

Advice to the Tertiary Education Commission for 2027 investment

Contents

Contents	2
Investment Advice	2
Development of this Advice	3
Data Sources	3
Overarching Advice.....	4
Automotive	4
Commercial Transport	8
Engineering	12
Extractives.....	18
Food and Beverage	24
Manufacturing.....	28
Marine	35
Ports and Maritime Transport	38
Supply Chain and Distribution.....	41
Other Advice	44

Investment Advice

Development of this Advice

Please note that this advice is pending formal approval and acceptance from TEC. This document reflects what Hanga-Aro-Rau submitted to TEC on the 31st of October 2025.

This investment advice for 2027 provision uses the 2026 investment advice provided to the Tertiary Education Commission (TEC) in 2024 as its base.

As set out in the guidelines provided by the TEC, the development of 2027 advice was targeted and focused on:

- Reviewing, validating and updating the advice provided to TEC for 2026 investment.
- Identifying gaps in the existing advice and providing new advice aligned with industry demand and engagement.

Developing the advice involved:

- Analysing industry engagement information to confirm industry priorities and input into the advice.
- Reviewing Workforce Development Plans (WDP) to capture already identified industry priorities.
- Engaging with National Industry Advisory Groups to review 2026 advice, validate proposed new advice and identify gaps.
- Reviewing and updating workforce, qualification data and occupation mapping used in workforce analysis.

The advice is structured by Hanga-Aro-Rau National Industry Advisory Group (NIAG) industry groupings: Automotive, Commercial Transport, Engineering, Extractives, Food and Beverage, Manufacturing, Marine, Ports and Maritime Transport, and Supply Chain and Distribution.

We gratefully acknowledge the valuable feedback provided by members of the Hanga-Aro-Rau National Industry Advisory Groups, which informed the development of this advice.

The 2027 advice includes all new qualifications developed by Hanga-Aro-Rau since the 2026 advice for which we suggested an increase in TEC funding to support new provision. These qualifications are a response to industry needs that were identified via collaboration between industry representatives and education providers within the Qualification Advisory Groups.

Additionally, Hanga-Aro-Rau sought feedback from education providers about previous investment advice, and challenges and barriers they face in delivering industry's skills needs. This feedback was also considered in the development of the advice.

Data Sources

Workforce data was sourced from Infometrics as of September 2025 with 2024 as the base year used to inform the advice. This data includes historical and forecast measures of employment and total job openings¹. It was analysed with vocational education and training (VET) enrolment data sourced from TEC, which was obtained via the Ohu Ahumahi Shared Data Platform. This analysis examined how qualifications aligned with industry occupations to provide a clearer picture of future workforce needs in relation to the qualifications in Hanga-Aro-Rau's coverage.

Workforce and enrolment data was considered alongside insights and priorities from NIAGs and industry engagement.

Overarching Advice

Change of Provision

Hanga-Aro-Rau recommends that funding be maintained for all its qualifications not explicitly identified in the following advice. Delivery and funding is expected to continue at current levels for qualifications and credentials developed by Hanga-Aro-Rau that are not listed in this section to meet ongoing industry demand.

Some sectors within Hanga-Aro-Rau's coverage have experienced declines in enrolments in 2024, in particular for work-based learning, which are influenced by current economic conditions, volatility in export markets and changes in incentives for VET training (for example, removal of TTAF and apprenticeship boost in some areas). While this could continue in the short-term, the qualifications identified remain critical for meeting future workforce needs, which are forecast to increase as economic conditions improve post 2027.

This advice is provided as the vocational education system undergoes reform. Resulting changes across the provider network could impact this advice in future, in particular changes to work-based learning providers.

New Providers

Investment should support new providers or provision of new qualifications by existing providers where there is industry demand for skills and training. This will ensure a continuous pipeline of provision.

Workforce Development Plans

Hanga-Aro-Rau has published updated Workforce Development Plans (WDP) for its nine National Industry Advisory Groups – these can be [viewed here](#).

The WDPs include priorities and actions identified-by National Industry Advisory Groups and engagements with industry. TEC is encouraged to have regard to information in the WDPs. This has been noted in the ['other'](#) section of this advice.

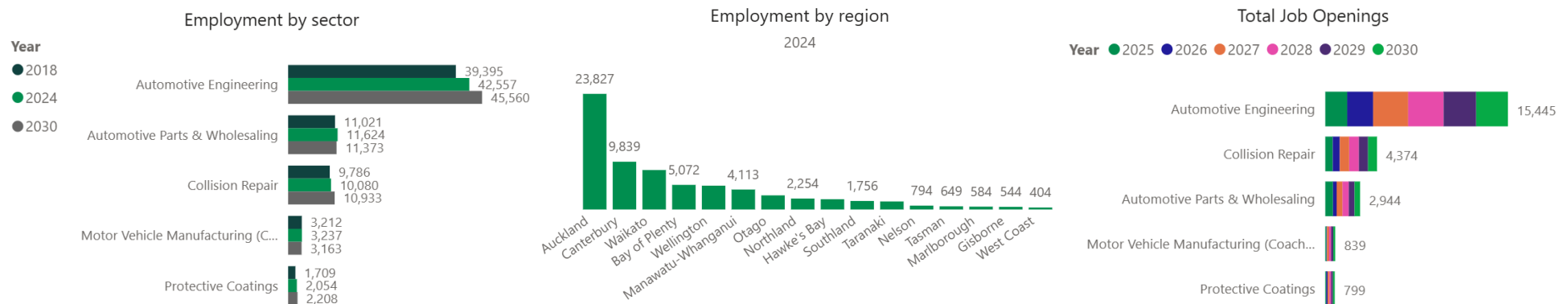
¹ Total job openings estimates overall workers required in a sector as a result of job creation and replacement demand. It is the sum of new job openings and replacement job openings in a given year. Employment and total job opening data has been rounded to the nearest 10 in the body of this document.

Automotive

The automotive workforce development plan (WDP) can be [viewed here](#). This WDP highlights emerging skills areas and standard setting priorities which will be transferred to Industry Skills Boards (ISBs), for example train the trainer skills and electric vehicle (EV) training needs which may require future investment.

The Automotive sector employed 69,550 people in 2024 in total and is forecast to grow to 73,240 in 2030 – a 5.3% increase in employment. Employment is forecast to grow 0.9% per year between 2025 and 2030, with an annual average total job openings of 4,070 per year. Auckland, Canterbury and Waikato are the largest regions for employment.

Automotive engineering employs more people than any other automotive sub-sector (42,560 in 2024) and collision repair is forecast to be the fastest growing sub-sector within automotive with an annual average employment growth of 1.4% between 2025 and 2030 (faster than 1.0% forecast growth in employment annually across the total economy).



Source: Infometrics

Across automotive, enrolments fell marginally (3.8% year on year) in 2024, after peaking in 2022 and 2023. Automotive engineering is the largest sub-sector of automotive for vocational education, at 11,290 enrolments and 3,195 completions in 2024. Followed by Collision repair with 1,470 enrolments in 2024.

Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Automotive Engineering	11,290	3,195	6.9%	3,003	7.1%	1.1%	15,445	2,574
Automotive Parts & Wholesaling	235	95	4.0%	-251	-2.2%	-0.4%	2,943	491
Automotive Reglazing	160	50						
Collision Repair	1,470	400	-0.1%	853	8.5%	1.4%	4,374	729
Motor Vehicle Manufacturing (Coachbuilding)	90	35	-1.0%	-75	-2.3%	-0.4%	839	140

For occupations which approximately align with automotive qualifications, motor mechanic (general) is the largest, employing 12,762 in 2024, with an increase of 807 new jobs and 4,422 total job openings up to 2030. The next highest occupations in terms of total job openings are panel beater, motor vehicle parts interpreter and vehicle painter.

Automotive qualifications support skills for occupations outside of the automotive sector. For example, while there are almost 13,000 motor mechanics (general) employed directly in the automotive sector, there are almost an additional 6000 in other sectors, with a total of 18,874 employed across the total economy. Automotive qualifications form the primary vocational pathway for skills related to many automotive occupations.

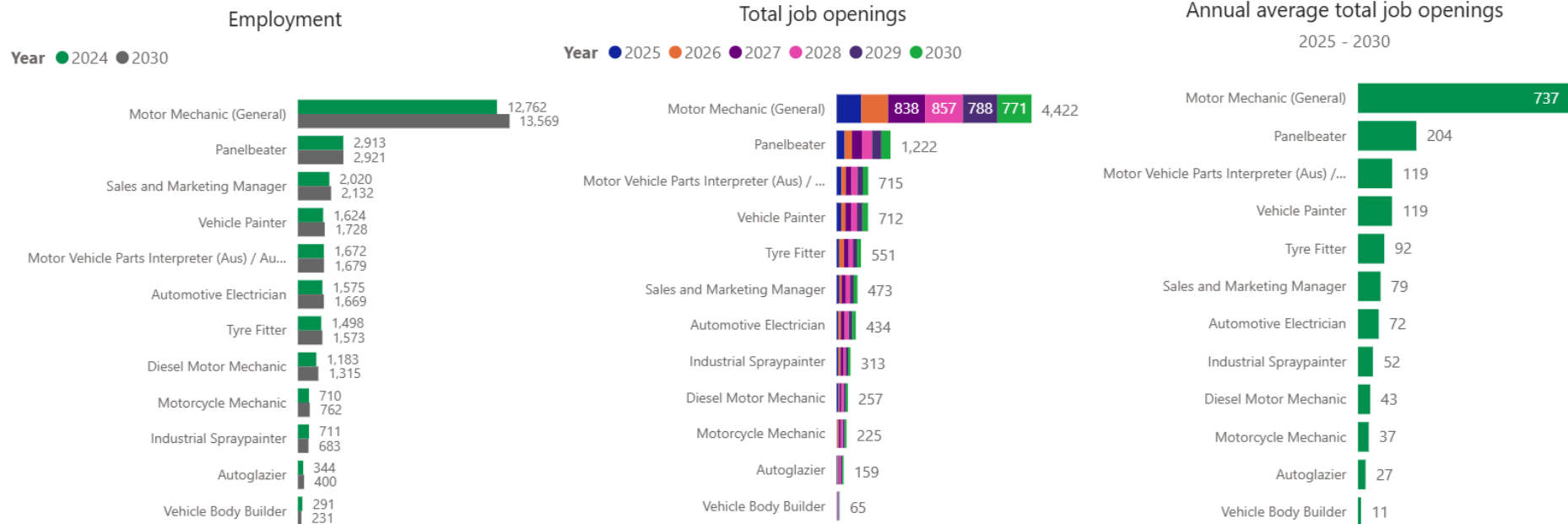
The qualification-aligned automotive occupations with the highest forecast growth in employment between 2024 and 2030 are:

- Motor Mechanic (general); 807 new jobs, 6% employment growth
- Diesel motor mechanic; 132 new jobs, 11% employment growth
- Vehicle painter; 105 new jobs, 6% employment growth
- Automotive electrician; 94 new jobs, 6% employment growth.

The Autoglazier occupation is forecast to be the fastest growing qualification-aligned occupation across automotive, with 16% growth in employment between 2024 and 2030 (57 new jobs).

Several automotive occupations were added to the Green List's Work to Residence pathway in August 2025, including Panel Beater and Vehicle Painter.²

² [Ten trades occupations added to the Work to Residence pathway :: Immigration New Zealand](#)



Source: Infometrics

Investment advice for 2026 - Automotive

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
New Zealand Certificate in Electric Vehicle Automotive Engineering (Level 5) (3915)	<i>Increase</i>	Priority in Plan Guidance	No change
New Zealand Certificate in Automotive Engineering (Level 3) (3097)	<i>Increase</i>	Priority in Plan Guidance	Update to enrolment base for increase ³ : 2024 enrolments: 5,485
New Zealand Certificate in Collision Repair and Automotive Refinishing (Level 3) (3008), to be replaced by two new qualifications: a) New Zealand Certificate in Automotive Collision Repair (Level 3) (4858) b) New Zealand Certificate in Automotive Refinishing (Level 3) (4859)	<i>Replace and increase</i>	Priority in Plan Guidance	No change

³ Enrolments used as the base for 2026 advice were missing some parent qualification enrolments from complex apprenticeships. Enrolment data for 2027 advice uses provision without programme data from TEC provided in April 2025 where this issue has been corrected

New Zealand Certificate in Heavy Automotive Engineering (Level 4) with strands in Road Transport, Plant and Equipment, Agricultural Equipment, and Materials Handling (3118)	<i>Increase</i>	Priority in Plan Guidance	Update to enrolment base for increase ⁴ : 2024 enrolments: 2,330
New Zealand Certificate in Automotive Refinishing (Level 4) (3009)	<i>Increase - Preference for work-based delivery</i>	Engagement - small number of providers	No change
New Zealand Certificate in Collision Repair (Non-Structural Repairer) (Level 4) with optional Strand in Structural Repair Technician (3011)	<i>Increase - Preference for work-based delivery</i>	Engagement - small number of providers	No change
New Zealand Certificate in Collision Repair (Structural Repair) (Level 5) (3012)	<i>Increase - Preference for work-based delivery</i>	Engagement - small number of providers	No change
New Zealand Certificate in Light Automotive Engineering (Level 4) (3450)	<i>Increase</i>	Priority in Plan Guidance	Update to enrolment base for increase ⁴ : 2024 enrolments: 2,290
New Zealand Certificate in Automotive Electrical Engineering (Level 4) (3460)	<i>Increase</i>	Priority in Plan Guidance	Update to enrolment base for increase ⁴ : 2024 enrolments: 470
New Zealand Certificate in Automotive Parts and Accessories (Level 4) (5104)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change

New advice for 2027 - Automotive

Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Prepare to deliver in-vehicle driver education [Approved awaiting publication]	<i>All</i>	<i>All</i>	Increase – new	New micro-credential – Developed in response to skill gap identified in qualification review.
Deliver in-vehicle driver education [Approved awaiting publication]	<i>All</i>	<i>All</i>	Increase – new	New micro-credential – Developed in response to skill gap identified in qualification review.

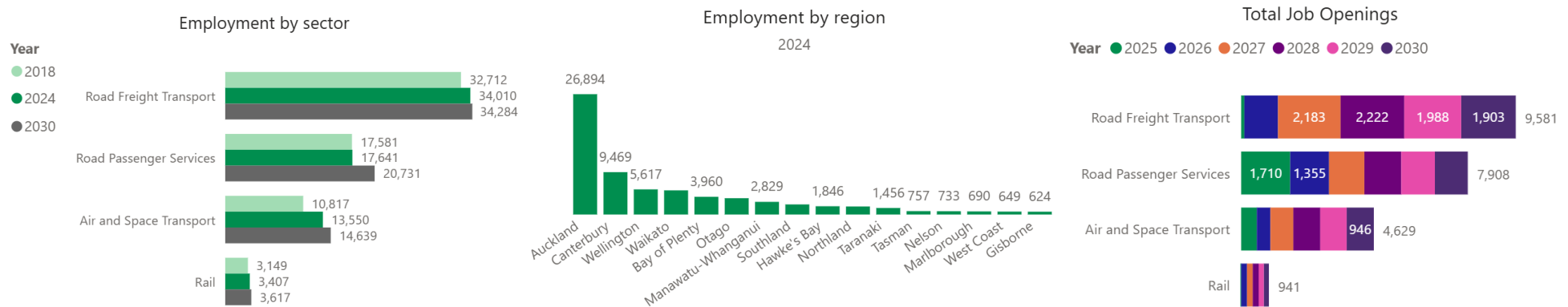
⁴ Enrolments used as the base for 2026 advice were missing some parent qualification enrolments from complex apprenticeships. Enrolment data for 2027 advice uses provision without programme data from TEC provided in April 2025 where this issue has been corrected

Commercial Transport

The commercial transport workforce development plan can be [viewed here](#).

[Building New Zealand Rail Skills for the Future](#) (May 2025) is a report commissioned by Hanga-Aro-Rau with the Australasian Railway Association, about developing the skills needed to support a modern and sustainable rail sector.

The commercial transport sector employed 68,600 people in 2024 in total and is forecast to grow to 73,270 in 2030 – a 6.8% increase in employment. Employment in sector is forecast to grow 1.1% per year between 2025 and 2030, with an annual average total job openings of 3,840 per year. Auckland, Canterbury and Wellington are the largest employing regions across commercial transport.



Source: Infometrics

Enrolments have been relatively steady for commercial transport since 2020, with a 9.5% year on year decrease in 2023 followed by a 7.6% increase in 2024. Rail is the largest sub-sector of commercial transport for vocational education, at 375 enrolments and 165 completions in 2024. Rail has been the primary driver of enrolment growth since 2021 across commercial transport. Despite the strong demand for other road freight and passenger occupations, there have been limited enrolments in the qualifications aligned with these occupations.

Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Rail	375	165	4.3%	210	6.2%	1.0%	941	157
Road Freight Transport	190	75	3.8%	273	0.8%	0.2%	9,581	1,597
Air and Space Transport			-0.3%	1,090	8.0%	1.3%	4,629	771
Road Passenger Services			-9.5%	3,090	17.5%	2.7%	7,908	1,318

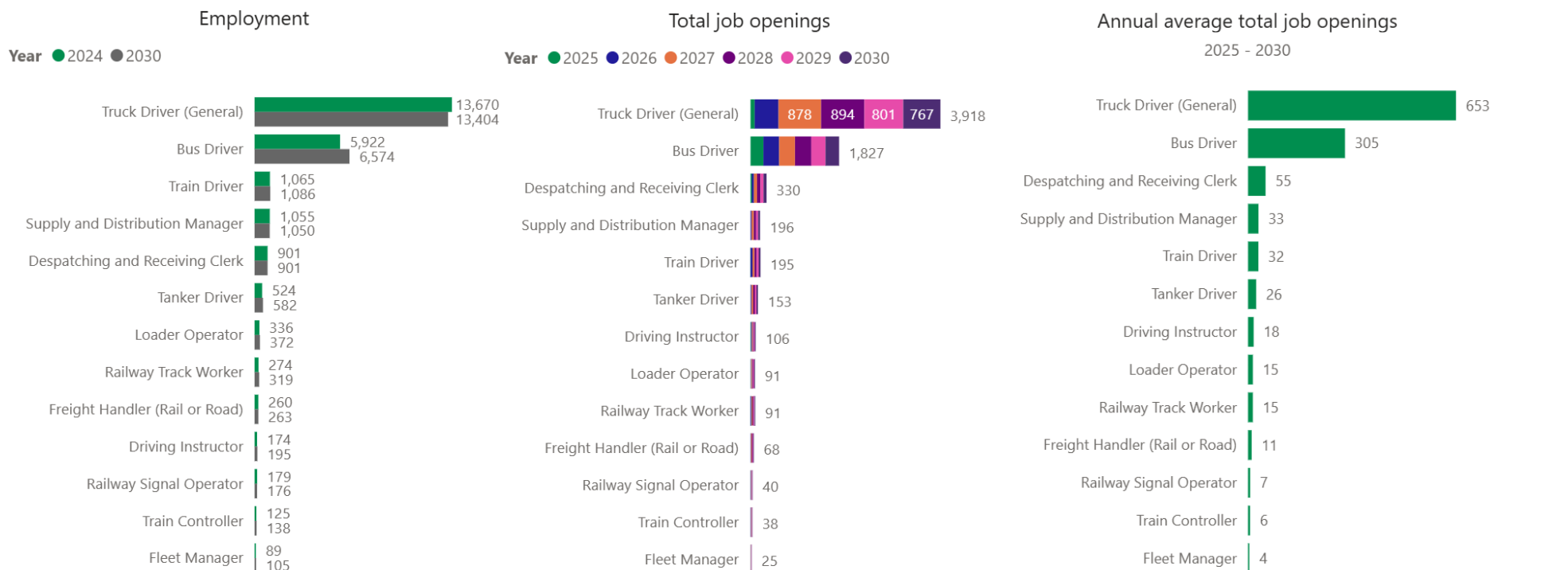
For occupations approximately aligned with commercial transport qualifications, truck driver (general) is the largest, employing 13,670 in 2024 directly in the commercial transport sector, and a total of 30,490 across the total economy. While there is a forecast reduction to 13,400 truck drivers (general) employed in commercial transport 2030, there are still 650 total job openings on average each year to replace those leaving the sector, with 1,460 total job openings on average each year across the total economy between 2025 and 2030.

The next highest occupations in terms of total job openings between 2025 and 2030 are bus driver, despatching and receiving clerk, supply and distribution manager and train driver.

The commercial transport occupations with the highest forecast growth in employment between 2024 and 2030 are:

- Bus driver; 650 new jobs, 11% employment growth
- Railway track worker; 45 new jobs, 16% employment growth
- Loader operator; 35 new jobs, 11% employment growth
- Train driver; 20 new jobs, 2% employment growth.

Fleet manager and railway track worker are forecast to be the fastest growing qualification aligned occupations across commercial transport, with 18% and 16% growth in employment between 2024 and 2030 respectively.



Source: Infometrics

Investment advice for 2026 – Commercial transport

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
Communicate to improve safety, compliance and performance in commercial road transport (Micro-credential) (5109)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change
Data Collection and Analysis to Improve Performance in Commercial Road Transport (Micro-credential) (5106)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change
Heavy vehicle recovery skills (Micro-credential) (4862)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change

Introduction to Dispatch Operations for Commercial Road Transport (Micro-Credential) (5108)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Off-road heavy vehicle driving skills (Micro-credential) (4865)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Waste transport driver operations and safety (Micro-credential) (4863)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Waste transport driver operations and safety using a left-hand waste collection vehicle (Micro-credential) (4864)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Workplace Driver Trainer Skills for Commercial Road Transport (Micro-credential) (5110)	<i>Increase - Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
New Zealand Certificate in Commercial Road Transport (Heavy Vehicle Operator) (Level 3) (3089)	<i>Increase - Preference for work-based delivery</i>	Priority in Plan Guidance	No change

New advice for 2027 – Commercial Transport

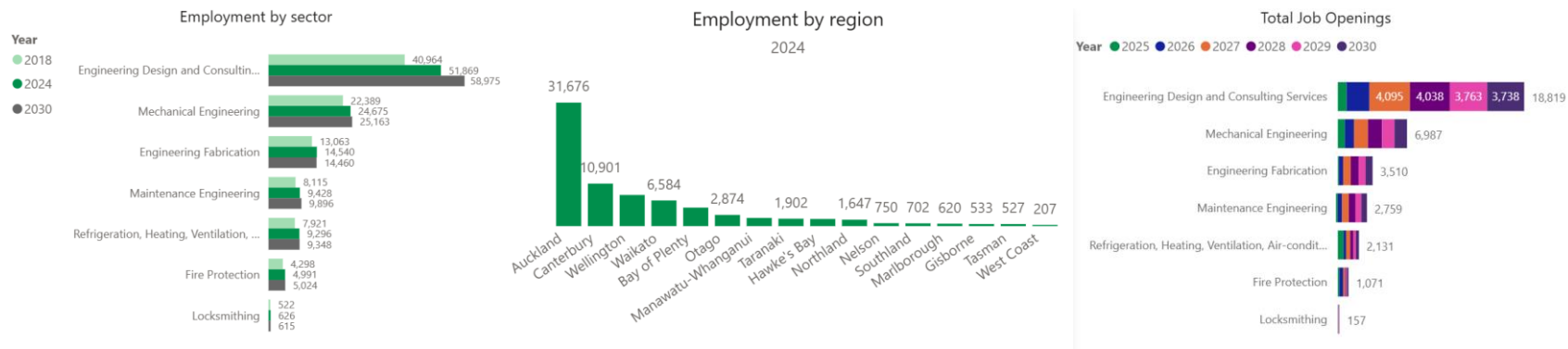
Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Locomotive Refinishing: Paint Technology and Application (Micro-credential) [5138]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified by industry.
Locomotive Refinishing: Paint Preparation, Painting Plastics and Applying Adhesive Graphics (Micro-credential) [5158]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified by industry.

Locomotive Refinishing: Prepare, Fill and Prime (Micro-credential) [5156]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified by industry.
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Engineering

The engineering workforce development plan can be [viewed here](#).

The engineering sector⁵ employed 75,600 people in 2024 in total and is forecast to grow to 87,400 in 2030 – a 10.1% increase in employment. Employment in this sector is forecast to grow 1.6% per year between 2025 and 2030, with an annual average total job openings of 4,130 per year. Auckland, Canterbury and Wellington are the largest regions for engineering employment.



Source: Infometrics

Enrolments across engineering have been increasing steadily, including a 10.4% increase in 2024, after a drop of 6.1% in 2023. Mechanical engineering is the largest sub-sector of engineering for vocational education, at 3,135 enrolments and 565 completions in 2024 – this also includes enrolment for maintenance engineering which is a strand of mechanical engineering. This was followed by engineering fabrication (2,380 enrolments)

⁵ The definition for engineering sector uses only ANZSIC industry definition used in the WDP. Mechanical engineering, engineering fabrication and locksmithing are based on ANZSCO occupation codes; their employment includes people employed in relevant occupations across the total economy.

and refrigeration, heating ventilation and air conditioning (1,005).

Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Mechanical Engineering	3,135	565	8.8%	488	2.0%	0.3%	6,987	1,165
Engineering Fabrication	2,380	740	10.4%	-80	-0.6%	-0.1%	3,510	585
Refrigeration, Heating, Ventilation, Air-conditioning	1,005	140	13.5%	52	0.6%	0.1%	2,131	355
Fire Protection	800	140	12.5%	33	0.7%	0.1%	1,071	179
Locksmithing	60	5	16.9%	-11	-1.8%	-0.3%	157	26
Engineering Design and Consulting Services			23.6%	7,106	13.7%	2.2%	18,819	3,137
Maintenance Engineering			14.8%	468	5.0%	0.9%	2,759	460

Engineering occupations below are based on total economy values, due to training occurring through these qualifications, but ultimately graduates are employed across a range of sectors, including in manufacturing.

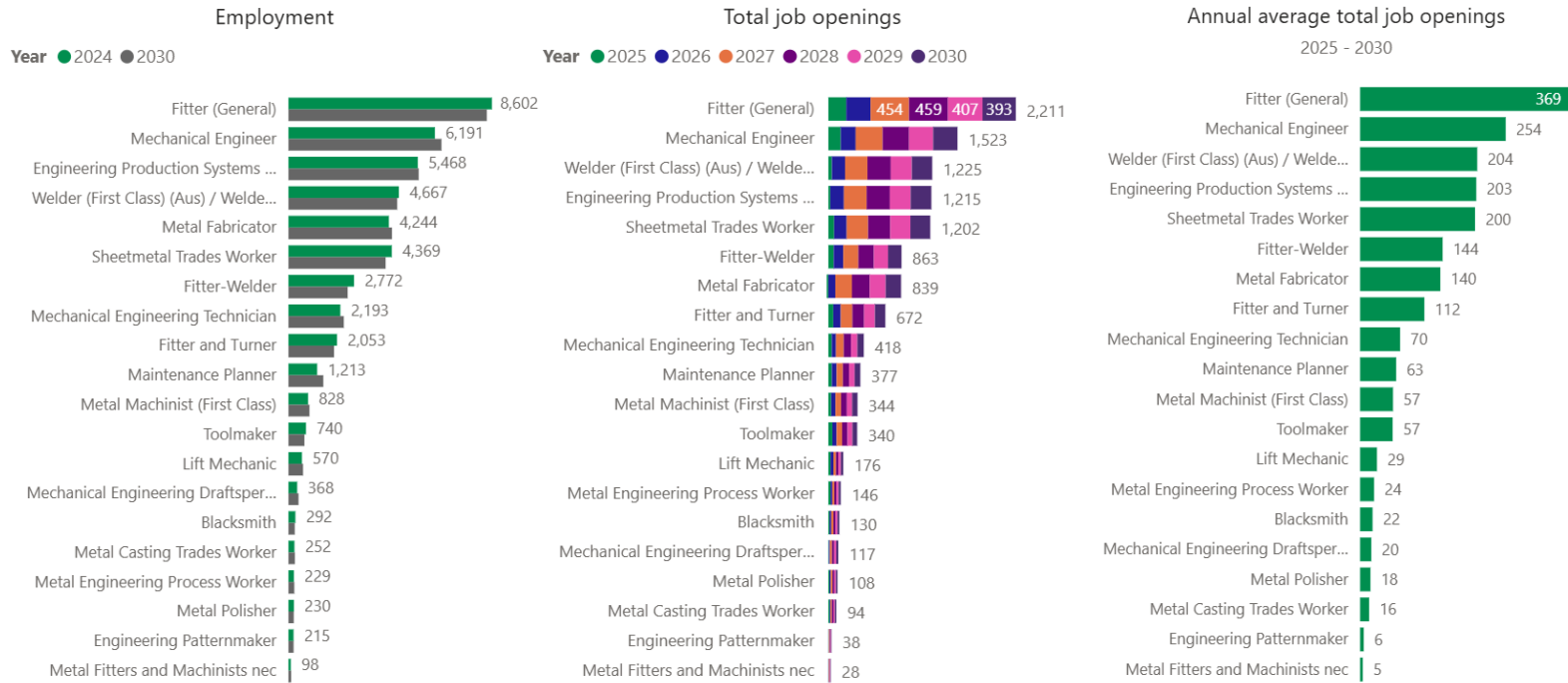
For occupations which approximately align with engineering qualifications, fitter (general) is the largest, employing 8,600 in 2024, with a decrease in total employment to 8,390 in 2030, but with 2,210 total job openings between 2025 and 2030 to replace those leaving roles. This was followed by mechanical engineer, engineering production systems worker and welder.

The qualification-aligned engineering occupations with the highest forecast growth in employment between 2024 and 2030 are:

- Mechanical engineering; 280 new jobs, 4% employment growth
- Maintenance planner; 260 new jobs, 21% employment growth
- Mechanical engineering technician; 150 new jobs, 7% employment growth
- Metal fabricator; 130 new jobs, 3% employment growth
- Metal machinist (first class); 60 new jobs, 7% employment growth.

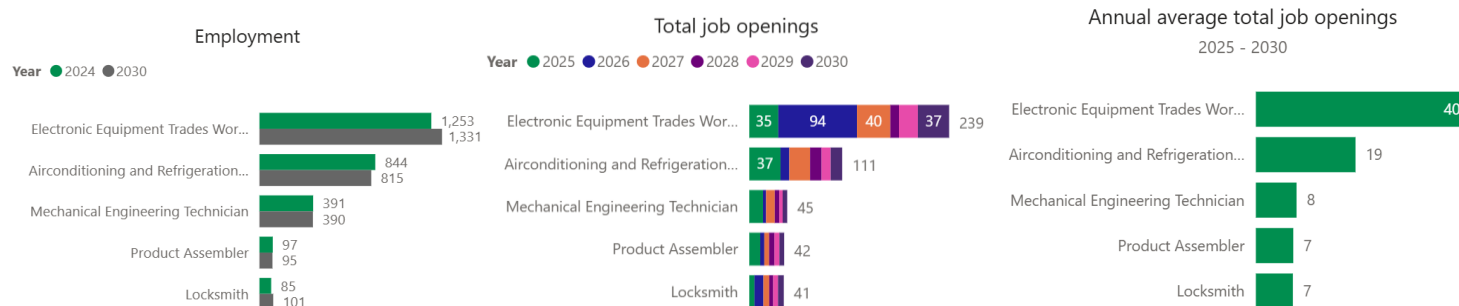
Several engineering occupations were added to the Green List’s Work to Residence pathway in August 2025, including Metal Fabricator, Metal Machinist (First Class), Fitter (General), Fitter and Turner, Fitter-Welder, Pressure Welder and Welder.⁶

⁶ [Ten trades occupations added to the Work to Residence pathway :: Immigration New Zealand](#)



Source: Infometrics

Occupations which approximately align with Locksmithing, Fire Protection and Refrigeration, Heating, Ventilation and Air Conditioning qualifications include:



Source: Infometrics

Investment advice for 2026 – Engineering

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
New Zealand Certificate in Transport Engineering (Trade) (Level 4) (5054)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change
New Zealand Certificate in Refrigeration and Air Conditioning (Trade) (Level 4) (2366)	<i>Increase</i>	Engagement – small number of providers	<p>Hanga-Aro-Rau is reviewing Refrigeration, heating, ventilation and Air-Conditioning qualifications and standards.</p> <p>Industry is responsible for identifying the training requirements for the MfE Refrigerant Product Stewardship Scheme (PSS).</p> <p>Hanga-Aro-Rau is supporting this process by facilitating the development and review of relevant NZQA products listed on the New Zealand Qualifications and Credentials Framework (NZQCF), which may include new micro-credentials.</p> <p>Current industry feedback from the 5-yearly review cycle suggests that a range of new qualifications and /or micro-credentials may need to be developed in response across areas such as, Refrigerant Recovery, Appliance Servicing, Vehicle A/C, Transport</p>

			Refrigeration, Flammable Refrigerants, Ammonia, CO2 and Split A/C and HP Installation and Servicing. Hanga-Aro-Rau will continue to work with industry to gather information, review and develop, and handover further industry recommendations to ISB.
New Zealand Certificate in Mechanical Engineering (Trade) (Level 4) with strands in Fitting and machining, General Engineering, Machining, Maintenance Engineering, Metal Forming, and Toolmaking (2714)	<i>Increase - Preference for work-based delivery</i>	Engagement – small number of providers	No change
New Zealand Certificate in Mechanical Engineering (Advanced) (Level 5) (2716)	<i>Increase</i>	Engagement – small number of providers	No change
New Zealand Cert in Engineering Fabrication (Trade) (Level 4) with strands in Heavy Fabrication, Light Fabrication, and Steel Construction (2719)	<i>Increase - Preference for work-based delivery</i>	Engagement – small number of providers	Engineering National Industry Advisory Group (NIAG) has raised concerns about potential closures of engineering facilities which could impact delivery of this qualification in Wellington and Taranaki. Update: removal of specific regional focus – nationwide.
New Zealand Certificate in Welding (Level 3) (4605)	<i>Increase</i>	Engagement – small number of providers	No change
New Zealand Certificate in Welding (Level 4) (4606)	<i>Increase</i>	Engagement – small number of providers	No change
New Zealand Certificate in Fluid Power engineering Fundamentals (Level 3) (4777)	<i>Increase</i>	Engagement – small number of providers	No change
New Zealand Certificate in Fixed Fire Protection Systems (Level 4) with optional strand in Special Hazards Fixed Fire Protection Systems (2577);	<i>Increase + improve completions</i>	Engagement – small number of providers	No change
New Zealand Certificate in Fire Detection and Alarm Systems (Level 4) with optional strand in special hazards (2575);	<i>Increase + improve completions</i>	Engagement – small number of providers	No change
New Zealand Certificate in Fire Protection Systems Technology (Inspections) (Level 4) with strands in Fire Detection and Alarms Systems, and Fixed Fire Protection Systems (2579)	<i>Increase + improve completions</i>	Engagement – small number of providers	No change
New Zealand Certificate in Hand Operated Fire Fighting Equipment (Level 3) (2580)	<i>Increase + improve completions</i>	Engagement – small number of providers	No change
New Zealand Certificate in Passive Fire Protection Systems (Level 4) with strands in Routine Compliance Inspections, and Construction Monitoring (2581)	<i>Increase + improve completions</i>	Engagement – small number of providers	No change

New advice for 2027– Engineering

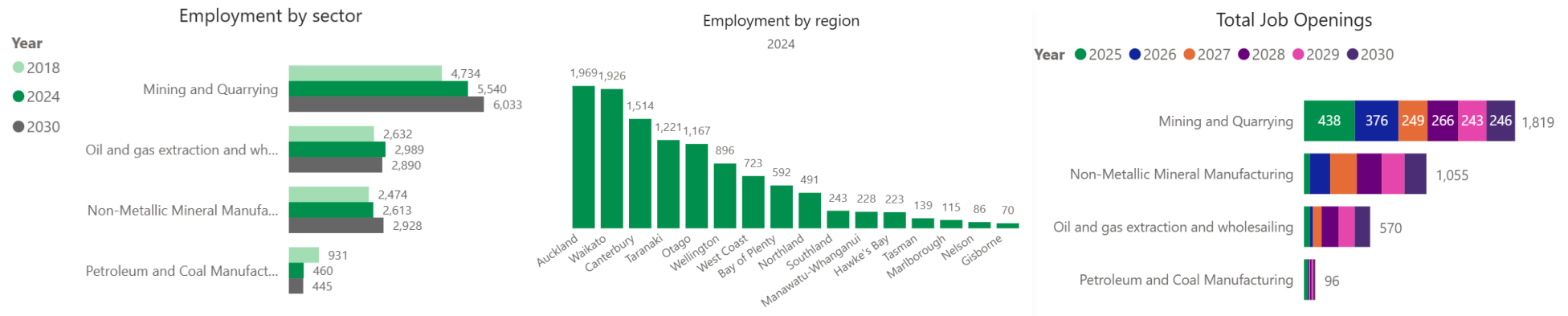
Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Mechanical Engineering CNC Operator (Micro-credential) [5138]	All	All	Increase – New	New micro-credential – Developed in response to a skill gap identified by industry.
New Zealand Certificate in Irrigation Technology (Level 3) [5316]	All	All	Replacement of 3761	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Irrigation Installation (Level 3) [Ref: 3761] which will be discontinued.
New Zealand Certificate in Irrigation Technology (Level 4) [5317]	All	All	Replacement of 3762	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Irrigation Engineering (Level 4) [Ref: 3762] which will be discontinued.
New Zealand Certificate in Passenger Ropeways Maintenance Engineering (Level 4) with optional strand in Conveyor Systems [5365]	Blended	All	Increase – New	New qualification – Developed in response to a skill gap identified by industry. Formal skills recognition of employees working to service passenger ropeway equipment and machinery critical for passenger safety, and reliable operations of one of New Zealand’s most specialised and high-risk tourism industries.

Extractives

The extractives workforce development plan can be [viewed here](#).

The extractives sector employed 11,600 people in 2024 in total and is forecast to grow to 12,300 in 2030 – a 6.0% increase in employment. Employment is forecast to grow 1.0% per year between 2025 and 2030, with an annual average total job openings of 590 per year. Auckland, Waikato, Canterbury, Taranaki, Otago and West Coast are the largest employing regions across extractives. Mining and Quarrying, which has the most significant connection to VET qualifications, has strong employment in Waikato, Otago and West Coast.

The extractives sector has been identified by the Government⁷ as a priority for regional growth and exports and they have signalled changes which could lead to more operations in future⁸. This could increase future workforce development needs. This will be highlighted further in the upcoming research report: Extractives and Mining: Workforce Acceleration planning (see ‘other’ advice).



Source: Infometrics

Enrolments across extractives have been falling in 2023 and 2024, after increases in 2021 and 2022 – enrolments fell 7.4% year on year in 2024. Mining and Quarrying is the largest sub-sector of extractives for vocational education, at 315 enrolments and 90 completions in 2024. The other sub-sectors do not currently have specific vocational education qualifications.

⁷ [A new direction for the minerals sector to grow the economy | Beehive.govt.nz](#)

⁸ [Making it easier to consent quarries and mines | Beehive.govt.nz](#)

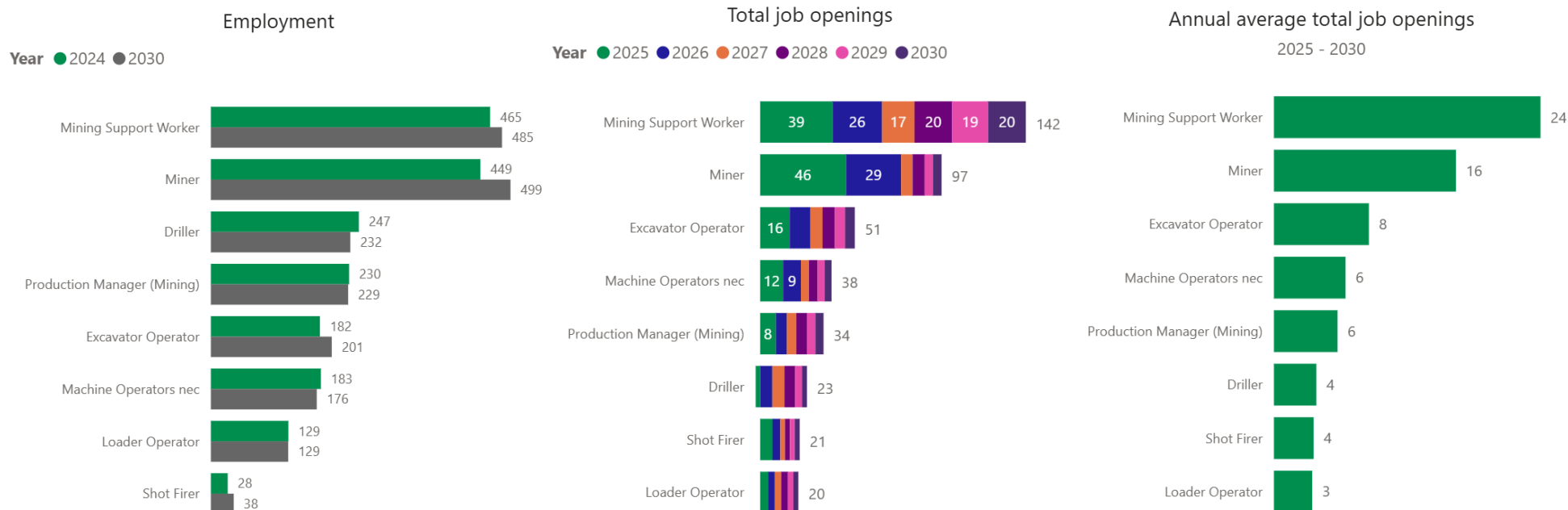
Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Mining and Quarrying	315	90	14.2%	493	8.9%	1.4%	1,819	303
Non-Metallic Mineral Manufacturing			3.7%	316	12.1%	1.9%	1,055	176
Oil and gas extraction and wholesaling			10.0%	-99	-3.3%	-0.5%	570	95
Petroleum and Coal Manufacturing			-51.8%	-15	-3.2%	-0.5%	96	16

For occupations that approximately align with extractives qualifications, mining support worker is the largest, employing 465 in 2024 and forecast to reach 485 in 2030, with a forecast total job opening of 140 between 2025 and 2030. The next highest occupations in terms of total job openings are miner, excavator operator and machine operators not elsewhere classified (NEC).

The qualification aligned extractive occupations with the highest forecast growth in employment between 2024 and 2030 are:

- Miner; 50 new jobs, 11% employment growth
- Mining support worker; 20 new jobs, 4% employment growth
- Excavator operator; 20 new jobs, 11% employment growth.

Miner is forecast to be the fastest growing qualification aligned occupation across extractives.



Source: Infometrics

Investment advice for 2026 – Extractives

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
Extractive Industries Site Construction and Maintenance (Micro-credential) (4849)	<i>Increase - Preference for work-based delivery - Focus on West Coast, Otago, Taranaki and Waikato.</i>	Noted in Plan Guidance as new qualification/credential	No change
Extractive Industries Standard Operating Procedures (4848)	<i>Increase - Preference for work-based delivery - Focus on West Coast, Otago, Taranaki and Waikato.</i>	Noted in Plan Guidance as new qualification/credential	No change

New advice for 2027 – Extractives

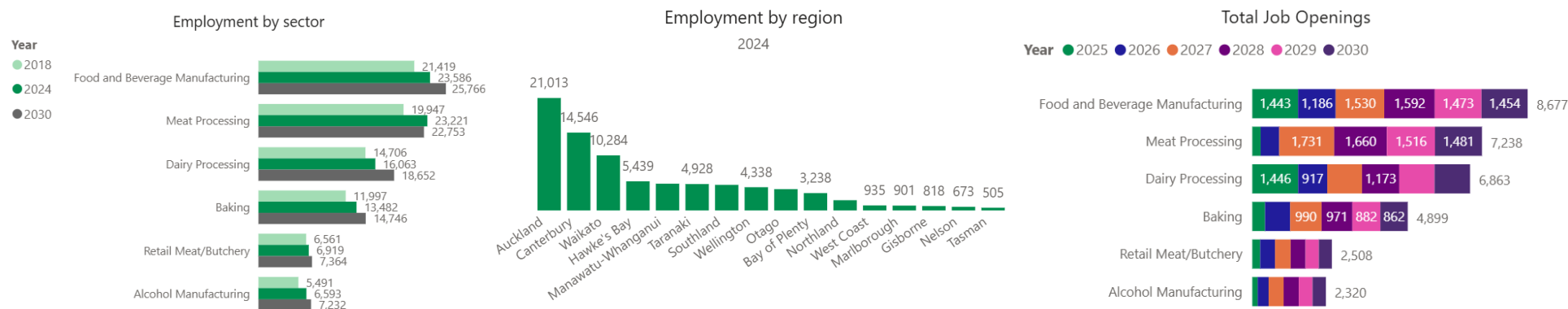
Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Extractive Industries Team Leadership and Worker Health (Micro-credential) (5268)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review.
Extractive Industries Leadership and Worker Health Risk Management (Micro-credential) (5270)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Site Maintenance and Equipment Safety (Micro-credential) (5269)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Applied Coordinated Incident Management (Micro-Credential) (5303)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Legislation and Regulatory Requirements (Micro-credential) (5295)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Rehabilitation Operations Planning (Micro-credential) (5294)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review.

				<i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Plan and Manage Extraction Methods (Micro-credential) (5292)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Explosives Properties and Storage (Micro-credential) (5291)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Develop Safety Inspections and Operating Procedures (Micro-Credential) (5290)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>
Extractive Industries Safety and Risk Management (Micro-credential) (5293)	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. <i>Note: Initial feedback from TEC on this advice suggest this may not be eligible for funding due to funding conditions for Health and safety or regulatory compliance learning.</i>

Food and Beverage

The food and beverage workforce development plan can be [viewed here](#). This workforce development plan highlights emerging skills areas which will be transferred to Industry Skills Boards (ISBs), for example, brewing skills to support the beer manufacturing industry.

The food and beverage sector employed 83,270 people in 2024 in total and is forecast to grow to 89,280 in 2030 – a 7.2% increase in employment. Employment is forecast to grow 1.2% per year between 2025 and 2030, with an annual average total job openings of 5,030 per year. Auckland, Canterbury, Waikato and Hawke’s Bay are the largest employing regions. Dairy processing has the largest forecast growth between 2024 and 2030 (16.1% employment growth, 2590 new jobs), followed by alcohol manufacturing and baking.



Source: Infometrics

Enrolments across food and beverage have been reducing since a 2018 peak, falling 20.1% year on year in 2024. Food and beverage manufacturing is the largest sub-sector of food and beverage for vocational education, at 1,120 enrolments and 745 completions in 2024 – these include general qualifications, which can be used across a broad range of food and beverage business. This was followed by meat processing and baking at 850 and 825 enrolments in 2024 respectively.

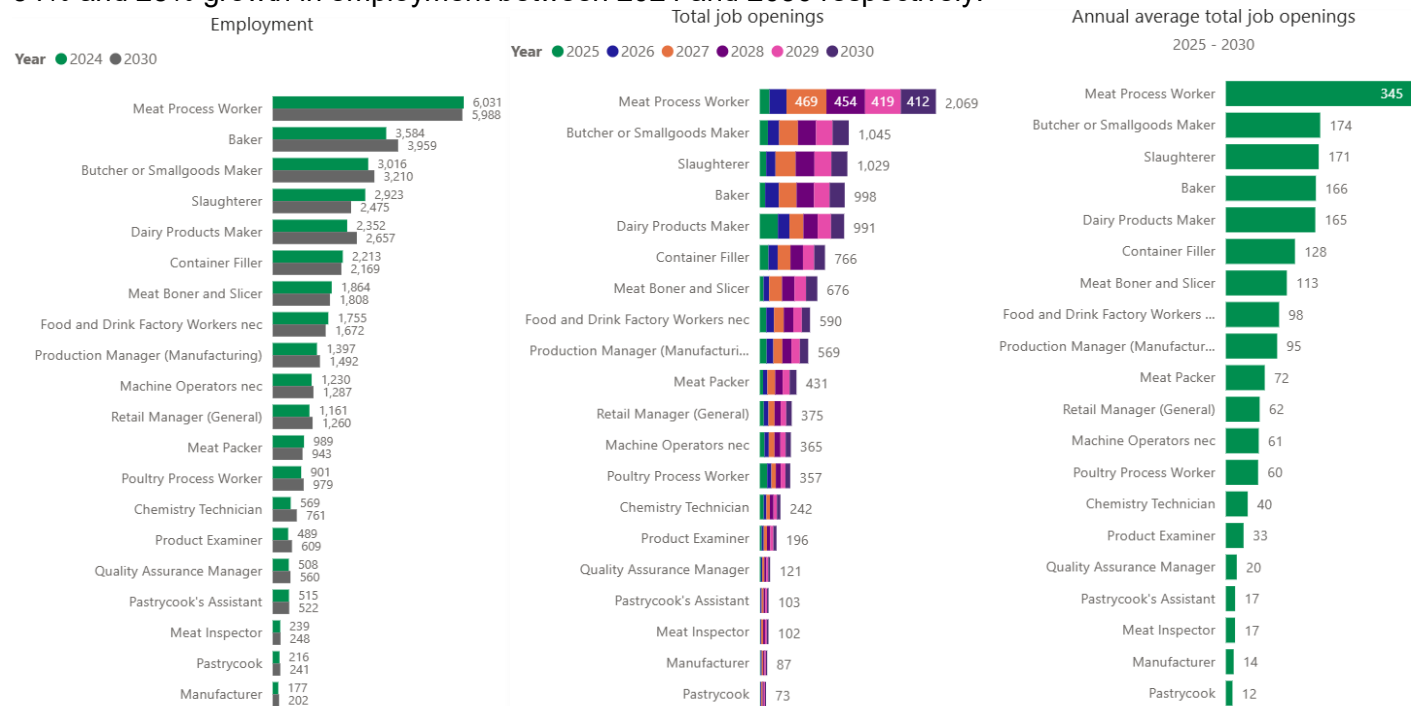
Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Food and Beverage Manufacturing	1,120	745	6.1%	2,180	9.2%	1.5%	8,677	1,446
Meat Processing	850	470	13.6%	-468	-2.0%	-0.3%	7,238	1,206
Baking	825	300	6.2%	1,264	9.4%	1.5%	4,899	816
Dairy Processing	695	210	6.7%	2,588	16.1%	2.5%	6,863	1,144
Retail Meat/Butchery	615	115	5.4%	446	6.4%	1.1%	2,508	418
Alcohol Manufacturing			16.9%	639	9.7%	1.6%	2,320	387

For occupations which approximately align with food and beverage qualifications, meat process worker is the largest, employing 6,030 in 2024 – but with a forecast decrease in total employment to 5,990 in 2030. However, there are 2,070 total job openings to replace those leaving roles between 2025 and 2030. The next highest occupations in terms of employment are baker, butcher or smallgoods maker, slaughterer and dairy products maker.

The qualification aligned food and beverage occupations with the highest forecast growth in employment between 2024 and 2030 are:

- Baker; 370 new jobs, 10% employment growth
- Dairy products maker; 300 new jobs, 13% employment growth
- Butcher or smallgoods maker; 190 new jobs, 13% employment growth
- Chemistry technician; 190 new jobs, 34% employment growth.

Chemistry technician and product examiner are forecast to be the fastest growing qualification-aligned occupations across food and beverage, with 34% and 25% growth in employment between 2024 and 2030 respectively.



Source: Infometrics

Investment advice for 2026 – Food and Beverage

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
New Zealand Certificate in Meat and Meat Product Manufacturing (Level 3) (2495)	<i>Increase - Preference for work-based delivery - focus on regions with high proportion of employment: Canterbury, Southland, Hawkes Bay, Waikato, Manawatu-Whanganui and Otago.</i>	Engagement – small number of providers	No change
New Zealand Certificate in Trade Butchery (Level 4) with optional strands in Carcass Breaking and Boning, Curing and Smoking, and Handcrafted Small Goods (2972)	<i>Increase</i>	Engagement – small number of providers	Feedback from industry and current enrolment data shows a decrease in enrolments in 2023 and 2024 from a 2022 peak. However, total job opening and employment forecasts show recovery from 2026 onwards for the retail meat / butchery sector. No change

New Advice for 2027– Food and Beverage

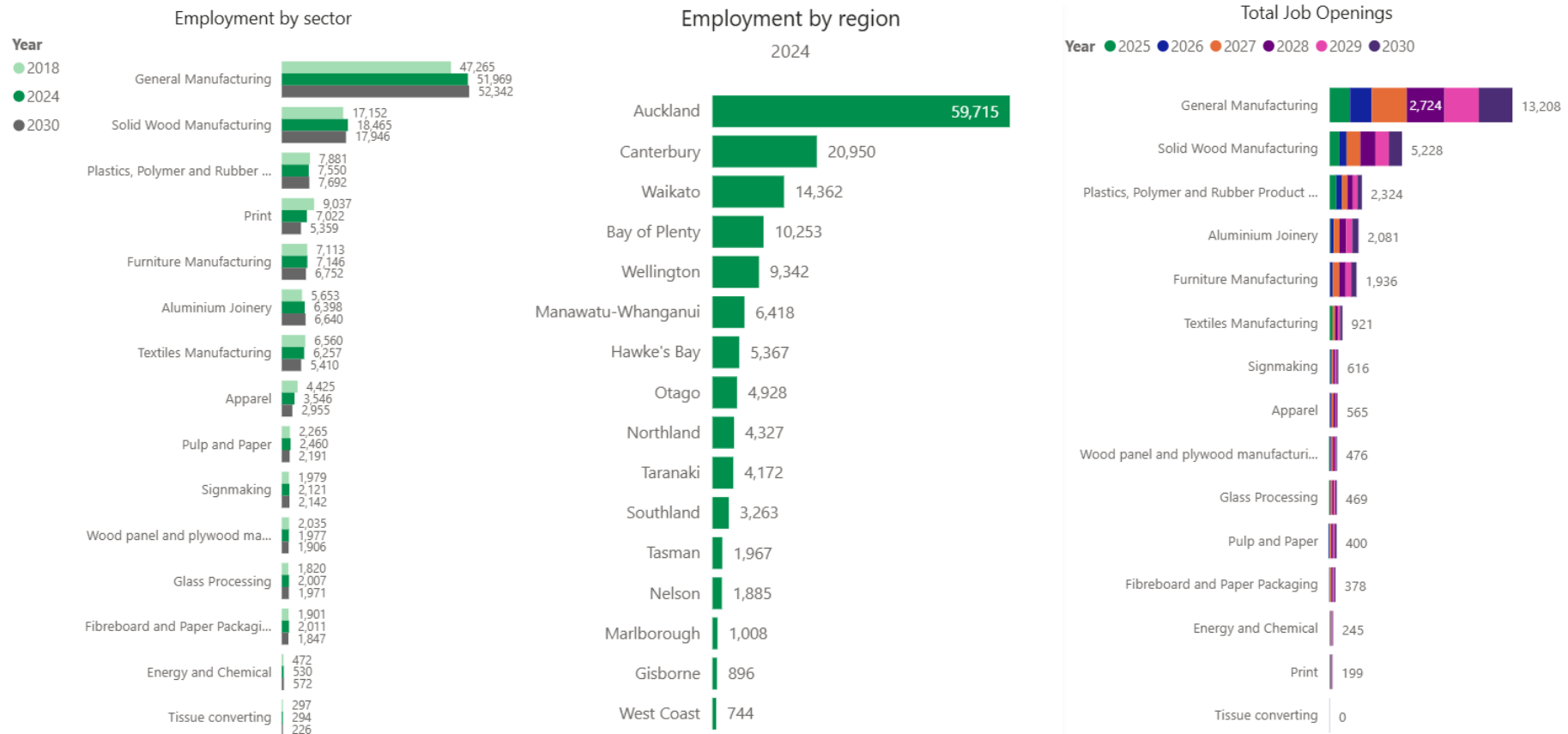
Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
New Zealand Certificate in Baking (Fundamentals) (Level 3) [5319]	All	All	Replacement of 1841	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Baking (Level 3) [Ref: 1841], which will be discontinued.
New Zealand Certificate in Baking (Generalist) (Level 4) [5320]	All	All	Replacement of 1842	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Baking (Level 4) [Ref: 1842], which will be discontinued.
New Zealand Certificate in Baking (Trade) (Level 3) [5321]	All	All	Replacement of 2696	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Trade Baking (Level 3) [Ref: 2696], which will be discontinued.
New Zealand Certificate in Baking (Trade) (Level 4) with strands in Bread, Cake and Biscuit, Instore, Pastry and Plant [5322]	All	All	Replacement of 2698 and 2697	Developed in response to needs identified in qualification review process, replacing New Zealand Certificate in Trade Baking (Craft) (Level 4) [Ref: 2698]

				<p>and the New Zealand Certificate in Trade Baking (Plant) (Level 4) [Ref: 2697], which will be discontinued.</p> <p>The qualification and its strands have been restructured to better support the various types of baking businesses which use this qualification, and the addition of a new instore strand which makes this qualification more relevant to wider range of businesses. These changes could lead to increase in enrolments in future. The baking workforce is forecast to grow 9.4% between 2025 and 2030 (an increase of 1,264 new jobs), faster than the total economy at 4.8% employment growth.</p>
New Zealand Certificate in Fellmongery and Leather Processing (Level 3) [2486]	Work-based	All	New provision	Qualification under review – industry has indicated need for qualifications though qualification review process, but there have been no providers.
New Zealand Certificate in Fellmongery and Leather Processing (Level 4) [2492]	Work-based	All	New provision	Qualification under review – industry has indicated need for qualifications though qualification review process, but there have been no providers.
New Zealand Certificate in Dairy Processing (Level 5) with strands in Operational Leadership, and Dairy Technology [4268]	Blended (workplace based with online /campus support)	All	New provision	<p>Qualification review process is ongoing. At the Qualification Advisory Group (QAG) meeting held in July 2025, industry representatives expressed concern about the accessibility of this qualification – there are no providers currently delivering.</p> <p>The dairy processing sector employed 16,063 people in 2024, reflecting 6.7% growth since 2018. Looking ahead, employment in the sector is forecast to grow much faster than the total economy. By 2030, employment is expected to reach 18,652 – a 16.1% increase in total and averaging 2.5% growth per year compared with just 1% across the economy overall.</p>
New Zealand Diploma in Dairy Processing (Level 6)	All	All	New provision	<p>Qualification review process is ongoing. At the Qualification Advisory Group (QAG) meeting held in July 2025, industry representatives expressed concern about the accessibility of this qualification – currently single provider with access only in Hamilton impacting accessibility in other regions.</p> <p>The dairy processing sector employed 16,063 people in 2024, reflecting 6.7% growth since 2018. Looking ahead, employment in the sector is forecast to grow much faster than the total economy. By 2030, employment is expected to reach 18,652 – a 16.1% increase in total and averaging 2.5% growth per year compared with just 1% across the economy overall.</p>

Manufacturing

The manufacturing workforce development plan can be [viewed here](#).

The manufacturing sector (excluding food and beverage) employed 163,100 people in 2024 in total and is forecast to contract slightly to 160,560 in 2030 – a 1.6% fall in employment. The largest fall in employment is forecast for 2025 and 2026, before some recovery between 2027 and 2030. The sector has an annual average total job openings of 7,000 between 2025 and 2030, driven by the need to replace those leaving roles and recovery in employment from 2027 onwards. Auckland, Canterbury, Waikato and Bay of Plenty are the largest employing regions across manufacturing.



Source: Infometrics

Enrolments across manufacturing peaked in 2022 at 10,095 (significant growth from 5,590 in 2020), but fell significantly in 2023 and 2024, with a 38.5% decrease year on year in 2024. General manufacturing (760), solid wood manufacturing (605), aluminium joinery (595) and furniture manufacturing (315) were the largest manufacturing sectors for enrolments in vocational education in 2024.

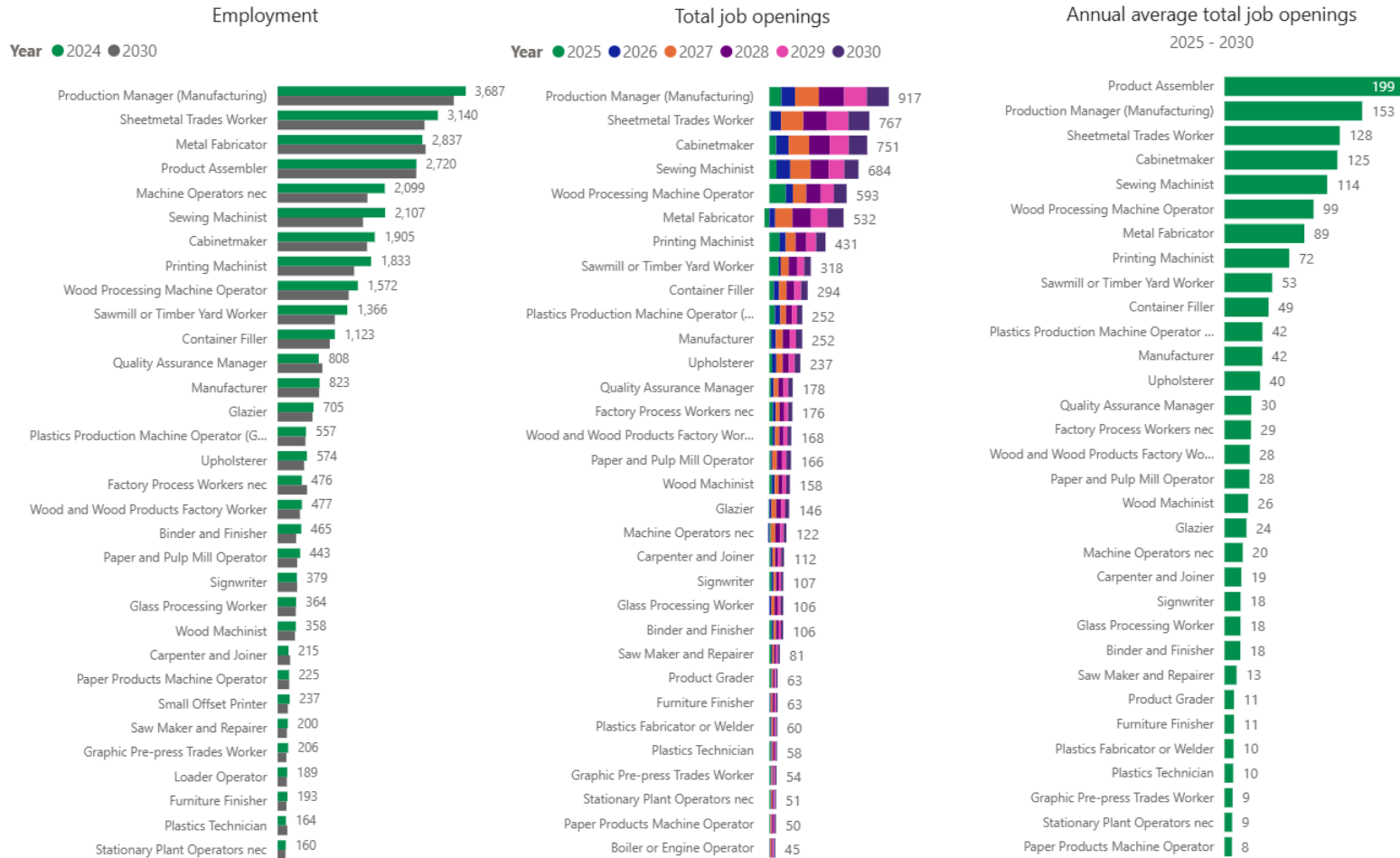
Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 - 2030
General Manufacturing	760	270	8.7%	1,286	1.5%	0.3%	22,428	3,738
Solid Wood Manufacturing	605	195	9.1%	-519	-2.8%	-0.5%	5,228	871
Aluminium Joinery	595	185	15.8%	242	3.8%	0.6%	2,081	347
Furniture Manufacturing	315	45	2.7%	-393	-5.5%	-0.9%	1,936	323
Applied Science	230	125						
Print	160	15	-20.3%	-1,679	-23.3%	-4.3%	222	37
Plastics, Polymer and Rubber Product Manufacturing	150	30	0.2%	143	1.9%	0.3%	2,324	387
Energy and Chemical	130	50	10.0%	42	7.9%	1.3%	245	41
Signmaking	130	25	7.0%	21	1.0%	0.2%	616	103
Fibreboard and Paper Packaging	65	10	4.4%	-164	-8.2%	-1.4%	378	63
Apparel	55	45	-14.3%	-591	-16.7%	-3.0%	565	94
Tissue converting	25	15	-6.1%	-68	-23.2%	-4.3%	0	0
Glass Processing	20	5	18.3%	-35	-1.8%	-0.3%	469	78
Pulp and Paper	15	5	7.5%	-269	-10.9%	-1.8%	400	67
Wood panel and plywood manufacturing	5	0	1.2%	-71	-3.6%	-0.6%	476	79
Textiles Manufacturing			-3.1%	-847	-13.5%	-2.4%	921	154

Manufacturing spans a wide range of sectors and qualifications, and the charts below shows some of the largest employing occupations that these qualifications support. The occupations with the largest forecast total job openings include production manager (manufacturing), sheet metal trades worker, cabinet maker, sewing machinist and wood processing machine operator. Several general manufacturing qualifications provide critical skillsets which go across many occupations, for example the digital skills micro-credentials and operational excellence (formerly competitive systems and practices) qualifications.

The qualification aligned manufacturing occupations that have the highest forecast growth in employment between 2024 and 2030 are:

- Factory process worker not elsewhere classified (NEC); 103 new jobs, 22% employment growth
- Quality assurance manager; 70 new jobs, 9% employment growth
- Metal fabricator; 64 new jobs, 2% employment growth
- Carpenter and joiner; 31 new jobs, 14% employment growth
- Plastics technician; 27 new jobs, 17% employment growth.

Factory process worker NEC and plastics technician are forecast to be the fastest growing qualification-aligned occupations across manufacturing, with 22% and 17% growth in employment between 2024 and 2030 respectively.



Source: Infometrics

Investment advice for 2026 – Manufacturing

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
Digital Systems for Productivity Improvement in Manufacturing (Micro-credential) (5011)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change
New Zealand Certificate in Plastics Engineering and Fabrication (Level 4) (5015)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Onsite polymer welding (Micro-credential) (5013)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Plastic fabrication workshop and welding (Micro-credential) (5014)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Plastics acrylics fabrication and assembly (Micro-credential) (5012)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Assist a Print Operator (Micro-credential) (4884)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Guillotine Operations for Print Production (Micro-credential) (4861)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
Print Industry Foundation Knowledge (Micro-credential) (4881)	<i>Increase – Preference for work-based delivery</i>	Noted in Plan Guidance as new qualification/credential	No change
New Zealand Certificate in Industrial Sewing (Level 3) (5081)	<i>New delivery sought</i>	Noted in Plan Guidance as new qualification/credential	No change
Digital Skills in Manufacturing Micro-Credential (Level 3) (4341)	<i>Increase</i>	Engagement – small number of providers	Micro-credential is being used to support Project Fetu (see other advice).
New Zealand Certificate in Manufacturing (Level 3) (2730)	<i>New providers – Increase</i>	-	Update to include increase of provision in addition to new providers. See other section ‘Supporting employment and education pathways in the manufacturing sectors’. Hanga-Aro-Rau is working with industry-led pilot programmes, which could result in new provision of this qualification and future increase in demand across regions.

New Advice for 2027 – Manufacturing

Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Certificate in Waste Reduction in the Workplace (Micro-credential) [5231]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. These micro-credentials can be delivered as standalone micro-credentials or stack towards this full qualification: New Zealand Certificate in Operational Excellence (Competitive Systems and Practices) (Level 3) Ref: [5250]. Development signalled in 2026 advice.
Identify costs associated with waste in the workplace [with NZQA for approval]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. These micro-credentials can be delivered as standalone micro-credentials or stack towards this full qualification: New Zealand Certificate in Operational Excellence (Competitive Systems and Practices) (Level 3) Ref: [5250]. Development signalled in 2026 advice.
Use continuous improvement tools in the workplace [with NZQA for approval]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. These micro-credentials can be delivered as standalone micro-credentials or stack towards this full qualification: New Zealand Certificate in Operational Excellence (Competitive Systems and Practices) (Level 3) Ref: [5250]. Development signalled in 2026 advice.
Manage impact of change in own work environment [with NZQA for approval]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. These micro-credentials can be delivered as standalone micro-credentials or stack towards this full qualification: New Zealand Certificate in Operational Excellence (Competitive Systems and Practices) (Level 3) Ref: [5250]. Development signalled in 2026 advice.
Sustain process improvements in the workplace [with NZQA for approval]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. These micro-credentials can be delivered as standalone micro-credentials or stack towards this full qualification: New Zealand Certificate in Operational Excellence (Competitive Systems and Practices) (Level 3) Ref: [5250]. Development signalled in 2026 advice.
Concepts and Principles of Total Productive Manufacturing (TPM) in the Workplace (Micro-credential) [5230]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified in qualification review. Development signalled in 2026 advice.
New Zealand Certificate in Apparel and Fashion Technology (Level 4) [5218]	All	All	Replacement of 2607, 2608 and 3178.	Developed in response to needs identified by the qualification review process, replacing New Zealand Certificate in Apparel and Fashion Technology (Level 4) [Ref: 2607]; New Zealand Certificate in Apparel and Fashion Technology

				(Patternmaking) (Level 5) [Ref: 2608]; New Zealand Certificate in Apparel and Fashion Technology (Fabric Cutting) (Level 4) [Ref: 3178]
New Zealand Certificate in Operational Excellence (Competitive Systems and Practice) (Level 3) [5250]	<i>All</i>	<i>All</i>	Replacement of 2998.	Developed in response to needs identified by the qualification review process, replacing New Zealand Certificate in Competitive Systems and Practices (Level 3) [Ref: 2998].
New Zealand Certificate in Operational Excellence (Competitive Systems and Practice) (Level 4) [5251]	<i>All</i>	<i>All</i>	Replacement of 2999	Developed in response to needs identified by their qualification review process, replacing New Zealand Certificate in Competitive Systems and Practices (Level 4) [Ref: 2999].
New Zealand Diploma in Operational Excellence (Competitive Systems and Practice) (Level 5) [5252]	<i>All</i>	<i>All</i>	Replacement of 3000	Developed in response to needs identified by the qualification review process, replacing New Zealand Diploma in Competitive Systems and Practices (Level 5) [Ref: 3000].
Introduction to the Energy and Chemical Industry (Micro-Credential) [5298]	<i>All</i>	<i>All</i>	Increase - new	New micro-credential – Developed in response to skill gap as identified in qualification review

Wood Manufacturing Qualifications – Availability of Block Courses

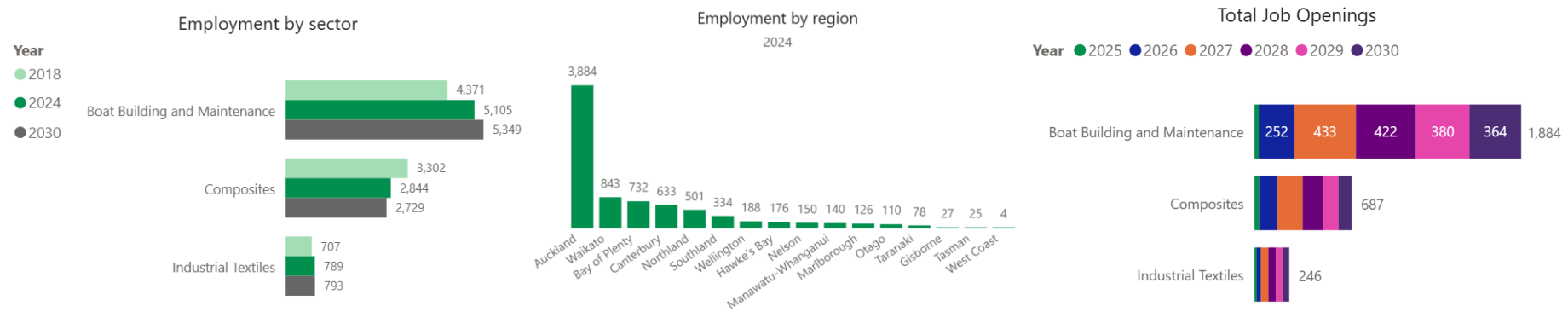
Industry have identified the potential closure of the Timber Industry Training Centre (TITC) at Toi Ohumai Waipā Campus as a risk to training for wood manufacturing qualifications, in particular for timber machining and saw doctoring. This campus is the primary location for block course training (supporting work-based learning with Competenz as the main provider), and its closure will impact learners in industries who may not have the ability to run a work-based only model.

Hanga-Aro-Rau has been working with an industry group who are considering options for the future of block courses, where this issue has been highlighted. Availability of block courses was also highlighted as a challenge in a recent survey of wood manufacturers undertaken by Hanga-Aro-Rau in preparation for the qualification review, and through Hanga-Aro-Rau's engagement with the wood manufacturing sector. We encourage TEC to work with industry and providers on this matter.

Marine

The marine workforce development plan can be [viewed here](#). Support for education to employment programmes have been highlighted as a priority for the marine sector in the WDP and by the Marine National Industry Advisory Group (NIAG).

The marine sector⁹ employed 8,740 people in 2024 in total and is forecast to grow to 8,870 in 2030 – a 1.5% increase in employment. Employment in sector is forecast to grow 0.3% per year between 2025 and 2030, with an annual average total job openings of 470 per year. Auckland, Waikato and Bay of Plenty are the largest employing regions across marine. Boat building and maintenance has the largest forecast increase in employment between 2024 and 2025 (4.8% increase in employment, 240 new jobs).



Source: Infometrics

Enrolments across marine trended upwards to a peak of 870 in 2022, before some reduction in 2023 (5.2% decrease) and 2024 (14.5% decrease). There are, however, relatively high 2025 year to date enrolments as a proportion of 2024 (70.9%) which could indicate growth in 2025. Boat building and maintenance is the largest sub-sector of marine for vocational education, at 585 enrolments and 100 completions in 2024. Followed by composites and industrial textiles at 75 and 25 enrolments in 2024 respectively.

⁹ The marine sector has been defined more broadly than the WDP in this analysis to include composites and industrial textiles to better reflect the qualifications. This is a different definition that what was used for the WDP.

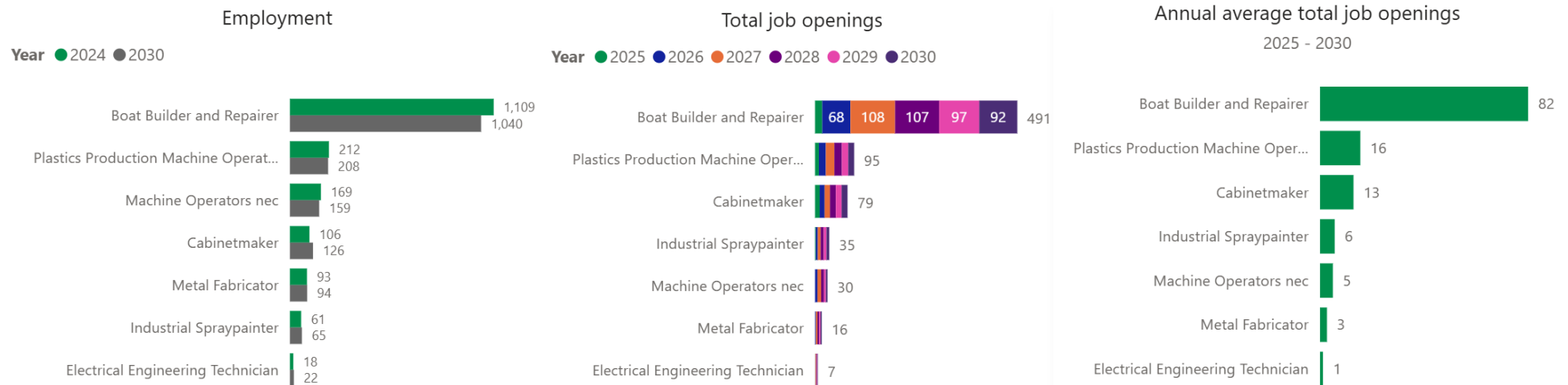
Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Boat Building and Maintenance	585	100	16.4%	243	4.8%	0.8%	1,884	314
Composites	75	5	-8.7%	-116	-4.1%	-0.7%	687	114
Industrial Textiles	25	10	11.9%	4	0.5%	0.1%	246	41
Marina Operations	20	5						

For occupations approximately aligned with marine qualifications, boat builder and repairer is the largest, employing 1,110 in 2024, and forecast to decrease by 70 total jobs to 1,040 in 2030, but with 490 total job openings between 2025 and 2030 to replace those leaving roles.

The qualification-aligned marine occupations that have the highest forecast growth in employment between 2024 and 2030 are:

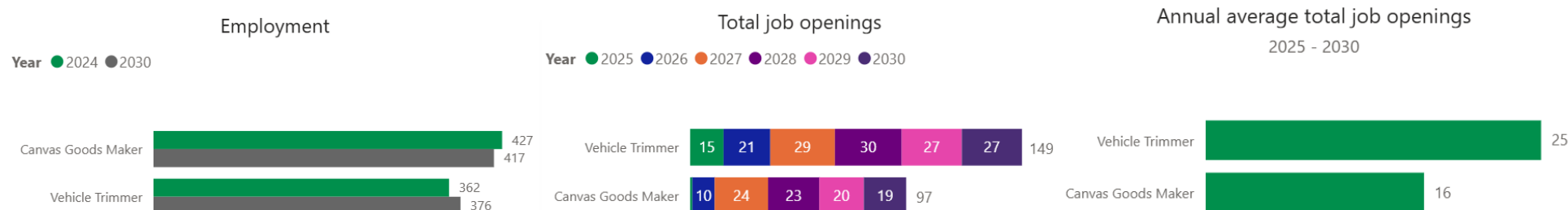
- Cabinetmaker; 20 new jobs, 18% employment growth
- Vehicle trimmer; 14 new jobs, 4% employment growth.

Cabinetmaker and electrical engineering technician are forecast to be the fastest growing qualification-aligned occupations across marine, with 18% and 17% growth in employment between 2024 and 2030 respectively.



Source: Infometrics

The following occupations approximately align to industrial textiles¹⁰ qualifications:



Source: Infometrics

Investment advice for 2026 – Marine

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
New Zealand Certificate in Advanced Textiles (Level 4) with strands in Industrial Textiles Fabrication, and Industrial Trimming (5060)	Increase – Preference for work-based delivery	Noted in Plan Guidance as new qualification/credential	No change
Industrial Textile Fabrication On-site Installation (Micro-credential) (5074)	Increase – Preference for work-based delivery	Noted in Plan Guidance as new qualification/credential	No change

New Advice for 2027 – Marine

Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
New Zealand Diploma in Vessel Technology Project Management (Level 5) [5115]	All	All	Replacement qualification	Developed in response to needs identified by the qualification review process, replacing New Zealand Diploma in Marine Vessel Project Management (New Build, and Refit) (Level 6) [Ref: 3127-3].

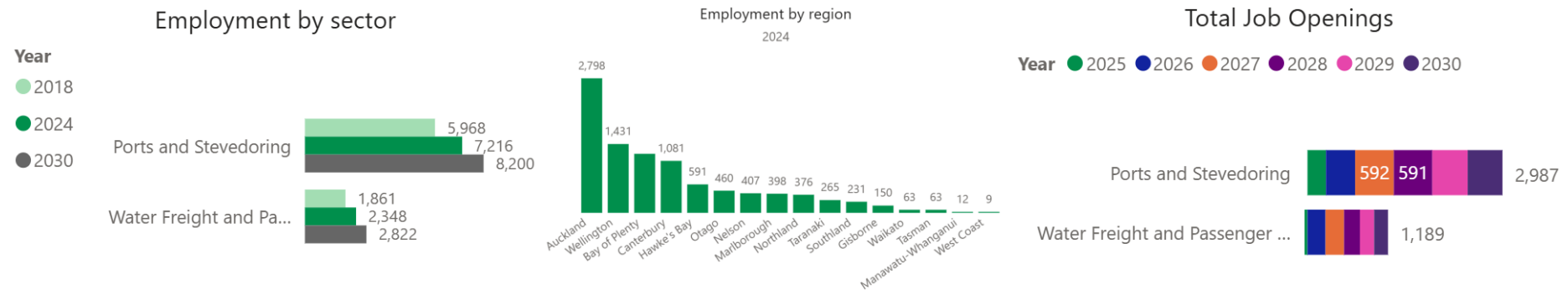
¹⁰ Industrial textiles occupations have used a total economy definition due to there being no specific ANZSIC codes reflecting the industry these qualifications support.

New Zealand Certificate in Marine Pre Trade (Level 3) with strands in Boat Building and Composites [approved but not yet listed]	<i>All</i>	<i>All</i>	Increase – New	Developed in response to needs identified by the qualification review process.
New Zealand Certificate in Marine Systems Pre Trade (Level 3) [approved but not yet listed]	<i>All</i>	<i>All</i>	Increase – New	Developed in response to needs identified by the qualification review process.

Ports and Maritime Transport

The ports and maritime transport workforce development plan can be [viewed here](#).

The ports and maritime transport sector employed 9,560 people in 2024 in total and is forecast to grow to 11,020 in 2030 – a 15.3% increase in employment. Employment in this sector is forecast to grow 2.4% per year between 2025 and 2030, with an annual average total job openings of 670 per year. Auckland, Wellington and Bay of Plenty are the largest employing regions across ports and maritime transport.



Source: Infometrics

Enrolments across ports and maritime transport have fallen since 2020, with a 16.2% year on year fall in 2023, and 3.9% fall in 2024. Some of this fall is from a reduction in ports enrolments, which is related to the availability of provision. This is likely to recover in future years as new provision increases. Water freight and passenger transport is the largest sub-sector of ports and maritime for vocational education, at 1,085 enrolments and 545 completions in 2024.

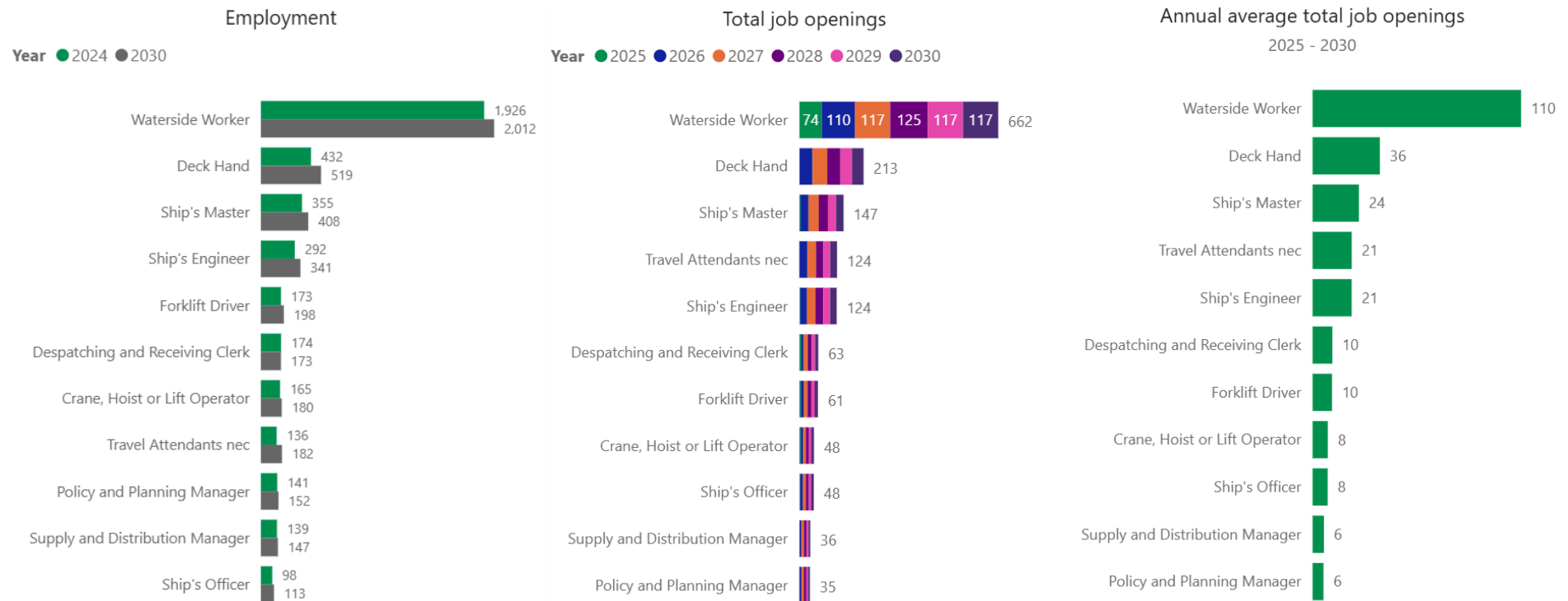
Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Water Freight and Passenger Transport	1,085	545	17.8%	474	20.2%	3.2%	1,189	198
Ports and Stevedoring	10	5	15.7%	984	13.6%	2.2%	2,987	498

For occupations that approximately align with ports and maritime transport qualifications, waterside worker is the largest, employing 1,930 in 2024, and forecast to increase by 86 new jobs to 2,010 in 2030, with 660 total job openings between 2025 and 2030. This is followed by deck hand (430), ship's master (350) and ship's engineer (290).

The qualification-aligned ports and maritime transport occupations that have the highest forecast growth in employment between 2024 and 2030 are:

- Deck hand; 90 new jobs, 20% employment growth
- Waterside worker; 90 new jobs, 4% employment growth
- Ship’s master; 50 new jobs, 15% employment growth
- Ship’s engineer; 50 new jobs, 17% employment growth.

Travel attendant not elsewhere classified (NEC) and deck hand are forecast to be the fastest growing qualification-aligned occupations across ports and maritime transport, with 34% and 20% growth in employment between 2024 and 2030 respectively.



Source: Infometrics

Investment advice for 2026 – Ports and Maritime Transport

Qualification or credential	Goal	TEC response	Any changes to advice for 2027
New Zealand Certificate in Domestic Maritime Operations (Restricted Limits) (Level 4) (2505)	<i>Increase – particular focus on Northland and Marlborough</i>	Priority in Plan Guidance	No change. Enrolments reached top end of 2026 advice range in 2024 at 545 – further increase may be required to meet future demand.
New Zealand Certificate in Maritime Crewing (Level 3) with strands in Deck Crewing, Engineering, Passenger Services, and Superyacht Crewing (2506)	<i>Increase – particular focus on Northland and Marlborough</i>	Priority in Plan Guidance	No change
New Zealand Certificate in Maritime Operations (Level 4) with strands in Fishing, and Watchkeeping (2513)	<i>Increase – particular focus on Northland and Marlborough</i>	Priority in Plan Guidance	No change
New Zealand Certificate in Port Operations (Level 3) with strands in Port Administration, Cargo Handling, and Heavy Machinery (2814)	<i>Increase</i>	Engagement – small number of providers	Qualification has been reviewed, direct increase to new qualification as new programmes are developed: New Zealand Certificate in Port Operations (Level 3) with strands in Port Administration, Cargo Handling, and Heavy Machine Operation [5256] – see New Advice.

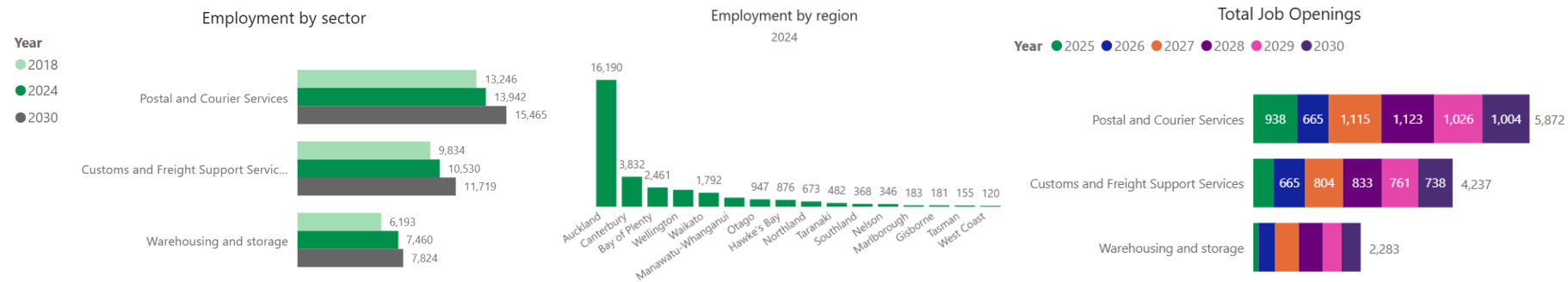
New Advice for 2027 – Ports and Maritime Transport

Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
New Zealand Certificate in Port Operations (Level 3) with strands in Port Administration, Cargo Handling, and Heavy Machine Operation [5256]	<i>All</i>	<i>All</i>	Replacement qualification	Developed in response to needs identified in qualification review process, replacing the New Zealand Certificate in Port Operations (Level 3) with strands in Port Administration, Cargo Handling, and Heavy Machine Operation [Ref: 2814].

Supply Chain and Distribution

The supply chain and distribution workforce development plan can be [viewed here](#). This sector and its National Industry Advisory Group (NIAG) is shared with Ringa Hora WDC, who have coverage for the distribution qualifications.

The supply chain and distribution¹¹ sector employed 31,930 people in 2024 in total and is forecast to grow to 35,010 in 2030 – a 9.6% increase in employment. Employment in sector is forecast to grow 1.5% per year between 2025 and 2030, with an annual average total job openings of 2,060 per year. Auckland, Canterbury, and Bay of Plenty largest employing regions across supply chain and distribution.



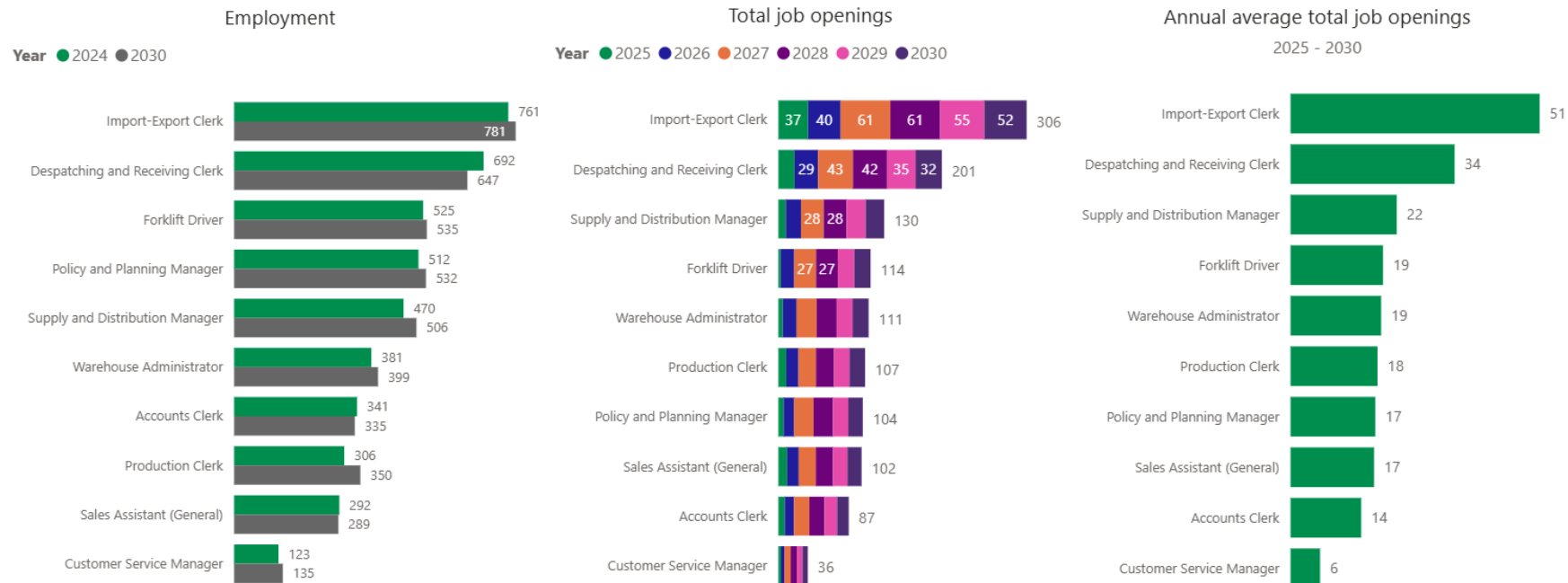
Source: Infometrics

Enrolments across the supply chain sector fell from a peak in 2021 – there has, however, been some recovery in 2024 with a 9.7% year-on-year increase in enrolments. Custom and freight support services is the largest sub-sector of Supply Chain and Distribution for vocational education within Hanga-Aro-Rau coverage, at 170 enrolments and 75 completions in 2024. The supply chain skills contained in some of these qualifications have value across a border ranger of sectors that require supply chain management. The following table excludes qualifications and sectors in Ringa Hora WDC’s coverage.

Sector	Total Enrolments (2024)	Total Completions (2024)	% Employment change 2018 - 2023	Employment Growth 2024 to 2030	% Employment change 2024 - 2030	AVG y/y employment change (2025 - 2030)	Total Job Openings 2025 - 2030	Average annual total job openings 2025 -2030
Customs and Freight Support Services	170	75	2.1%	1,189	11.3%	1.8%	4,237	706
Postal and Courier Services			5.6%	1,523	10.9%	1.7%	5,872	979
Warehousing and storage			20.7%	364	4.9%	0.8%	2,283	380

¹¹ The definition of supply chain and distribution used ANZSIC codes within Hanga-Aro-Rau’s order in council.

For occupations which approximately align with supply chain and distribution qualifications, import-export clerk is the largest, employing 760 in 2024 and forecast to increase by 20 new jobs to 780 in 2030, with 306 total job openings between 2025 and 2030. Followed by despatching and receiving clerk (690), forklift driver (520), policy and planning manager (510) and supply and distribution manager (470).



Source: Infometrics

The qualification-aligned supply chain and distribution occupations that have the highest forecast growth in employment between 2024 and 2030 are:

- Production clerk; 45 new jobs, 15% employment growth
- Supply and distribution manager; 36 new jobs, 8% employment growth
- Policy and planning manager; 20 new jobs, 4% employment growth
- Import-export clerk; 20 new jobs, 3% employment growth.

Production clerk and customer service manager are forecast to be the fastest growing qualification-aligned occupations across supply chain and distribution, with 15% and 10% growth in employment between 2024 and 2030 respectively.

New Advice for 2027 – Supply Chain and Distribution

Qualification or credential	Work-based, provider-based or all	Specific regions?	Change you are seeking (increase, decrease, change)	Information regarding workforce shortage
Digital Skills for Supply Chain Management (Micro-credential) [5324]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified by the qualification review.
Operate a forklift safely [with NZQA for approval]	All	All	Increase – new	New micro-credential – Developed in response to skill gap as identified by the qualification review.
2812 - New Zealand Diploma in Supply Chain Management (Level 6)	All	All	New providers	Qualification has been reviewed by Hanga-Aro-Rau. Enrolments have fallen and we understand there may not be provision in the future. Consider new providers to enable future delivery.
2811 - New Zealand Certificate in Supply Chain Management (Level 5)	All	All	New providers	Qualification has been reviewed by Hanga-Aro-Rau. Limited providers delivering this qualification which means there is limited regional access. We currently understand there is only one provider who delivering this qualification.

Other Advice

Investment Advice for 2026

The 2026 new providers and Have Regard advice provided in sections 'Emerging skills and other vocational education system issues' and 'Other vocational education system issues outside of TEC advice' remain relevant for the manufacturing, engineering and logistics sectors and are still valid for 2027 advice.

Our 2026 'Other vocational education system issues outside of TEC advice' Have Regard advice included issues and topics impacting industry, employers and learners in the manufacturing, engineering and logistics sectors. Hanga-Aro-Rau would like to restate the relevance of the Have Regard advice provided to TEC for 2026. The topics included:

- Access to digital skills, preemployment skills, leadership skills and literacy and numeracy training.
- Older workers in the workforce.
- Disabled people in the workforce.
- Sustainability skills development.
- Pathways programmes and support.
- Issues with modes of learning that are not adapted to or suited to many learners.
- The Good Employer Matrix tool (GEM) and enabling industries to enable and expand their Māori workforce.
- Supporting Pacific learners and workers through the actions set out in the Lumana'lo Tangata Moana action plan.
- Supporting recognition of skills brought to the workplace by Pacific employees.

The below section covers advice to TEC about additional themes and issues (identified after the 2026 advice) that are currently significant to the industries we cover.

Workforce Development Plans

Hanga-Aro-Rau has published the 2025 Workforce Development Plans (WDP) for our industries. Each WDP includes information relevant to qualification provision and planning.

Emerging Skills

Hanga-Aro-Rau has developed qualifications and credentials in response to emerging skills identified in 2026 advice, these have been included in new advice for 2027. Other emerging skills will be handed to Industry Skills Boards (ISBs) for further investigation and potential development where appropriate – these are contained in the 2026 advice and are still relevant for 2027 advice, for example, brewing skills.

The following new emerging skills have been identified by industry since the 2026 advice – these will also be handed over to ISBs:

- Train the trainer – Automotive
 - The automotive industry has identified a lack of resources to support the training and upskilling of technicians, particularly in helping experienced

workers pass on their knowledge to future technicians. This is highlighted in the automotive WDP and will be passed on to the relevant ISB.

Hanga-Aro-Rau White Papers

In 2025, Hanga-Aro-Rau commissioned white papers focusing on how the potential of Māori, Pacific peoples and disabled people can be unlocked in the workplace.

- Redesigning the Vocational Education and Training system to unlock the potential of Māori and the Māori economy through workforce development: Eight strategies to inform vocational training design, [April 2025](#)
- Redesigning the Vocational Education and Training system to unlock the potential of Pacific Peoples through workforce development: Strategies to inform vocational training design, [April 2025](#)
- Unlocking the potential of the disabled workforce: Strategies to inform redesign of the vocational education and training system and its link to employment support and recruitment, [April 2025](#)

Micro-Credentials

Use of micro-credentials to facilitate targeted formalised training, that can also be stacked to full qualifications where appropriate, continues to be a priority for the manufacturing, engineering and logistics sectors. Micro-credentials can be used to upskill employees with skills and knowledge that meet immediate needs in the workplace rather than a qualification that takes longer to complete and upon completion may not provide the same level of relevance to the skills the employee requires to be successful in their role. The manufacturing industry has identified use of micro-credentials as key to addressing technical skill gaps and fulfilling a preference for just-in-time, skills-focused education.

The limitations on which micro-credentials are funded by TEC is impacting the uptake of micro-credentials by providers and, consequently, employees. There is also uncertainty about the future of funding for micro-credentials, despite continued need by industry.

These issues are impacting the willingness of industry and providers to engage with micro-credentials. As a result, industry may be engaging with informal and non-standardised training instead of training with formal recognition.

The increased use of micro-credentials to address technical skill gaps (including critical upskilling and re-skilling), which can be stacked towards qualifications has been highlighted as a key direction for future qualification reviews.

Flexibility for Programme Funding to Limit Impact on Learners and Industry

Hanga-Aro-Rau is aware of challenges providers have faced in developing programmes, in particular for apprenticeships, to meet requirements around the amount of level 4 content. This can be impacted by the timing of qualification and unit standard reviews – particularly if standard reviews have not yet been completed to ensure the availability of standards at the right level to accommodate new requirements. Hanga-Aro-Rau is working with providers to review and address challenges as they are raised.

TEC could consider flexibility when providers encounter this issue to ensure that industry and learners are not impacted and provision is available while reviews to enable further programme updates are underway.

Flexible Funding to Support Niche Sectors

Niche industries within Hanga-Aro-Rau's coverage that have critical skill and learning needs and limited learner numbers face challenges under the current volume-based funding conditions. Considering more flexible funding models that is informed by future ISB workforce evidence, would support critical niche training that meets workforce needs and allow industries to remain competitive and productive.

Pathways: Funding for Effective Transitions

Long term strategies are required to attract workers to Hanga-Aro-Rau sectors. Most new entrants are career-changers, which highlights the importance of building talent pipelines from schools. Research shows that structured, well-supported careers education—delivered in collaboration with schools, families, employers, and communities—can improve transitions into employment and vocational pathways. Programmes like Gateway and Trades Academies have proven effective in helping students stay in education, enter apprenticeships, and move into employment, and Hanga-Aro-Rau supports continued funding for initiatives that connect education with industry.

Ngāti Maniapoto Marae Pact Trust (NMMPT) Project

NMMPT is leading three interconnected iwi-led initiatives that support workforce development and require TEC's attention in system planning and investment. These projects—focused on renewable energy, Māori-led housing supply chains, and food and water sovereignty—embed mana motuhake and create pathways for sustainable Māori enterprise while addressing national skill shortages. Each initiative demands targeted workforce development across sectors such as trades, infrastructure, forestry, construction, horticulture, aquaculture, and Māori enterprise management.

Lumana'i O Tangata Moana

The Lumana'i o Tangata Moana Hanga-Aro-Rau Pacific Peoples Workforce Development Action Plan provides a foundation for building a resilient Pacific workforce. Its actions guide the VET system and industry to align pathways with Pacific strengths and aspirations. Directing resources toward learning, development, and education programmes that are intentionally designed to strengthen the skills of Pacific learners and workers will enable their full potential to be realised within industry pathways that foster career progression and respond to workforce needs. This work is essential to the ISB's work and the wider VET system in achieving a responsive and inclusive skills system.

2026 Hanga-Aro-Rau Projects

Hanga-Aro-Rau has commissioned the following projects, to be completed by the end of 2026:

Workforce acceleration planning

Hanga-Aro-Rau has commissioned Deloitte to conduct research focused on workforce planning for the manufacturing, engineering, logistics, automotive and extractives sectors. The findings will provide evidence-based insights into future workforce needs aligned with government growth objectives, helping inform TEC's system planning and investment advice. Further updates will be shared as the project progresses.

Supporting employment and education pathways in the manufacturing sectors

- Leveraging the success of the Waikato-Tainui partnership of getting rangatahi Māori into commercial road transport and meat processing careers, this project seeks to scale and extend this initiative across to other regions, partnering with relevant Māori, government and industry stakeholders. Expected outputs include guidance to other regions and sectors on how to attract, support and retain more rangatahi Māori in their businesses, and outcomes are expected to include sustained employment and career development.
- We are scaling the Earn as You Learn Manufacturing programme across Aotearoa, working with local economic development agencies/Chambers of Commerce, training providers (including local/regional ITPs, WBL, PTEs), and, most critically, local manufacturing employers. During 2025, Waikato manufacturing employers have partnered with Advancing Manufacturing Aotearoa and the vocational education system to deliver a fully work integrated entry-level manufacturing programme. This model has proven successful with strong industry support and engagement, and there is an opportunity to expand this to other regions. Expected outputs include guidance to other regions and sectors on how to attract, support and retain more people into the manufacturing sectors; outcomes are expected to include sustained employment and career development. This pilot uses the NZC in Manufacturing (Level 3) – further regional roll out could increase future demand for this qualification, and the need for new providers to support local delivery support.

Supporting rangatahi Māori in regional logistics careers

Leveraging the success of the Waikato-Tainui partnership of getting rangatahi Māori into commercial road transport and meat processing careers, this project seeks to scale and extend this initiative across to other regions, partnering with relevant Māori, government and industry stakeholders. Expected outputs include guidance to other regions and sectors on how to attract, support and retain more rangatahi Māori in their businesses, and outcomes are expected to include sustained employment and career development.

Project Fetu - Pathways for upskilling in manufacturing, engineering and logistics sectors

Hanga-Aro-Rau has been working with the Oamaru Pacific Island Trust on a pilot supporting 10 Pacific workers to complete the digital skills for (4341) manufacturing micro-credential through a workplace-based, community-delivered programme at the OPIT Learning Hub. Project Fetu, inspired by Pacific navigation traditions, is locally led and provides wraparound support to learners, aiming to build skills, confidence, and a scalable model for future regional workforce development.

Project Fetu responds to skill shifts in manufacturing, engineering and logistics sectors, where changing skill demands are creating challenges for some Pacific workers. The project pilots micro-credentials that build essential and digital skills, positioning workers to confidently adapt, grow, and explore new roles or sector, while also supporting industry to build a resilient, digitally ready workforce. There is clear need and growing interest for this initiative to continue in the Waitaki District and to be extended into other regions with increasing Pacific populations.

Attracting supporting more disabled people into manufacturing, engineering and logistics sectors

Extending the research completed in 2024, this work seeks to create practical tools for employers and the vocational education system to improve accessibility to our sectors and better support the workforce development aspirations of disabled communities. Expected

outputs include the development of guides for employers, improve standard setting processes to ensure this is embedded in the vocational education system.