Food and Fibre Workforce Data 2022 Spotlight

Disclaimer

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These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) and Longitudinal Business Database (LBD) which are carefully managed by Stats NZ. For more information about the IDI and LBD please visit https://www.stats.govt.nz/integrated-data/

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes, and is not related to the data's ability to support Inland Revenue's core operational requirements.

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Executive summary

This presentation provides an analysis of the food and fibre workforce for the year ended 31 March 2022 (period 1 April 2021 – 31 March 2022). This was the second year the borders were closed because of COVID-19. It presents a picture of what the workforce looked like in that year, comparing it to the 2020 and 2021 years.

Although the overall workforce number was similar to previous years, there was variation across the year for some sectors, especially at peak times.

The numbers of people on working holiday scheme visas continued to decline.

Self-employment numbers continued to decline across all sectors and was particularly pronounced in sheep and beef farming.

Food and Fibre Workforce Data 2022

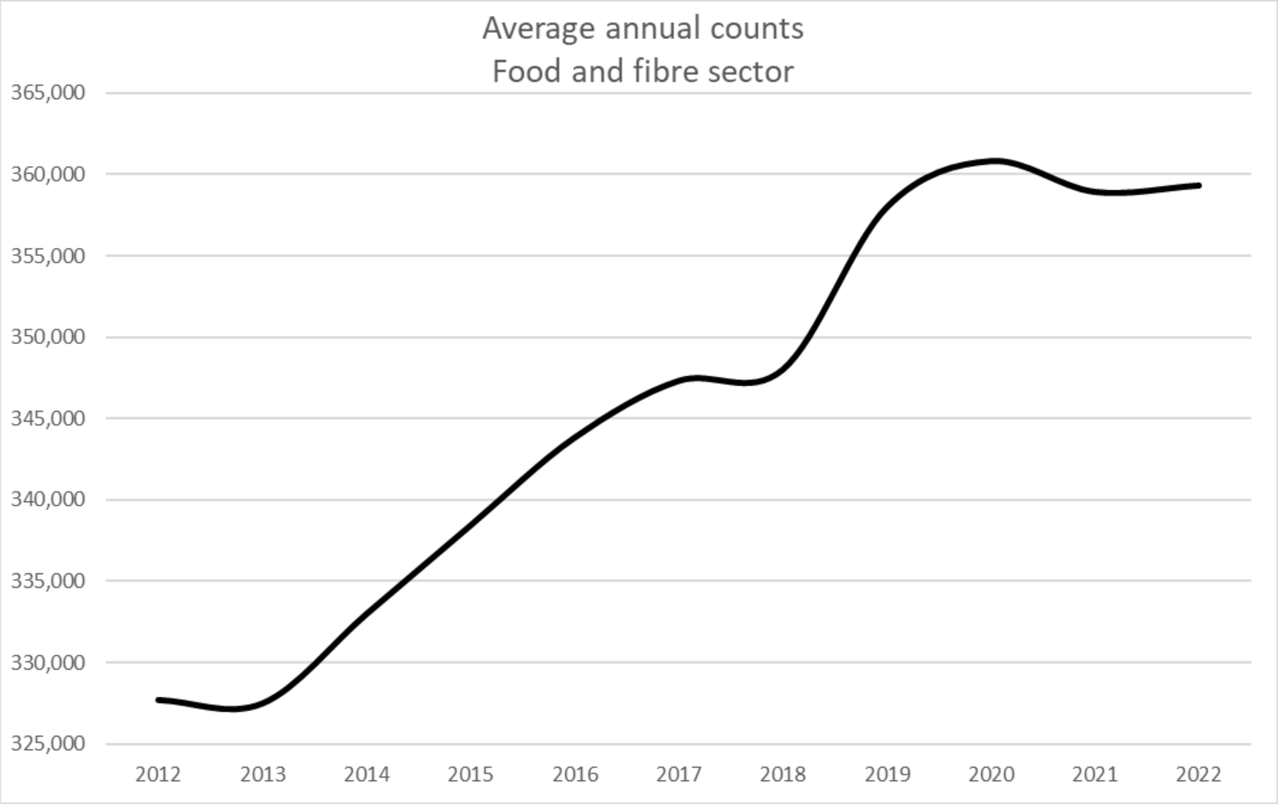
Context

- The 2022 data covers the period from 1 April 2021 to 31 March 2022
- New Zealand went into nationwide lockdown (alert level 4) on 25 March 2020 and the borders were closed until 14 March 2022.
- Many of our food and fibre businesses were considered essential services (only limited number of forestry and wood processing firms were considered essential services).
- We have continued to define and classify the workforce as set out on our website (https://www.workforceinsights.govt.nz/about-this-data/how-we-organise-the-sectors/)

Overview of the whole food and fibre workforce

- At a very high level, the overall 2022 workforce number represents a **slight change (+0.1%)**.
- The trajectory from previous years had been a period of continued employment growth (2013-2020). This has flattened in 2021 and 2022.
- The changes are most pronounced in the horticulture and forestry & wood processing sectors.
- However, average annual counts are unlikely to fully demonstrate the changes over the year

	Year		Change	
Sector	**2021**	**2022**	**Numerical**	**Percentage**
Arable	23,388	23,963	575	2.5%
Cross sector	66,319	66,990	671	1.0%
Dairy	55,233	55,208	-25	0.0%
Forestry and wood processing	41,632	42,880	1,248	3.0%
Horticulture	65,954	64,815	-1,139	-1.7%
Pork, poultry, bees and other	26,642	26,542	-100	-0.4%
Red meat and wool	76,753	75,996	-757	-1.0%
Seafood	12,080	11,908	-172	-1.4%
Food & Fibre Sector	**358,935**	**359,327**	**392**	**0.1%**

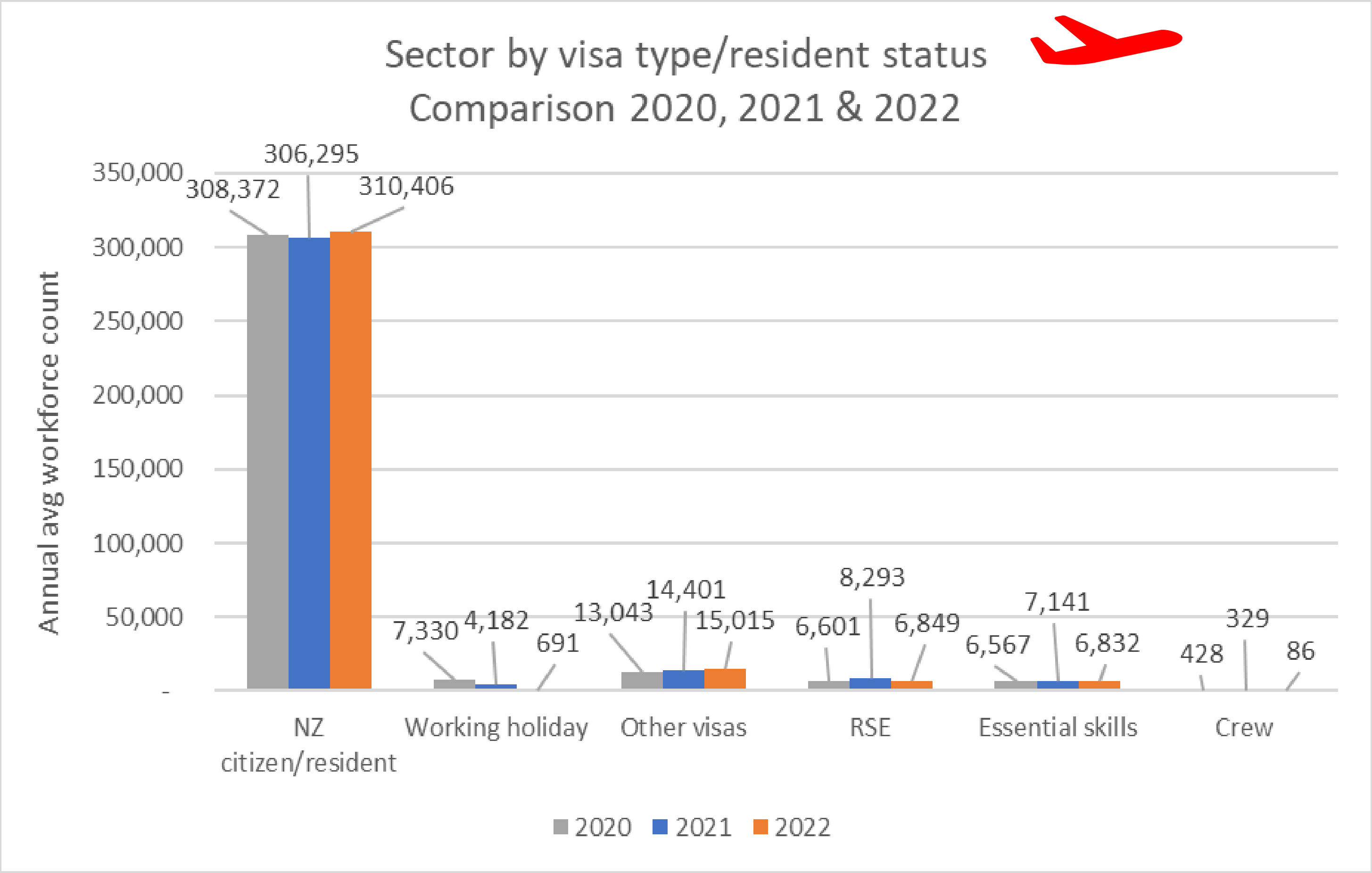


Overview of the whole food and fibre workforce by visa type/resident status

- The number of New Zealanders employed in the food and fibre sectors increased in 2022.
- There were only small numbers of working holiday visa holders employed during the year.
- Many Recognised Seasonal Employer (RSE) visa holders had their visas extended in 2021. This was due to COVID and meant that there were more RSE workers than normal over the winter months in 2021. This was not as pronounced in 2022 which means the average annual RSE count is lower in 2022 than 2021.

Note : These workforce counts exclude the relevant & other designation categories

Annual average employment



Approach to the analysis

To better understand any changes in the number of people employed we have broken the data down by:

- Position in the value chain – Core Production, Core Processing, Strongly Connected, Relevant and Other
- Employment status – self employed, employed
- New Zealand citizens and residents vs migrants to better understand the impact of border closures
- We have also analysed the monthly employment counts

Sector/Designation changes

- To further understand the changes, the average annual counts have been disaggregated across the value chain.

- For a description of these value chain categories use this link… (https://www.workforceinsights.govt.nz/about-this-data/how-we-organise-the-sectors/)

Sector	March tax year	Core production	Core processing/ manufacturing	Strongly connected	Relevant	Other	Total
Arable	2022	4,975	2,033	16,675	280		23,963
	2021	4,900	1,983	16,242	280		23,388
	Change	75	50	433	0		575
Dairy	2022	39,783	14,400	1,108			55,208
	2021	39,567	14,500	1,225			55,233
	Change	216	-100	-117			-25
Forestry and wood processing	2022	12,783	11,442	18,500	196		42,880
	2021	12,700	11,317	17,533	190		41,632
	Change	83	125	967	6		1,248
Horticulture	2022	35,075	26,192	4,117	256		64,815
	2021	37,025	25,325	4,125	229		65,954
	Change	-1,950	867	-8	27		-1,139
Pork, poultry, bees and other	2022	9,167	3,458	13,975			26,542
	2021	9,550	3,575	13,583			26,642
	Change	-383	-117	392			-100
Red meat and wool	2022	46,183	24,375	5,292	396		75,996
	2021	47,442	23,983	5,208	370		76,753
	Change	-1,259	392	84	26		-757
Seafood	2022	6,017	4,450	1,022	541		11,908
	2021	6,133	4,508	1,083	514		12,080
	Change	-116	-58	-61	27		-172
Cross sector	2022	26,800		11,900	22,580	5,769	66,990
	2021	27,775		11,317	21,499	5,804	66,319
	Change	-975		583	1,081	-35	671
Indicative	2022	**49%**	**24%**	**20%**	**7%**	**2%**	**359,327**
	2021	**50%**	**24%**	**20%**	**6%**	**2%**	**358,935**
	Change	**-1%**	**0.3%**	**0.6%**	**0.3%**	**-0.01%**	**392**

***Note**: Workforce counts for each designation and sector won't necessarily sum to the total - some people may work in more than one sector and designation. The total indicates the overall unique numbers of people.*

Self-employment analysis

		Red Meat & Wool		Arable		Dairy		Forestry & Wood Processing		Horticulture		PPBO		Seafood		Cross sector	
Year	Designation	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed	Employee
2021	Core production	30,300	17,058	2,700	2,217	16,100	23,458	5,400	7,350	7,900	29,050	4,000	5,533	2,600	3,533	8,800	18,983
2021	Core processing/mfg	420	23,575	100	1,875	150	14,333	430	10,900	1,100	24,225	20	3,550	800	3,708		
2021	Strongly connected	350	4,883	2,300	14,000	140	1,092	3,400	14,117	180	3,942	1,400	12,208	220	849	1,200	10,125
2021 Total		**31,070**	**45,516**	**5,100**	**18,092**	**16,390**	**38,883**	**9,230**	**32,367**	**9,180**	**57,217**	**5,420**	**21,291**	**3,620**	**8,090**	**10,000**	**29,108**
2022	Core production	28,800	17,417	2,600	2,383	16,200	23,508	5,300	7,458	7,800	27,308	3,700	5,500	2,600	3,400	8,600	18,225
2022	Core processing/mfg	420	23,958	110	1,925	140	14,250	440	11,025	970	25,208	20	3,442	720	3,758		
2022	Strongly connected	310	4,975	2,300	14,408	140	970	3,400	15,167	190	3,917	1,400	12,600	170	850	1,200	10,717
2022 Total		**29,530**	**46,350**	**5,010**	**18,716**	**16,480**	**38,728**	**9,140**	**33,650**	**8,960**	**56,433**	**5,120**	**21,542**	**3,490**	**8,008**	**9,800**	**28,942**
Self-employment changes 2021-2022		**-1,540**		**-90**		**90**		**-90**		**-220**		**-300**		**-130**		**-200**	

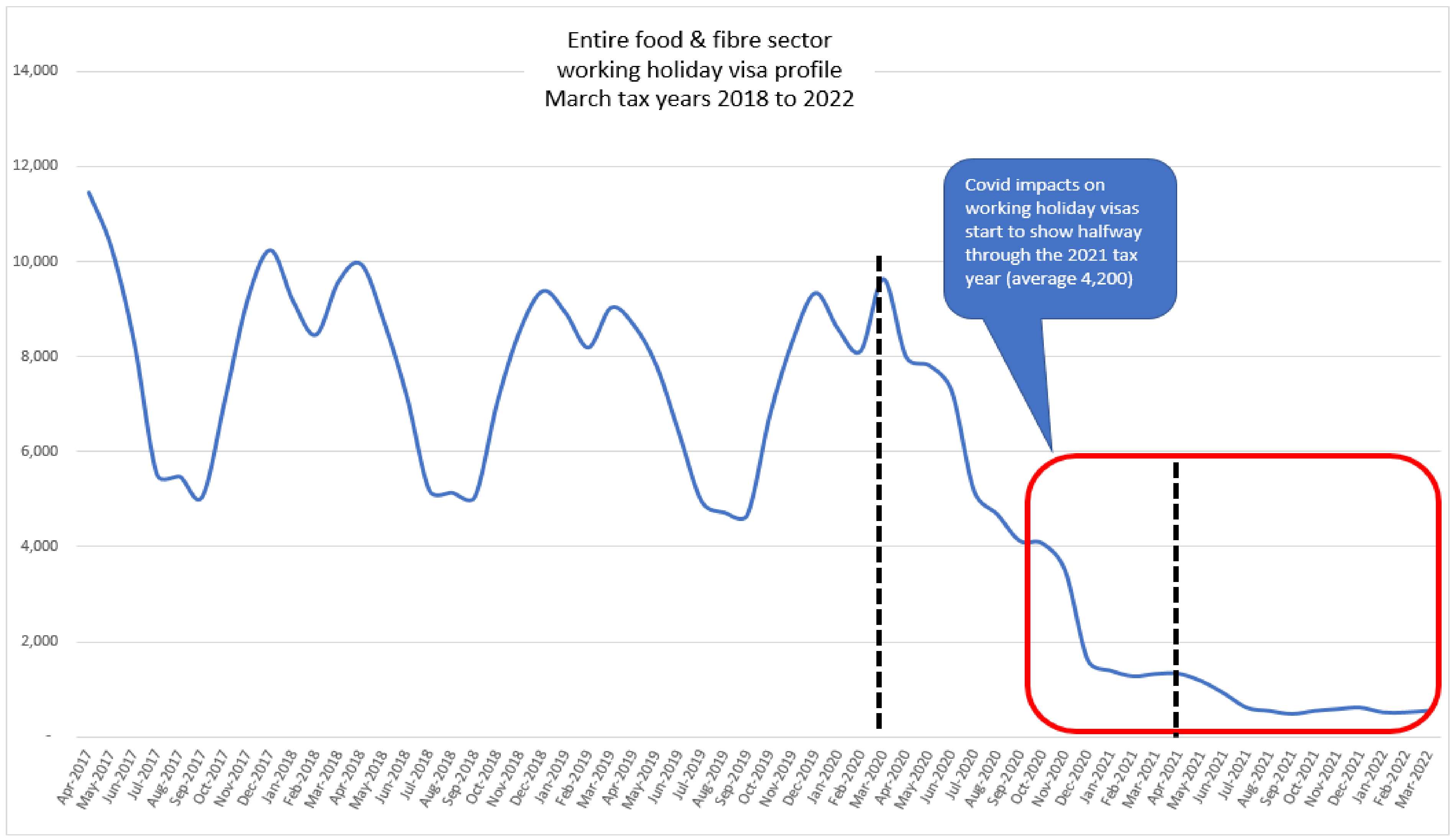
**PPBO = Pork, poultry, bees & other*

Cross sector includes activities/services that are not attributable to a single sector, rather they span multiple sectors and include veterinarian services, fertiliser & pesticide manufacturing, aerial topdressing, road transport, agritech and contracting firms (especially horticulture)

Self-employment numbers continued to decline across all sectors. This was particularly pronounced in sheep and beef farming.

Note: These workforce counts exclude the relevant & other designation categories, so will not sum back to the 360,000 food and fibre workforce totals.

Working holiday visa analysis food and fibre sector



Significant change in Working Holiday Scheme (WHS) visa holders

- The second half of the 2021 tax year shows a reduction in WHS visa holders. The borders remained closed for WHS visa holders until 22 March 2022. As people on these visas left, they were not replaced by new WHS visa holders. Some people already on WHS visas transferred to other visa types such as the Supplementary Seasonal Employment visa (SSE) in order to get expiry date extensions, so there was a small offsetting rise in people in the "Other visas" type.

***Note**: Workforce counts in graphs are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Arable

Key characteristics of the arable sector

- The arable sector includes grain and seed production along with a diverse range of downstream industries such as flour milling, bread, bakery, cake, beer and spirit manufacturing
- Most of the arable seed production is from the Canterbury region (around 75%)
- The Foundation for Arable Research (FAR) advises that approximately 800 of their levy payers are dairy farmers growing 30 - 40 hectares of maize

Arable

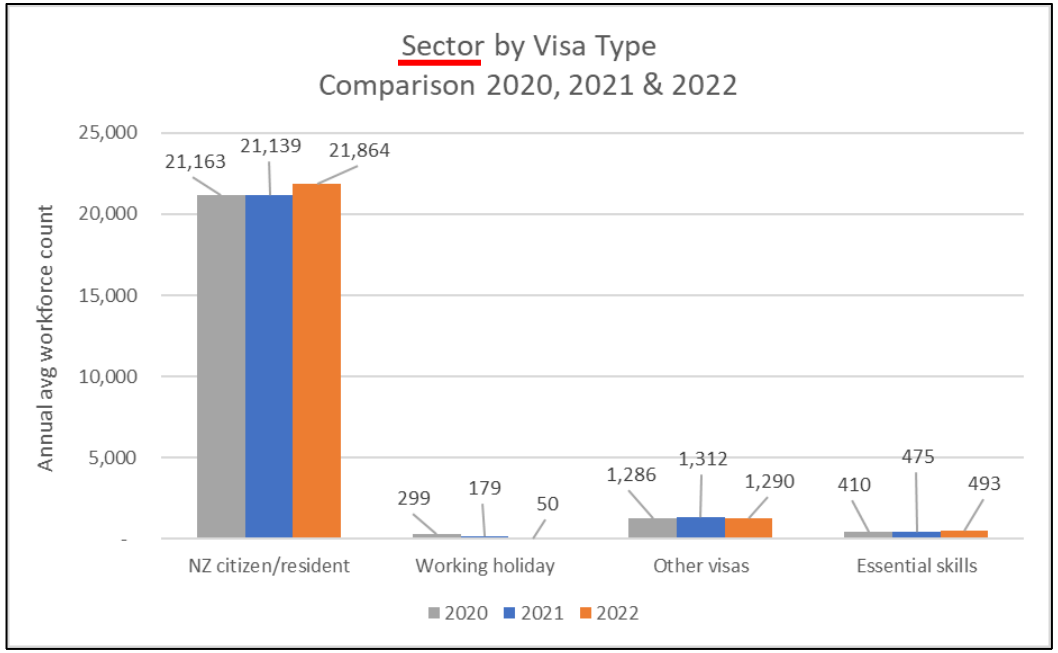
Changes in arable employment counts

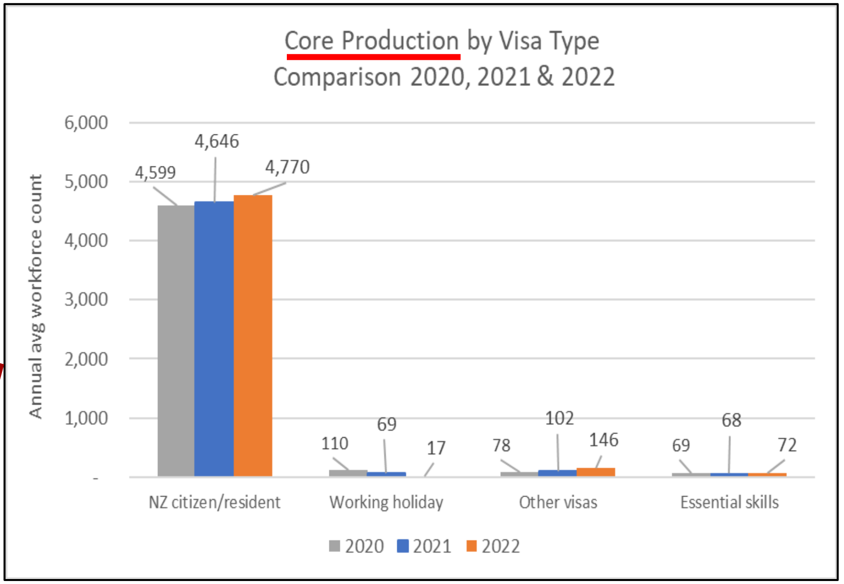
- Overall annual average counts in 2022 were slightly higher (575) than 2021 levels, predominately in Strongly connected.
- By industry type, the main driver of the increase was due to an increase in the annual average count of bakery product and beer manufacturing
- For analysis purposes in the arable sector, the designation settings of “Core processing/manufacturing” and “Strongly connected” have been combined.

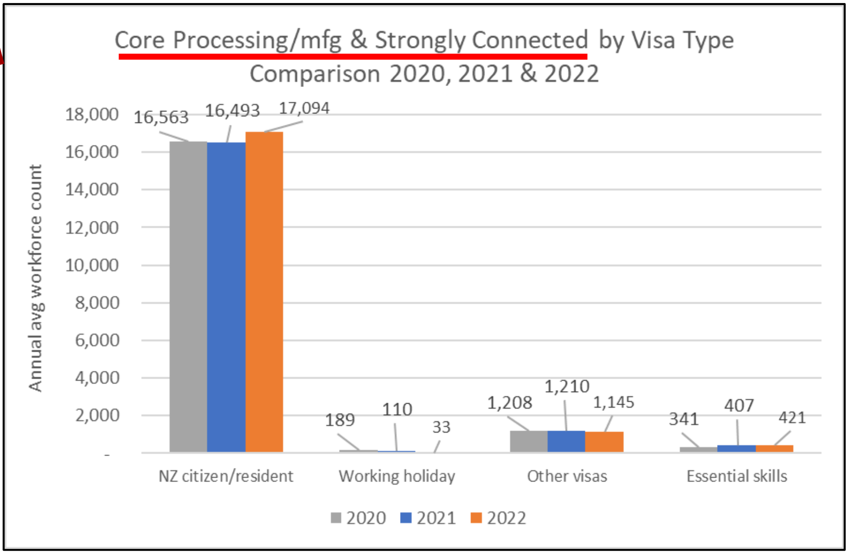
Arable

Annual average employment by visa type/resident status

The Arable sector had an overall annual average increase of 575 people (2.5%)







- The sector level change was primarily due to an increase in the annual average New Zealand citizen/residents by around 700, and a decrease in working holiday visa holders by 130.

- Working holiday visa holders decreased across both the core production and the core processing and strongly connected designations.
- There was a offsetting increase in NZ citizen/residents mostly within the core processing and strongly connected designations.

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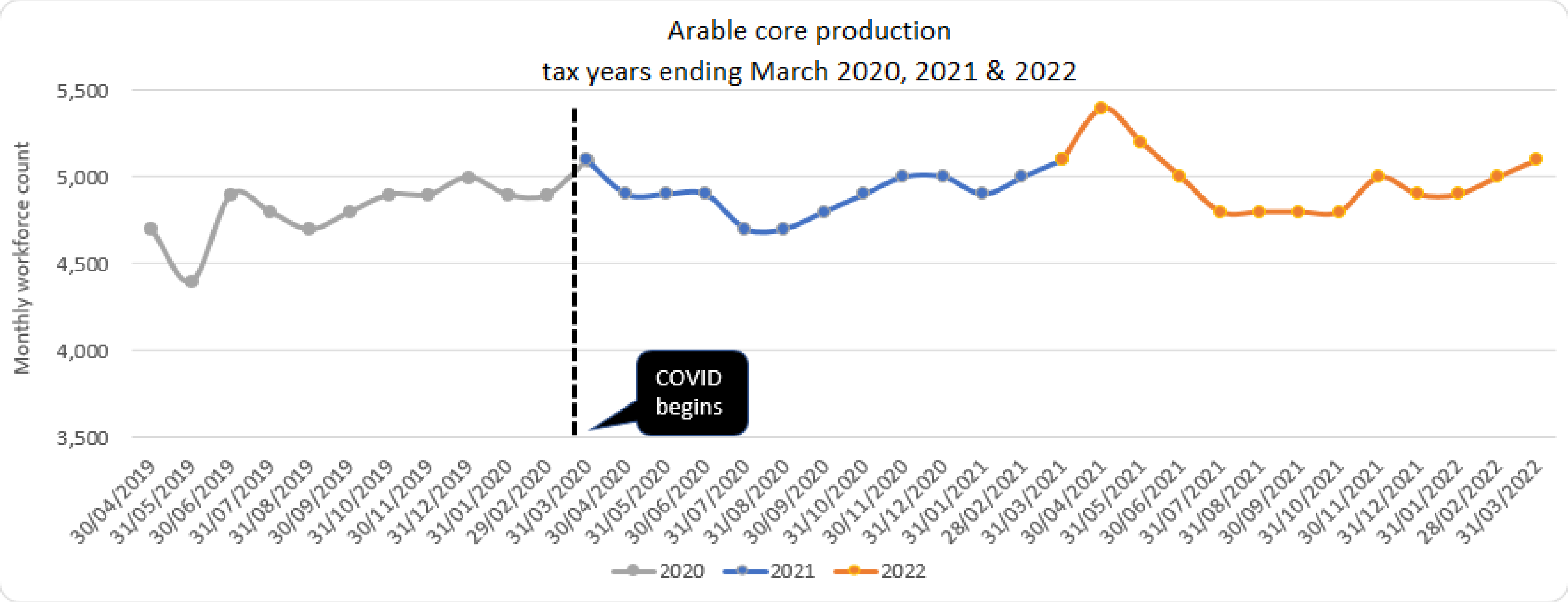
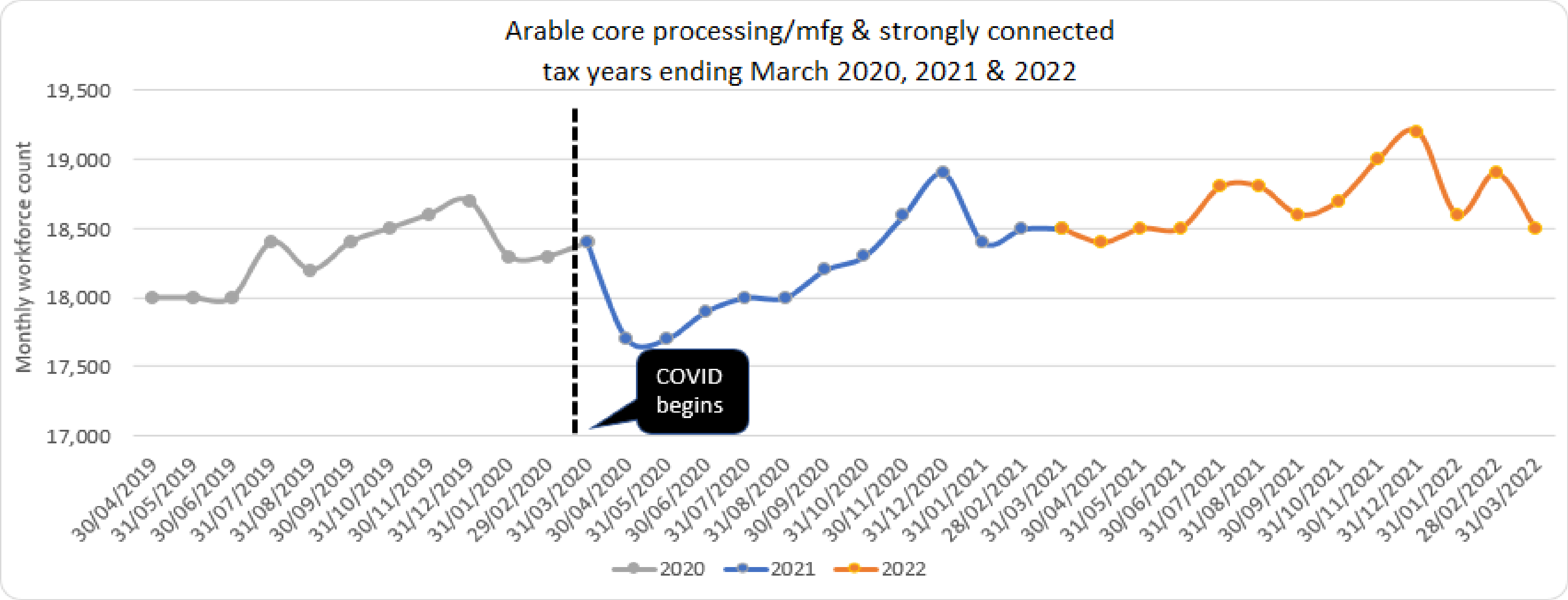
Arable

The arable sector workforce depicts slightly increased workforce levels across the 2022 and 2021 years.





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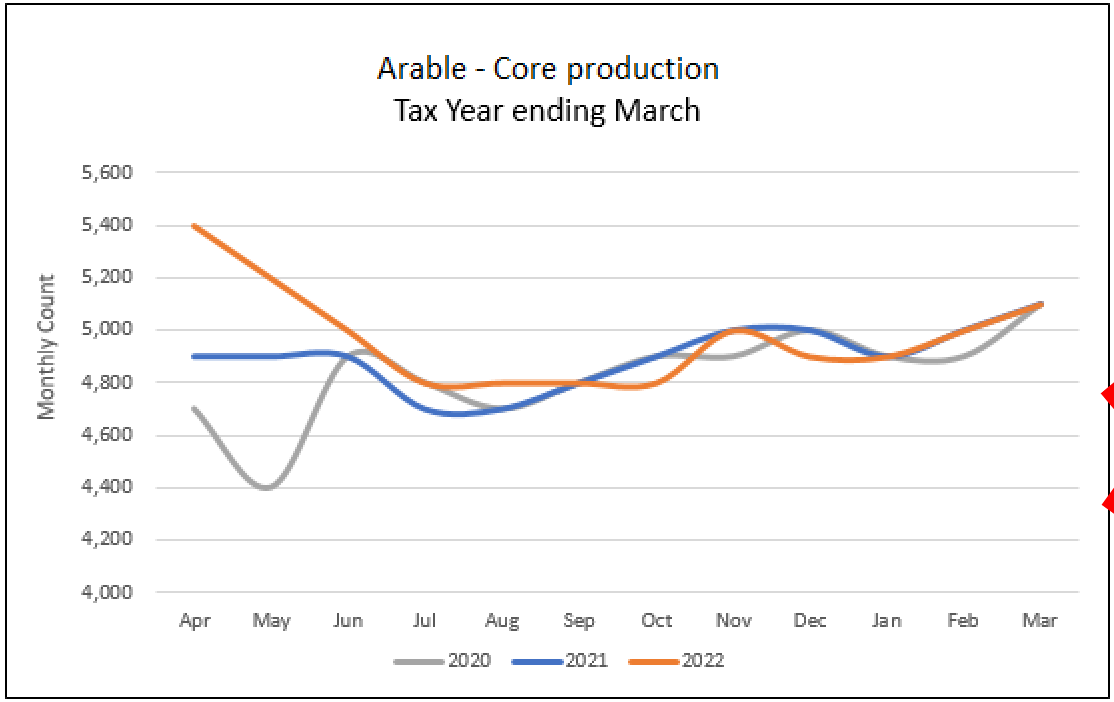
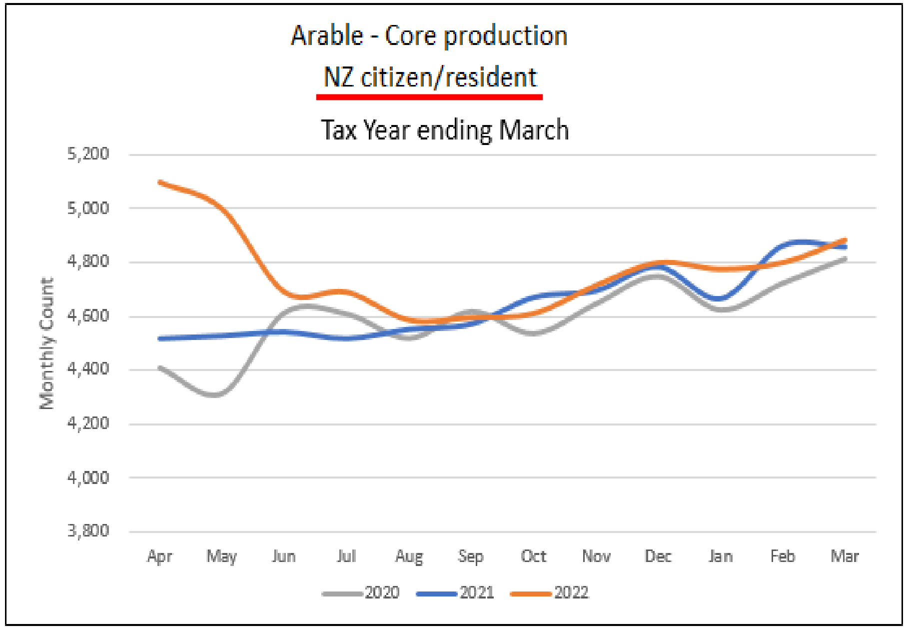
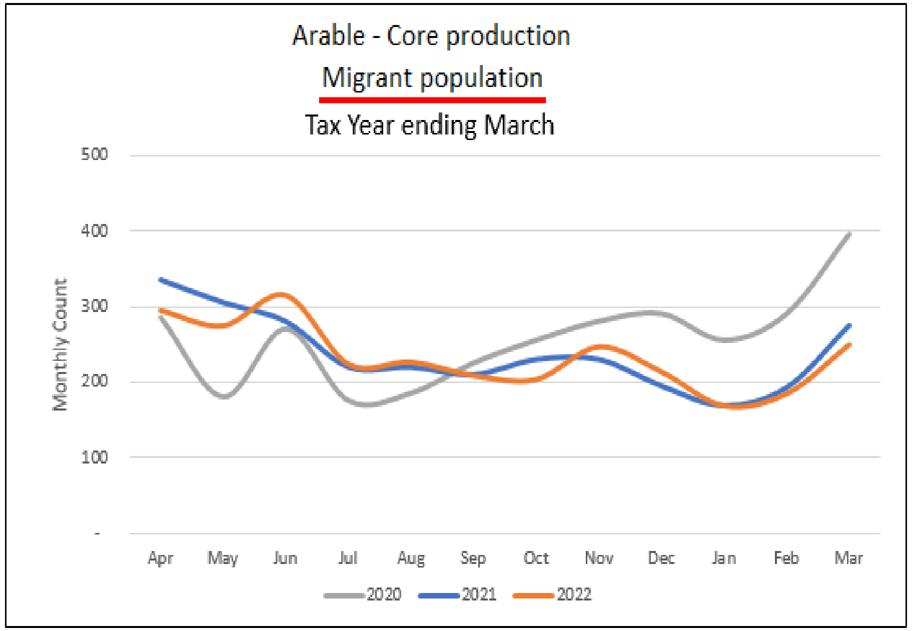
Arable







Overall, the arable core production workforce was relatively stable between the 2021 and 2022 tax years.

The seasonal pattern in the 2022 tax year was similar to that of the 2021 tax year (exception being the first two months which had higher levels of employment).

- At the beginning of the 2022 tax year, more New Zealanders were employed in core production compared with the preceding two years. For the last half of the 2022 tax year, the number of New Zealanders in core production was almost the same as the 2021 tax year, except for December 2021 and January 2022, where more New Zealanders were employed over that period.
- In core production, migrant numbers were aligned with the 2021 tax year, though both of those years were slightly lower in the 2nd half of the tax year than the pre-covid levels (as depicted for the tax year ending March 2020).

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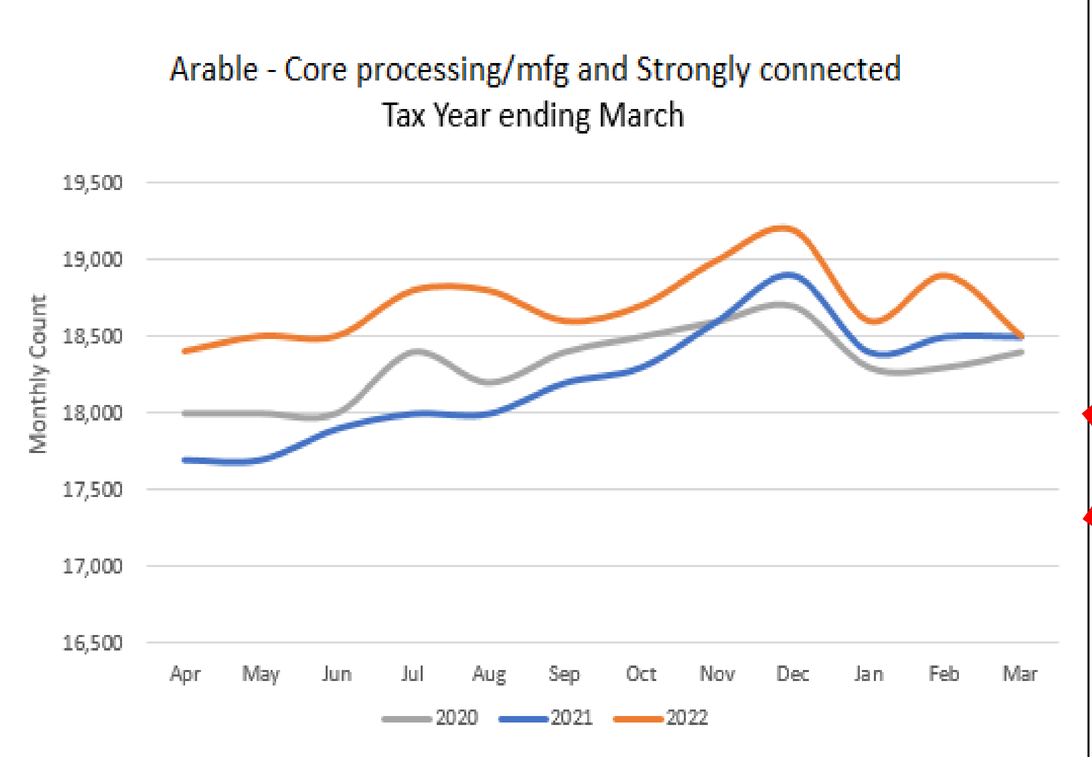
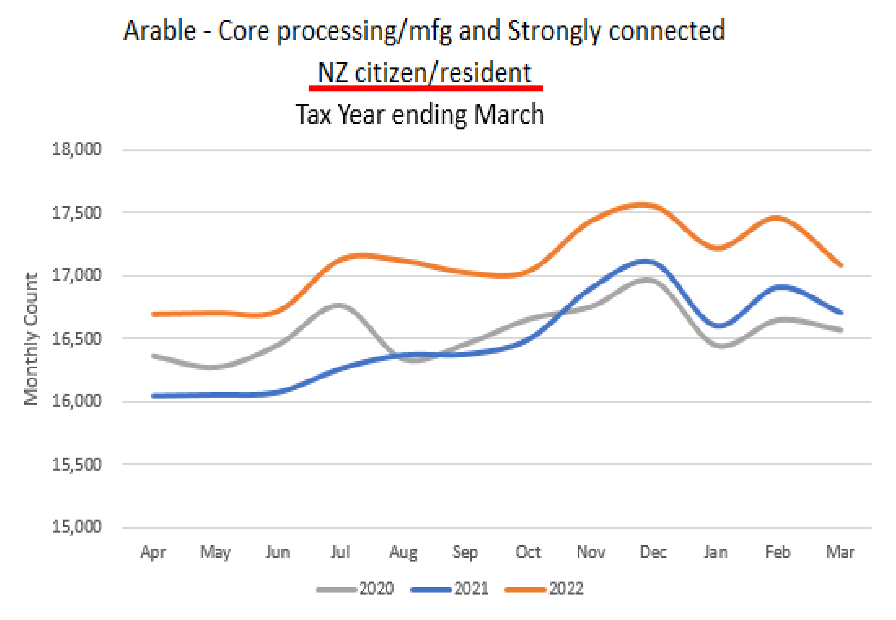
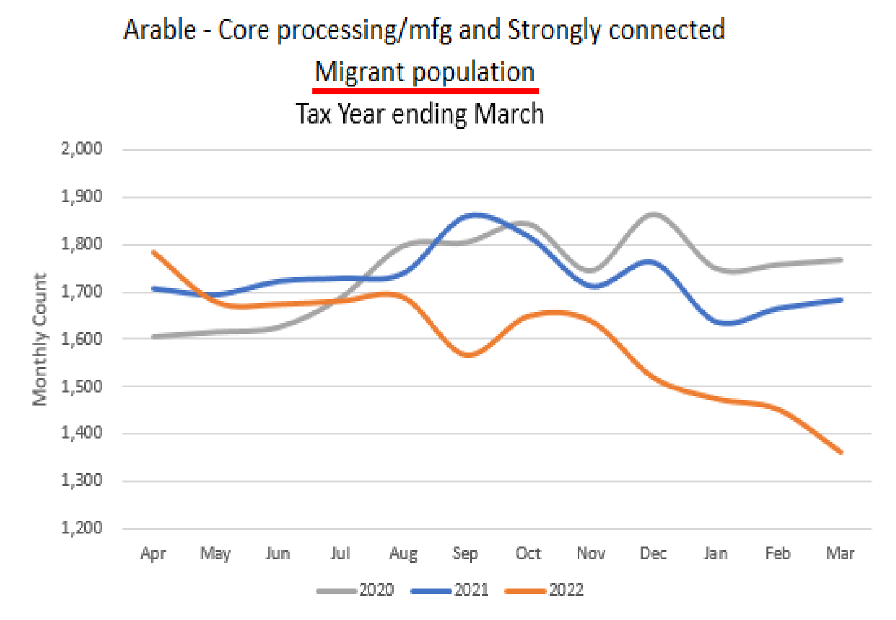
Arable







- The number of New Zealanders in core processing/mfg and strongly connected designations increased by 500 people. This was largely in the Bakery product (non factory) and Beer manufacturing industries.

- Migrant numbers were trending downward throughout the 2022 tax year. Working holiday and Other visa holder numbers fell as they left and were not replaced with new workers because of the closed border.

Overall, the arable core processing/mfg and strongly connected workforce was slightly higher across all months between the 2021 and 2022 tax years.

The seasonal pattern in the 2022 tax year was similar fluctuations to that of the 2021 tax year (albeit at higher level higher levels of employment).

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Dairy

Key characteristics of dairy sector

- Large workforce (annual average 55,000)
- 72% of workforce is in core production
- Between the 2021 and 2022 both the dairy farming and the dairy core processing average employment levels were static
- The migrant workforce varies throughout a year, essential skill visa holders are around 8% of the production workforce at an annual average of 2,900 people
- People on working holiday visas are a small but important part of the calving workforce, from July to October each year

Dairy

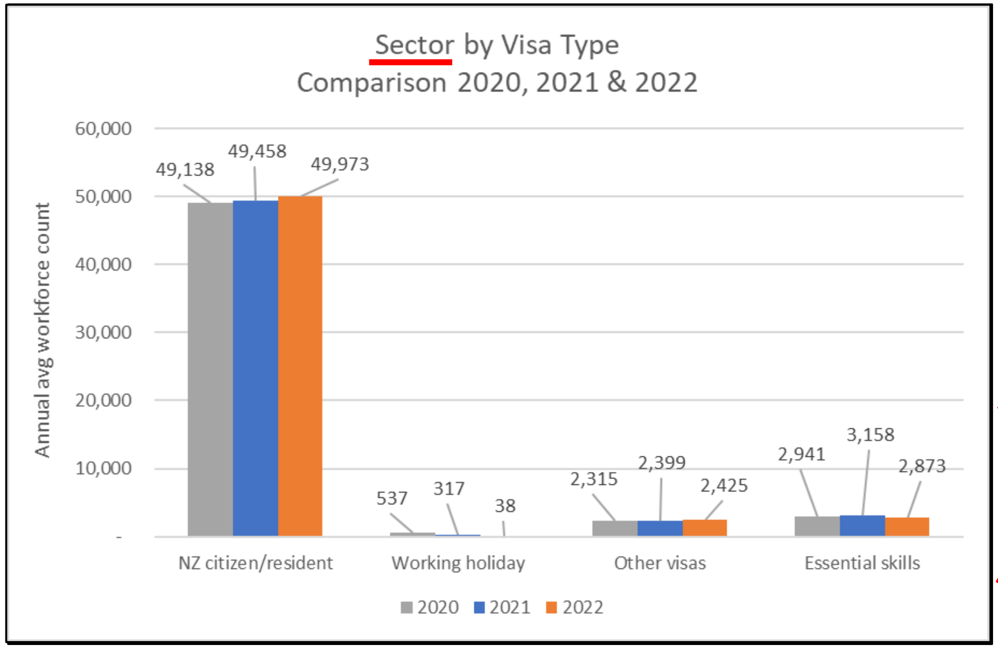
Changes in dairy employment counts

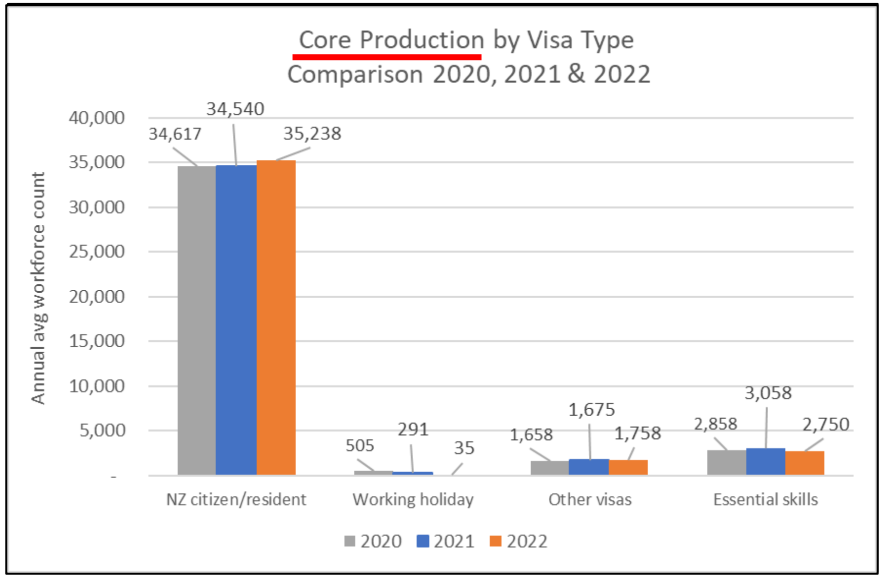
- Overall annual average counts in 2022 were static
- By visa type, in core production there was a slight decrease in essential skill visa holders which was offset by an increase in New Zealanders.
- Following on from a period of sustained growth between 2012 to 2021, the core processing/manufacturing workforce was static in 2022

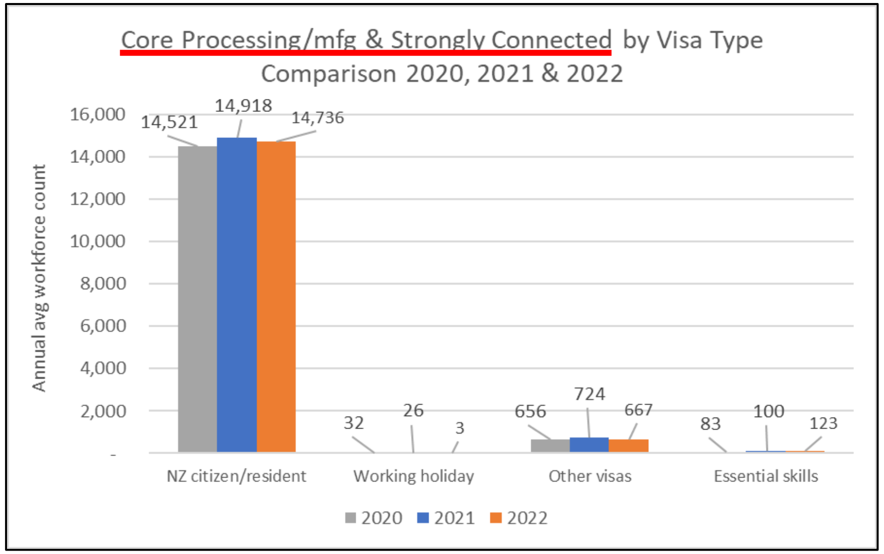
Dairy

Annual average employment by visa type/resident status

The Dairy sector was static, a decrease of 25 people (0.05%)







- The overall annual average sector level change was due to:
  i. An increase in New Zealanders by 515
  ii. An decrease in essential skill visa holders by 279
  iii. A decrease of 220 in working holiday visa holders.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Dairy

The dairy farming workforce is smallest in June. There has been a minor increase in the earlier months of 2022 compared to the same period in 2021.

The core processing/manufacturing workforce has remained static in 2022 after a period of growth from 2012-2021.

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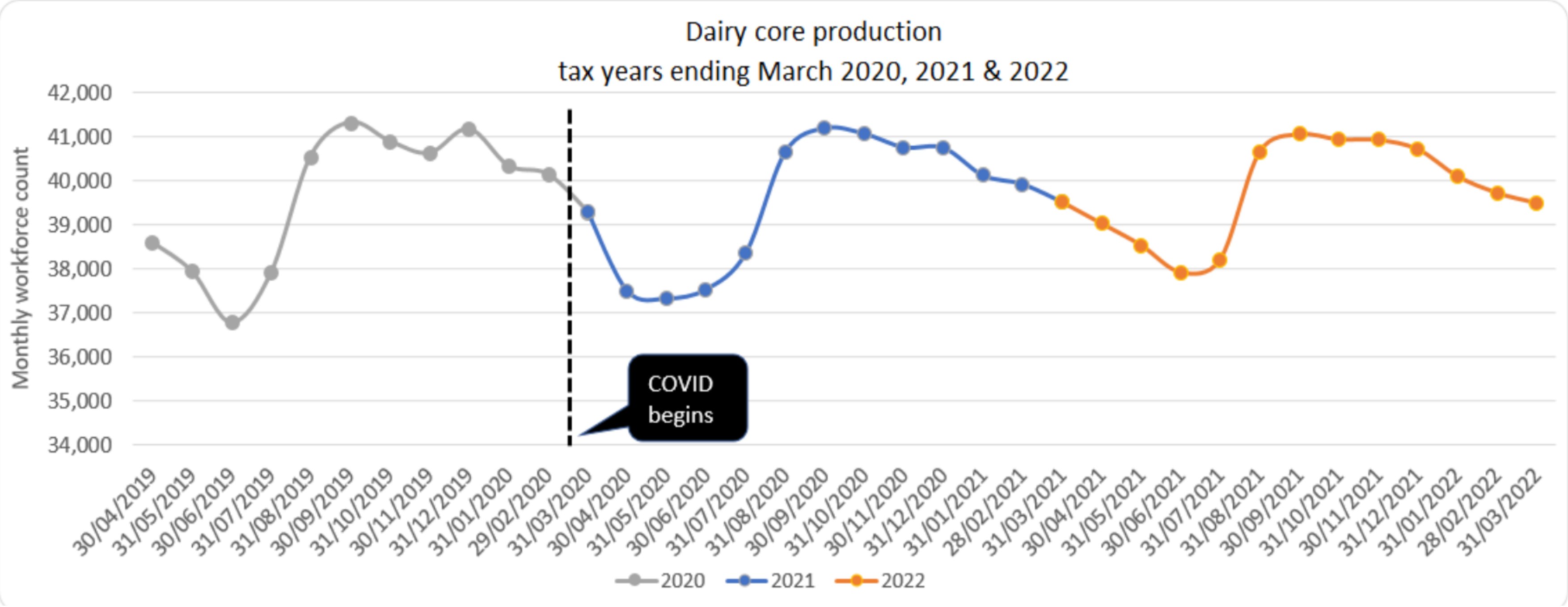
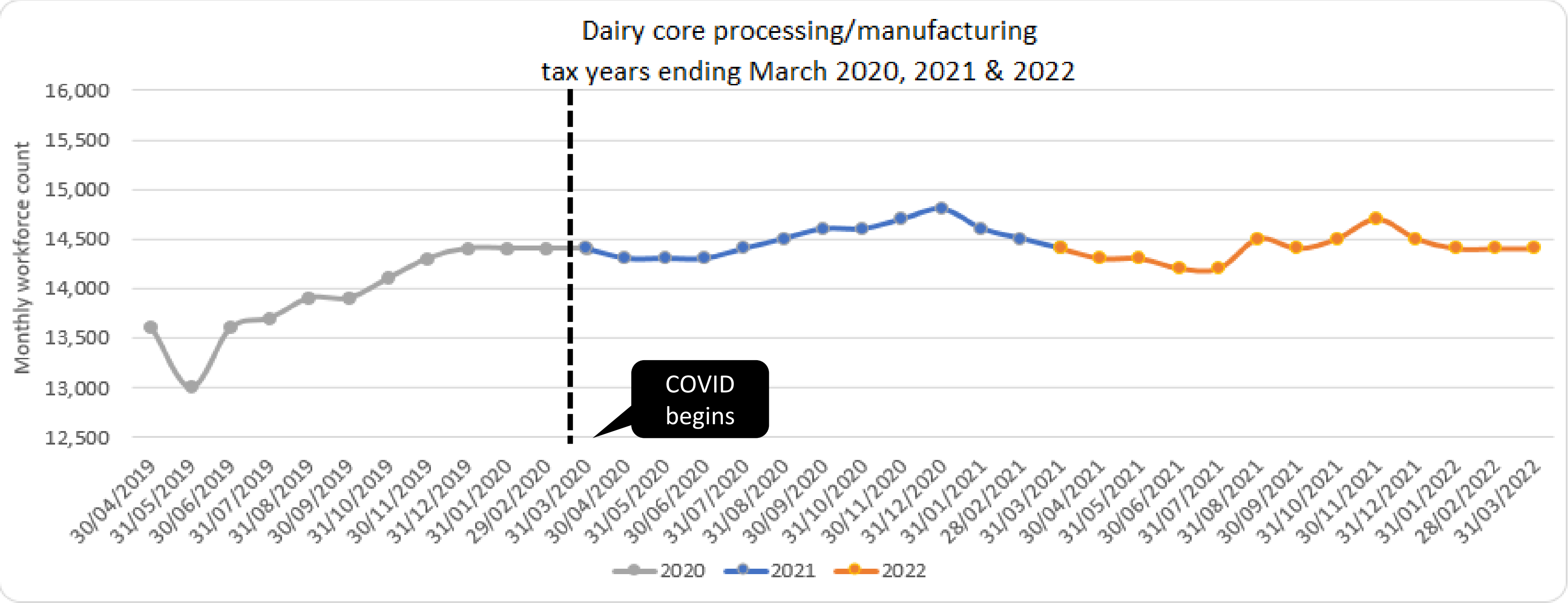
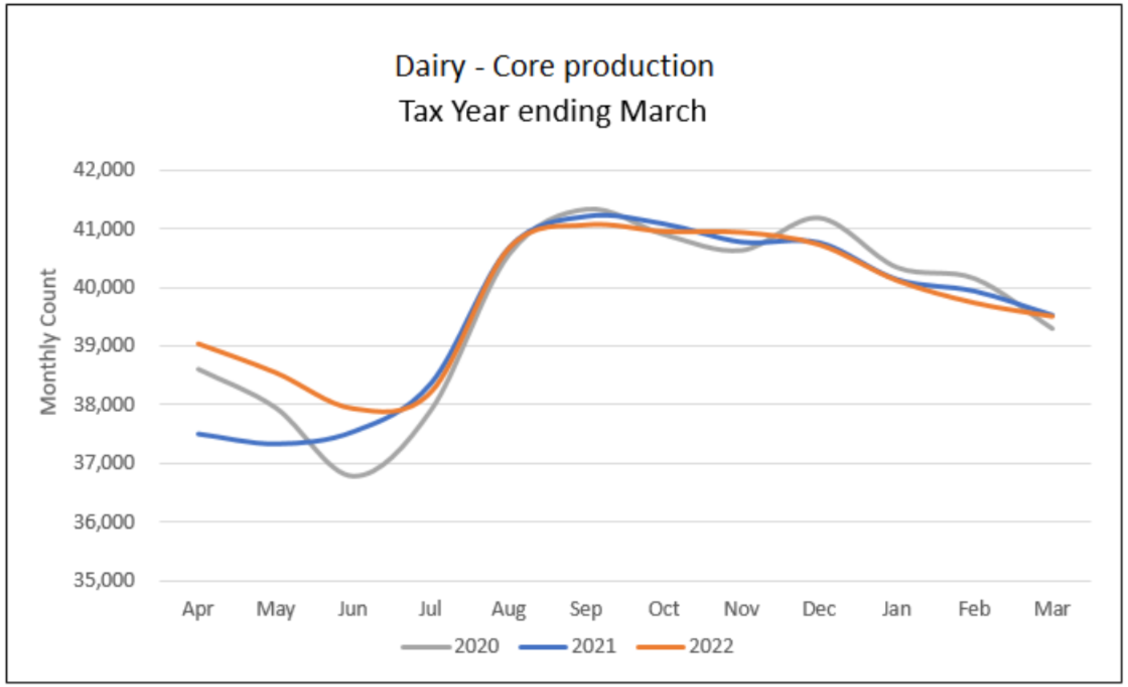
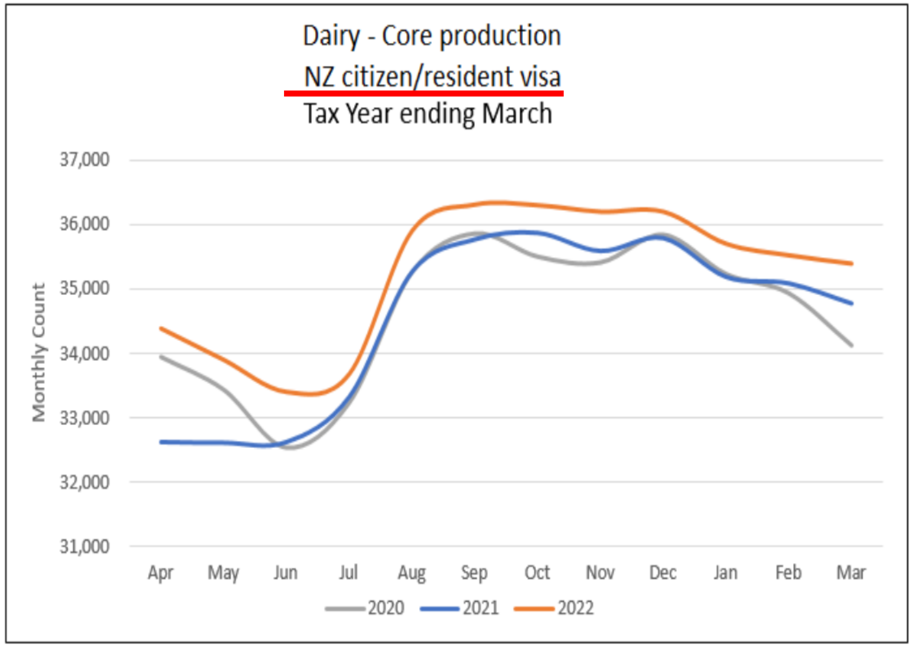
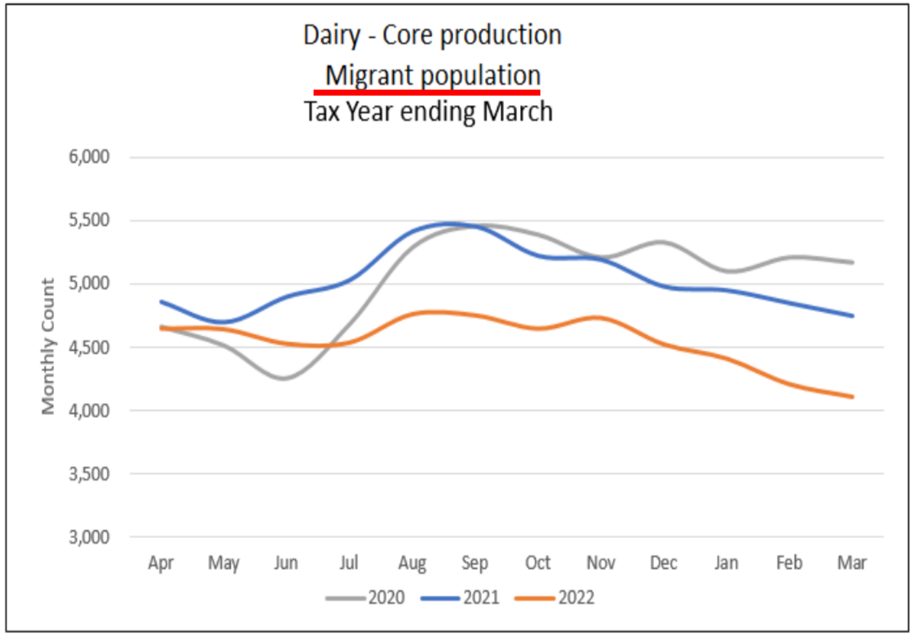




Dairy







Overall, the dairy core production workforce remained relatively stable during the 2022 tax year. The number of people working in the earlier months of 2022 was slightly higher than in the two preceding years.

Migrant numbers (mostly essential skills visa holders) were at similar levels initially compared to previous years then tracked downward for the last 10 months. This may have been due to some essential workers becoming NZ residents in 2022 (see core production graph on next slide). The numbers of working holiday visa holders was low across the whole year (see next slide).

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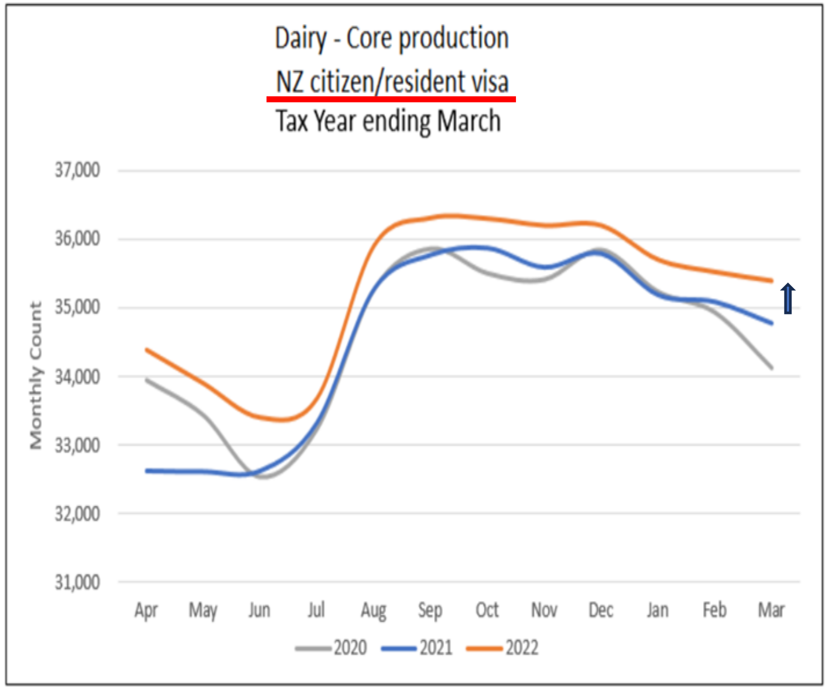
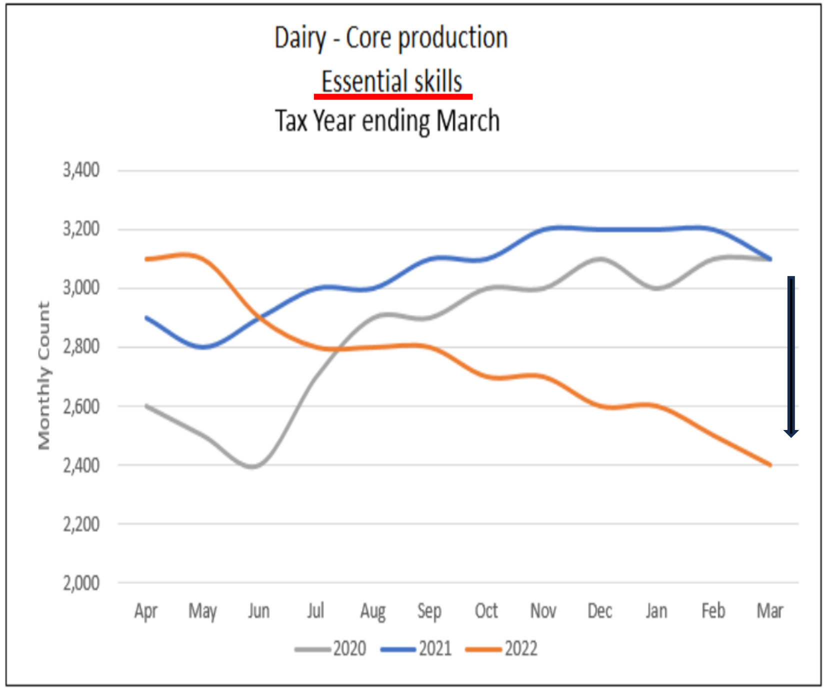
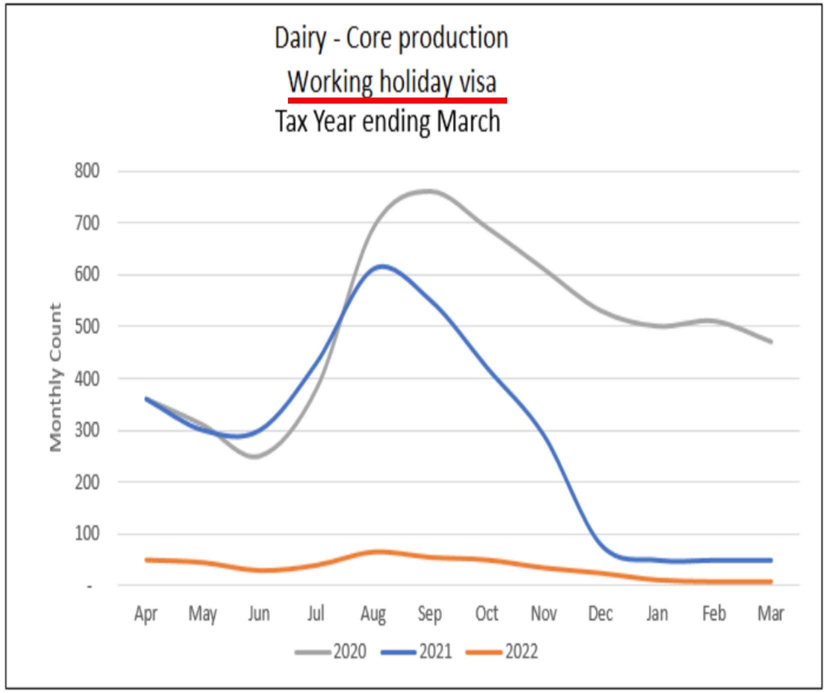
Dairy

The Dairy sector had a minor decrease of 25 people (0.05%)







- Whilst dairy core production appeared to be fairly stable overall during the 2022 tax year there were changes within the migrant categories of essential skills visas and working holiday visas. Some essential skill visa holders may have switched to NZ resident visas. https://www.beehive.govt.nz/release/one-residence-pathway-provides-certainty-migrants-and-business

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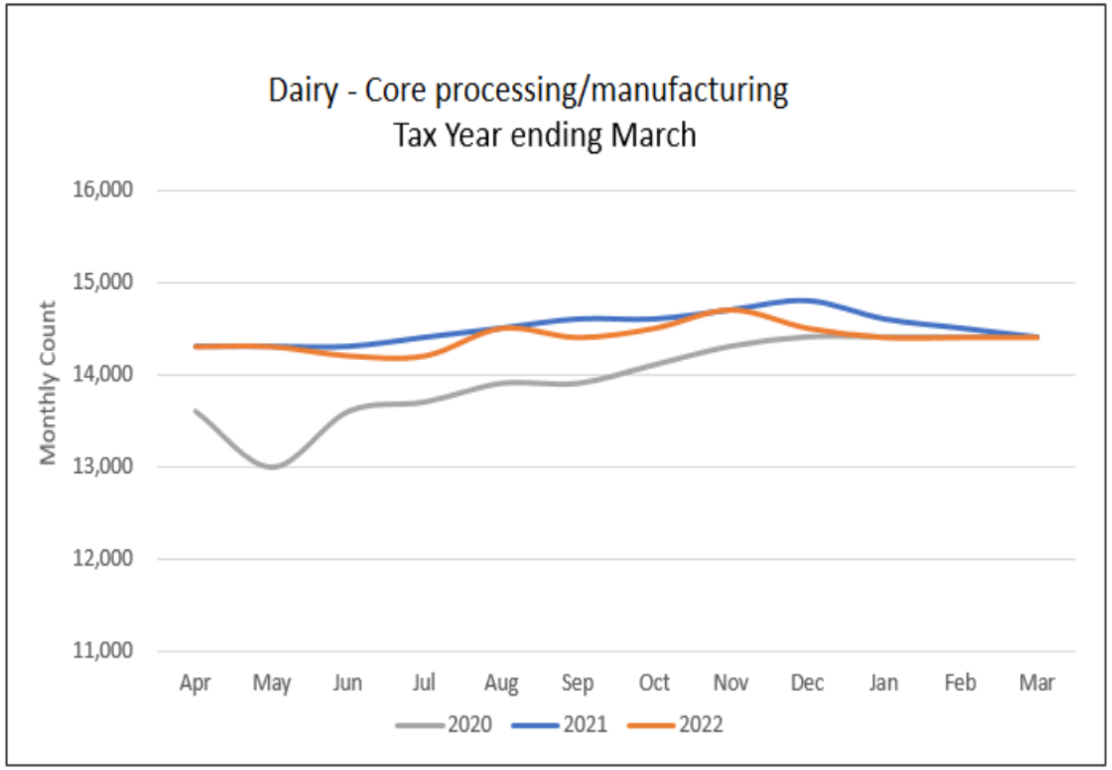
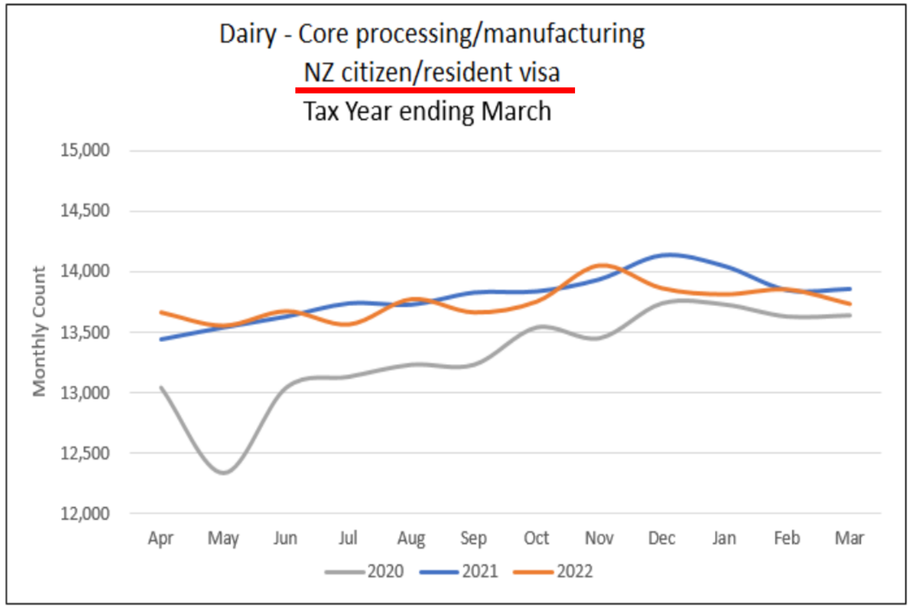
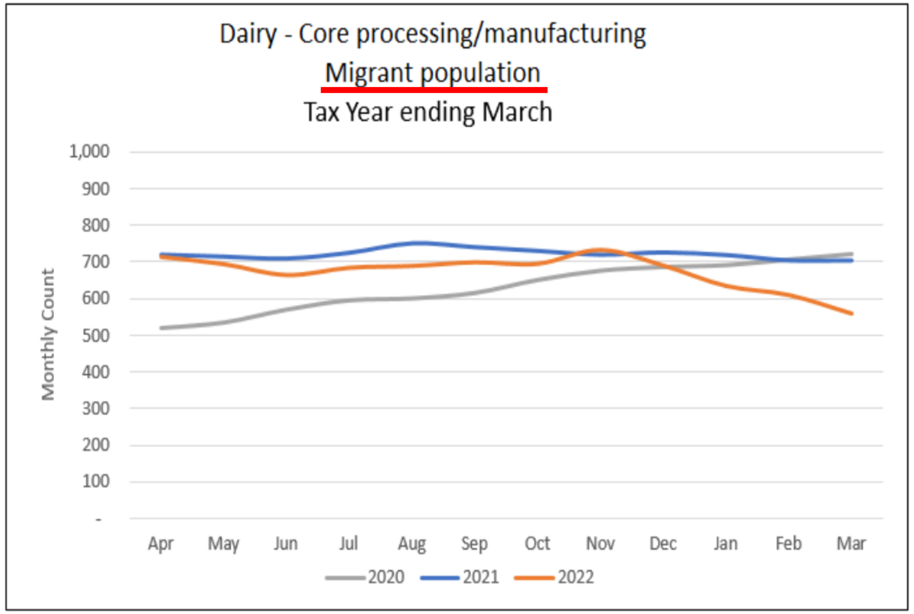
Dairy







The dairy processing workforce was reasonably stable over the 2022 tax year.

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Forestry and Wood Processing

Key characteristics of the Forestry and Wood Processing sector

- Over 70% of the workforce is in core processing/manufacturing and strongly connected
- More than 50% of forestry exports go to China
- Only some parts of the Forestry and wood processing sector were considered as an **essential service** during the level 4 lockdown**:**

  * *Some pulp and paper mills operated;*
  * *Secondary wood processors who produced shipping pallets, packing cases and other packaging requirements for supporting food, beverage and pharmaceutical supplies;*
  * *Chip and pellet production for supply of essential domestic and industrial heating (such as for hospitals and food processors);*
  * *Dispatch operators involved in moving sawmill stocks;*
  * *Nurseries were able to carry out maintenance on capital stock and plants to keep them alive.*

  Non-essential services included:

  * *Logging harvesters;*
  * *Sawmills and all other producers of wood products including but not limited to Particleboard, plywood, MDF & LVL; and*
  * *All secondary processors of wood products except those explicitly listed above.*

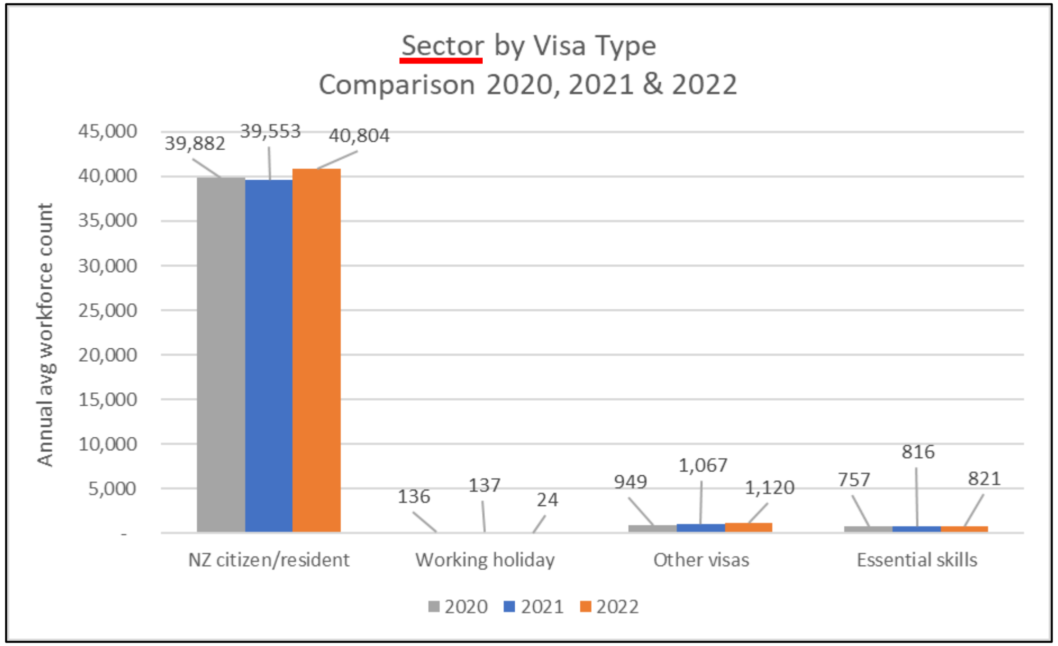
Forestry and Wood Processing

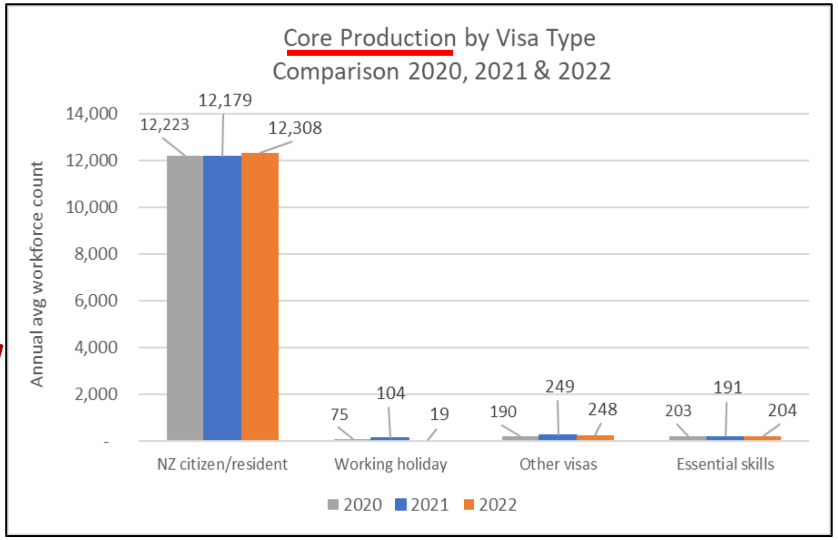
Changes in forestry and wood processing employment counts

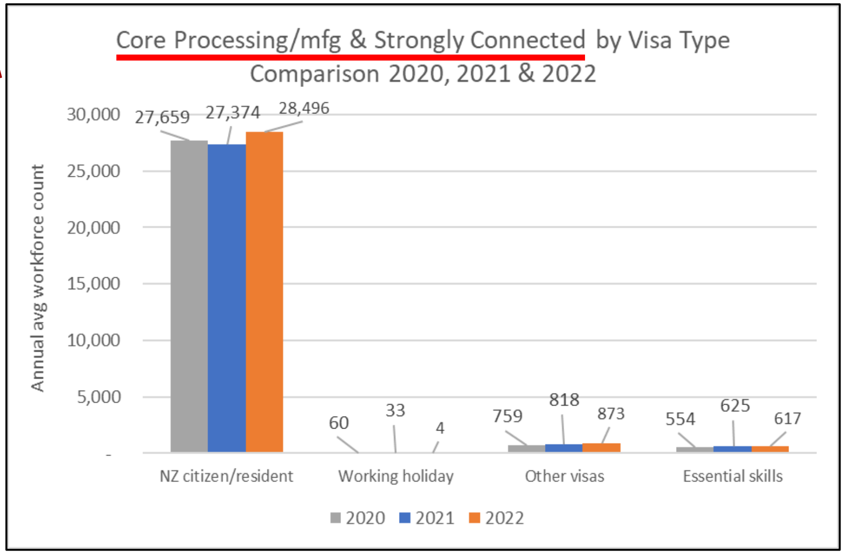
- Overall annual average count went up by 1,248 (3.0%)
- The increase mostly happened in the strongly connected part of the value chain, within two industries namely: the Wooden structural fittings & components manufacturing industry; and the Wooden furniture & upholstered seat manufacturing industry
- For analysis purposes in the forestry and wood processing sector, first and second stage processing industries have been combined as the designation settings of "Core processing/manufacturing" and "Strongly connected".

Forestry & Wood Processing

Annual average employment by visa type/resident status







***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

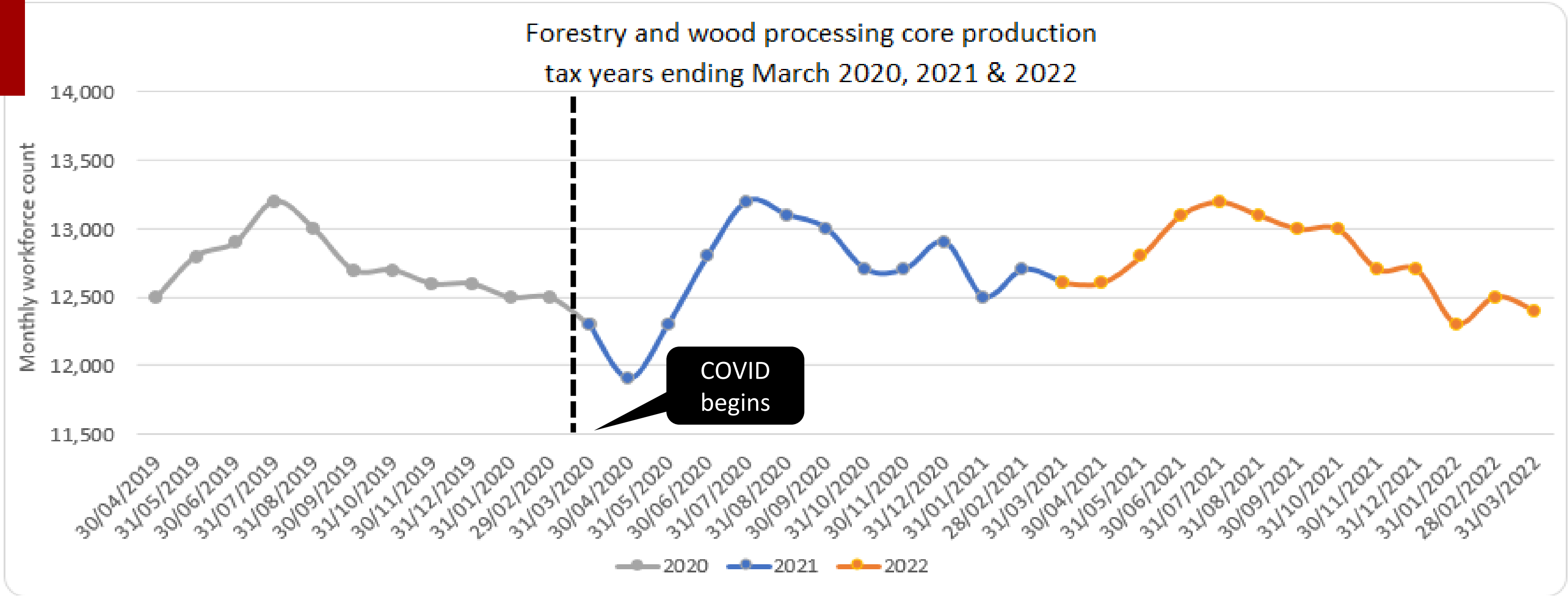
Forestry & Wood Processing

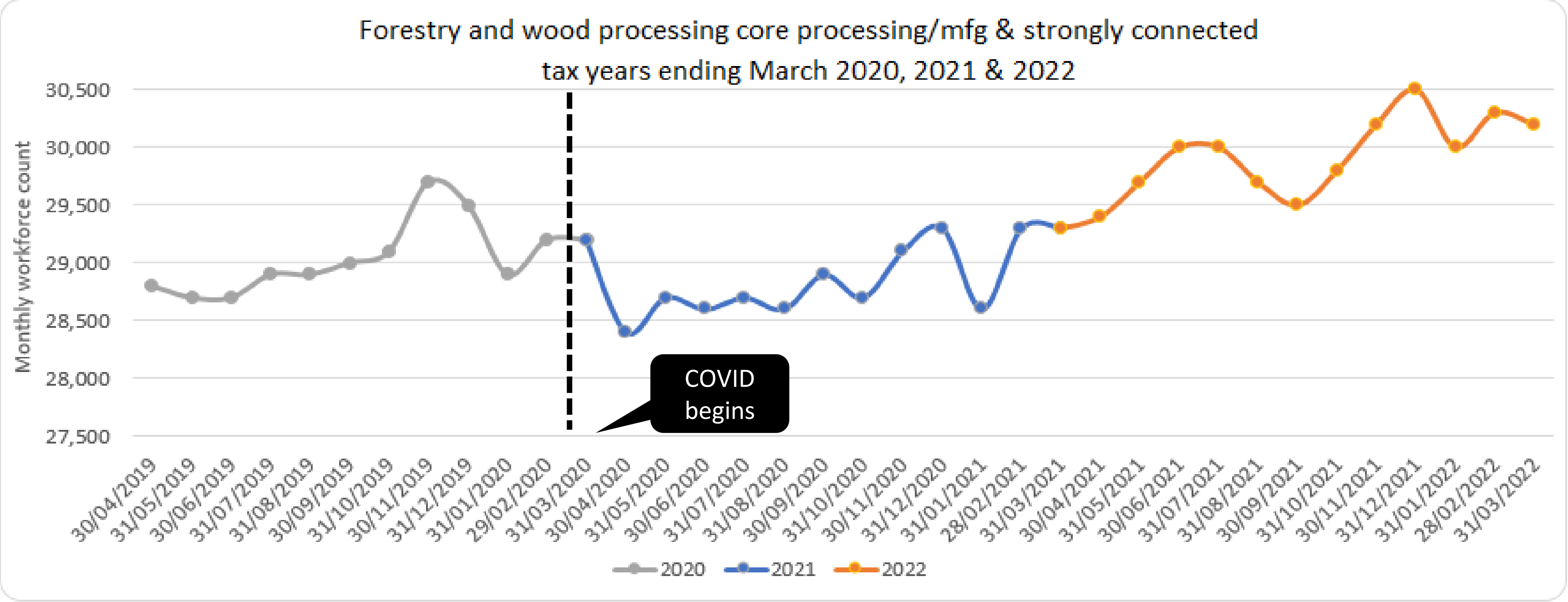
In 2022, the forestry core production workforce maintained similar levels to that of the two previous years except for the period of March/April/May 2020 (when the COVID-19 lockdowns occurred).

The core processing/manufacturing and strongly connected workforce was slightly higher than the two previous years, driven by increases in the strongly connected part of the value chain. This was largely driven by an increase in wooden structural fittings & components manufacturing and wooden furniture & upholstered seat manufacturing.

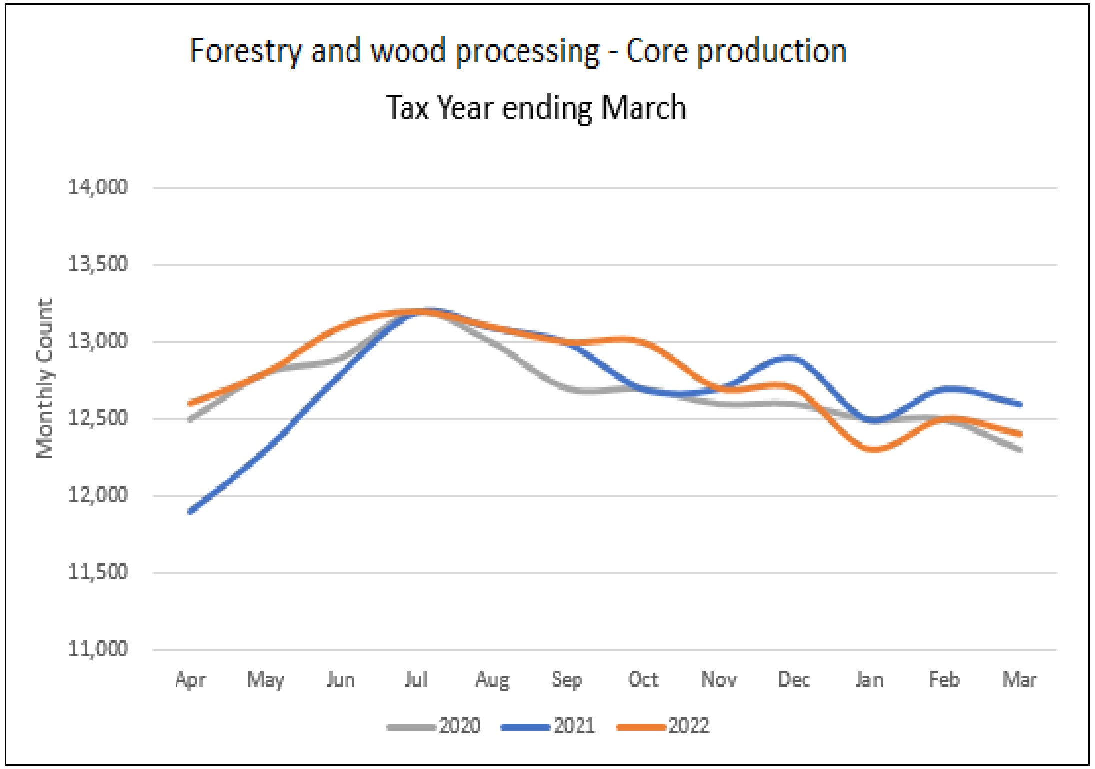
Industry	2021	2022	Annual change 2022 vs 2021
Wooden furniture and upholstered seat mfg	5,108	5,400	292
Wooden structural fittings and components mfg	6,983	7,375	392

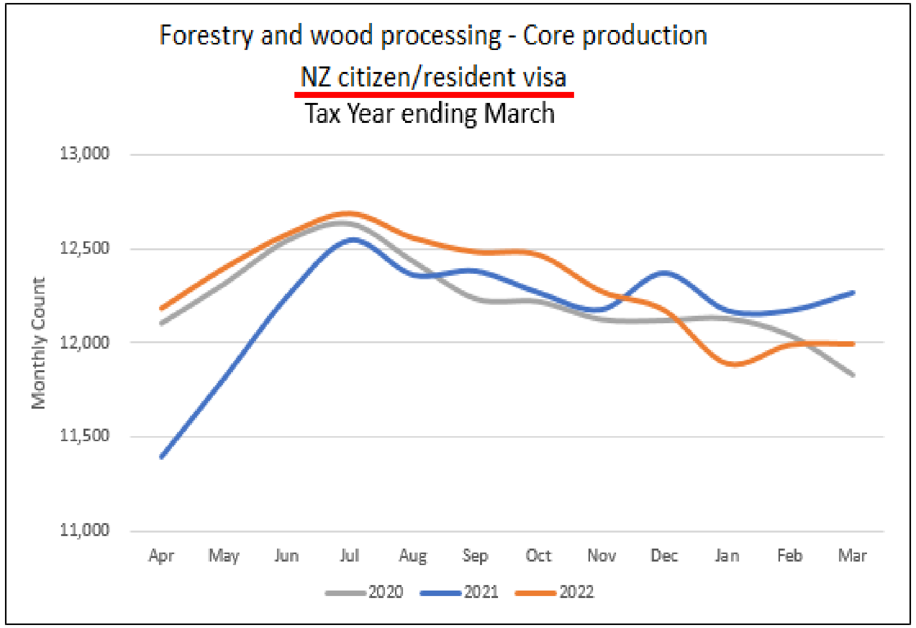
***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

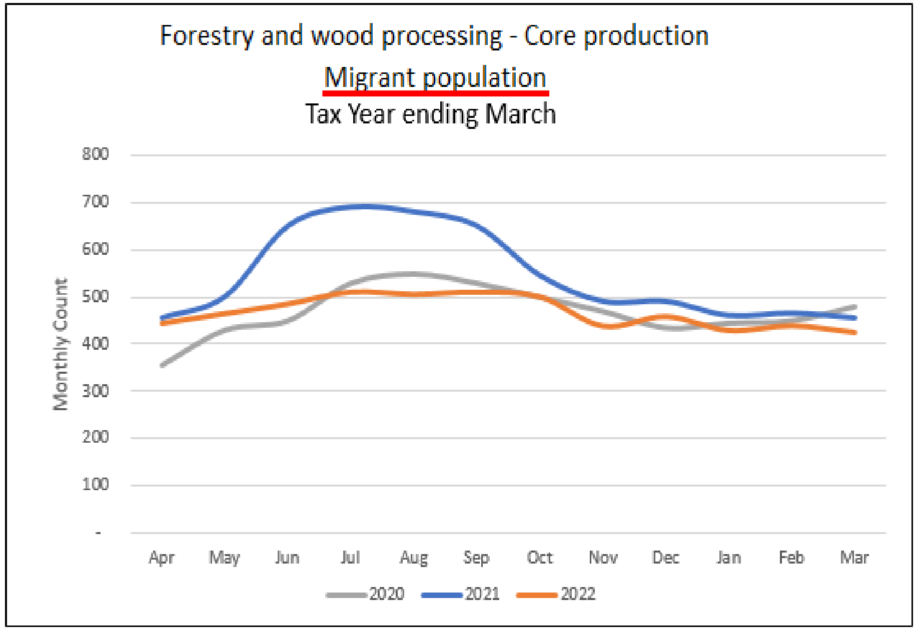




Forestry & Wood Processing



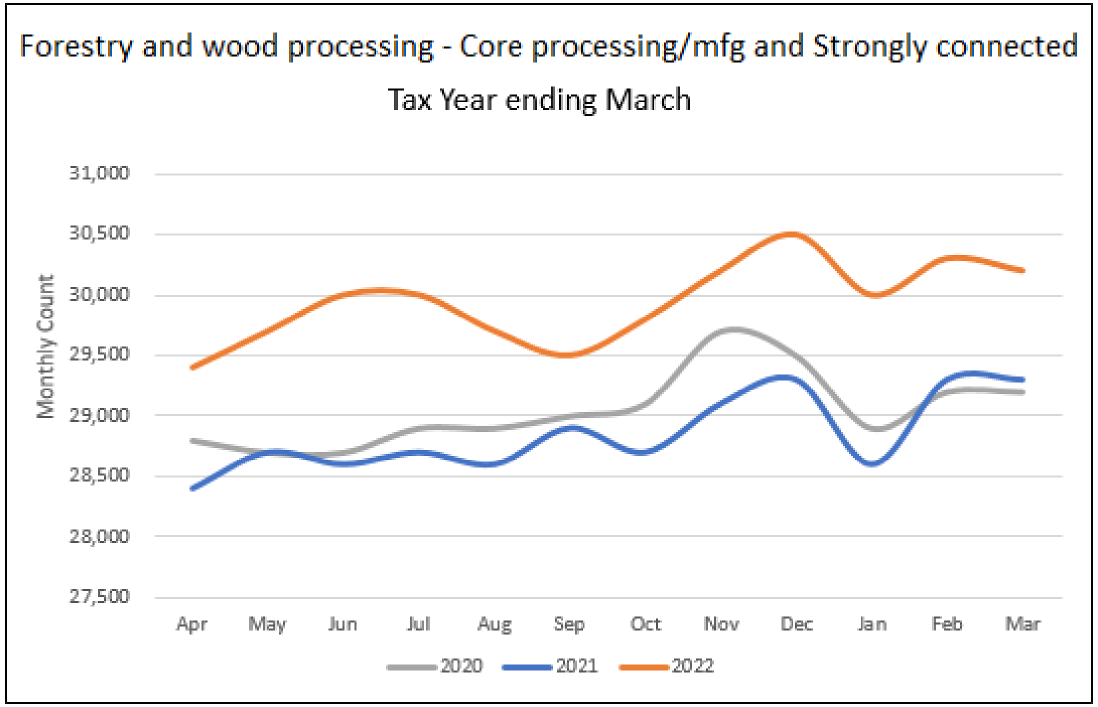


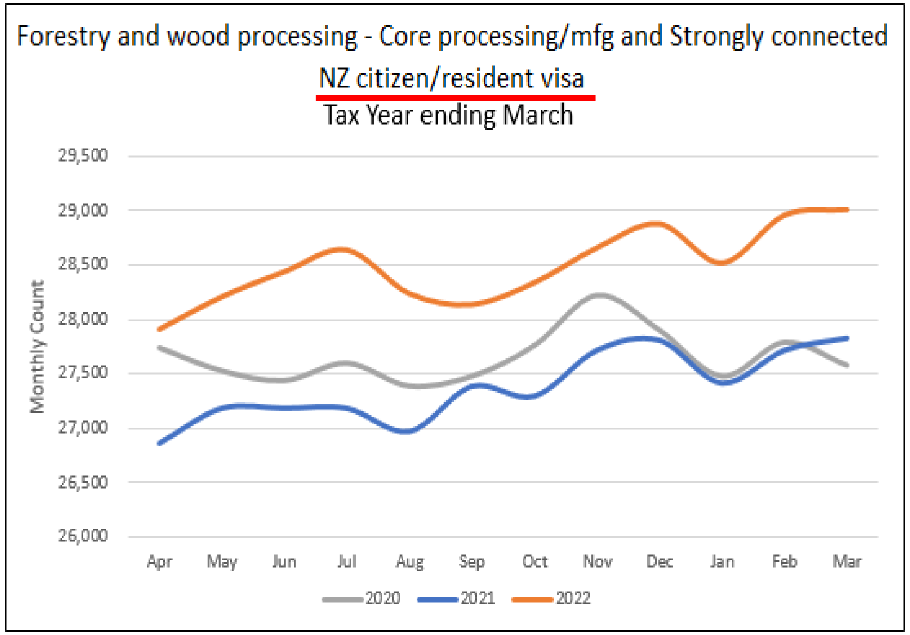


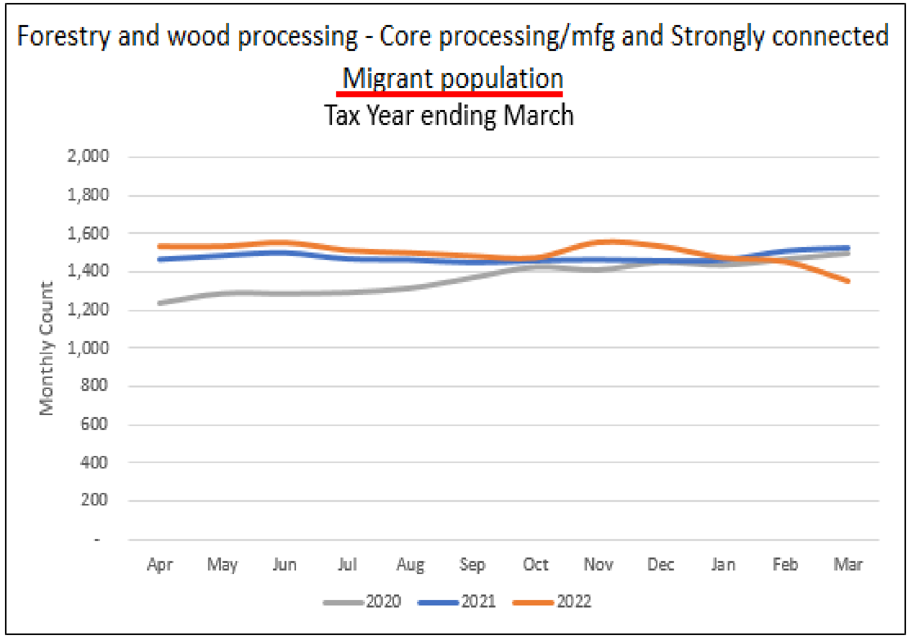
Overall, the forestry core production workforce in 2022 was similar to the 2 previous years with the exception of the period of April/May 2020 when COVID-19 lockdowns occurred.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Forestry & Wood Processing







Overall, the forestry core processing/manufacturing and strongly connected workforce was higher in 2022 with similar seasonal patterns. The additional workers in 2022 were New Zealand citizens and residents.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Horticulture

Key characteristics of the horticulture sector

- Horticulture covers a diverse range of subsectors (including vegetable growing, kiwifruit, viticulture), with large variations in demand for labour. Migrants (especially Recognised Seasonal Employer [RSE] and Working Holiday Scheme [WHS] are an important source of labour at critical times
- Many RSE workers had their visas extended during Covid. This meant that there were higher numbers over the winter period in 2021. This was not as prominent in 2022.
- Horticulture is more difficult to analyse than other food and fibre sectors, because of the wide usage of contractors across the sector (see Horticulture spotlight)
- The main additional ANZSIC06 classes identified are Other Agriculture and Fishing Support Services (seasonal contractors) and Labour Supply Services, which are located in Cross Sector

Changes in horticulture employment counts

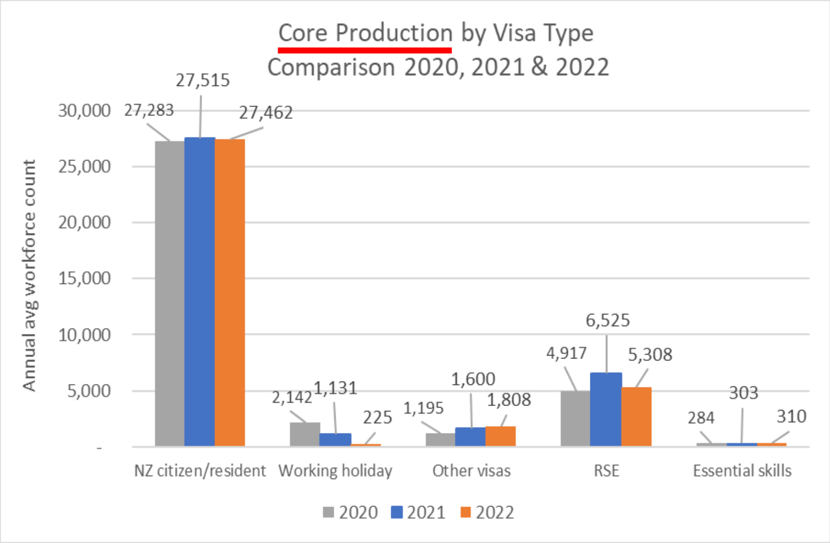
Horticulture

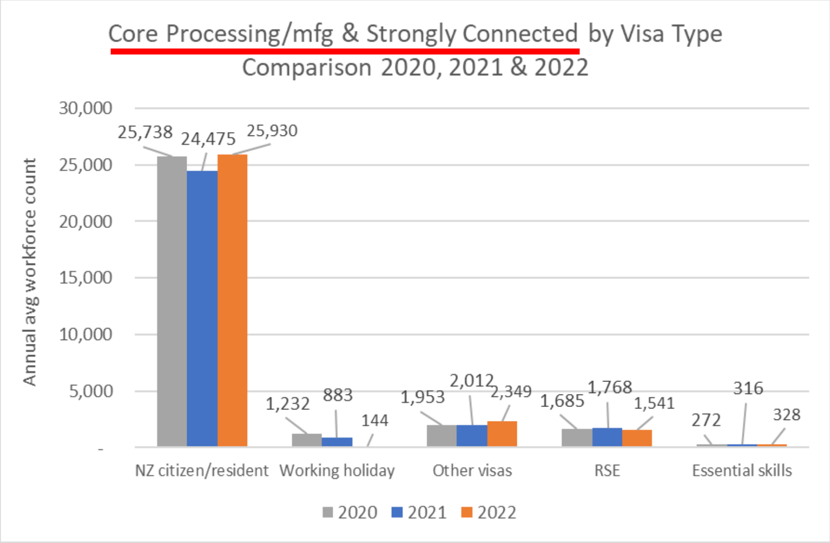
- Overall average annual numbers down by 1,140 (1.7%)
- The number of people involved in core production activities decreased, with the number of people involved in core processing activities increasing by a lesser amount
- RSE numbers returned to a more pre-COVID pattern. However, the average annual Working holiday visa (WHS) numbers were down by 1,645 people compared to 2021 and even more so compared to 2020
- Average annual numbers of people involved in Other agriculture and fishing support services (A052900), which includes fruit and vegetable picking activities were also down due to lower numbers of working holiday visa holders
- Annual averages don't tell the full story. One needs to sight the monthly changes to fully understand the drivers causing the movements in the workforce figures. Note the seasonal drop in numbers in February and March 2022 compared to the year before

Horticulture

Annual average employment by visa type/resident status

The Horticulture sector had an overall annual average reduction of 1,140 people (1.7%)

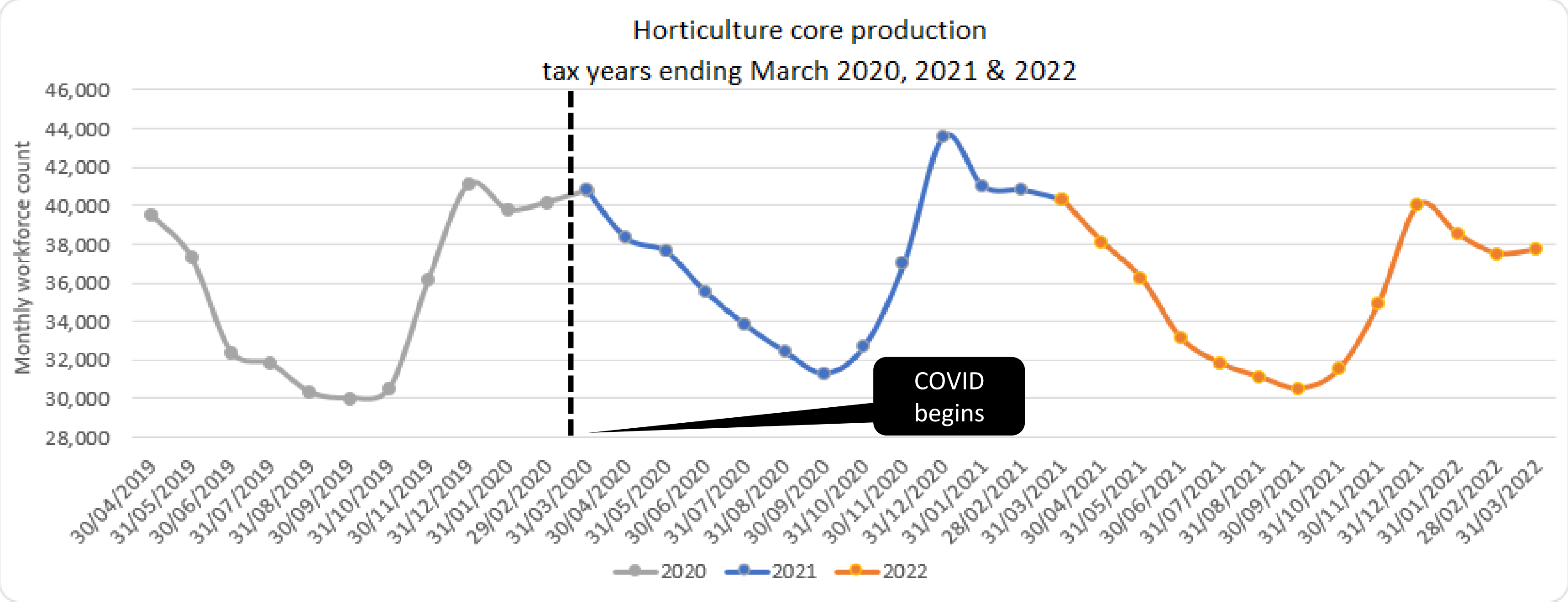


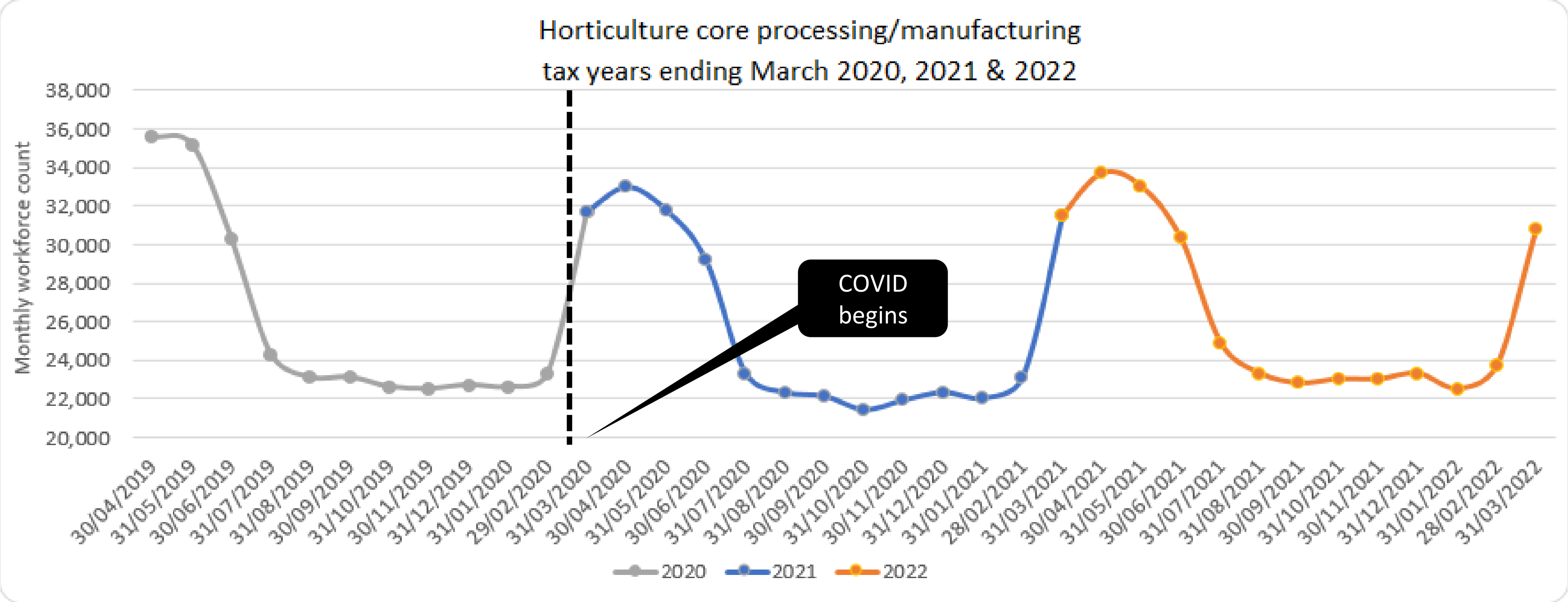


- Changes included:
    1. An increase in New Zealanders by 1,401
    2. A decrease in working holiday visa holder by 1,645
    3. A decrease of RSE visa holders by 1,444
    4. An increase of Other visas by 546

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

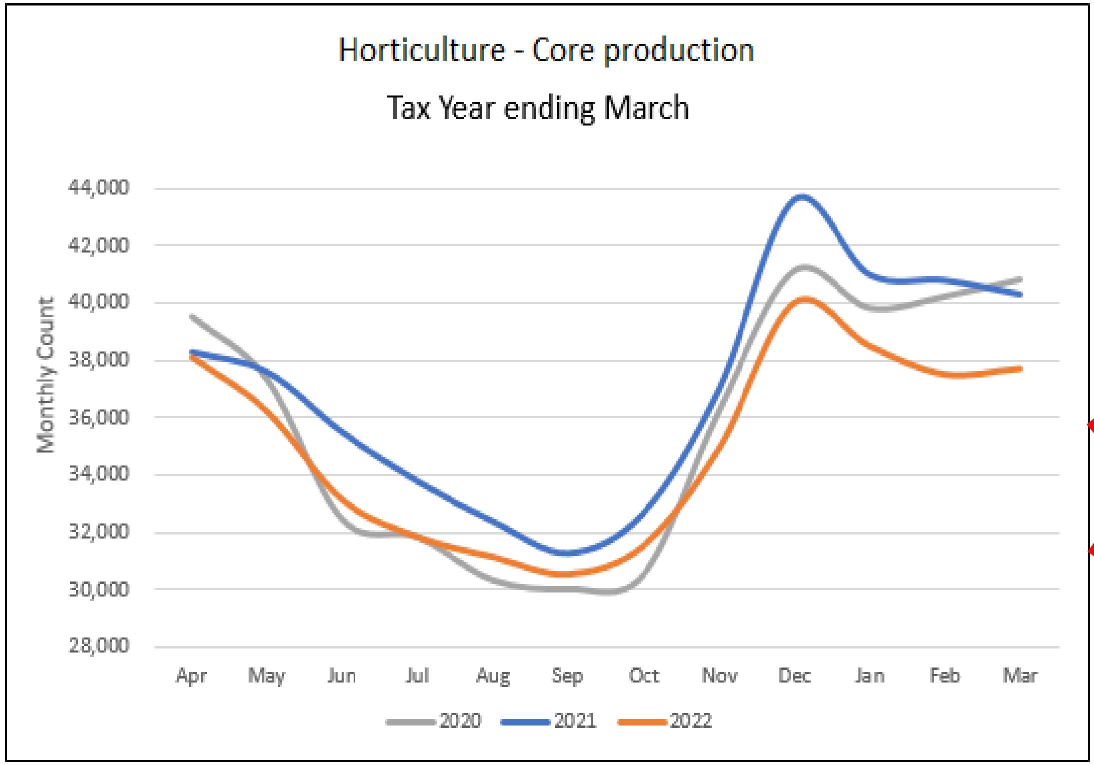
Horticulture

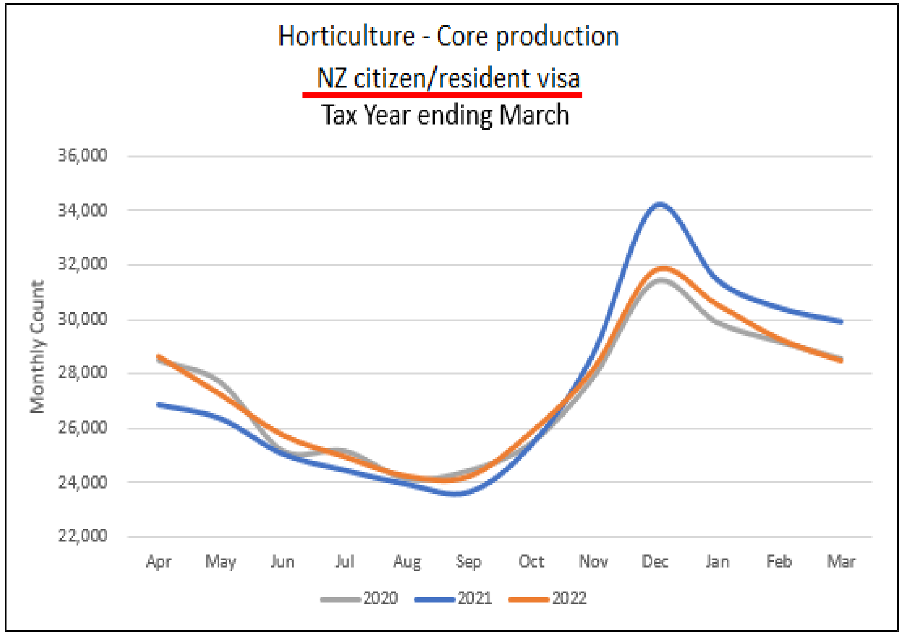


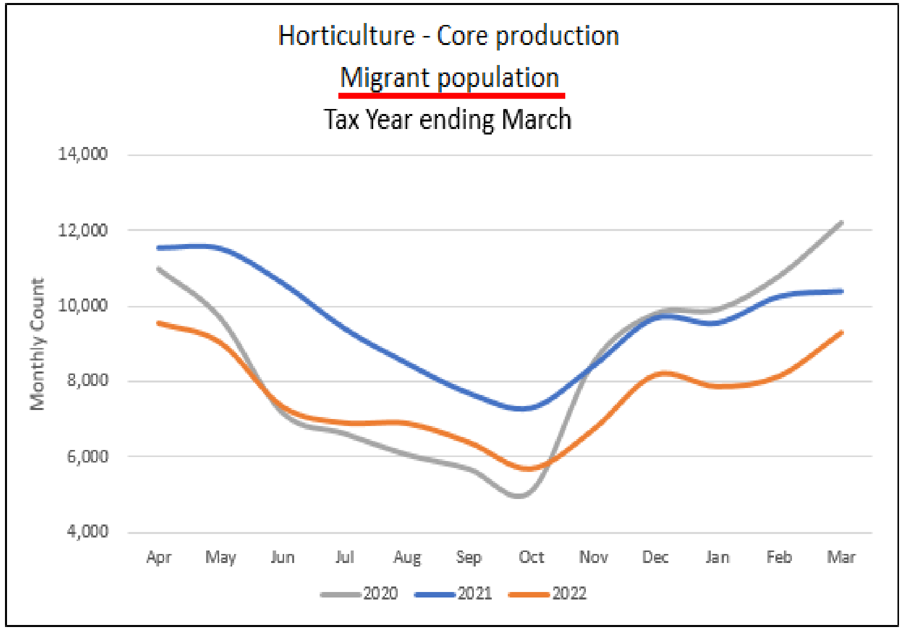


***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Horticulture







Overall, the horticulture core production workforce decreased by an annual average of 1,950 people between the 2021 and 2022 tax years.

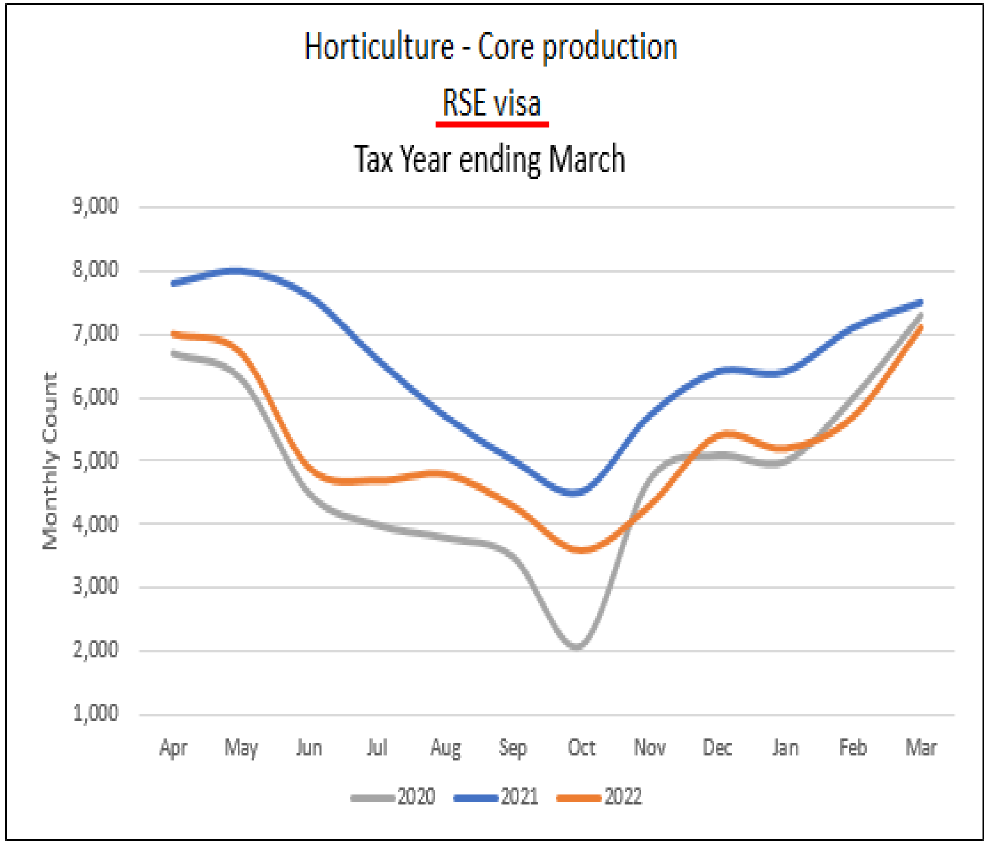
There was a similar seasonal pattern when comparing the 2022 tax year against the past two years.

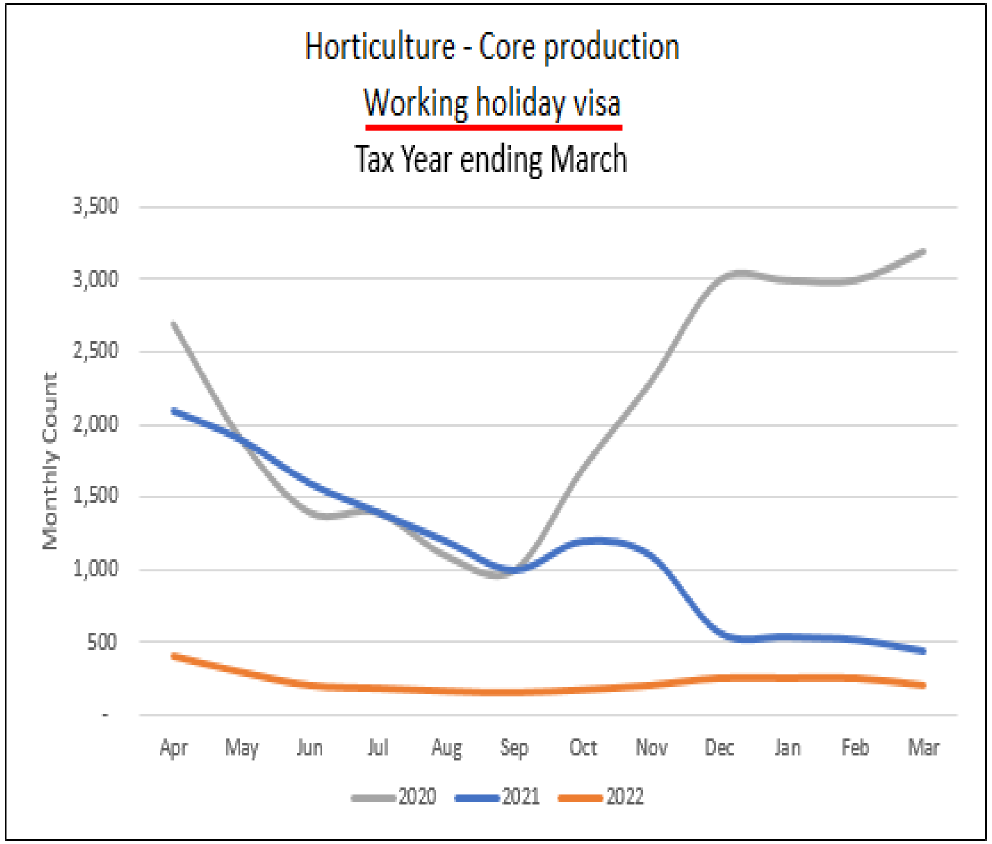
- In the 2022 tax year, for core production the number of New Zealanders was slightly higher in the first half of the year and slightly lower in the second half of the year compared to previous years.
- In core production, the number of migrants is lower than the previous year, particularly with regards to RSE workers, RSE workers' visas had been extended in the 2021 tax year. The number of working holiday visa holders is lower across the whole of the year.

Note*: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Horticulture

The Horticulture core production sector had an overall annual average decrease of 1,950 people

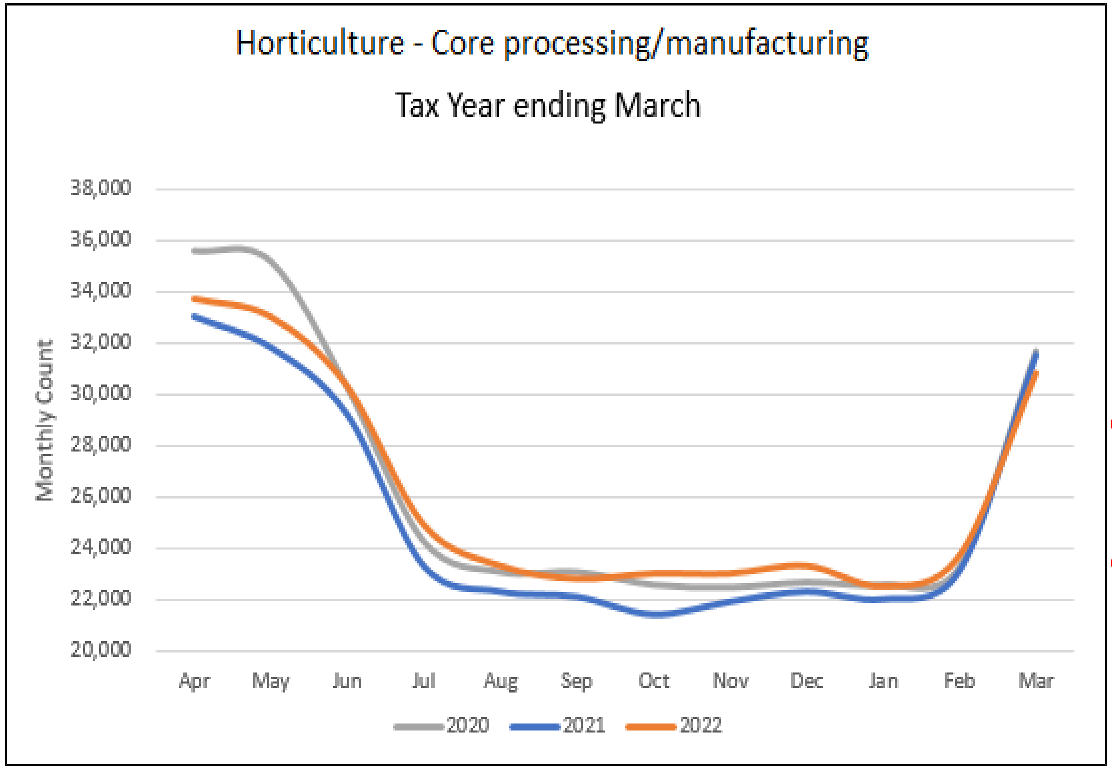




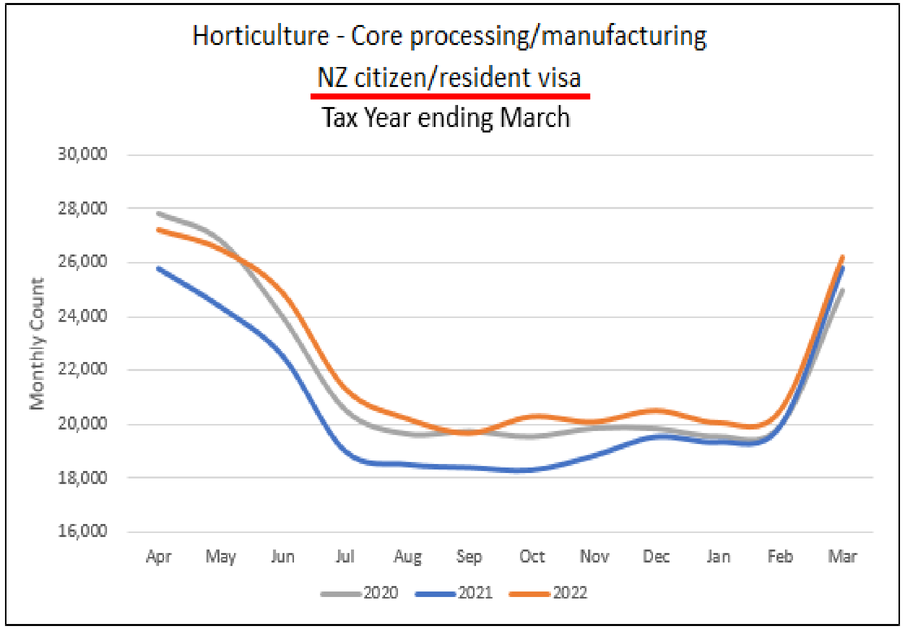
- There was a decrease in the number of RSE workers across all months as RSE numbers reverted to prior year levels (the 2021 tax year was an exception, as many RSE visa holders had their visa expiry dates extended).
- Working holiday visa holders dropped to extremely low levels in 2022 (as the NZ border did not re-open for new working holiday visa holders until 15 March 2022).

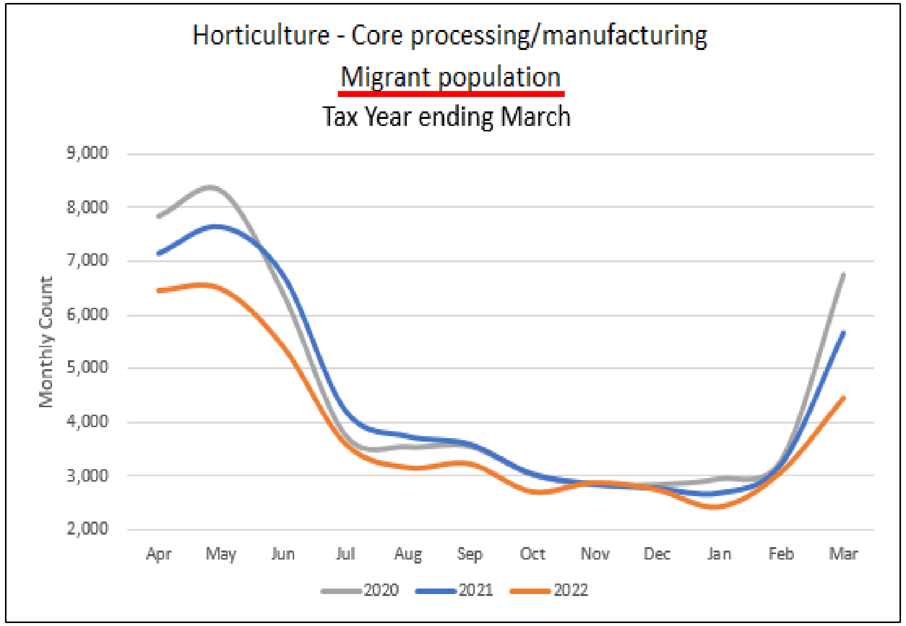
***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Horticulture



There was a similar seasonal pattern when comparing the 2022 tax year against the past two years. However numbers across the 3 years were spread slightly more widely in the April and May months.





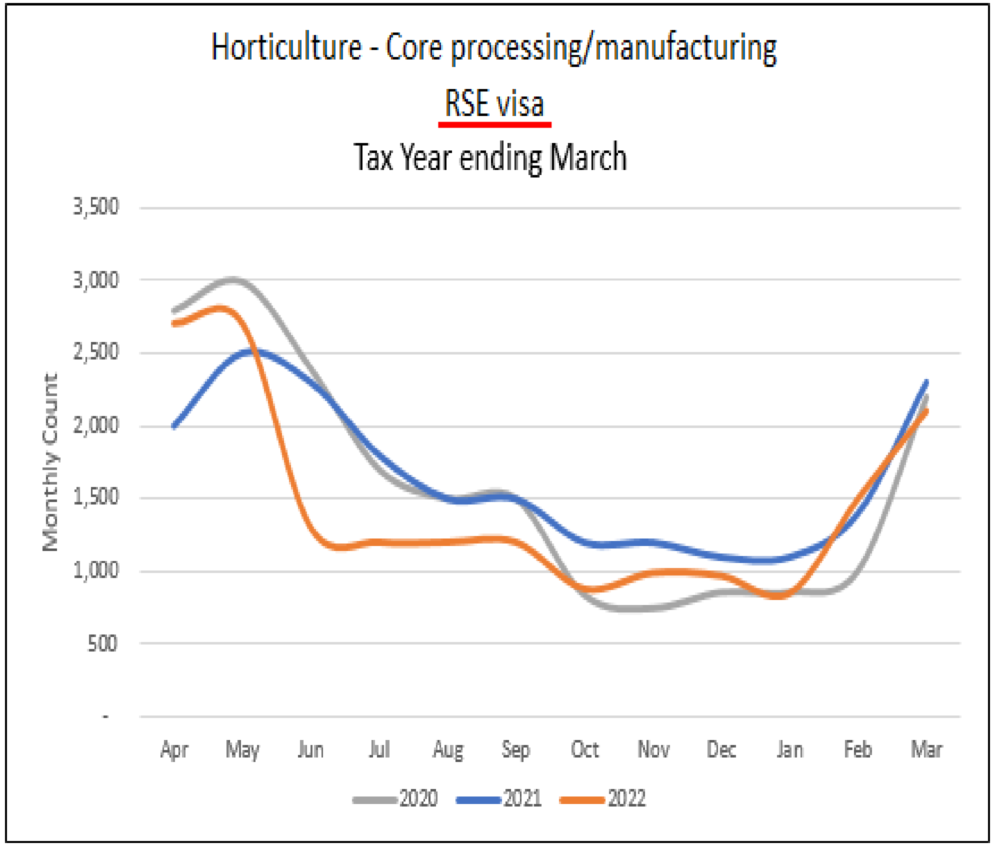
- In the 2022 tax year, the number of New Zealanders in core processing/manufacturing matched the pre COVID 2020 tax year.

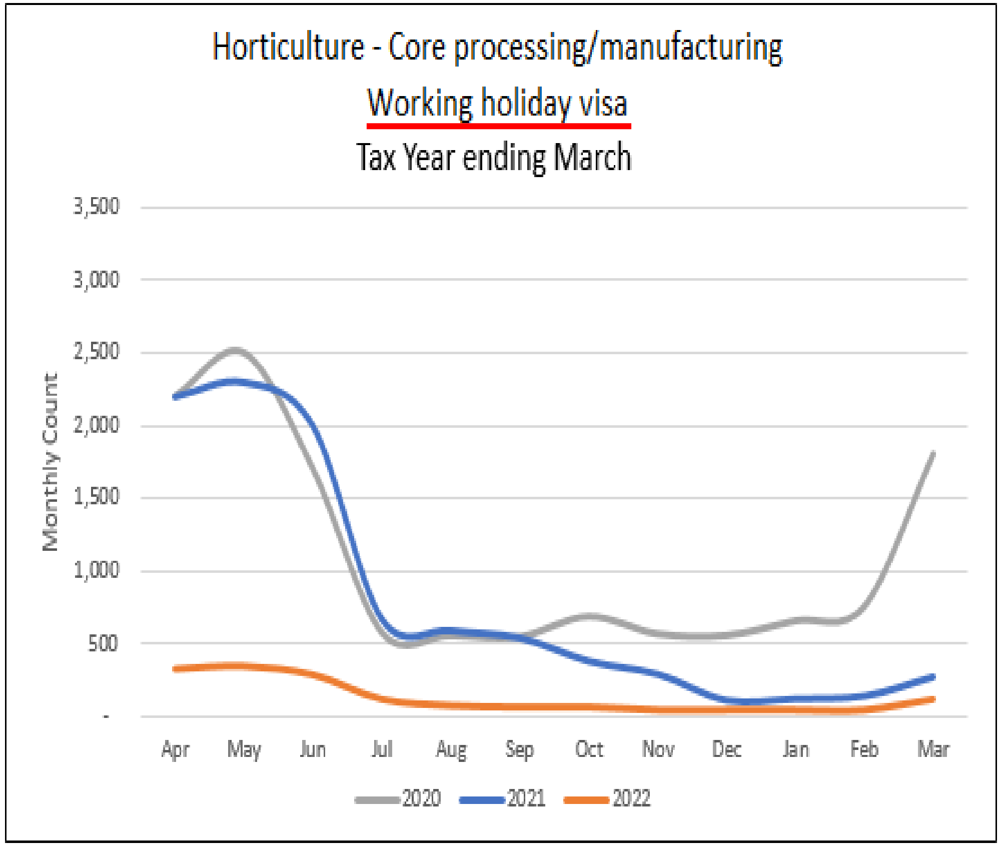
- In the 2022 tax year, the number of migrant workers in core processing/ manufacturing fell during the months of April/May/June 2021. For the remainder of the year, the number of migrants mirrored the trend of the 2020 & 2021 tax years but at slightly lower levels. This would have been due to the reduction of working holiday visa holders.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Horticulture

The Horticulture core processing/manufacturing sector had an annual average increase of 867 people





- There was a decrease in the number of RSE workers across all months as RSE numbers fell back to prior year levels (the 2021 tax year was an exception, as many RSE visa holders had their visa expiry dates extended.
- Working holiday visa holders were at low levels in 2022.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Pork, Poultry, Bees and Other

Key characteristics of the pork, poultry, bees and other sector

- The sector is made up of a diverse range of activities including: pig farming; poultry farming and processing; beekeeping; horse farming; hunting and trapping; and other livestock farming such as goats and alpacas

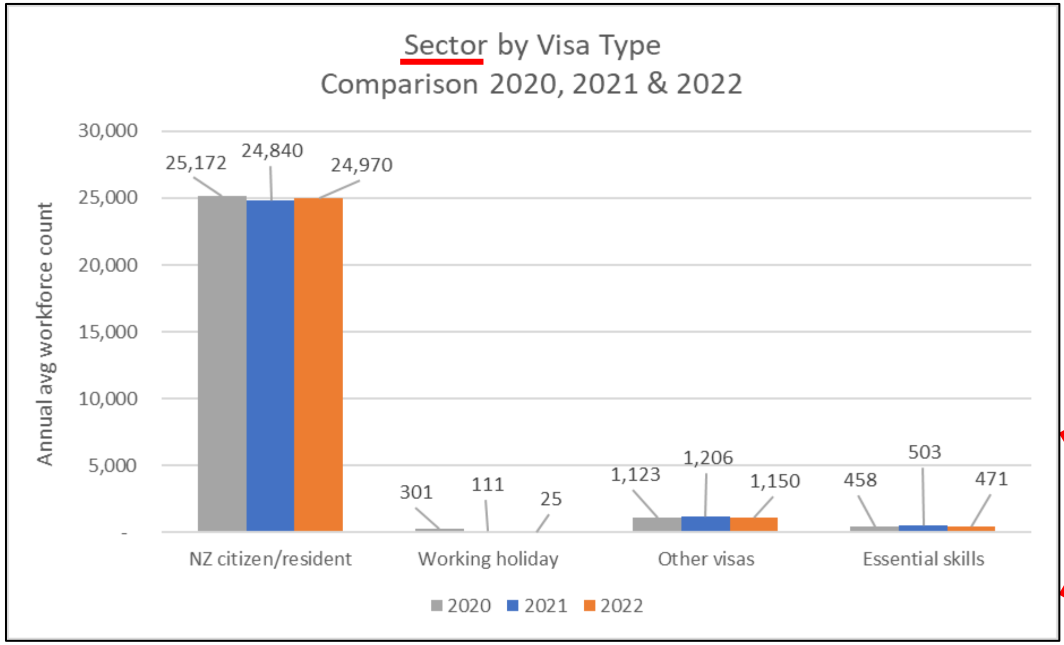
- Less than 35% of the workforce is in of core production

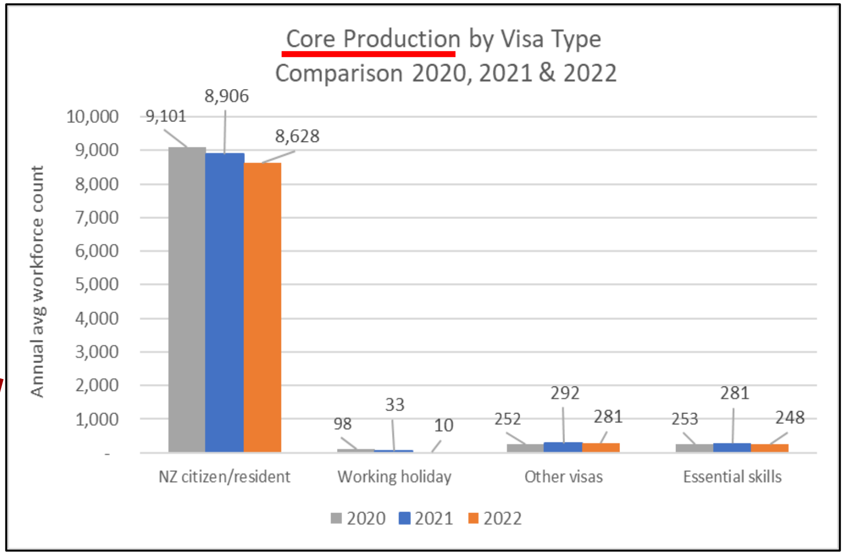
- Overall annual average count went down by 100 (0.4%)

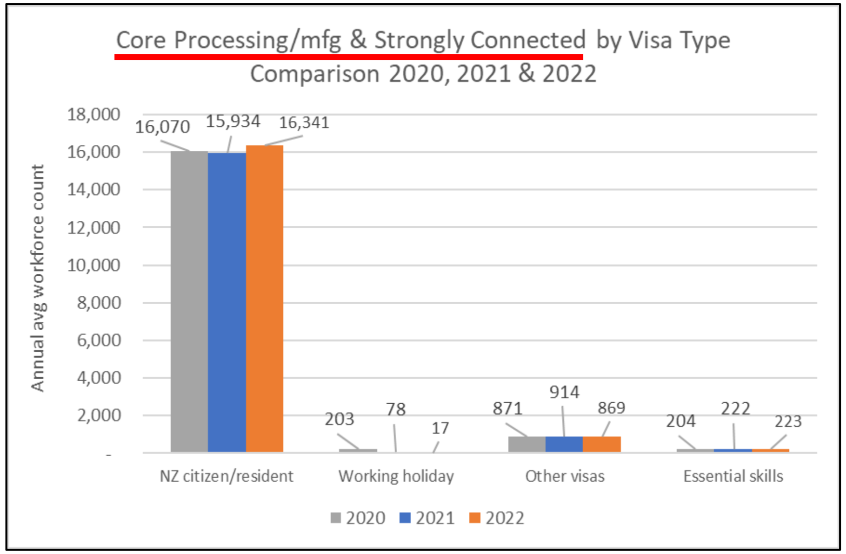
- For analysis purposes in the pork, poultry, bees and other sector, the designations Core processing/ manufacturing and Strongly connected have been combined.

Pork, Poultry, Bees and Other

Annual average employment by visa type/resident status





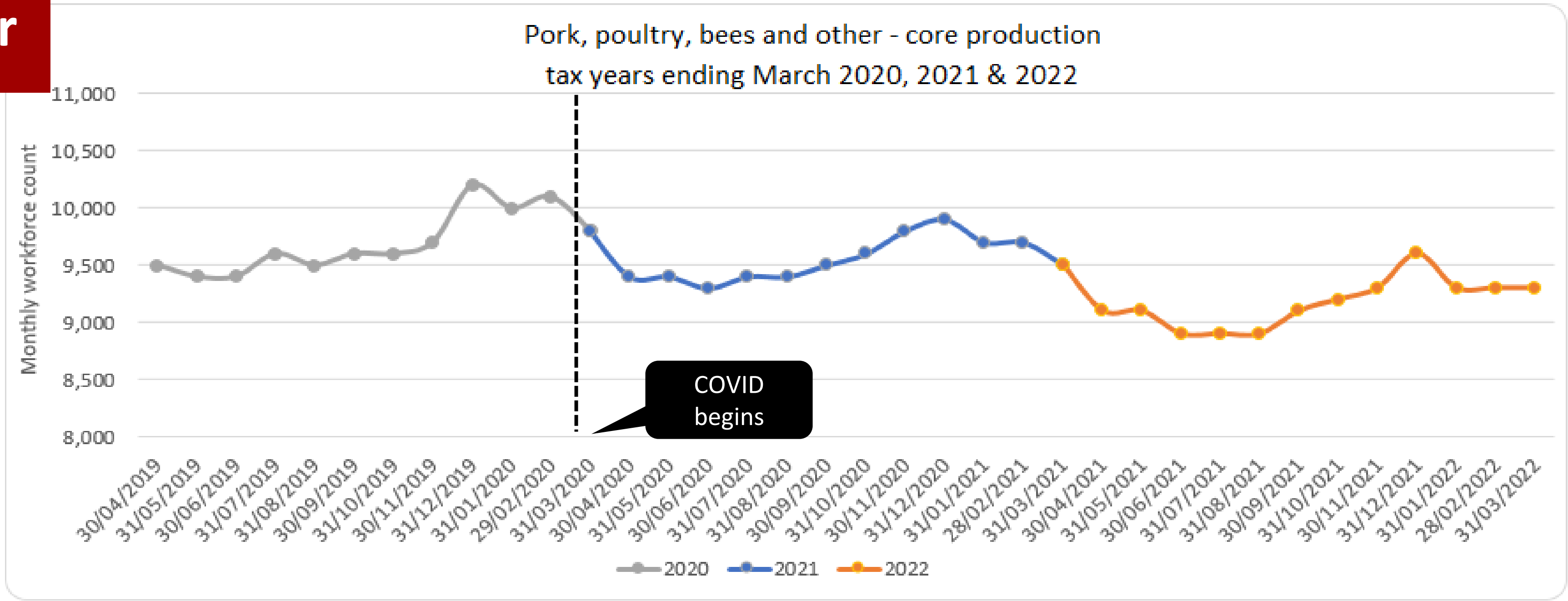


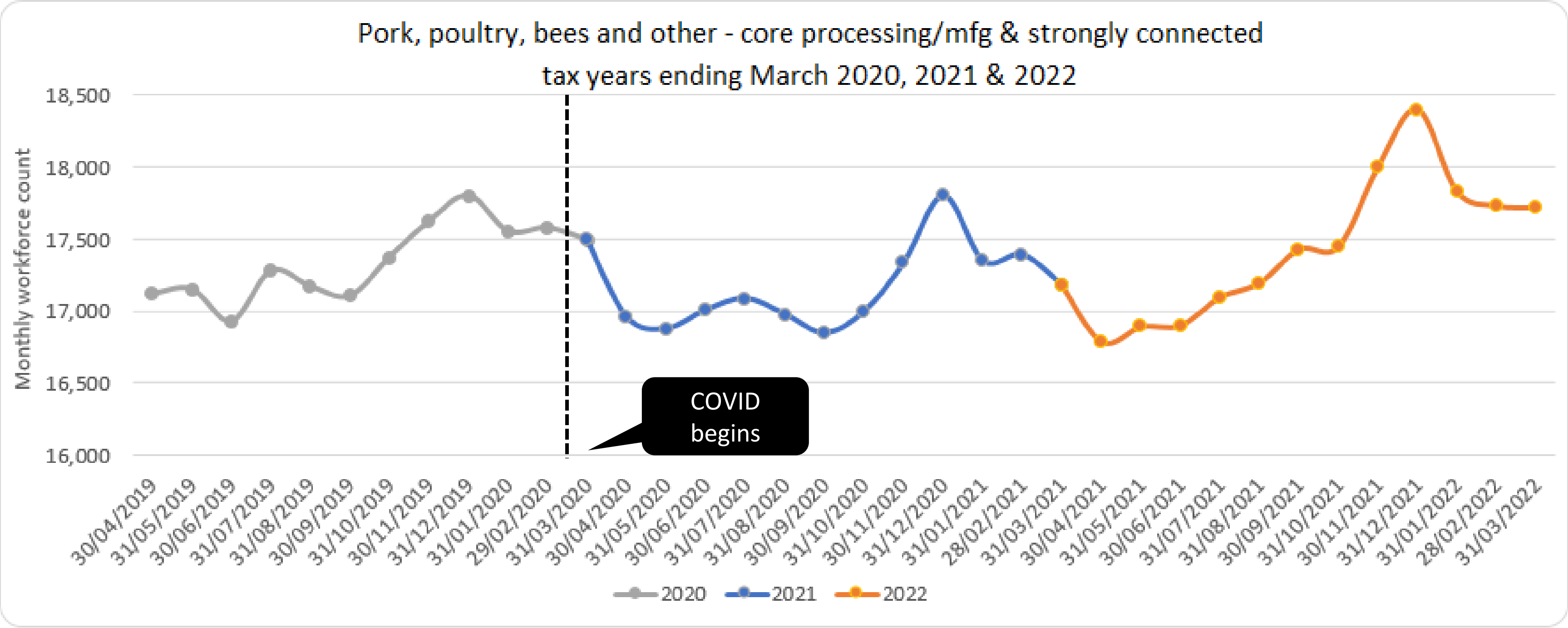
***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Pork, Poultry, Bees and Other

This view of the Pork, poultry, bees & other core production sector workforce depicts a slight reduction across all months in 2022.

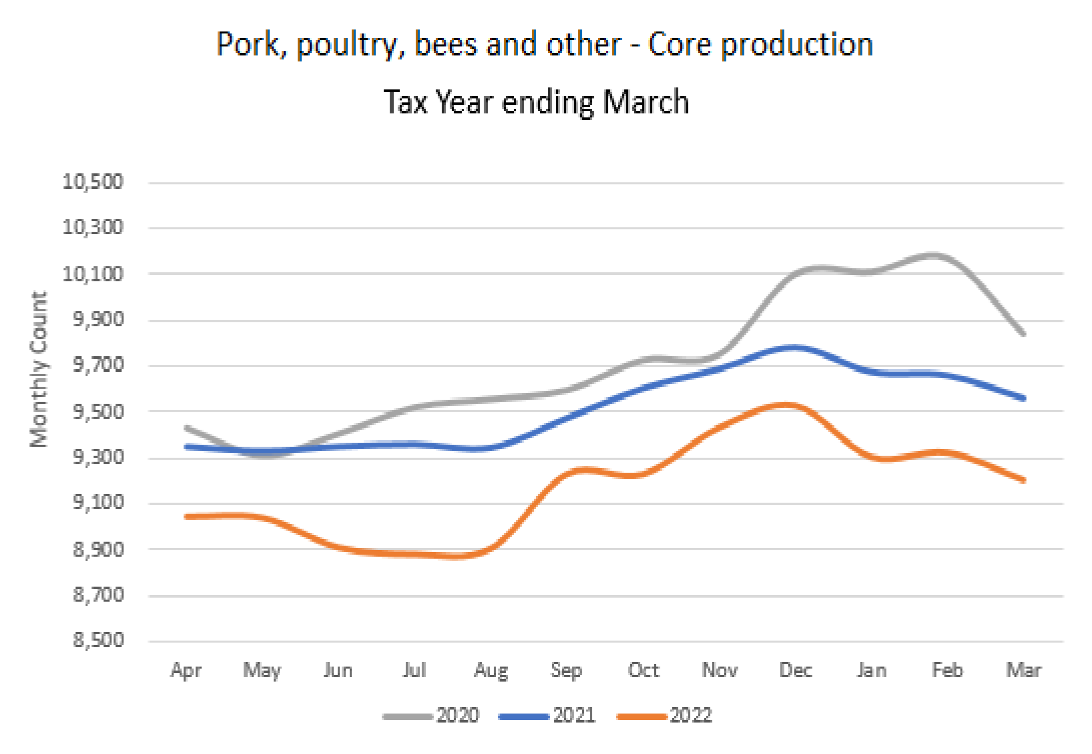
The processing and strongly connected workforce increased by around 400 during the second half of the 2022 tax year.



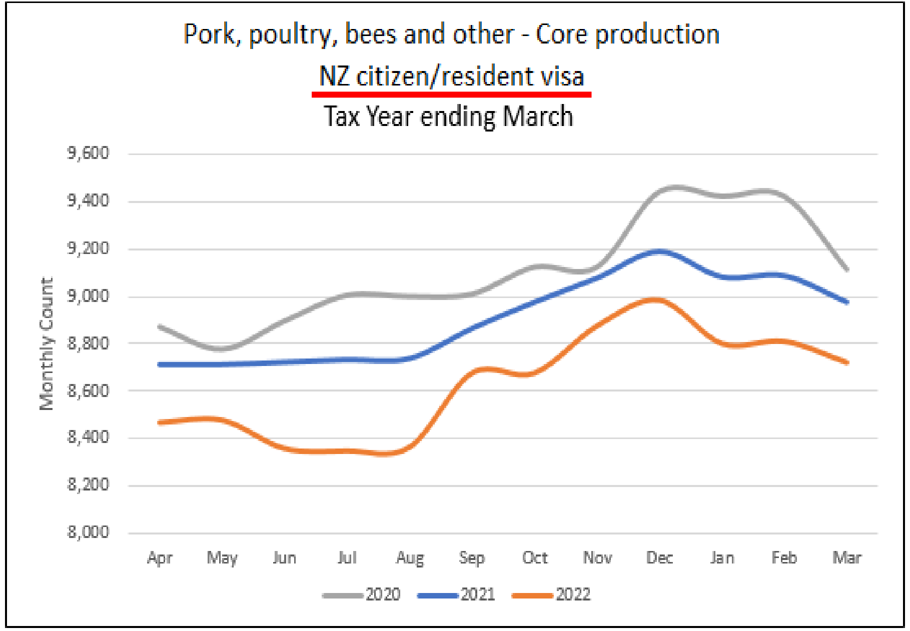


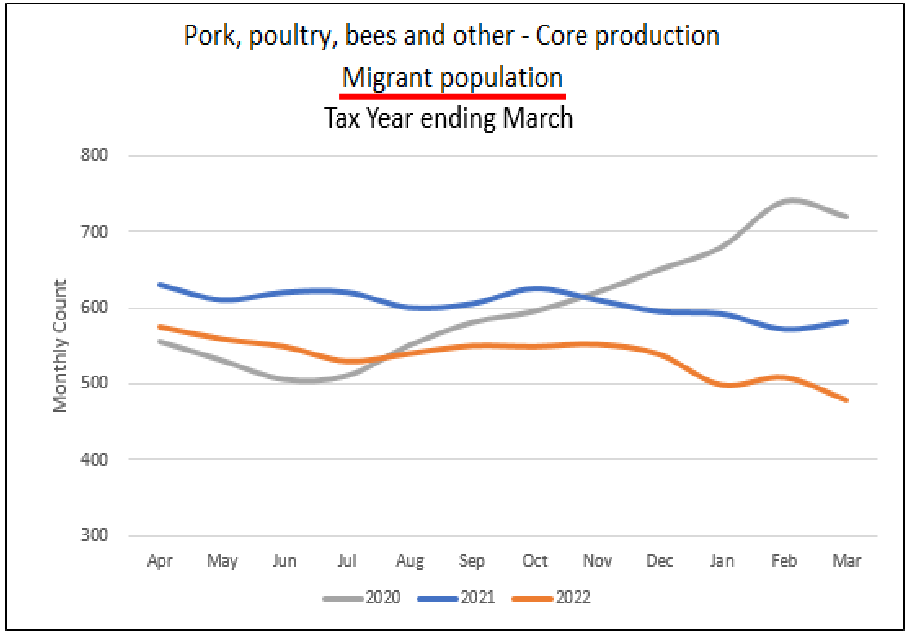
Note: *Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Pork, Poultry, Bees and Other



Overall, the pork, poultry, bees and other core production annual average workforce reduced by 383 people between the 2021 and 2022 tax years.

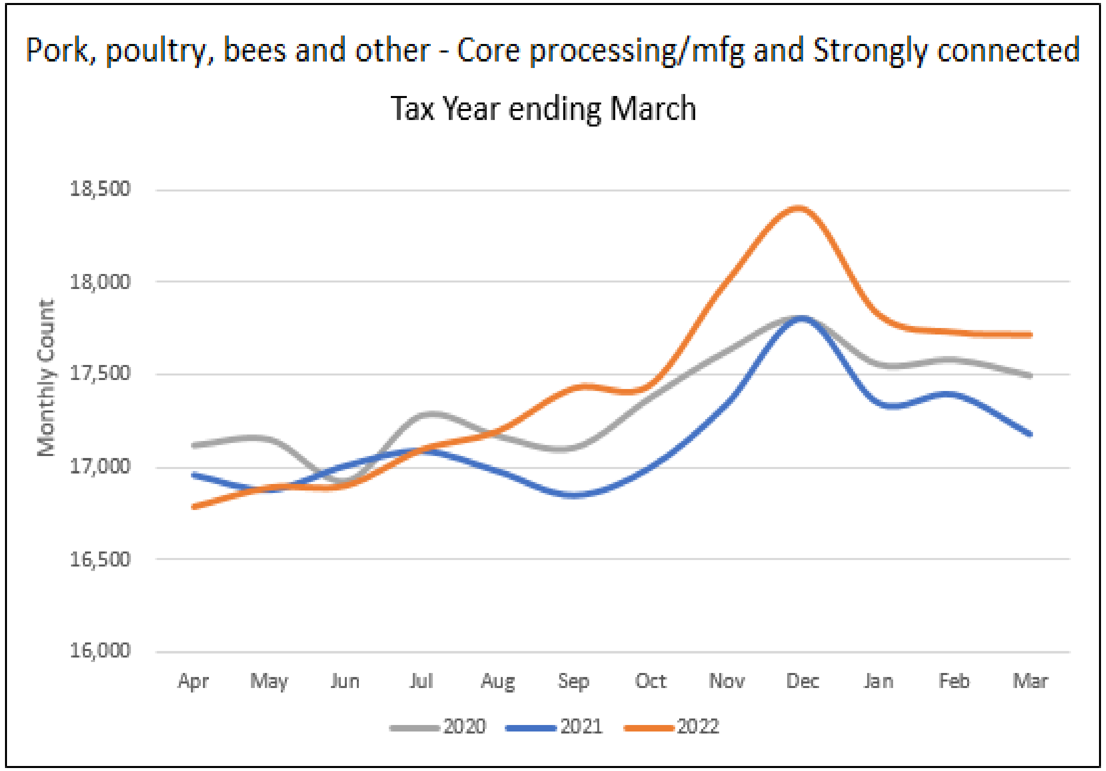


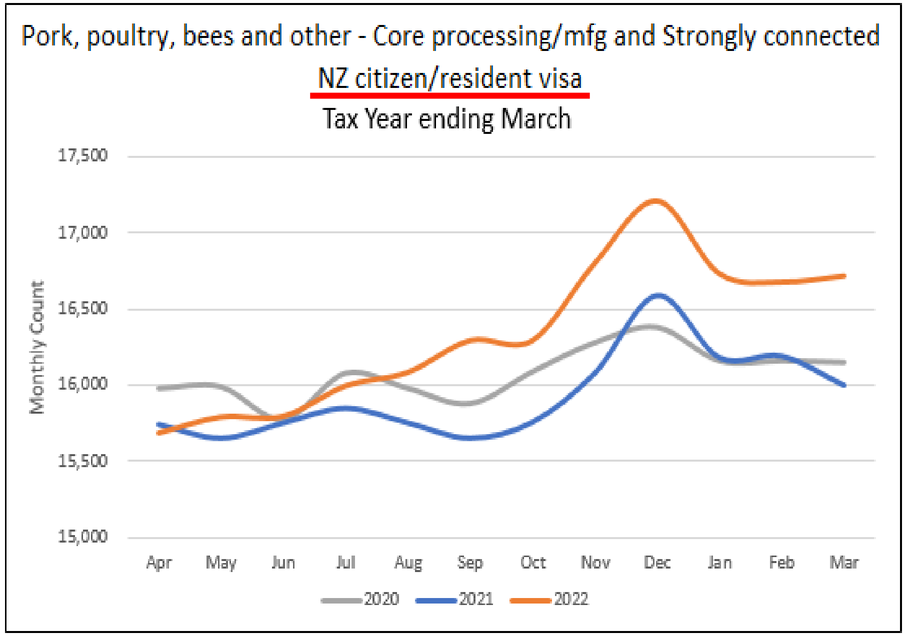


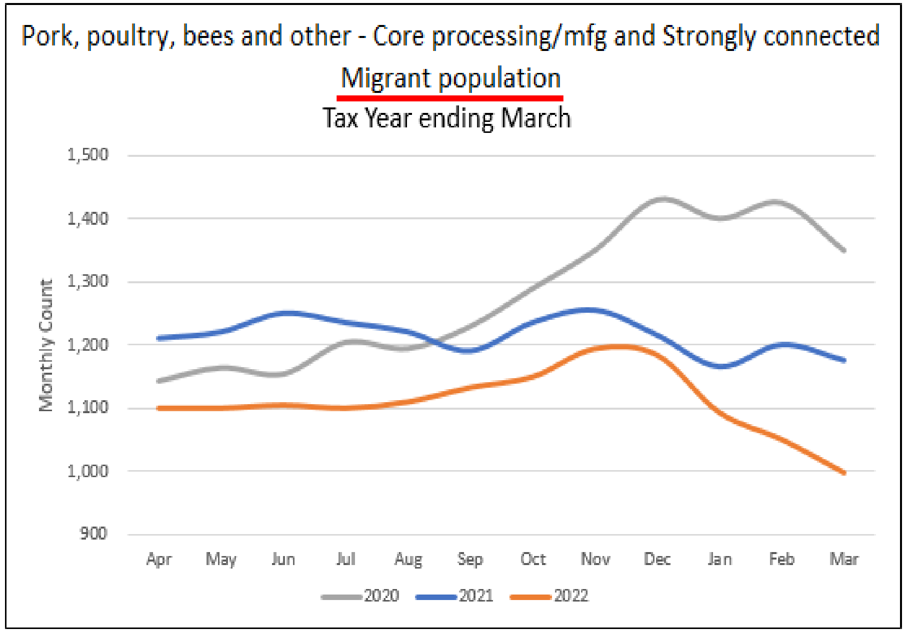
- In core production, self employment is the main driver impacting the reduction in the New Zealander's figures of circa 300 across all months.
- In core production, migrant numbers were slightly down across all visa types in the 2022 tax year (see page 47)

Note: *Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Pork, Poultry, Bees and Other







Overall, the pork, poultry, bees and other core processing workforce numbers were slightly higher than previous years, however migrant numbers declined in the latter part of the year due to fewer people on working holiday visas and other visas.

Note: *Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Red Meat and Wool

Key characteristics of Red meat & wool sector

- Over 60% of workforce in core production (i.e. Sheep and beef farming)
- High level of self employment in sheep and beef farming (1.8:1 self-employed:employee, compared to 0.7:1 self-employed:employee for dairy farming)
- 97% of workers in this sector are New Zealanders
- Reasonably stable workforce throughout the year

Changes in employment count

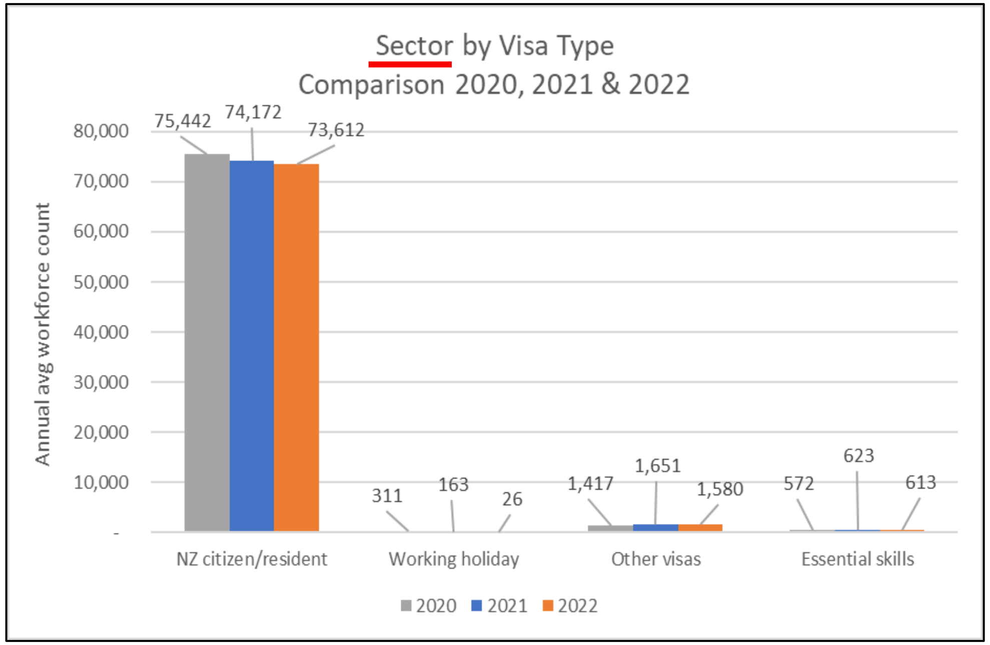
Red Meat and Wool

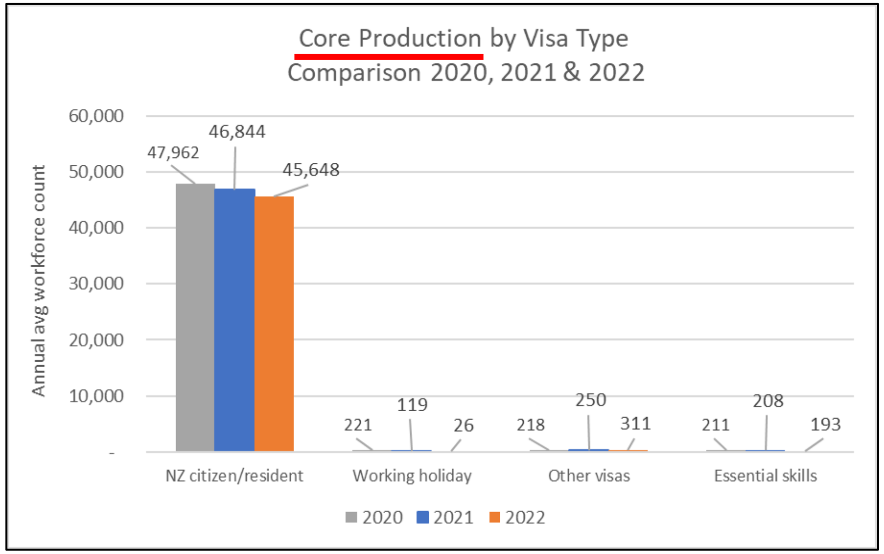
- Most of the change shown in the data was in core production
- Core processing was stable
- Most of the reduction in the numbers is in self-employed workers
- The reduction in self-employed numbers are seen across all sectors (see page 10), but is most pronounced in sheep and beef farming because of the high numbers of self-employed relative to total employment in sheep and beef farming
- It is unclear why self-employed numbers are down. This may, in part, be due to a delay in filing tax returns for the self employed and/or possibly the aging workforce are retiring. Our demographic data, which is due to be uploaded by 30 June 2024 to the website supports this aging analysis

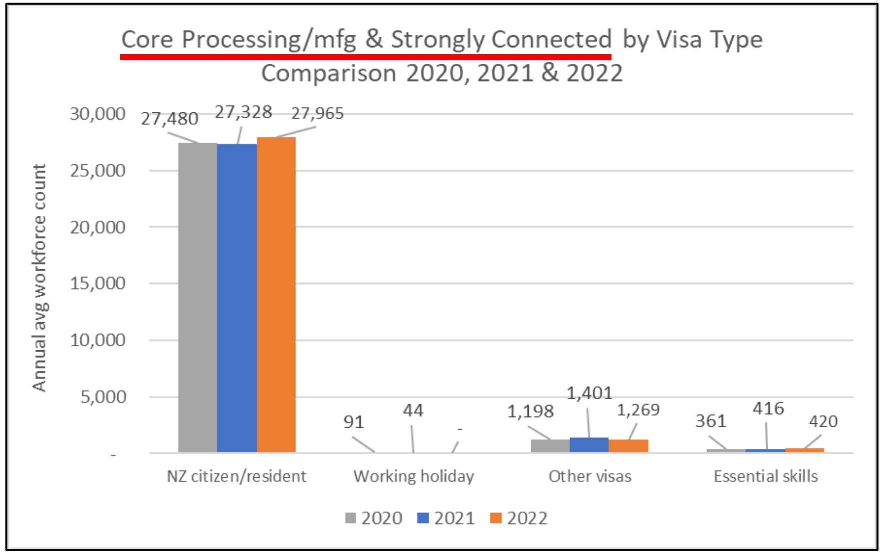
Red Meat and Wool

Annual average employment by visa type/resident status

The Red meat and wool sector had a decrease of 757 people (1.0%)





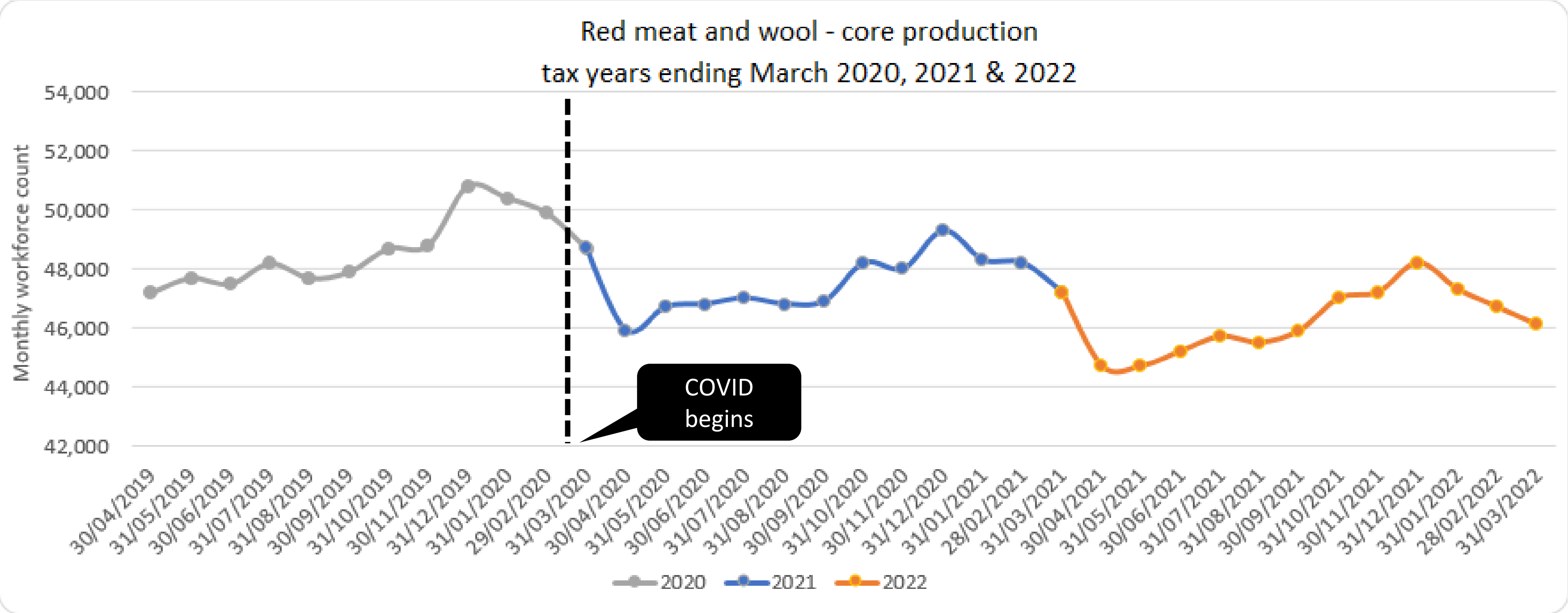


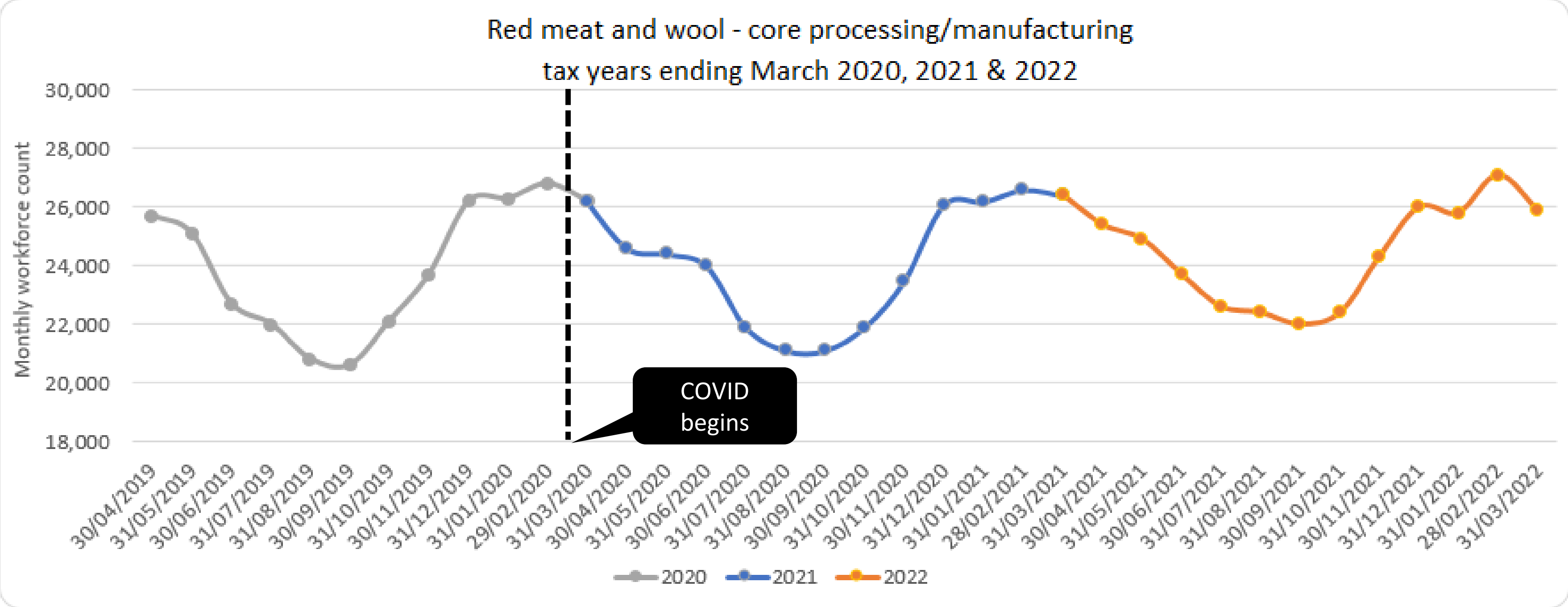
- The changes in annual average employment was mainly due to:
    i. A decrease in New Zealanders by 560
    ii. A decrease in working holiday visa holders by 137
    iii. An increase in other visas by 71

- The reduction in the number of New Zealanders in core production is driven by reductions in the number of self-employed workers

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

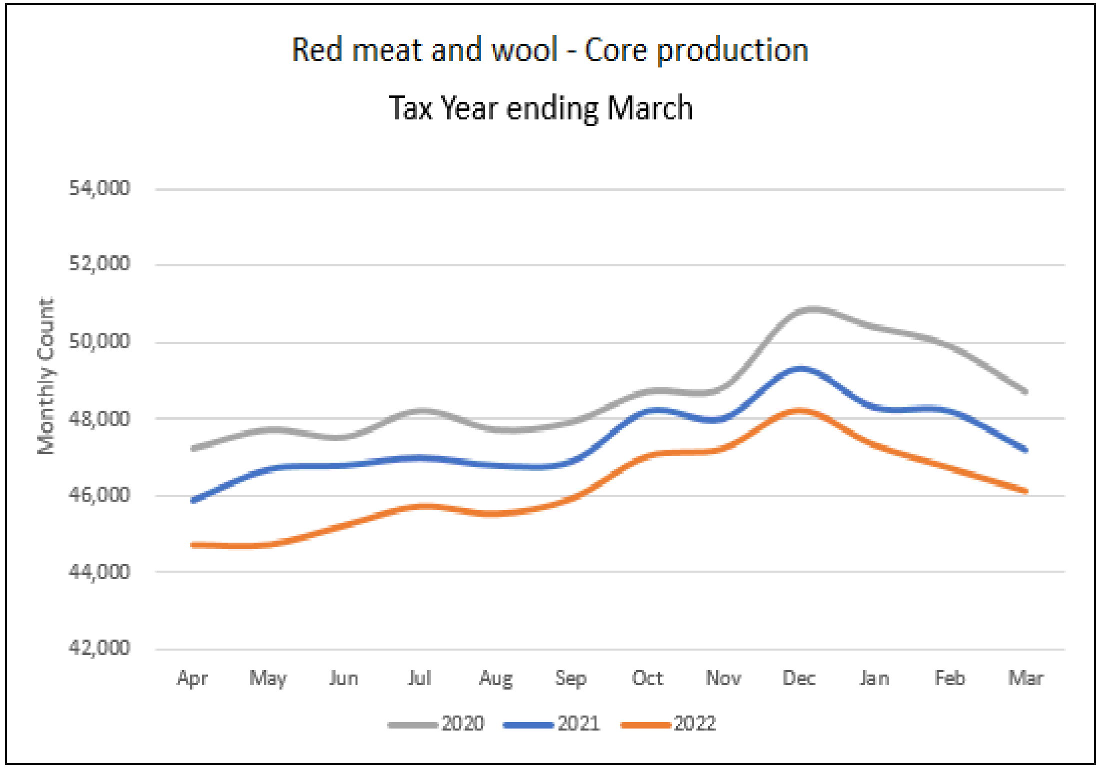
Red Meat and Wool

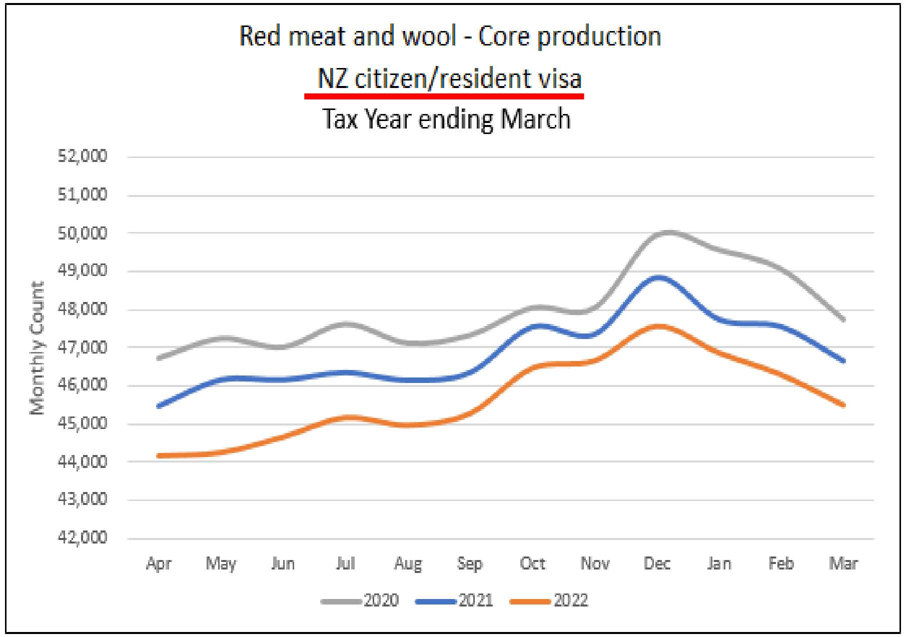


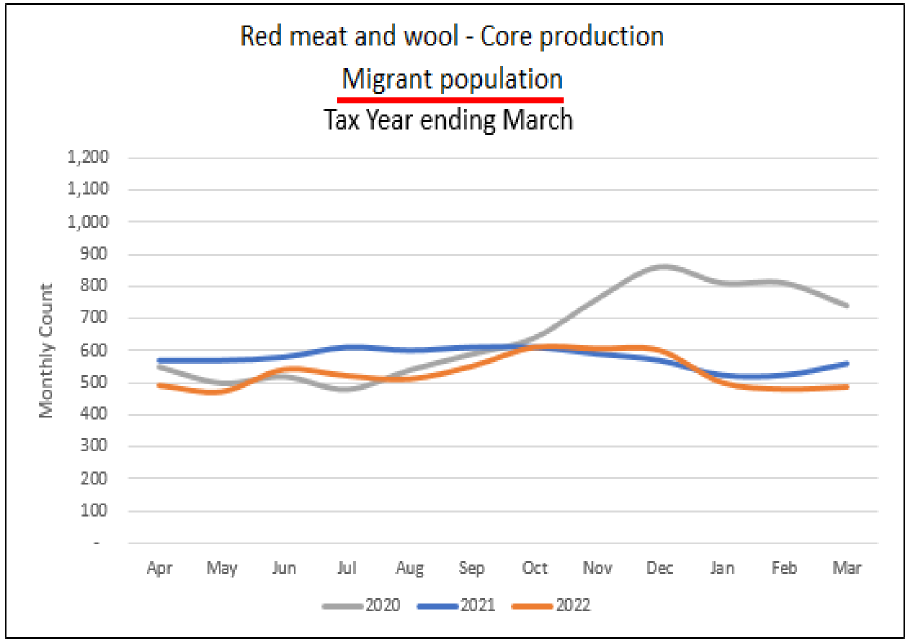


***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Red Meat and Wool



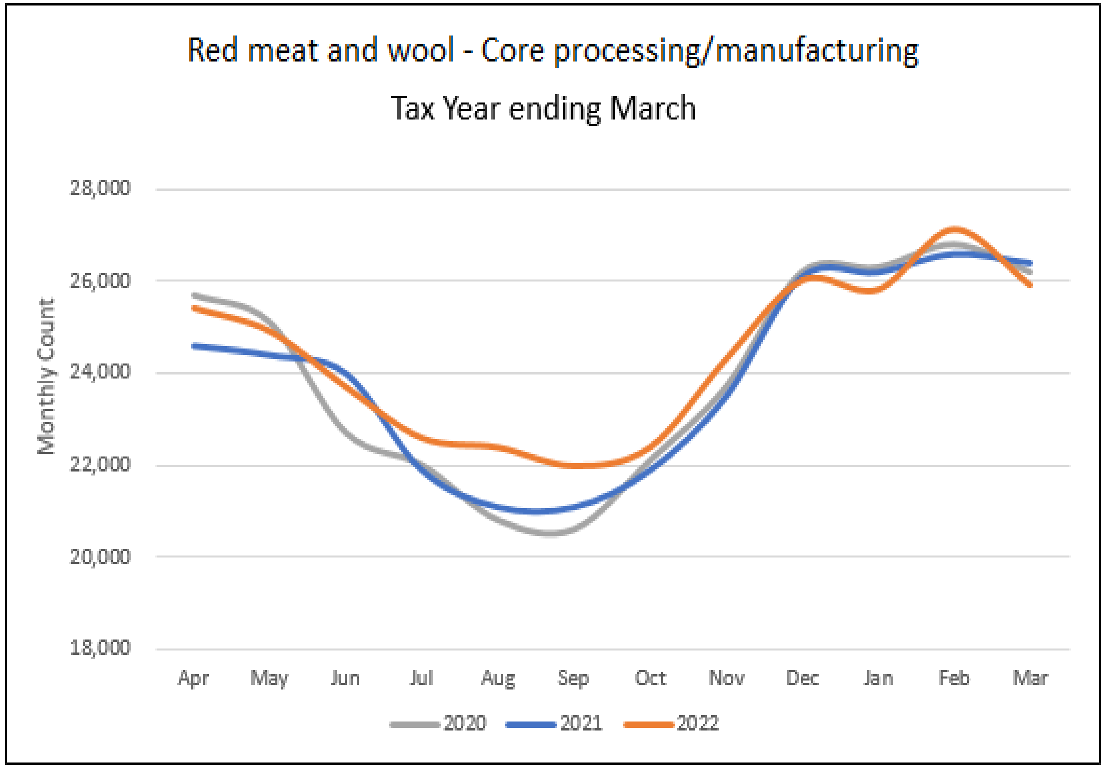


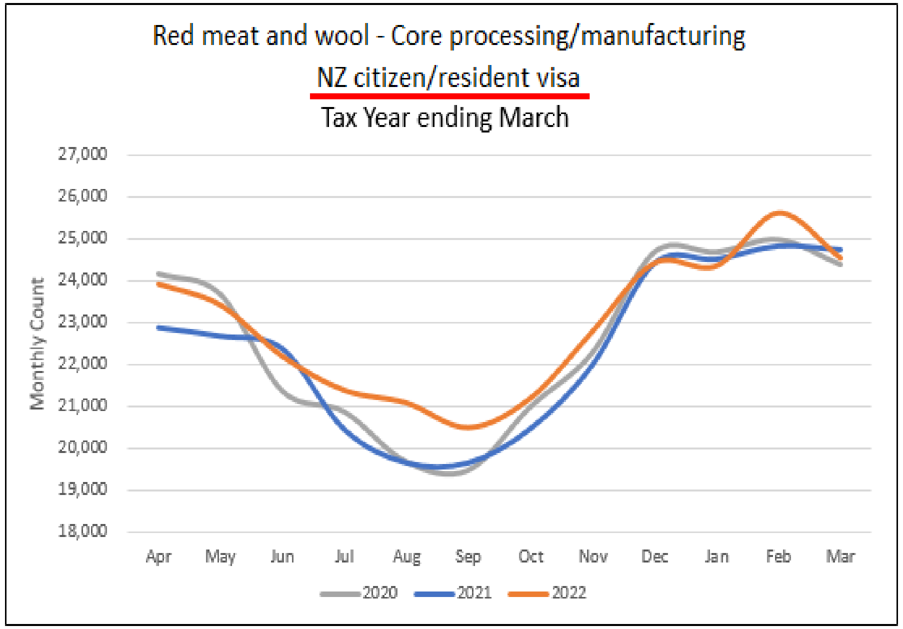


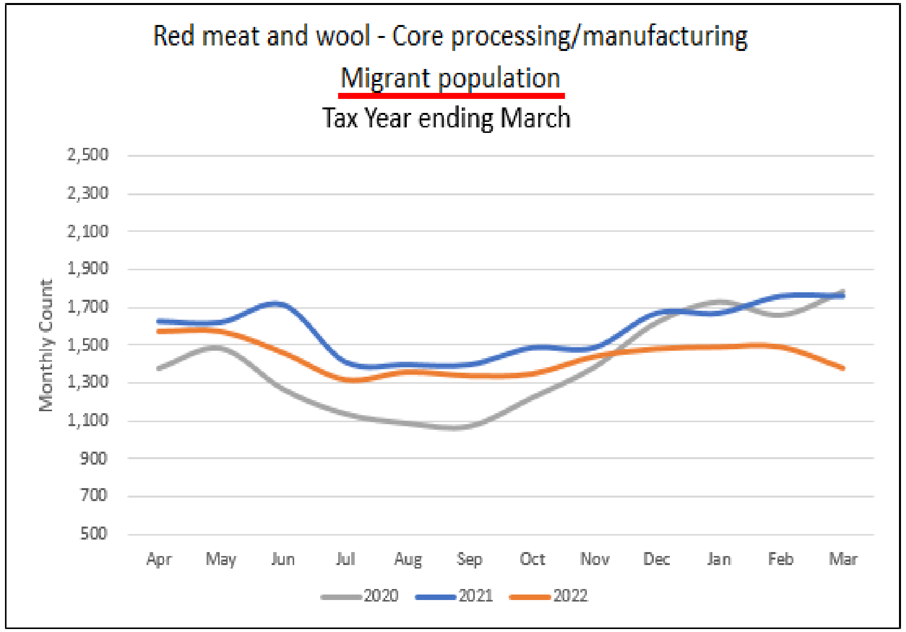
In the 2022 tax year, the reduction in the number of workers in core production was mainly due to a fall in the number of self-employed people. The 2022 migrant numbers mirrored the previous year.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the “y axis”, therefore a measure of caution should be exercised when interpreting this information.*

Red Meat and Wool







The number of people in core processing was similar to previous years, but with higher numbers in the July to September period.

Migrant numbers were similar to the previous year.

Note*: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Seafood

Key characteristics of seafood sector

- Smaller workforce (annual average 12,000) than other sectors (therefore small changes in numbers can be significant in terms of percentages)
- 50% of workforce is in core production
- Many firms are involved in both seafood processing and wholesaling, and so we often consider these workforces together
- The migrant workforce varies throughout a year
- People on working holiday visas are a small but important part of the processing workforce

Changes in employment count

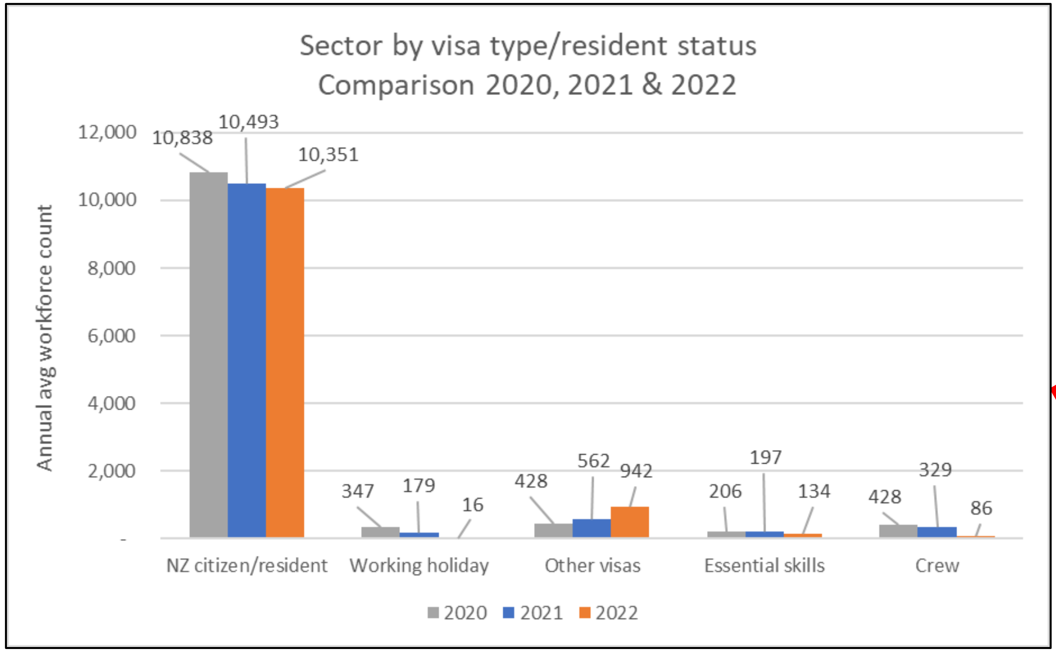
Seafood

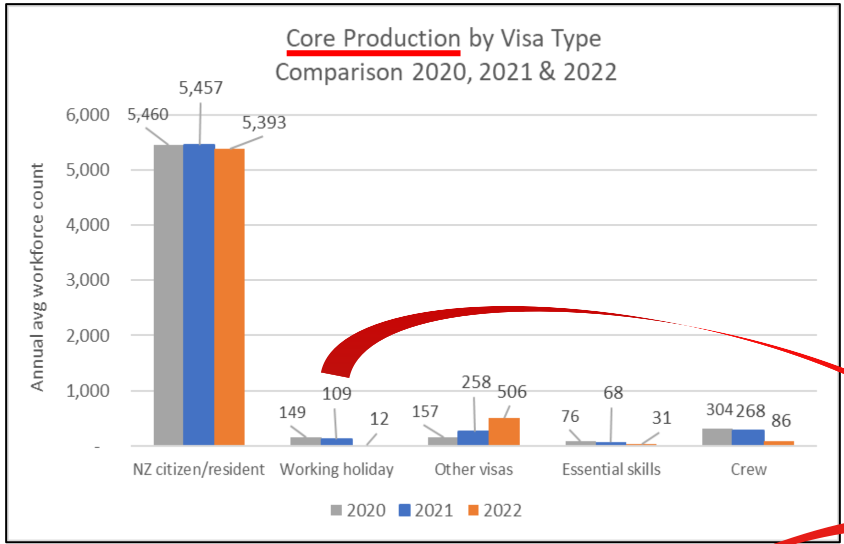
- Most of the changes were in core production workforce numbers
- This change was primarily due to a drop in New Zealanders (142) and Working holiday visa holders (163)
- The number of working holiday visa holders decreased as the year progressed. The reduction in numbers from the closed borders increased as the year progressed and people returned to their home countries. This can be seen both in the seafood figures and WHS figures more generally

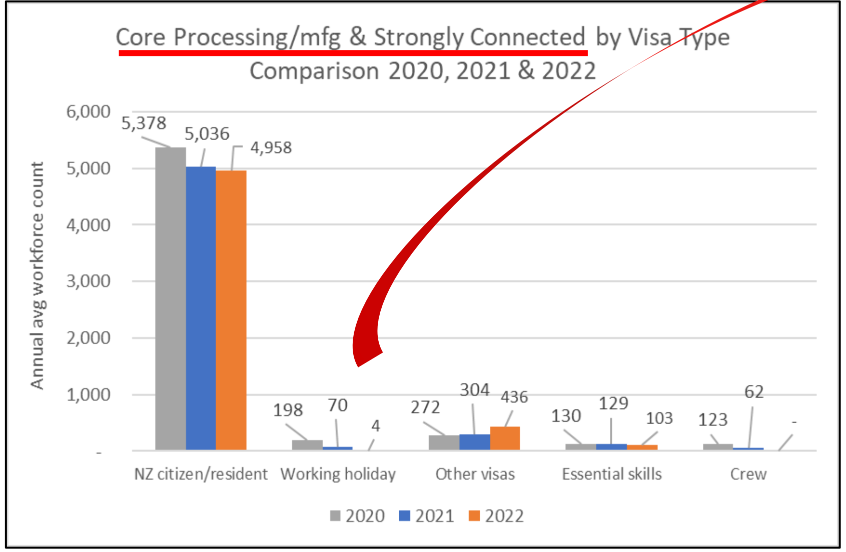
Seafood

Annual average employment by visa type/resident status

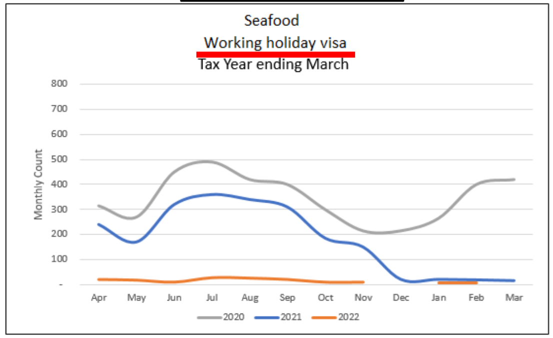
The Seafood sector had a reduction in annual average employment of 1% (172 people)







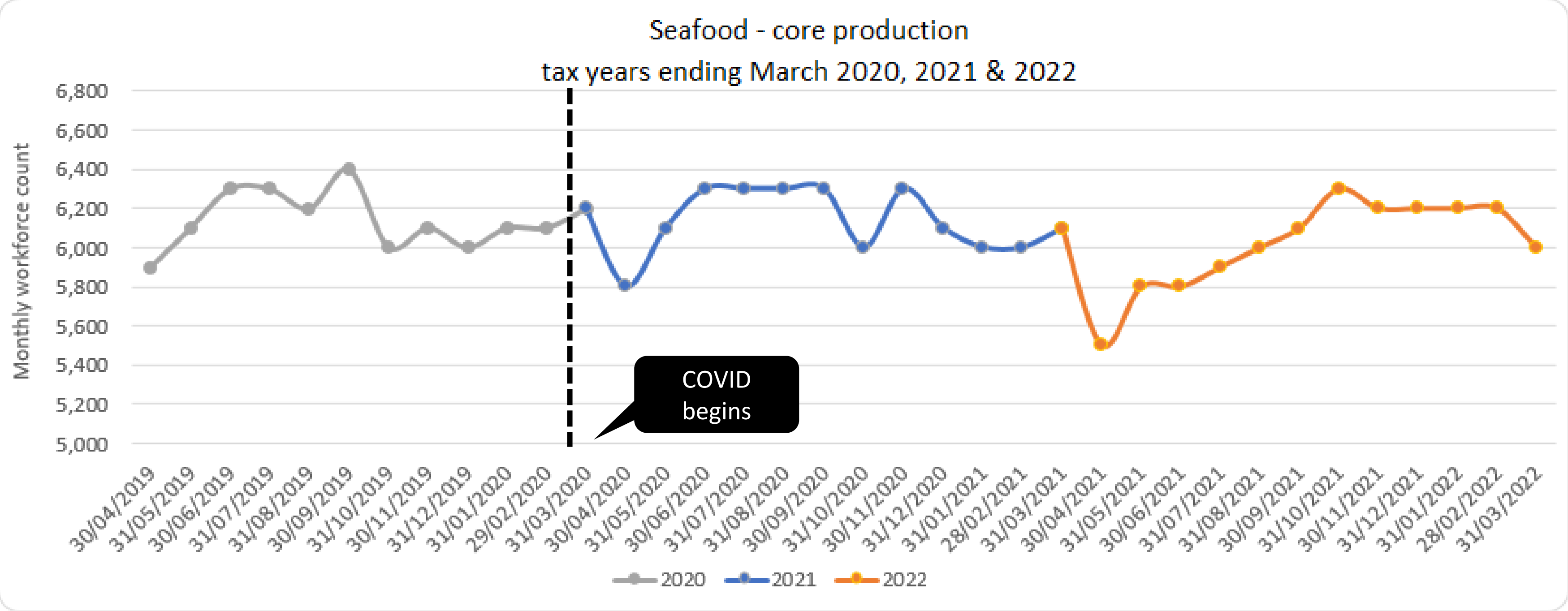
Monthly view

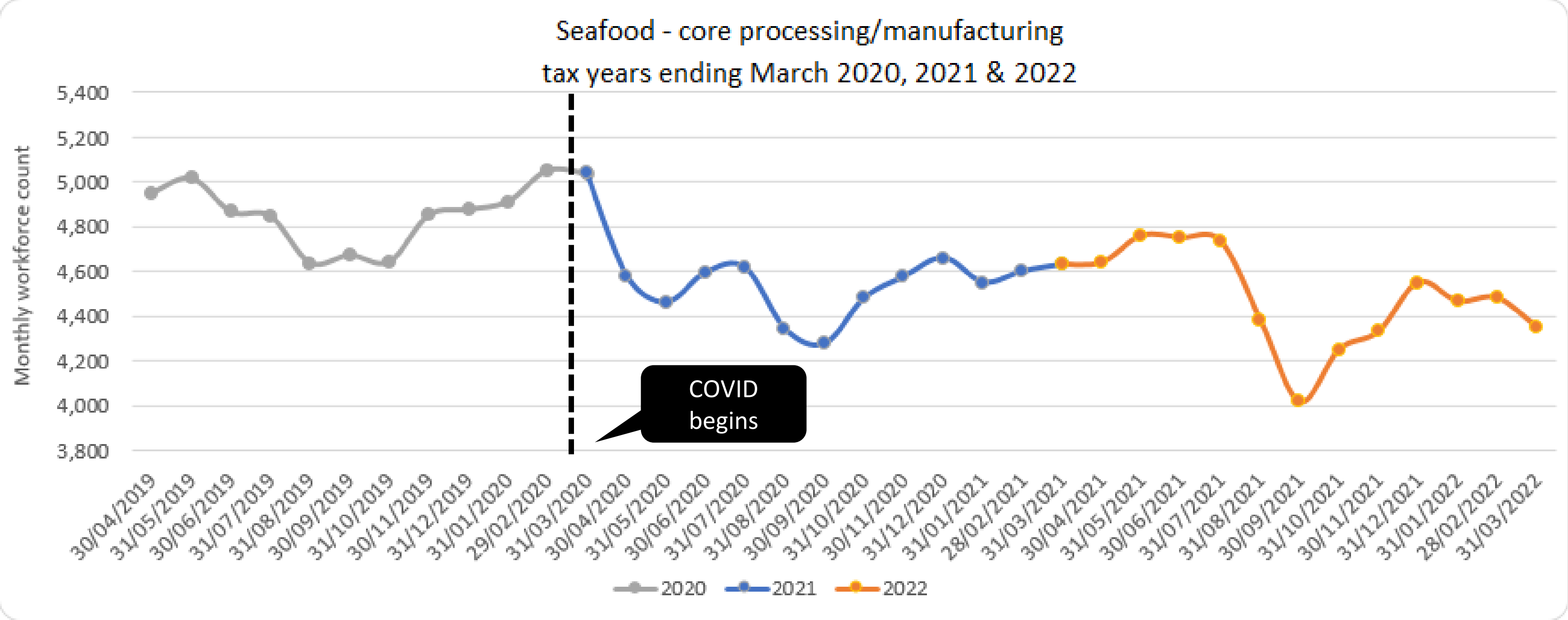


- The reduction in annual average employment was mainly due to:
  - i. A decrease in New Zealanders by 142
  - ii. A decrease in crew visa by 243
  - iii. An increase in other visa holders by 380
  - iv. Very few people on WHS
- In 2022, some crew visa holders appear in "other visas" as they entered New Zealand via the "critical purpose" visa type. So, whilst crew visas appear to have dropped 243 there was an offsetting rise in "other visas" by 380.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Seafood





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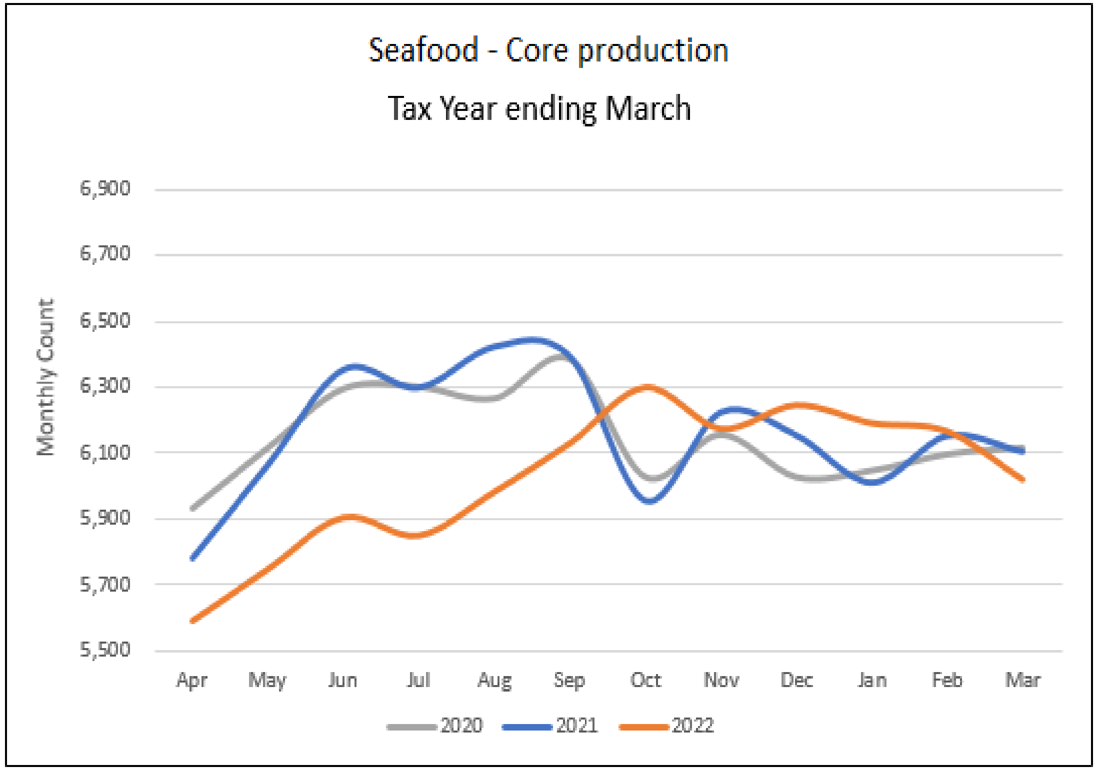
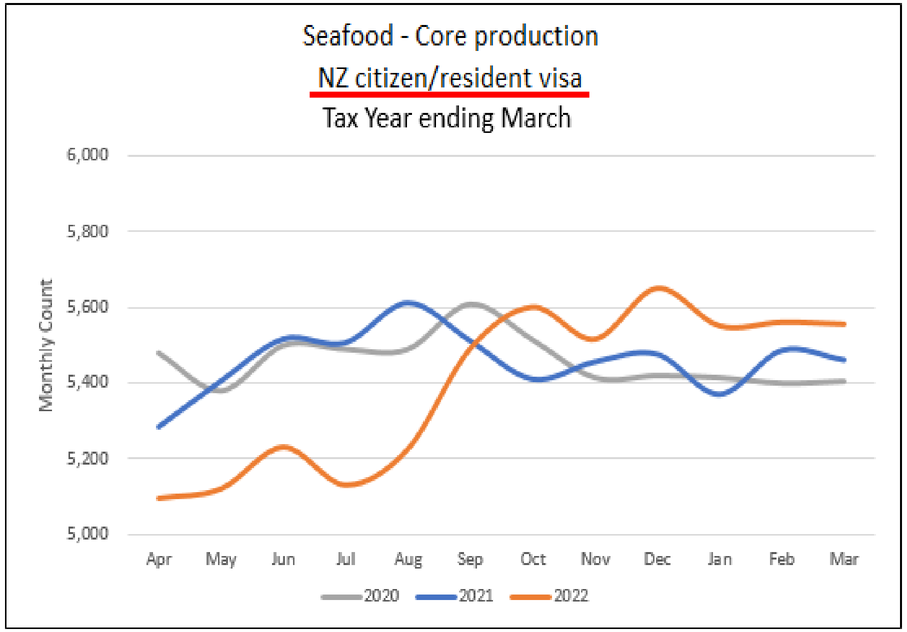
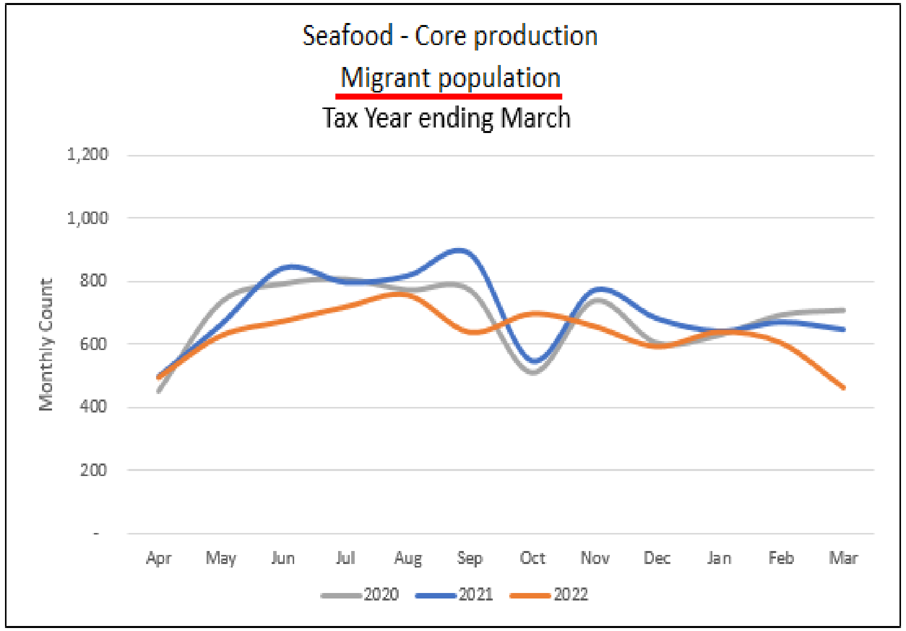
Seafood



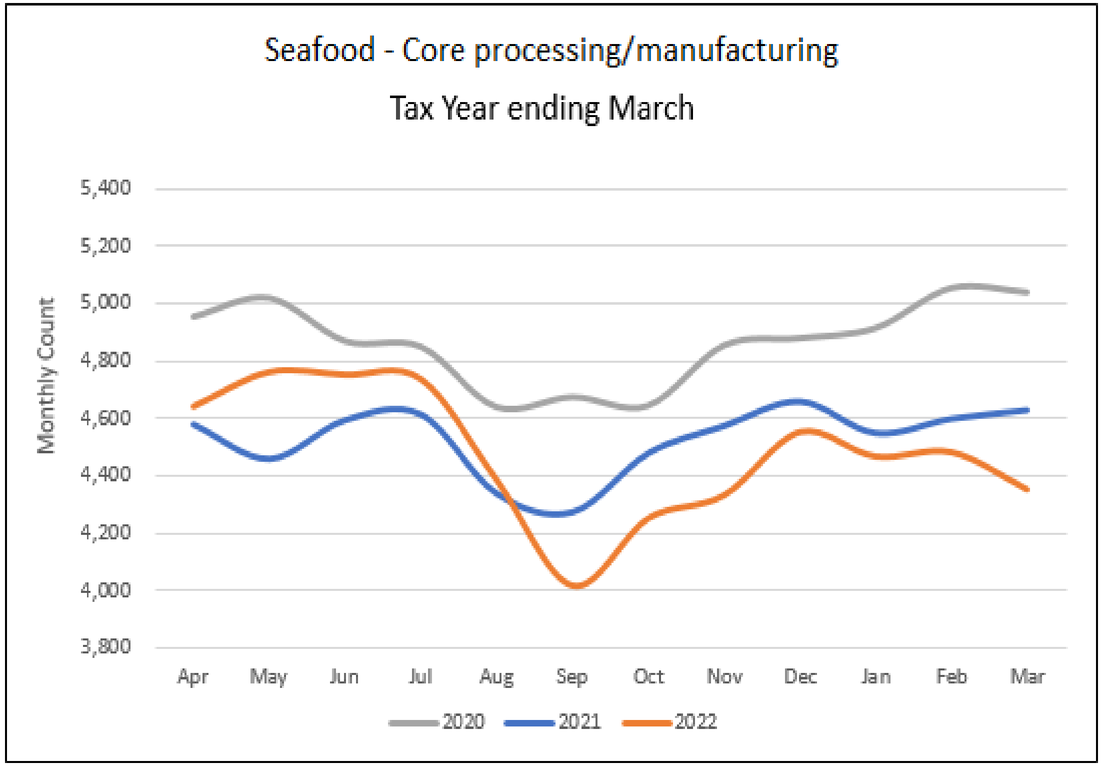


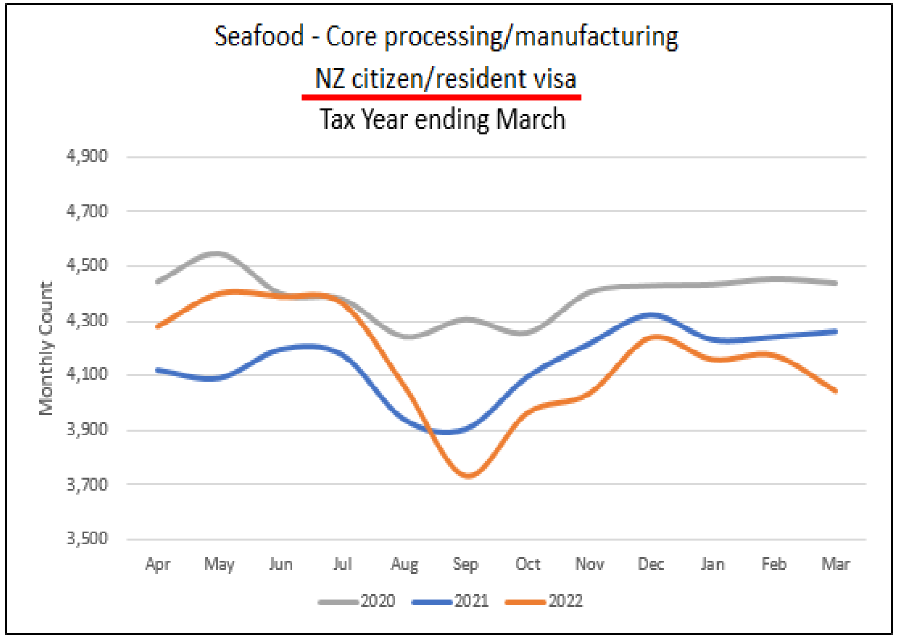


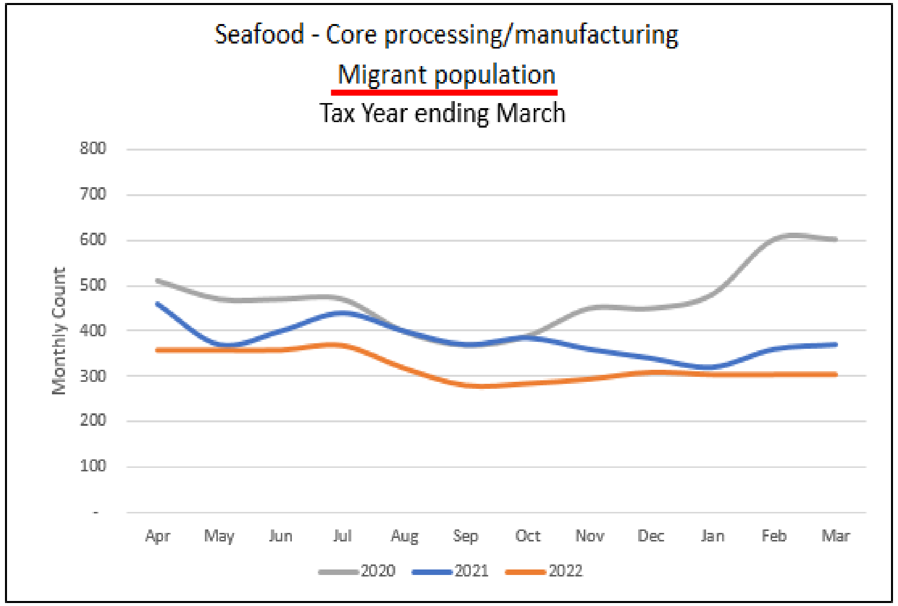
In the 2022 tax year, the overall seafood core production workforce was lower in the first half of the tax year by around 300-400 people. It then recovered to mirror the prior 2020 and 2021 tax years. This recovery has been driven by increased levels of New Zealanders.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Seafood







The seafood core processing workforce was smaller throughout the latter part of the 2022 tax year compared to previous years. The reduction in numbers was predominately due to fewer New Zealanders, although the smaller number of working holiday visa holders throughout the year also had an impact.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Cross Sector

Key characteristics of the Cross sector

- Cross sector includes activities/services that are not attributable to a single sector, rather they span multiple sectors/industries and include "other agriculture and fishing support services (including fruit picking), veterinarian services, fertiliser and pesticide manufacturing, aerial topdressing, road transport and some agritech and contracting firms (especially in horticulture)
- Over 40% of the cross sector workforce are in core production
- Over 40% of the cross sector workforce are in the relevant and/or other designation
- The majority of people (75%) in this sector are employees

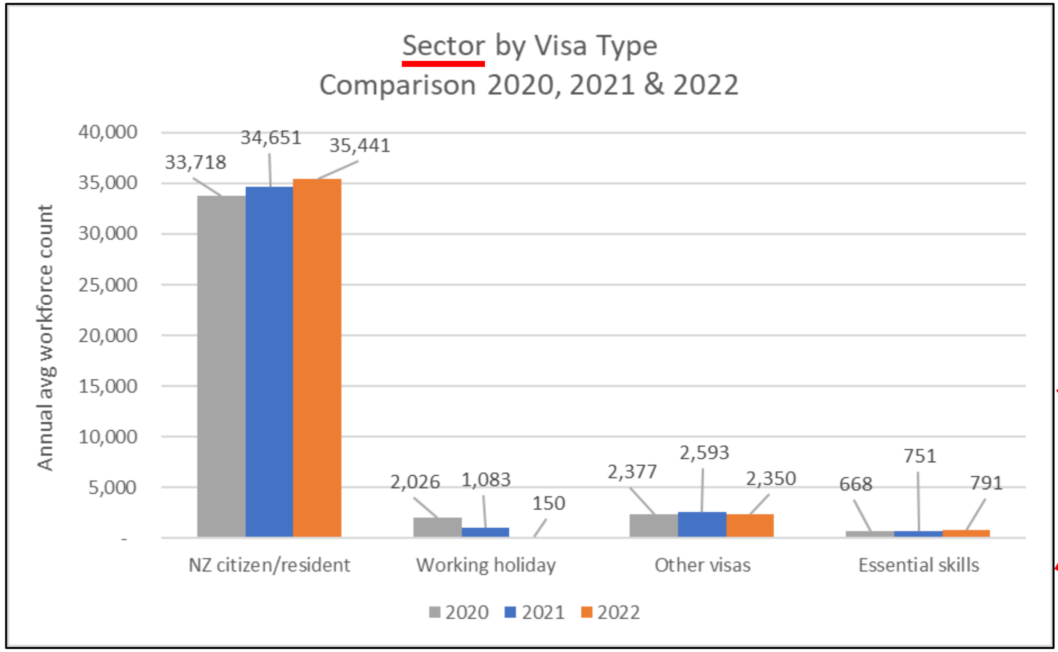
Cross Sector

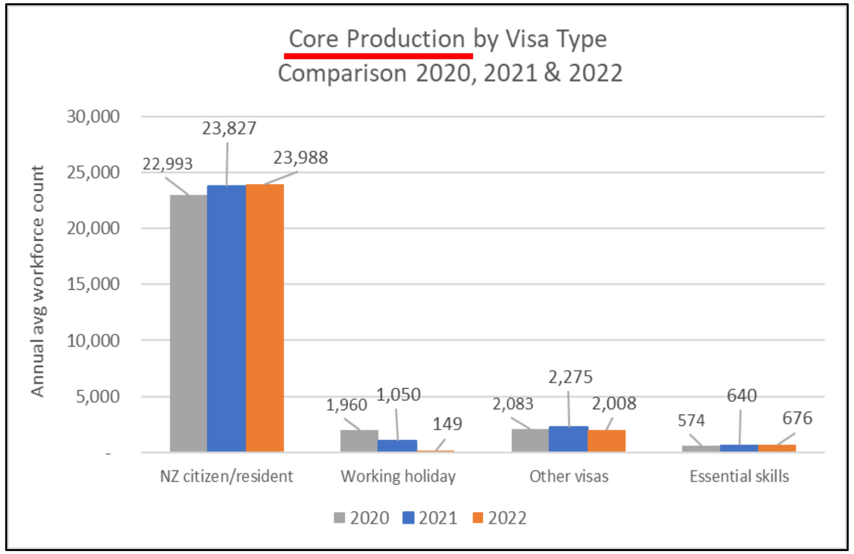
Changes in Cross sector employment counts

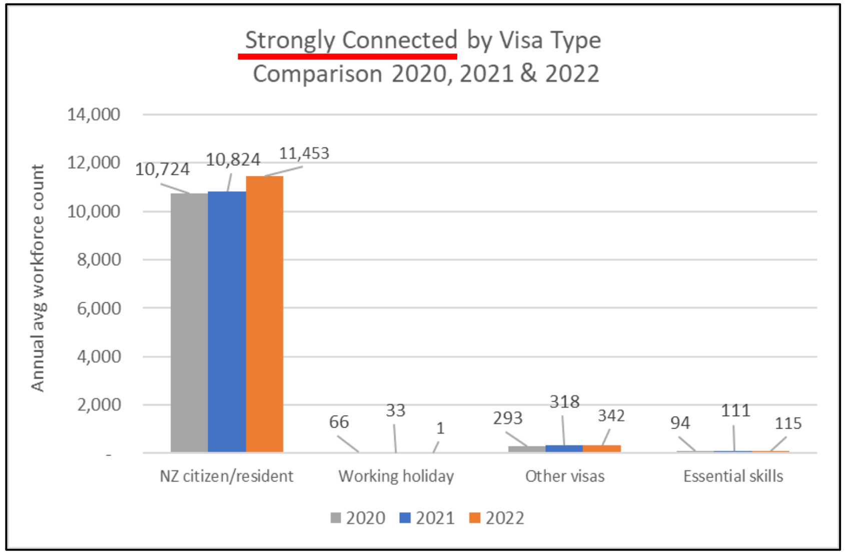
- Overall the annual average count went up by 671 (1.0%)
- There was an increase in the number of New Zealanders (790) in this sector
- There was a decrease in the annual average count of working holiday visa holders (933)
- In addition to those designations above, the 'Relevant' designation had an increase of 1,081 people. This was spread across a number of industries in this designation (see Cross sector relevant industries)
- Potentially the change in the relevant industry numbers may reflect economic factors relating to the wider economy, as our calculations are determined using a subset (15%) of a larger cohort
- For this sector, the graphs contain the core production and strongly connected designations

Annual average employment by visa type/resident status

The Cross sector classification had an overall increase of 671 people (1.0%)







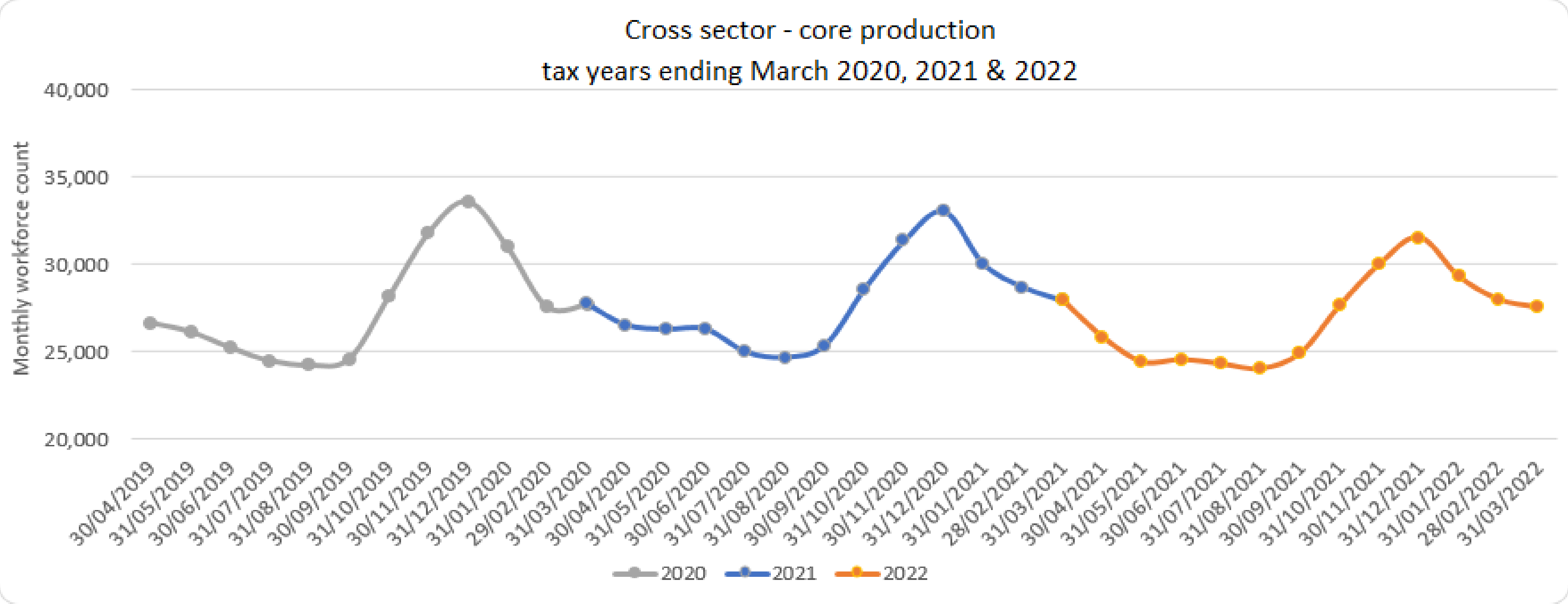
- The annual average change in employment was primarily due to:
    i. A decrease in working holiday visa holder by 933;
    ii. An increase in New Zealanders by 790; and
    iii. An increase in the relevant designation (not included in graph above) by 1,081.

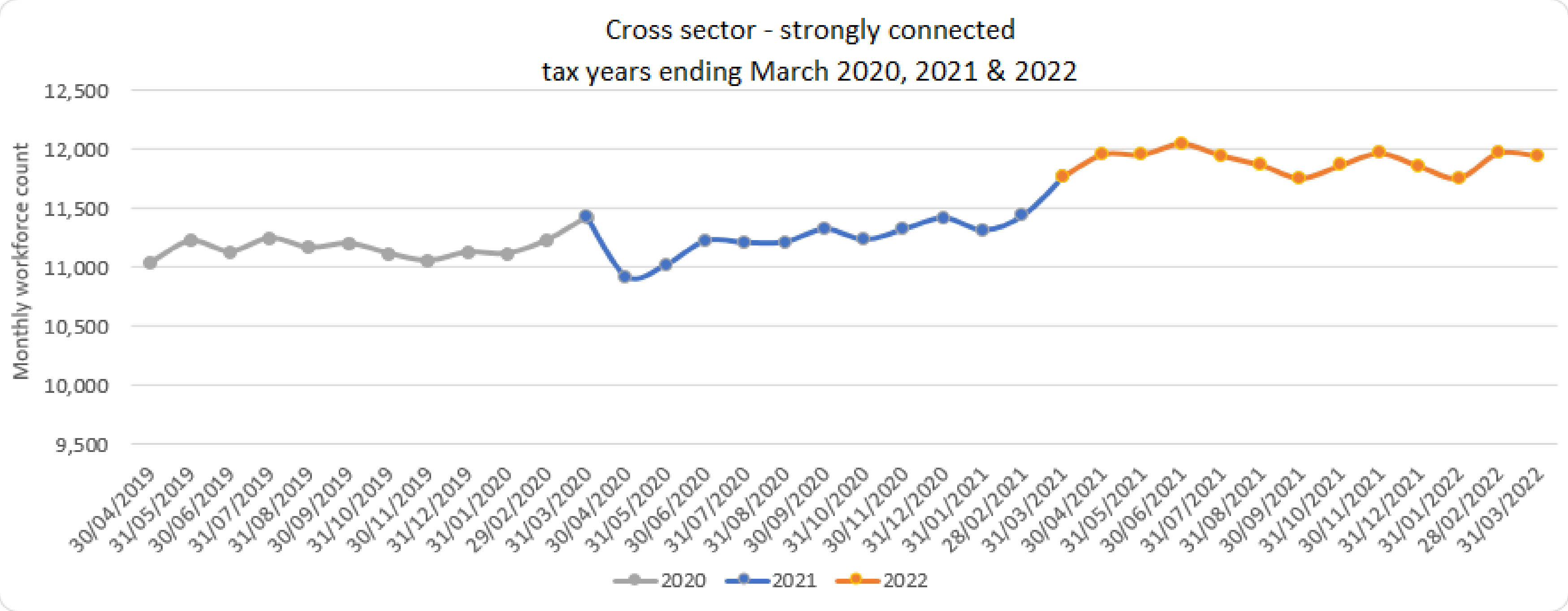
Note 1: These workforce counts exclude the relevant & other designation categories

Note 2: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.

Cross Sector

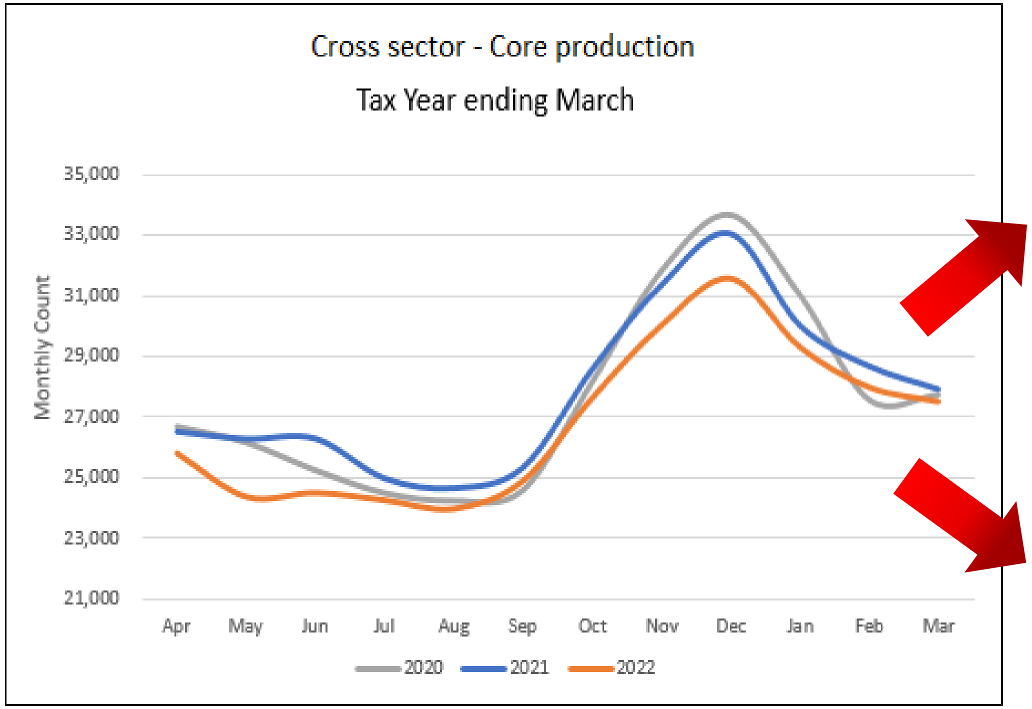
Core Production consists solely of the ANZSIC class Other agriculture and fishing support services

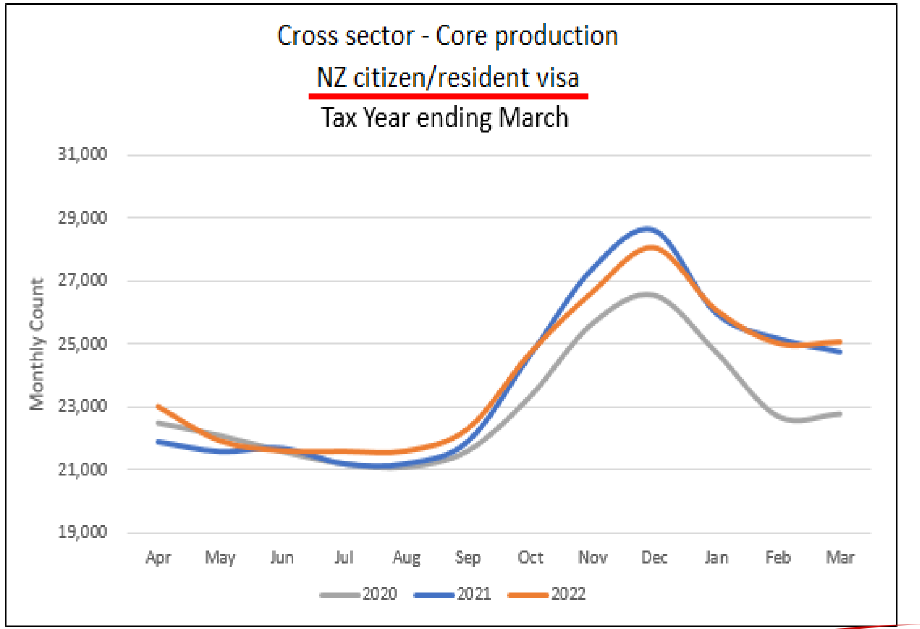


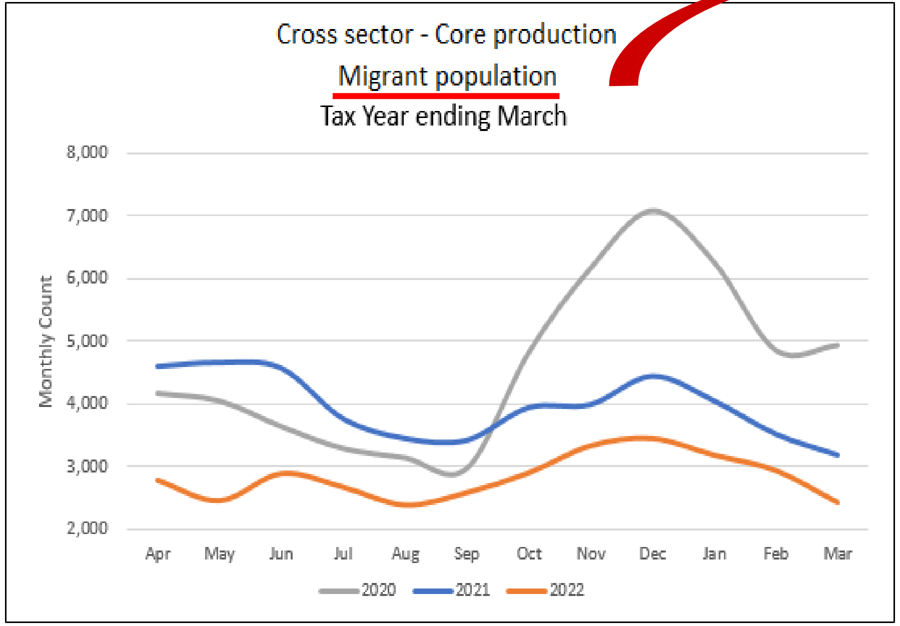


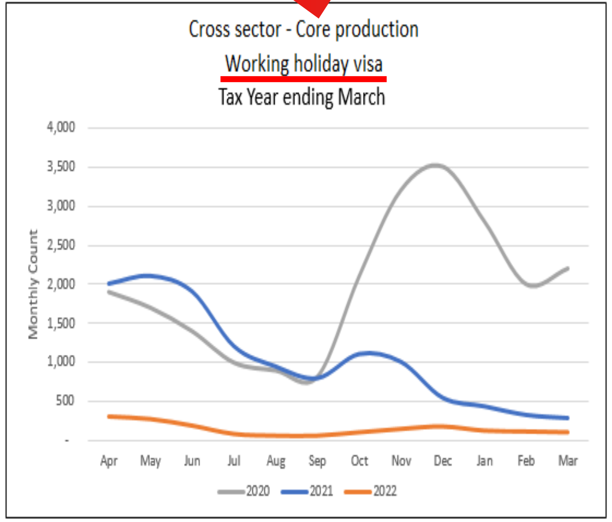
Note: *Workforce counts in each graph above are depicted using various numerical scales via the “y axis”, therefore a measure of caution should be exercised when interpreting this information.*

Cross Sector







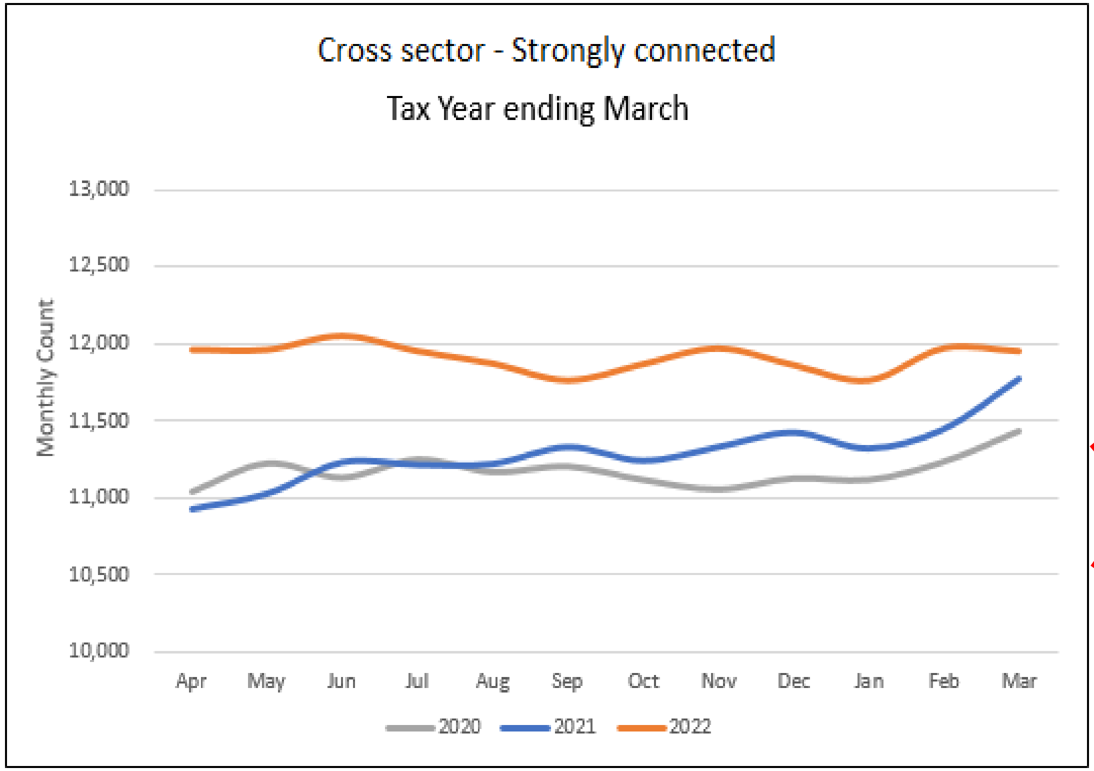


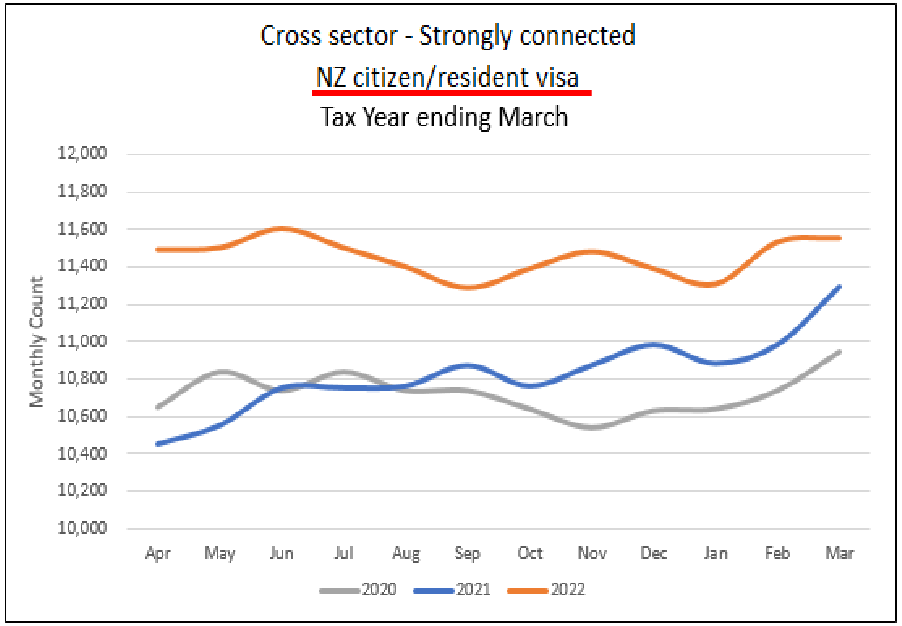
The seasonal pattern in the 2022 tax year was similar to that of the two previous years, with a slight dip around the peak demand months of November to December.

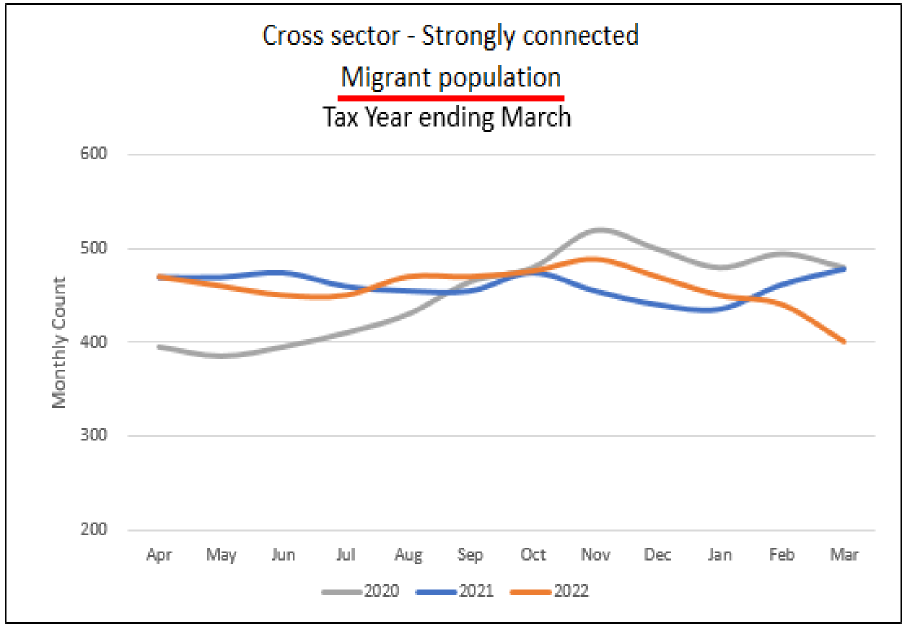
The reduced number of migrants (predominately people on working holiday visas) was low across the whole tax year.

***Note**: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*

Cross Sector







Overall, the cross sector strongly connected workforce increased by 600 people, mostly driven by increased personnel in the veterinary services industry (by 517 people to 7,175).

Note*: Workforce counts in each graph above are depicted using various numerical scales via the "y axis", therefore a measure of caution should be exercised when interpreting this information.*