (Level 4) [5055]		New development		New qualification developed with industry to meet industry need	Medium Priority
Forestry Foundation Skills (Micro-credential) (Level 2) [5040]		New development (aligns with 4918)		New qualification developed with industry to meet industry need	Medium Priority
New Zealand Certificate in Forest Industry Foundation Skills (Level 2) [4918]		New Development	Due to replace 2325 – prioritise this new development in place of the 2325.	New qualification developed with industry to meet industry need	

Groundspread Nutrient Application for Primary Industry (Micro-credential) (Level 3) [4914]		New development		New qualification developed with industry to meet industry need	
New Zealand Certificate in Cellar Operations (Level 4) [2723]		To be replaced by 4553		Please note this change	
New Zealand Certificate in Equine Racing (Level 4): Thoroughbred Racing Jockey, Harness Driver/Trainer, and Harness Racing Driver [2374]		To be replaced by 4221		Please note this change	
New Zealand Certificate in Apiculture (Level 3) [2223]	Focus on work-place based training		The delivery of this qualification should focus on work-place based training.		

Qualifications and credentials planned and under development

Are there qualifications or credentials that you are developing or plan to develop that will be available in the next 12-18 months?

Area of provision and / or qualification / credential name (if known)	Level	Mode	Qualification or micro-credential	Estimated date it will be available	Description of content	Qualification or micro-credential this will replace (if relevant)
Iwitanga Micro-credential	Level 2		Micro-credential	Early 2025		
Entry Level Qualification Development Project: including stackable micro-credentials	Level 2 and Level 3		Qualifications and micro-credentials	Mid-year 2025	We are planning to build flexible, sustainable, and enduring learning pathways for learners as they enter the primary industry sector.	
Agricultural Qualification Development Project: including stackable MCs			Qualifications and micro-credentials	Mid-year 2025	We are planning to review all Agriculture qualifications, micro credentials, and standards to build flexible, sustainable, and enduring learning pathways for learners, employers, and agriculture industries.	
Seafood Core Subjects Micro-credential (Level 3)	Level 3		Micro-credential	Early 2025	This micro-credential covers the core component of the new Level 3 qualification, covering workplace safety, health and wellbeing, and application of te ao Māori principles to a seafood operation.	
Seafood Core Subjects Micro-credential (Level 4)	Level 4		Micro-credential	Early 2025	This micro-credential covers the core component of the new Level 4 qualification, covering managing self, supporting team members, and application of te ao Māori	

					principles to facilitate a positive environment and the production of high-quality seafood.	
Seafood Biosecurity Micro-credential (Level 5)	Level 5		Micro-credential	Early 2025	This micro-credential will recognise practical skills and knowledge to effectively manage and mitigate biosecurity risks, and enhance the protection of ecosystems, public health, and production systems from biosecurity threats.	

Other system advice

Are there other system issues for vocational education that you are engaging with other government agencies (including the Ministry of Education) on that you want to share with TEC?

Advice

Business skills were identified as an industry priority for Dairy farming, but industry noted that the changing of the funding rate for the Diploma in Primary Industries Business Management (Level 5) has resulted in providers no longer wanting to offer this programme.

The Dairy Farming industry also noted the impact of the policy on visa-holders not being eligible for domestic fees. These workers are no longer accessing training which raises biosecurity and food safety risks and potentially affects productivity.

Note, in accordance with this template, we have not included here the funding and other issues that we have raised in our submission on the proposed vocational education system changes ([Muka-Tangata-submission-Redesign-of-the-vocational-education-and-training-system.pdf \(mukatangata.nz\)](#)).

Appendix A: How we derived our advice

Industry Engagement

What industries have told us about their skills and training needs is the key component to our advice.

We capture this information as part of our continuous engagement with industry.

In addition to this engagement, this year we undertook specific consultation with industries on our draft TEC Investment Advice for 2026.

Feedback from industry is the primary driver of changes to the advice that we provided for 2025.

MPI Forecasts

Our main source for workforce forecasts is the extensive work undertaken by the NZIER, in consultation with industries, for the Ministry for Primary Industries and published in January 2023. This work sets the workforce supply needs for each industry by 2032 for three possible scenarios.

In all scenarios, employment grows solidly, between 8 percent and 16 percent from the 2020 base to 2032. Over the same period the overall New Zealand workforce is expected to grow around 11 percent. All scenarios point toward the need to improve skills within the industries.

The forecasts are split by 'skills mix' – *managed*, *semi-autonomous*, and *managers* – which are built on extensive mapping of these 'skill' titles to roles/occupations in specific industries, as determined through interviews with industry representatives.

We collated information from the 'employment pathway' for all our qualification to provide a list of qualifications and associated pathway occupations. This was matched to the MPI forecasts.

This formed the basis for calculating the required number of learners each year for each qualification.

GDP and Occupation Forecasting

For our 2026 Investment, as a further check against the MPI Forecasts, we undertook in-house GDP and Occupation Forecasting that provided insights into the economy and job market by displaying historical and future Gross Domestic Product (GDP) by industry and forecasting the number of people in occupations in various industries.

The model used for this project consisted of three main parts:

1. Using official information (such as historic GDP by aggregated industry-by-region) and breaking this down to more detailed industries (ANZSIC class). This is done by splitting the official GDP proportional to the income of all people associated with a low-level industry (in other words, if an industry accounts for 10% of the income it is assigned 10% of the GDP). This split is corrected for industries with particularly large profits not reflected in the income of the people.
2. Forecasting GDP estimates and people counts. This approach averages national GDP forecasts from different sources (Reserve Bank of New Zealand, Stats NZ, Infometrics, Statista) and determines the ratio of the GDP of each industry in each region to the national GDP over time and extrapolates this. Therefore, it takes into account both the overall state of the economy and the individual development of each industry in each region. People counts are forecasted in a similar manner.
3. Determining and forecasting the count of people in each occupation. This is based almost entirely on the data from the five-yearly censuses. For each census, the distributions of occupations within each industry are determined, separately for each region and ethnicity. These distributions are then applied to the forecasted counts of people within each in industry.

Skills Forecasting – Interactive Training Demand Model for the Food and Fibre sector

We are developing a microsimulation model that will provide training demand forecasting focusing on the skills needs of the food and fibre sector.

The model uses existing workforce forecasts and other important drivers/inputs to forecast training demand for specific industries, specific skills and by level of training required. This model goes beyond just predicting the future – it allows us to play out different situations and test ideas. Starting with the current workforce details, the model mimics real-world workforce activities for each person, such as attraction, retention, and training. We can then try out various scenarios that impact demand and supply, like predicting the number and skills needed by industries (demand) and estimating the available workforce and skills (supply).

We are continuing to refine the model and are not yet in the position to use it for specific elements of our TEC Investment Advice. However, we have used the initial build to investigate some overarching training dynamics for our industries. This modelling indicates that, all other things being equal, if current training levels are only maintained, there will not be enough trained people to meet industries' current skills needs.

Appendix B: Assessment of the full set of qualifications for each industry

This appendix provides our assessment of the full set of our qualifications for each industry, detailing each industry's situation, skills and workforce needs, and industry's prioritisation of qualifications. Note that there will be variances between what an individual industry has prioritised and our final advice in Section B, which takes a sector prioritisation.

Pan-sector

Qualification or credential	Priority
New Zealand Certificate in Primary Industry Skills (Level 2): Optional strand in Self-Management and Employability Skills [2218]	High priority
New Zealand Certificate in Primary Industry Operational Skills (Level 3): Optional strands in Specialist Equipment, and Infrastructure [2215]	Medium priority
Emerging Leadership in People, Food and Fibre Industries (Micro-credential) (Level 4) [5044]	High priority
New Zealand Diploma in Primary Industry Business Management (Level 5) [2221]	Medium priority

Fruit

GDP in the Fruit industry is forecast to increase almost 6% between 2023 and 2027.

MPI's forecasted growth for 2032 across horticulture shows an increase across all occupations (BAU scenario):

- 9% increase for managed workers, which for the Fruit industry include orchard workers, pickers, thinners and pruners, machine operator, and packing staff
- 29% increase for managers (which for the Fruit industry include orchard managers, operations managers, and technical managers)
- 21% increase for semi-autonomous workers (assistant managers, forepersons, thinning supervisors, and picking supervisor).

The Fruit industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 15% have no qualification and 12% have NCEA L1 or equivalent. This is a higher level of people with low level or no qualifications compared with the benchmark across all Muka Tangata industries.

The focus is on raising the key skills sets and maintaining a pipeline of skilled workers through the qualifications at levels 3 and 4 and growing leadership through the pan-sector Emerging Leadership Micro-Credential.

Qualification or credential	Priority
New Zealand Certificate in Horticulture (General) (Level 3) [2677]	Decrease
New Zealand Certificate in Horticulture (Level 3) [Stranded] [2678]	High priority
New Zealand Certificate in Horticulture Production (Level 4) [Stranded] [2676]	High priority
Assess and manage risks to freshwater from horticultural production (Micro-credential) (Level 4) [5055]	Medium priority
New Zealand Diploma in Horticulture Production (Level 5) [Stranded] [2666]	Medium priority
New Zealand Certificate in Organic Primary Production (Level 3) [2680]	
New Zealand Certificate in Organic Primary Production (Level 4) [2681]	
New Zealand Certificate in Organic Primary Production (Level 5) [2682]	

Vegetables

GDP in the Vegetables industry is forecast to increase more than 4% between 2023 and 2027.

MPI's forecasted growth for 2032 across horticulture shows an increase across all occupations (BAU scenario):

- 9% increase for managed workers which for the Vegetable industry include glass house workers and packhouse workers
- 29% increase for managers (production managers, operations managers, grower managers, and packhouse managers)
- 21% increase for semi-autonomous workers (supervisors, glasshouse managers, grading team leads, pre pack team leads, dispatch team leads, and quality controllers).

The Vegetables industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 19% have no qualification and 11% have NCEA L1 or equivalent. This is a higher level of people with no qualifications compared with the benchmark across all Muka Tangata industries (NCEA Level 1 or equivalent is in line with the benchmark).

The focus is on raising the key skills sets and maintaining a pipeline of skilled workers through the qualifications at levels 3 and 4 and growing leadership through the pan-sector Emerging Leadership Micro-Credential.

Qualification or credential	Priority
New Zealand Certificate in Horticulture (General) (Level 3) [2677]	Decrease
New Zealand Certificate in Horticulture (Level 3) [Stranded] [2678]	High priority
New Zealand Certificate in Horticulture Production (Level 4) [Stranded] [2676]	High priority
Assess and manage risks to freshwater from horticultural production (Micro-credential) (Level 4) [5055]	Medium priority
New Zealand Diploma in Horticulture Production (Level 5) [Stranded] [2666]	Medium priority
New Zealand Certificate in Organic Primary Production (Level 3) [2680]	
New Zealand Certificate in Organic Primary Production (Level 4) [2681]	
New Zealand Certificate in Organic Primary Production (Level 5) [2682]	

Grapes and Wine

NZ Wines reports that the industry has continued to invest in the future. New vineyards have been planted and, as we experience a rapidly changing environment, there is a focus on research and sustainability. The new free trade agreement between New Zealand and the European Union has significantly improved access to the European market.

MPI's forecasted growth for 2032 across horticulture shows an increase across all occupations (BAU scenario):

- 9% increase for managed workers which for Grapes and Wine include production workers (distribution, viticulture/purchasing, logistics/bottling/transport, quality control, wine cellar, wine maker), winter pruning, and maintenance
- 29% increase for manager roles
- 21% increase by 2026 for semi-autonomous roles.

The focus is on strengthening the core skills from the level 3 and 4 qualifications – and especially the dedicated Complex Apprenticeship that was put into place two years ago.

Qualification or credential	Priority
New Zealand Certificate in Horticulture (General) (Level 3) [2677]	Decrease
New Zealand Certificate in Horticulture (Level 3) [Stranded] [2678]	High priority
New Zealand Certificate in Horticulture Production (Level 4) [Stranded] [2676]	High priority
Assess and manage risks to freshwater from horticultural production (Micro-credential) (Level 4) [5055]	Medium priority
New Zealand Diploma in Horticulture Production (Level 5) [Stranded] [2666]	Medium priority
New Zealand Certificate in Cellar Operations (Level 3) [2722]	
New Zealand Certificate in Cellar Operations (Level 4) [2723]	
New Zealand Certificate in Cellar Operations (Level 4): Optional strands in Vintage Operations, and Wine Analysis [4553]	
New Zealand Certificate in Cellar Operations (Level 5): Optional strands in Technical Operations, and Wine Analysis [4554]	

New Zealand Certificate in Organic Primary Production (Level 3) [2680]	
New Zealand Certificate in Organic Primary Production (Level 4) [2681]	
New Zealand Certificate in Organic Primary Production (Level 5) [2682]	

Nursery, Turf and Gardening

GDP across Nursery, Turf and Gardening is forecast to increase almost 16% between 2023 and 2027. Workforce forecasts for the industry sit within the wider Horticulture industries. MPI's forecasted growth for 2032 across horticulture shows an increase across all occupations (BAU scenario).

At the moment NZPPI are focused on looking at the broader Horticulture qualifications review and Nursery's input into that possible review, rather than prioritising existing qualifications.

Sports Turf has indicated that there is now learner demand for the level 5.

The arboriculture industry has noted an increase in health and safety costs, a need to support promotion of the industry and an increasing need for arborists in supporting all avenues of infrastructure and primary industries.

Qualification or credential	Priority
New Zealand Certificate in Horticulture (General) (Level 3) [2677]	
New Zealand Certificate in Horticulture (Level 3) [Stranded] [2678]	
New Zealand Certificate in Horticulture Production (Level 4) [Stranded] [2676]	
Assess and manage risks to freshwater from horticultural production (Micro-credential) (Level 4) [5055]	
New Zealand Certificate in Horticulture Services (Level 4): [Stranded] [2674]	
New Zealand Diploma in Horticulture Production (Level 5) [Stranded] [2666]	
New Zealand Certificate in Arboriculture (Level 5): Supervisory Operations, and Technical Operations [2670]	Medium priority
New Zealand Diploma in Arboriculture (Level 6) [2669]	Medium priority
New Zealand Certificate in Sports Turf (Level 5) [2675]	High priority
New Zealand Certificate in Sports Turf (Level 6) [2683]	
New Zealand Diploma in Amenity Horticulture (Level 5) [4284]	

New Zealand Certificate in Organic Primary Production (Level 3) [2680]	
New Zealand Certificate in Organic Primary Production (Level 4) [2681]	
New Zealand Certificate in Organic Primary Production (Level 5) [2682]	

Apiculture

Although GDP is forecast to increase 10% between 2023 and 2027, the Apiculture industry has been through a significant and rapid growth period and is now going through a period of consolidation and increasing focus on professionalisation and commercial discipline. There is a current glut in honey, making it difficult for some beekeepers to keep their businesses profitable. These cost pressures are leading some businesses to downscale hive numbers.

There have been significant increases in training numbers for Apiculture related qualifications in recent years, despite declining workforce numbers. Training considerations should focus on practical on-job training, as current delivery blends hobbyists and future workforce together, despite the need for a different set of skills need when training for a job in the industry.

Qualification or credential	Priority
New Zealand Certificate in Apiculture (Level 3) [2223]	
New Zealand Certificate in Apiculture (Level 4) [2224]	Low priority
New Zealand Certificate in Apiculture (Queen Bee Rearing) (Level 4) [2225]	

Dairy

Forecasted growth for GDP in the dairy industry is more than 21% between 2023 and 2027.

Almost everyone in the dairy workforce starts out as a farm assistant. This suggests that training needs to be at a reasonably low level to capture people, with level 3 and 4 qualifications being more useful than level 5.

The Level 2 sector-entry qualifications are also a priority because they support people to gain basic employability skills. New entrants to the workforce need to get these core qualifications when they start out in the industry. However, there are some pressing skills gaps around data analysis and leadership, which requires higher level 5 qualifications and credentials. If current training levels are only maintained, there will not be enough trained people to meet the skills demand from industry, and the gap will only get wider.

Many farm managers do not have formal training, and upskilling them is a priority for industry. The pan-sector Emerging Leadership Micro-Credential is a focus for the industry.

The industry is increasingly requesting shorter training options, such as micro-credentials with seasonal and regional considerations being a priority. Work-place based learning is preferred, but the bigger priority is that training is available across the regions where the workforce is based.

In our engagement with industry on our draft advice, the following skill needs were identified: technology use, data analysis, environmental considerations, animal welfare, milk quality, biosecurity, staff management and training skills. Biosecurity and health and safety are high risk areas due to migrants filling workforce gaps when they aren't trained.

Business skills were also identified as an industry priority, but industry noted that the changing of the funding rate for the Diploma in Primary Industries Business Management (Level 5) has resulted in providers no longer offering this programme.

Industry also noted the impact of the policy on visa-holders not being eligible for domestic fees. These workers are no longer accessing training which raises biosecurity and food safety risks and potentially affects productivity.

Qualification or credential	Priority
New Zealand Certificate in Agriculture (Level 3) [3869]	High priority
New Zealand Certificate in Agriculture (Farming Systems) (Level 3) [2220]	Medium priority
New Zealand Certificate in Land Based Sustainability Practices (Level 3) [2684]	
New Zealand Certificate in Agriculture (Level 4) [Stranded] [2212]	High priority

New Zealand Certificate in Sustainable Primary Production (Level 4) [2685]	
New Zealand Certificate in Primary Industry Production Management (Level 5) [Stranded] [2211]	Medium priority

Sheep, Beef, Deer and Wool

MPI's forecasted growth for 2032 across "Red Meat and Wool" shows an overall workforce decrease of 1% (BAU scenario). However, this varies by occupation:

- 14% decrease for casual workers
- 3% increase for manager roles
- 2% decrease for semi-autonomous roles.

The Sheep, Beef, Deer and Wool industries (excluding Shearing Services) have the highest percentage (45% in 2021) of people in the workforce who are 55 years or older across all Muka Tangata industries. With such a large percentage of the workforce approaching retirement, it is essential that the next generation have the skills and training.

The Sheep, Beef, Deer and Wool industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 15% have no qualification and 13% have NCEA L1 or equivalent. This is a higher level of people with low level or no qualifications compared with the benchmark across all Muka Tangata industries.

The Sheep and Beef sector would prefer work-based delivery models that support learners to gain hands-on experience and practical skills such as animal welfare and handling, land management, and machinery operation.

Qualification or credential	Priority
New Zealand Certificate in Agriculture (Level 3) [3869]	High priority
New Zealand Certificate in Agriculture (Farming Systems) (Level 3) [2220]	
New Zealand Certificate in Land Based Sustainability Practices (Level 3) [2684]	
New Zealand Certificate in Agriculture (Level 4) [Stranded] [2212]	High priority
New Zealand Certificate in Sustainable Primary Production (Level 4) [2685]	
New Zealand Certificate in Primary Industry Production Management (Level 5) [Stranded] [2211]	

Wool related qualifications and credentials

Qualification or credential	Priority
Introduction to Shearing (Micro-credential) (Level 3) [5068]	High priority
Shearing Essentials (Junior) (Micro-credential) (Level 3) [5066]	High priority
Wool Handling Fundamentals (Micro-credential) (Level 3) [5067]	High priority
Wool Pressing Skills (Micro-credential) (Level 3) [5065]	High priority
New Zealand Certificate in Woolshed Skills (Level 3): Wool Handling, and Wool Pressing [4112]	
New Zealand Certificate in Wool Harvesting (Level 3): Strong Wool Shearing, and Fine and Mid Micron Wool Shearing [4153]	
New Zealand Certificate in Wool Technology and Classing (Level 4) [4113]	High priority

Arable

The Arable industry has a smaller workforce size, comprising largely of owner-operated family farms. Pathways into the industry are not always clear.

GDP is forecasted to increase by 18% between 2023 and 2027.

MPI's forecasted growth for 2032 across the Arable industry shows an overall workforce decrease (BAU scenario). However, this varies by role:

- 16% decrease by for managed roles
- 8% increase for manager roles
- 2% increase for semi-autonomous roles (eg experienced hands).

The Arable industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 14% have no qualification and 13% have NCEA L1 or equivalent. This is a higher level of people with low level or no qualifications compared with the benchmark across all Muka Tangata industries.

Qualification or credential	Priority
New Zealand Certificate in Agriculture (Level 3) [3869]	
New Zealand Certificate in Agriculture (Farming Systems) (Level 3) [2220]	
New Zealand Certificate in Agriculture (Level 4) [Stranded] [2212]	High priority
New Zealand Certificate in Sustainable Primary Production (Level 4) [2685]	
New Zealand Certificate in Primary Industry Production Management (Level 5) [Stranded] [2211]	
New Zealand Certificate in Agriculture (Arable Production) (Level 3) [2624]	
New Zealand Certificate in Rural Contracting (Level 3): Crop Production, Harvesting, Mechanical Vegetation Control [2728]	
New Zealand Certificate in Seed Processing and Handling (Level 3) [4496]	
New Zealand Certificate in Seed Processing and Handling (Level 4) [2468]	

Pork, Poultry and Other Livestock

GDP for the Pork, Poultry and other Livestock industry is forecasted to increase more than 11% between 2023 and 2027.

MPI's forecasted growth for 2032 across the "Pork, Poultry, Bees and Other Sector" shows an overall workforce increase (BAU scenario). However, this varies by occupation:

- 5% decrease for farm workers – production workers, packaging, stores, transport – and poultry workers
- 19% increase for manager roles – farm managers, general managers processing and packing, and production managers
- 11% increase for forepersons and other semi-autonomous roles.

The Poultry, Pork and other Livestock industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 17% have no qualification and 13% have NCEA L1 or equivalent. This is a higher level of people with low level or no qualifications compared with the benchmark across all Muka Tangata industries.

Currently there is no progression pathway for the Poultry industry, with the only Poultry specific level training being at Level 2. The industry would like to see the Level 3 qualification delivered, but there is currently no programme developed against it. Biosecurity and health are front of mind for the Poultry industry as the threat of avian bird flu increases.

Qualification or credential	Priority
Introduction to the Poultry Industry (Micro-credential) (Level 2) [3991]	High priority
New Zealand Certificate in Pork Production (Stockperson) (Level 3) [Stranded] [2525]	High priority
New Zealand Certificate in Poultry Production (Level 3): Poultry Egg Production, Poultry Hatchery, and Poultry Rearing [2932]	High priority
New Zealand Certificate in Poultry Management (Level 4): Poultry Egg Production, Poultry Hatchery, and Poultry Rearing [2933]	Low priority
New Zealand Certificate in Pork Production (Management) (Level 4): Optional strand in Pig Farm Production Planning [4222]	High priority

Equine, Dogs and Racing

In 2024, the New Zealand Racing industry reported generating close to \$1.9 billion in value-added contribution to the New Zealand economy, up from a reported \$1.6 billion in 2018. The Equine, dogs and racing industries have been through significant challenges as a result of recent (and ongoing) Government reviews calling for reforms. The move to a more tightly regulated industry and focus on both animal welfare and worker safety will require increased training and skills to meet these needs.

The Equine, dogs and racing industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 21% have no qualification and 15% have NCEA L1 or equivalent. This is the highest level of people with low level or no qualifications across all Muka Tangata industries. Learner enrolments numbers are currently trending upward, as industry looks to raise the skills of this group to better meet its needs, especially as health and safety have been key issues, and to provide better career pathways to sustain industry.

The industry's priority is on new entrant skills (most of whom come with no formal qualifications) and the revised level 4 qualification that provides a career pathway.

Qualification or credential	Priority
New Zealand Certificate in Equine Skills (Level 2) [2375]	High priority
New Zealand Certificate in Assistant Trainer (Level 4) [4825]	High priority
New Zealand Certificate in Equine Breeding (Stud Groom) (Level 3) [2370]	
New Zealand Certificate in Equine Skills (Level 3): Harness Racing Stable Assistant, Thoroughbred Raceday Strapper, Thoroughbred Stable Assistant, Thoroughbred Racing Track Rider, and Sporthorse Stable Assistant [2376]	
New Zealand Certificate in Equine Racing (Level 4): Thoroughbred Racing Jockey, Harness Driver/Trainer, and Harness Racing Driver [2374]	To be replaced by 4221
New Zealand Certificate in Equine Skills (Sporthorse Groom) (Level 4) [2377]	
New Zealand Certificate in Equine Breeding (Senior Stud Groom) (Level 4) [2371]	
New Zealand Certificate in Equine Racing (Level 4): Thoroughbred Racing Jockey, Harness Trainer, and Harness Racing Driver [4221]	
New Zealand Diploma in Equine Management (Level 5): Broodmare Management, Yearling Management, Stallion Management, and Racing Stable Foreman [2380]	

Veterinary Services

GDP for Veterinary Services is expected to increase nearly 16% between 2023 and 2027.

Workforce shortage remains a concern for industry, but there is particular concern about the shortage of skilled professionals. The skills needs for technical expertise and leadership are more in demand, and the industry needs more trained managers and supervisors with strong leadership skills to fill the gap.

Feedback on our draft advice has highlighted that it is hard to determine training need numbers because there is high workforce turnover due to poor conditions and pay. Therefore, there is a more pressing need for training.

The focus is on the core Vet Nurse role and supporting Vet Techs.

Qualification or credential	Priority
New Zealand Certificate in Animal Care (Level 3): Companion Animals, Equine, and Rural Animals [2487]	Decrease
New Zealand Certificate in Animal Healthcare Assisting (Level 4): Companion Animal Healthcare, Equine Healthcare, and Rural Animal Healthcare [4388]	High priority
New Zealand Diploma in Veterinary Nursing (level 6) [2491]	Replaced by 4389
New Zealand Diploma in Veterinary Nursing (level 6): Companion Animal Veterinary Nursing, and Equine Veterinary Nursing [4389]	High priority
New Zealand Diploma in Animal Healthcare Technology (Level 6): Canine and Equine Rehabilitation Technology, and Equine Dental Technology [4390]	
New Zealand Diploma in Rural Animal Veterinary Technology (Level 6) [4391]	Medium priority
New Zealand Certificate in Animal Management (Level 4): Canine Behaviour and Training, Companion Animals, Fish, Amphibians and Reptiles, Pet Grooming, and Zookeeping [2489]	

Seafood

GDP for the Seafood industries is forecasted to decline by 14% between 2023 and 2027.

MPI's forecasted growth for 2032 across the Seafood industry shows an overall workforce increase (BAU scenario). However, this varies by occupation and role:

- 1% decrease for managed roles, including processing staff (deep sea), hatchery staff, and sea farm staff
- 27% increase for manager roles
- 17% increase for semi-autonomous roles.

The Aquaculture industry is forecast to increase significantly. Additionally, more specialist skills are becoming a necessity, particularly in the AI and technology space, which has seen an increase in use in the last 12-18 months.

The Seafood industry workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 16% have no qualification and 11% have NCEA L1 or equivalent. This is a higher percentage of workforce with no qualifications compared with the benchmark across all Muka Tangata industries.

The focus in the seafood industries is on the growing Aquaculture industry and the Micro-Credentials developed with industry to revitalise training in the sector.

Qualification or credential	Priority
Introduction to Aquaculture (Micro-credential) (Level 2) [5036]	High priority
Introduction to Commercial Fishing (Micro-credential) (Level 2) [5052]	High priority
Introduction to Seafood Processing (Micro-Credential) (Level 2) [5035]	High priority
New Zealand Certificate in Seafood Processing (Level 3): Fish and Fish Products, Live Holding, Cleaning and Sanitation, and Seafood Logistics [3130]	Medium priority
New Zealand Certificate in Aquaculture (Level 3): Hatchery, Fish, and Shellfish [3135]	High priority
New Zealand Certificate in Commercial Fishing (Level 3): Shellfish, Wet Fish, and Frozen Fish [3133]	Low priority

New Zealand Certificate in Seafood Processing (Level 4) [3131]	Medium priority
New Zealand Certificate in Commercial Fishing (Level 4) [3132]	Low priority
New Zealand Certificate in Aquaculture (Level 4): Hatchery, Fish, Shellfish, and Aquaculture Diving [3134]	High priority
New Zealand Certificate in Seafood (Level 5): Aquaculture, Seafood Processing, and Commercial Fishing [3129]	

Forestry

The Forestry production workforce as a whole is forecast to increase by at least 12% by 2032 (MPI BAU scenario). The trend is for increases in skilled roles:

- No increase for managed roles, such as nursery crew, silviculture manual, harvesting manual, and quality controller.
- 29% increase for forestry managers, nursery manager/owner, inventory crew manager, harvesting management, operations management, and forest roading engineer.
- 22% increase for skilled nursery crew, silviculture machine operators, mensuration technicians, machine operators, driver/machine operators, engineering machine operators/crew managers, harvesting machine operators/crew managers, infield management, dispatch managers, and roading machine operators.

The advice reflects the current state of the industry as it goes through a transition, where industry is looking to ensure that the workforce has the core skills needed, including increasing health and safety. Therefore, we have focussed on level 3 and 4 qualifications for the advice.

We anticipate a growing interest in adopting automation and mechanisation, and boosting forest management, as well as the uptake of the newly developed micro-credentials as things pick back up again. As a land-based industry in the regions, an increased level of importance is being shown by the industry to the role that whenua Māori and whānau, hapū and Iwi play in forestry.

Qualification or credential	Priority
New Zealand Certificate in Forest Industry Foundation Skills (Level 2) [2325]	Low Priority
New Zealand Certificate in Forest Industry Foundation Skills (Level 2) [4918]	Low Priority
Forestry Foundation Skills (Micro-credential) (Level 2) [5040]	Medium Priority
New Zealand Certificate in Forest Harvesting Operations (Level 3): Basic Machine Operation, Breaking Out - Cable, Landing Operations, and Tree Felling [2326]	High Priority
New Zealand Certificate in Forestry Operations (Level 3): Basic Machine Operations, Mensuration, Production Thinning, Planting, Pruning, and Thin to Waste [2334]	Medium Priority
New Zealand Certificate in Tree Felling and Clearing (Non-Production) (Level 3): Optional strand in Hazardous Tree Felling [2336]	Medium Priority

New Zealand Certificate in Log Stock Management (Level 3) [4173]	No provision
Core Construction of Forestry Roads (Micro-Credential) (Level 3) [4980]	Medium Priority
Forestry Deadman Installation (Micro-credential) (Level 3) [4981]	Medium Priority
Forestry Earthworks Plant Operation (Micro-Credential) (Level 3) [4975]	Medium Priority
Forestry River Crossing Construction (Micro-credential) (Level 3) [4974]	Medium Priority
Forestry Road Pavement (Micro-Credential) (Level 3) [4973]	Medium Priority
Geotextile Installation in Forestry Infrastructure (micro-credential) (Level 3) [4982]	Medium Priority
Maintenance and Rehabilitation of Forestry Roads (Micro-Credential) (Level 3) [4976]	High priority
New Zealand Certificate in Forest Harvesting Operations (Level 4): Cable Extraction, Ground Based Extraction, Mobile Cable Yarder, Head Breaker Out, Loading, Log Making, Mechanised Felling, Mechanised Processing, Spotting, Swing Yarder Extraction, and Tree Felling [2327]	High priority
New Zealand Certificate in Forest Industry Operations (Planning and Monitoring) (Level 4): Harvesting, and Silviculture [2330]	High priority
New Zealand Certificate in Forest Operations (Level 4): Mechanised Land Preparation, and Mechanised Thinning [4174]	Medium priority
New Zealand Certificate in Forest Harvesting Operations (Level 4) [4175]	High priority
Forestry Operations: Log Scaling (Micro-credential) (Level 4) [4925]	High priority
New Zealand Certificate in Forestry Leadership (Level 5) [4826]	Medium Priority
Business Forestry Leadership (Micro-Credential) (Level 5) [4979]	High priority
Core Forestry Leadership (Micro-Credential) (Level 5) [4977]	High priority
Operational Forestry Leadership (Micro-Credential) (Level 5) [4978]	High priority
New Zealand Diploma in Forest Management (Level 6) [2329]	Low priority

Support Services

Support Services is a complex industry grouping of people in the workforce who support the outputs of the food and fibre sector and other wider sectors. This includes four ANZSIC class codes: Hunting and Trapping; Landscape and Construction Services; Other Agricultural Product Wholesaling; Other Agriculture and Fishing Support Services.

These various industries that sit within Support Services can overlap with multiple parts of the food and fibre sector, with the most common industries being Nursery, Turf and Gardening; Arable; Sheep, Beef and Deer; Fruit; and Vegetables.

The workforce has seen a slight decline since 2019, but has high levels of seasonal variation (which affect how forecasts should be treated). MPI data for Support Services is not available. We have done our own forecasting, which shows a 4.5% workforce increase between 2023 and 2027. GDP is forecast to increase almost 11% between 2023 and 2027.

The workforce has a low level of formal qualifications. Based on those in the workforce where we have data on qualifications, 14% have no qualification and 12% have NCEA L1 or equivalent. This is in line with the benchmark across all Muka Tangata industries, with 1% more people having low level qualifications compared to the benchmark. The workforce has low new entrant retention rates and very low levels of industry tenure which drive a need for training of replacements. The sector has very strong reliance on those on RSE, temporary & work visas making the industry vulnerable to changes in immigration trends and policy shifts. If current training levels are only maintained, there will not be enough trained people to meet the skills demand from industry, and the gap will only get wider.

Feedback on our draft advice highlighted the following skills and occupation needs across Support Services:

- Pest Control: There is an increased need for workers as pest populations increase (for example, mice rising relative to rats and rising populations as a result of recent natural disasters and changing environments and climate). New skills may also be necessary as pest control methods change to meet new threats (for example, changing use of chemical controls and technology).
- Technical skills: As farming systems have diversified and become more complex, external technical expertise to assist producers has become more important.
- Agrichemical application: Industries across both horticulture and agriculture have identified the need for skills to apply agrichemicals safely. Industry has indicated that this is a growth area.
- Landscape Construction: The Landscape construction industry has a need for more autonomous and managerial skills.

Qualification or credential	Priority
New Zealand Certificate in Pest Operations (Level 3): Rural Pest Control, Rural Pest Monitoring, and Urban Pest Control [2443]	Medium priority

New Zealand Certificate in Pest Management (Level 4): Pest Animal, and Pest Plant [2444]	Medium priority
New Zealand Certificate in Rural Servicing (Level 4) [3520]	Medium priority
New Zealand Certificate in Agrichemical Application (Level 4) with strands in Aquatic, Broadacre, Tree and Vine Horticultural, Targeted Weed Control, and Total Vegetation Control [3984]	Low priority
New Zealand Certificate in Artificial Insemination of Livestock (Level 4) [2467]	
New Zealand Diploma in Landscape (Level 5) with strands in Construction, and Design [2888]	Low priority
New Zealand Diploma in Horticulture Production (Level 6): Process Improvement, and Product Development [2667]	Low priority
New Zealand Certificate in Fencing (Level 4) [4356]	
New Zealand Certificate in Fencing (Level 5) [2700]	
New Zealand Certificate in Agrichemical Supply (Level 4) [2497]	
Irrigation - Full pipe water measurement device installation and commission (Micro-credential) (Level 5) [5004]	High priority
Irrigation - Full pipe water measurement device verification (Micro-credential) (Level 5) [5002]	High priority
Irrigation - Water measurement telemetry system installation and commission (Micro-credential) (Level 5) [5003]	High priority
New Zealand Certificate in Irrigation System Performance Assessment (Level 4) [2555]	
New Zealand Certificate in Irrigation System Management (Level 4) [2556]	
New Zealand Certificate in Irrigation System Design (Level 5) [2557]	
New Zealand Diploma in Field Hydrology (Level 5) [2344]	
New Zealand Certificate in Tuberculosis (TB) Testing of Livestock (Level 3): Cattle [2369]	
New Zealand Certificate in Fencing (Level 3): Rural strand, and Industrial strand [2699]	
New Zealand Certificate in Land Based Sustainability Practices (Level 3) [2684]	
New Zealand Certificate in Sustainable Primary Production (Level 4) [2685]	

