

Workforce pressures facing the food & grocery manufacturing sector

Report for AFGC

May 2026



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Disclaimer

May 2026

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To discuss the report further please contact:

Emily Dabbs: edabbs@oxfordeconomics.com

Oxford Economics Australia

Level 6, 95 Pitt Street, Sydney, 2000, NSW

Executive summary

Structural labour market tightness is increasing workforce pressures

- Strong employment growth and historically low unemployment have tightened labour markets across Australia.
- While labour supply has improved, demand continues to outpace supply in many occupations.

The sector faces growing workforce risks with demand projected to exceed workforce supply in key occupations

- Around 10% of occupations in the food and grocery manufacturing sector currently face workforce shortages, with pressures most acute among technicians, trades, machinery operators and drivers.
- Workforce pressures vary by role but are expected to intensify over the coming decade.
- Modelling indicates growing workforce gaps across all key roles modelled in this work, ranging from 650 workers (forklift drivers) to nearly 5,000 workers (packers).

Ageing and retention challenges are key drivers of workforce shortages in key occupations

- Many occupations within the sector have older age profiles, increasing retirement-related attrition.
- In some occupations, more than 40% of the workforce is expected to leave within the next decade.
- Despite attracting a strong pipeline of new entrants through education channels, many key occupations face a net outflow into other industries. This reflects challenges in providing strong career pathways.

Addressing workforce pressures will require multiple responses

- Improving attraction and retention of workers into the food and grocery manufacturing sector and key roles
- Strengthening education and training pathways such that there are clear pathways into the occupations of need
- Ensuring migration settings support sector needs and are targeted towards those occupations where challenges are most acute
- Investing in automation and productivity improvements to reduce the potential impact on the food and grocery manufacturing sector's potential growth path

The image features several large, overlapping, curved shapes in various shades of light blue and teal against a white background. The shapes are positioned on the left and right sides of the frame, creating a sense of depth and movement. The word "Background" is centered in the lower right area of the image.

Background

Project background

Oxford Economics has analysed workforce challenges in key occupations across the sector

- Australia's food and grocery manufacturing sector is a critical part of the national economy and supply chain, employing tens of thousands of workers across production, logistics, and management roles.
- In recent years, the Australian labour market has tightened significantly, with employment demand outpacing labour supply following the COVID-19 pandemic. This has created workforce pressures across many industries, including food and grocery manufacturing.
- The Australian Food and Grocery Council (AFGC) commissioned Oxford Economics Australia to examine workforce pressures across key occupations in the sector. The aim of this analysis is to provide an evidence base to support discussions with government and stakeholders on workforce challenges and potential policy responses.
- This work focused on three areas of analysis:
 1. Assessment of workforce demand and supply across five key occupations that are critical to sector operations.
 2. Analysis of labour supply drivers including education pathways, migration, workforce mobility and ageing.
 3. Modelling of future workforce gaps over the next decade based on projected demand and supply dynamics.
- Key occupations in focus for this report include:
 - Food and drink factory workers
 - Packers
 - Forklift drivers
 - Purchasing and supply logistics clerks
 - Manufacturing production managers
- These occupations were selected due to their importance to the sector, indicators of workforce pressure, and vulnerability to future supply constraints.

Labour market backdrop

A tight labour market post-COVID presents occupational challenges for the sector

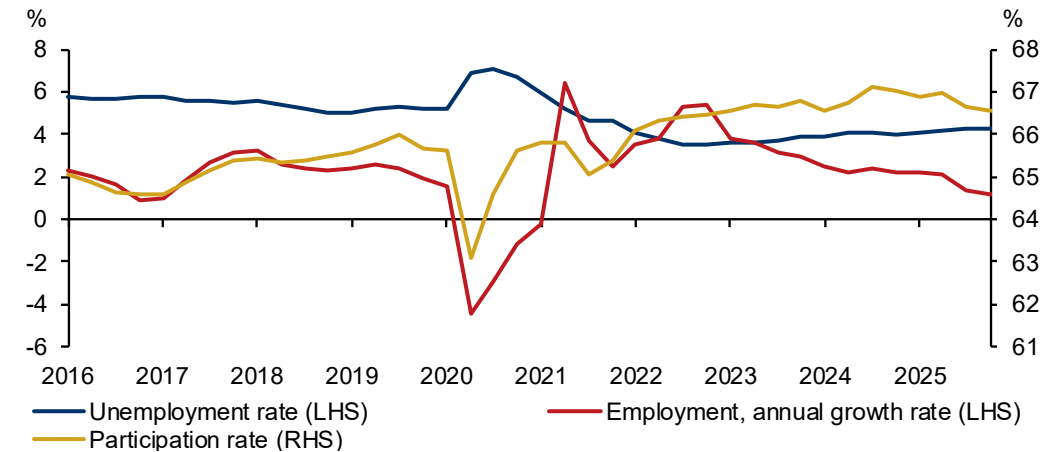
Employment demand has outstripped labour supply post-COVID, creating workforce pressures across the Australian labour market.

- Employment has steadily increased between 2020 and 2025 at an annual average rate of 3.0%. Fiscal stimulus resulted in a surge in labour demand post-COVID, with strong public sector activity supporting ongoing growth over the past few years.
- Labour supply has also grown consistently since COVID, easing some of the labour demand pressures. The working-age population grew at an annual average rate of 1.5% between 2020 and 2025, with net overseas migration returning to pre-COVID levels after peaking in FY23. Labour supply growth is further supported by strong workforce participation, with the participation rate reaching a record high of 67.1% in 2024 Q3.
- The unemployment rate has fallen to historically low levels as demand outstrips supply growth. The unemployment rate has remained in a band of 0.3 percentage points around 4.0% in every quarter since 2023 Q3. This is in comparison to the COVID peak of 7.0% in 2020 Q3. Underemployment and underutilisation have also decreased on average since late-2021, remaining well below pre-COVID levels.

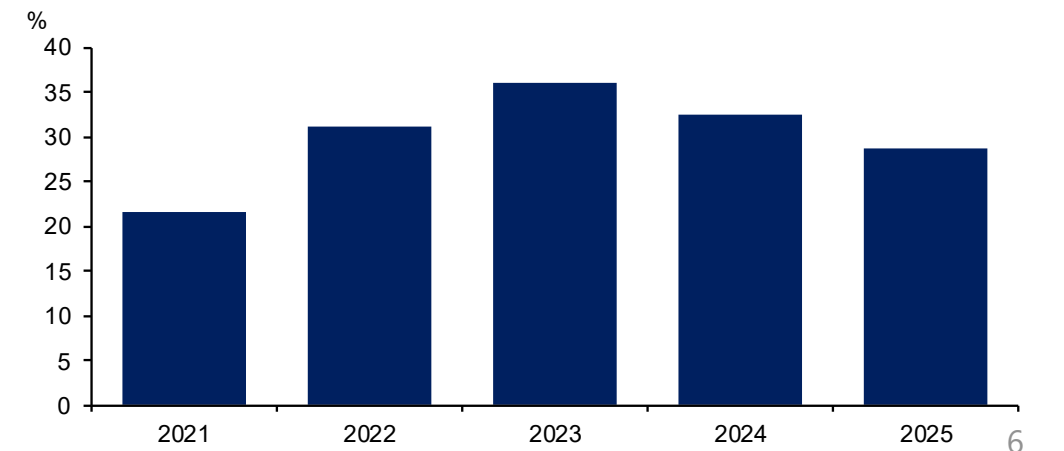
The tightness in the labour market is not even, with some occupations facing more challenges than others.

- In 2021, 22% of occupations across the Australian labour force were in national shortage, and this reached a peak of 36% in 2023, before moderating to 29% in 2025. This recovery is partially driven by easing shortages in professional roles, where the integration of AI technologies has eased demand pressures.
- Occupational shortages are most acute for technicians and trade workers and machinery operators and drivers.

Australian labour market conditions, 2015 to 2025



Share of occupations in shortages, total labour force, 2021 to 2025



Food and grocery manufacturing workforce overview

Labour demand is expected to grow even as investments focus on productivity gains

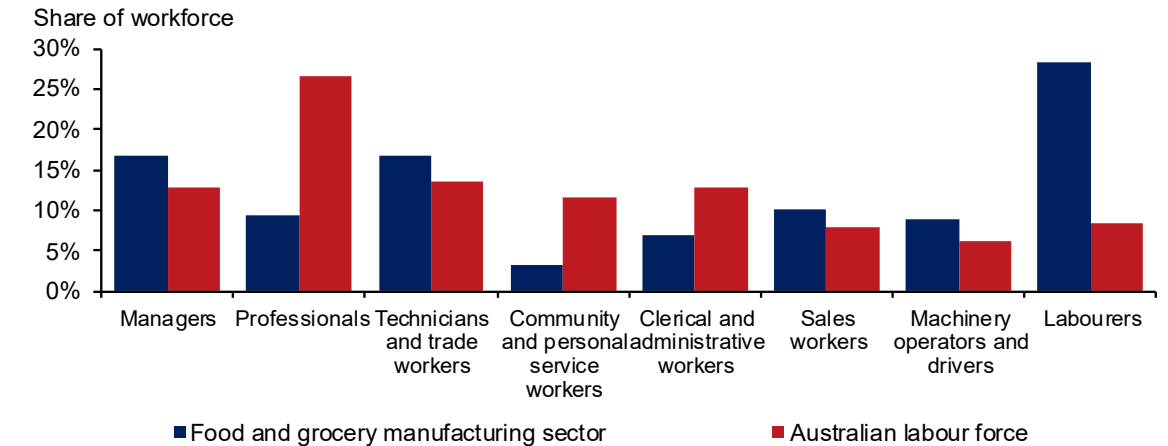
The food and grocery manufacturing sector is an important sector in the Australian economy and is facing workforce pressures.

- Total employment in the food and grocery manufacturing sector reached nearly 300,000 in FY24, accounting for around 2% of total employment in Australia.
- The workforce is concentrated in labourer (28%), and technician and trades workers (17%) roles, which creates unique workforce challenges compared to the broader labour market.
- An estimated 10% of occupations in the food and grocery manufacturing sector are facing some form of workforce shortage. In some cases, manufacturers are investing in automation to alleviate these workforce pressures.

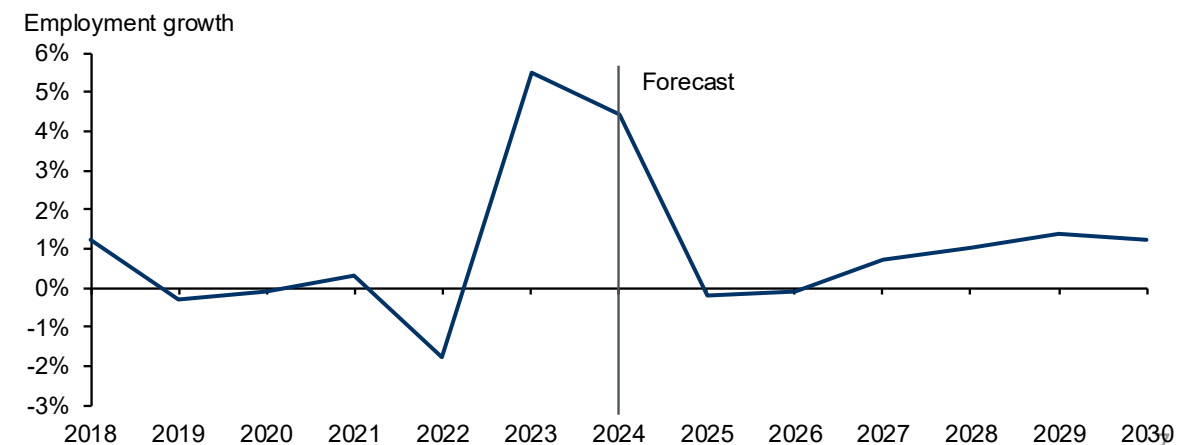
Employment growth has been mixed as the sector moves towards more technical roles as automation and productivity gains remain front of mind.

- There was a decline in employment between FY20 and FY22 of around 1.5%. This was in part due to significant investment by the sector into automation initiatives to address workforce pressures and support the productive capacity of the sector.
- Since then, employment growth has improved reaching 5.5% in FY23 and 4.4% in FY25. Strong underlying demand has supported much of this growth, coupled with some easing in workforce pressures.
- Employment growth is expected to average 0.7% between FY25 and FY30, supporting increased activity within the sector.

Food and grocery manufacturing sector employment profile by occupation, FY25



Food and grocery manufacturing sector employment growth, FY18 to FY30



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Workforce challenges within the food and grocery manufacturing sector

Food and drink factory workers

The tepid growth in supply of workers is likely to create workforce pressures moving forward

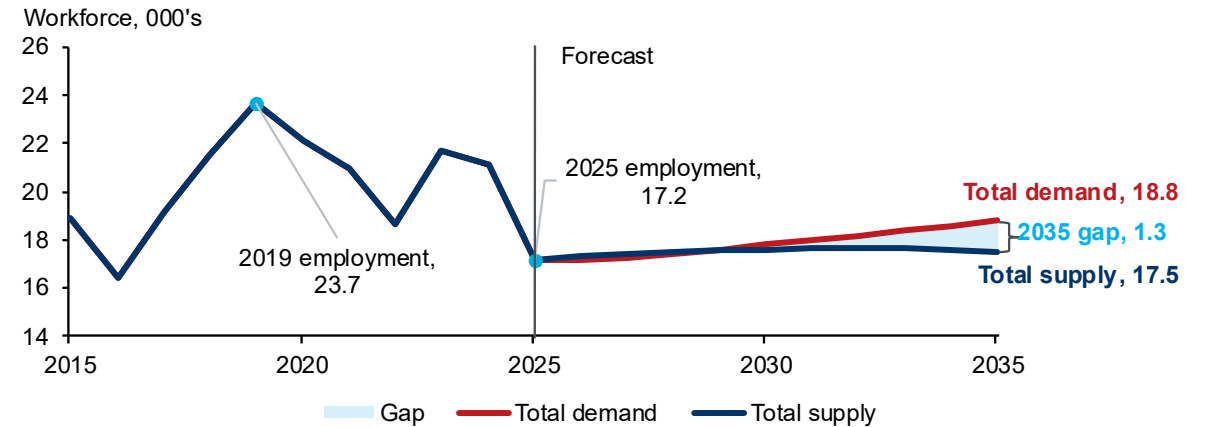
Food and drink factory workers are the largest pool of workers within the food and grocery sector and will likely face workforce risks over the next 10 years.

- Food and drink factory workers account for 10% of the food and grocery manufacturing sector workforce. These workers perform routine tasks in manufacturing food and beverages, including operating machinery and packing products.
- Employment of food and drink factory workers has been trending down over the past decade, falling at an annual average rate of 0.9%. This has been driven by a shift away from this occupation within the workforce, with its share falling over this period, likely due to a focus on automation.
- Over the next 10 years the supply of workers are expected to grow at an average annual rate of 0.2%, well below the 0.9% rate of employment demand in the sector over the same period. This results in a workforce gap of around 1,300 workers by 2035.

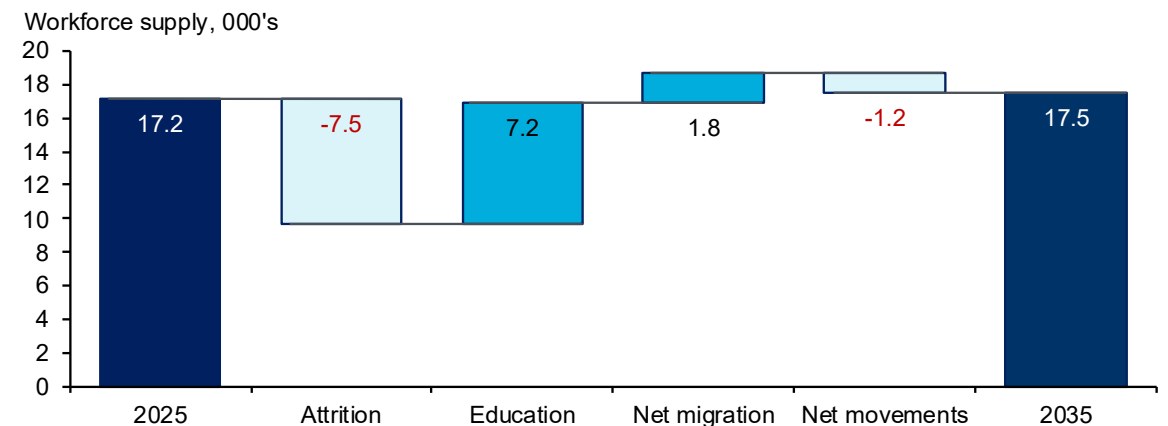
An older age profile, combined with retention challenges, is expected to keep a lid on workforce supply over the next decade.

- The older age structure of the current workforce creates a significant retirement risk for food and drink factory workers. Over 40% of the current 2025 workforce (7,500 workers) are expected to leave by 2035 due to attrition.
- While many new entrants to the workforce join this role in the food and grocery sector, there are challenges retaining these workers over their career. An estimated 7,200 workers are expected to join this workforce between 2025 and 2035 through the education pipeline, predominantly straight from high school. But the workforce is also expected to lose another 1,200 in net movements as they move into different industries and occupations.

Workforce supply and demand projections, 2015 to 2035



Change in workforce supply by channel, 2025 to 2035



Packers

Retention challenges are likely to reduce the supply of workers over the coming decade

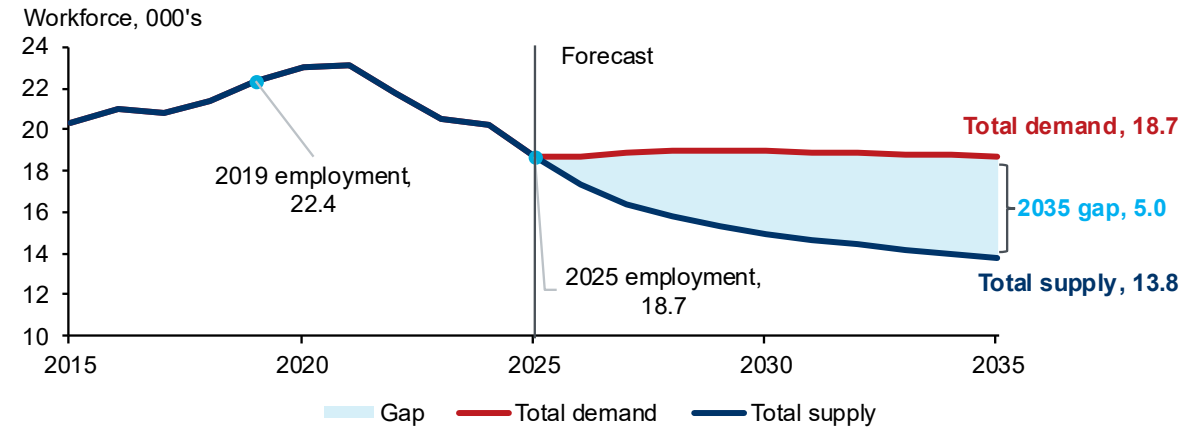
Packers are a major pool of workers within the food and grocery sector, with significant workforce risks over the next 10 years as supply dwindles.

- Packers account for 8% of the food and grocery manufacturing sector workforce. These workers weigh, wrap, seal and label various food and beverage products as part of the manufacturing process.
- Employment of packers has been falling at an annual average rate of 0.8% between 2015 and 2025. This trend intensified post-COVID as businesses focused on automation within the manufacturing process.
- Over the next 10 years the supply of workers is expected to decline at an average annual rate of 3.0%, and despite relatively flat employment demand, this results in a workforce gap of around 5,000 workers by 2035.

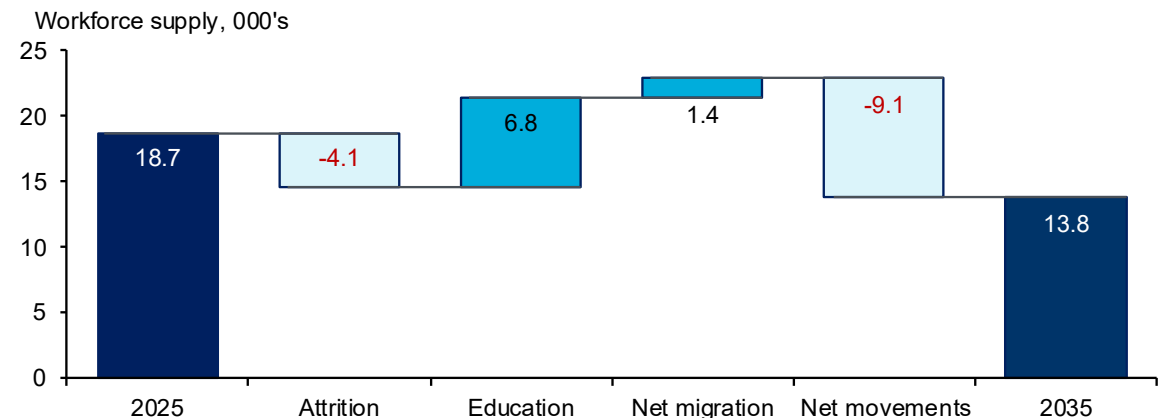
Strong attraction of new joiners to the workforce is not enough to offset retention challenges as they move into new jobs over their career, resulting in significant workforce losses.

- The 3.0% average annual rate of decline in workforce supply between 2025 and 2035 is much weaker than the 0.8% decline over the preceding decade.
- While many new entrants to the workforce join this role in the food and grocery sector, this is not enough to offset the net outflow as workers move into new occupations. Around half of the 2025 workforce (9,100 workers) are expected to be lost to net movements, offsetting the increase in workforce through education (6,800 workers) and migration (1,400 workers).
- The workforce is expected to lose over 20% of the 2025 workforce (4,100 workers) through attrition by 2035 as older workers retire. While this is lower than the average expected across the Australian labour force, it adds to the retention issues faced by this role.

Workforce supply and demand projections, 2015 to 2035



Change in workforce supply by channel, 2025 to 2035



Forklift drivers

Despite a positive short-term outlook, an ageing workforce creates long-term challenges

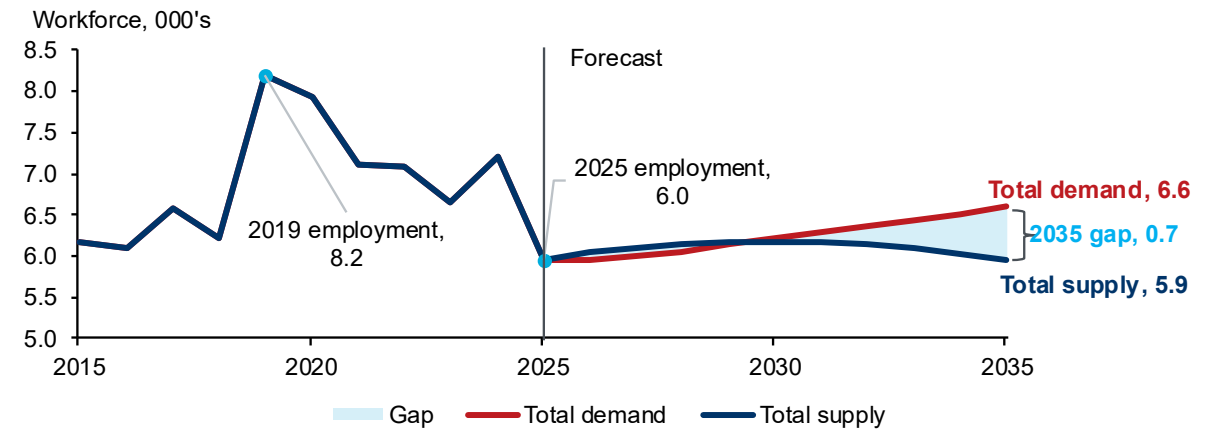
The food and grocery manufacturing sector is a major employer of forklift drivers, with workforce risks appearing over the longer-term as supply challenges emerge

- About 10% of all forklift drivers are employed in the food and grocery manufacturing sector, even though forklift drivers account for only 2% of the sector's workforce. These workers operate forklifts to move bulk materials, containers, crates, palletised goods, cartons and bales.
- Employment growth for forklift drivers has been mixed over the past decade. Investment in supply-chain logistics supported an uplift in demand just prior to COVID-19, but as workforce pressures increased businesses focused on efficiency and automation which weighed on employment from 2020 through to 2025.
- Over the next 10 years the supply of workers is expected to decline marginally, and coupled with demand growth of around 1.0% over the same period, this results in a workforce gap of just under 700 workers by 2035.

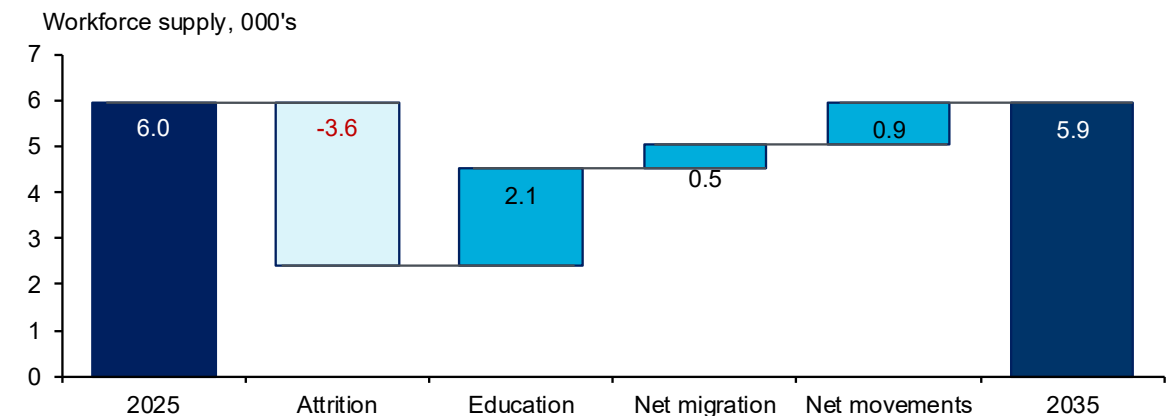
The significantly older age structure of the workforce creates long-term pressures on supply of this workforce

- The limited growth in workforce supply between 2025 and 2035 represents an improvement relative to the 0.3% decline over the preceding decade.
- The older age structure of the current workforce is expected to drive significant retirements over the next decade. Around 60% of the current 2025 workforce (3,600 workers) are expected to leave by 2035 due to attrition. This is around double the rate expected across the whole Australian labour market.
- While this role receives inflows from new joiners, other occupations across the labour market and migration, this is not expected to be enough to offset the significant outflows from an ageing workforce. Additions are most significant through education (2,100 workers) and net movements (900 workers), with a smaller number through migration (500 workers).

Workforce supply and demand projections, 2015 to 2035



Change in workforce supply by channel, 2025 to 2035



Purchasing and supply logistics clerks

Strong demand and workforce retention issues creates a growing workforce challenge

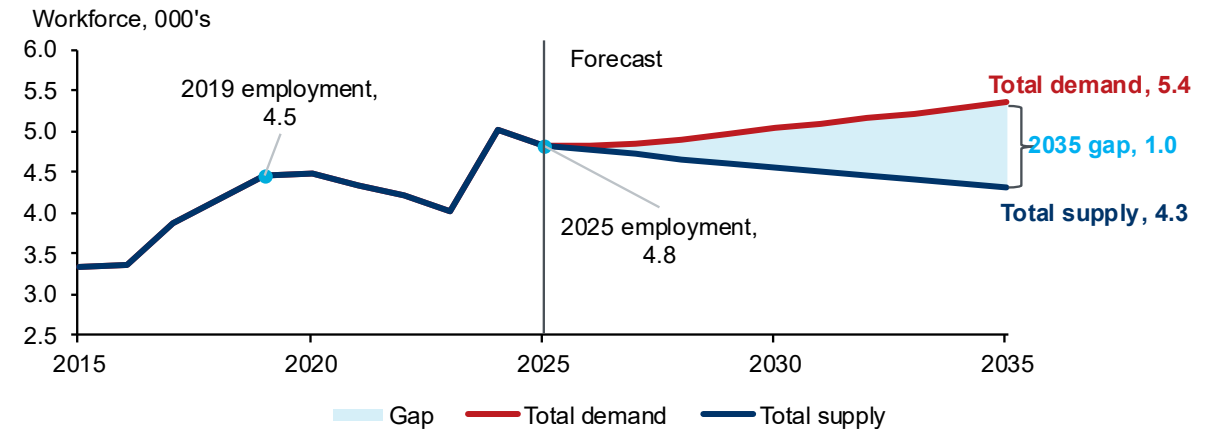
Purchasing and supply logistics clerks are a diverse occupation facing workforce risks as supply steadily decreases.

- About 4% of purchasing and supply logistics clerks are employed in the food and grocery manufacturing sector, despite accounting just 1% of the sector's workforce. These workers prepare and process orders, monitor stock and supply, and coordinate the flow of materials between departments and storage and distribution operations within organisations. This workforce is diverse with both younger entry level workers and older experienced workers. More information is available in the appendix.
- Employment growth has been very strong for purchasing and supply logistics clerks, increasing at an annual average rate of 3.7% between 2015 and 2025. A focus on digital supply chains and complex inventory management has increased the importance of this role within the workforce.
- Over the next 10 years the supply of workers is expected to decline at an average annual rate of 1.1%, and coupled with growing employment demand from the sector, this is expected to result in a workforce gap of around 1,000 workers by 2035.

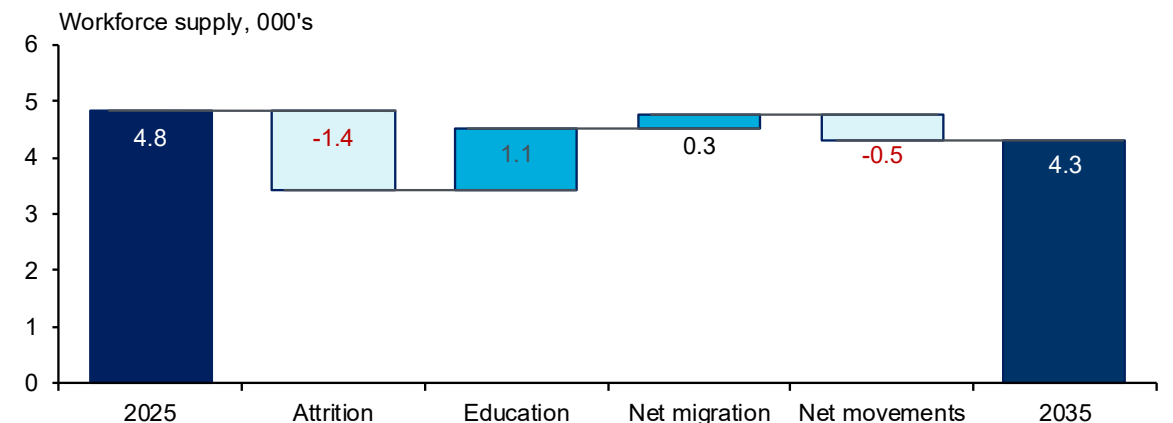
Supply growth from new joiners and migration relatively muted, with retention challenges and an ageing workforce driving overall workforce losses.

- While this role attracts workers entering the job market through education (1,100) and migration (300), workers leave and join other occupations across the economy with a net movement outflow of around 10% (500).
- In addition, this workforce is expected to lose 29% of the 2025 workforce (1,400 workers) through attrition as they retire by 2035. While this is on par with the average expected across the Australian labour force, it adds to the retention issues faced by this role.

Workforce supply and demand projections, 2015 to 2035



Change in workforce supply by channel, 2025 to 2035



Manufacturing production managers

Demand is likely to outpace supply growth despite strong additions through all channels

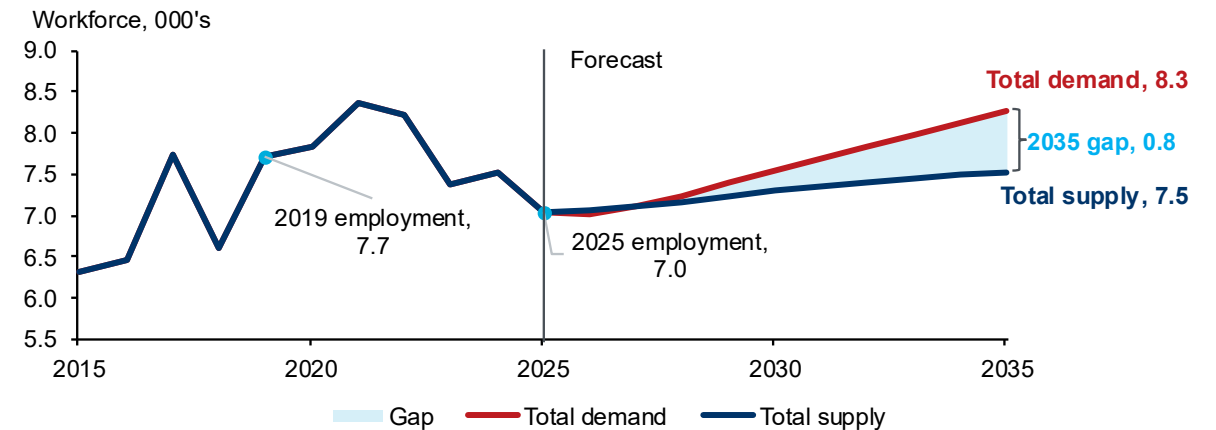
The food and grocery manufacturing sector is a major employer of manufacturing production managers, with workforce demand likely to outpace supply growth.

- About 14% of manufacturing production managers are employed in the food and grocery manufacturing sector, despite accounting only 3% of the sector's workforce. These workers plan, organise, direct, control and coordinate the manufacturing activities of an organisation, including physical and human resources.
- Employment growth has averaged 1.1% between 2015 and 2025 for manufacturing production managers. The increased importance of technical roles in modern manufacturing has supported demand, increasing the occupation's share of the workforce over time.
- Over the next 10 years, the supply of workers is expected to grow at an average annual rate of 0.7%, and coupled with strong employment demand in the sector of around 1.6% over the same period, this results in a workforce gap of around 750 workers by 2035.

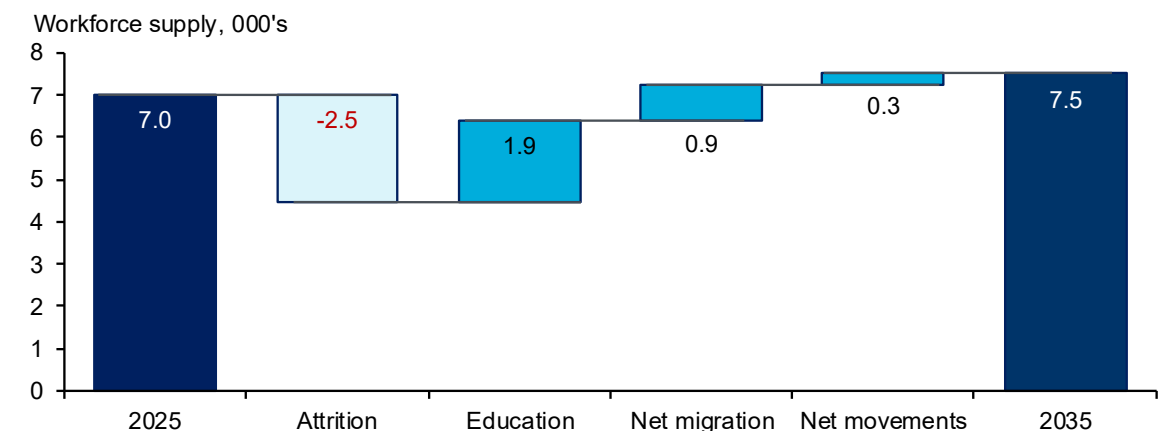
Migration, education and attraction from other occupations are supporting steady supply growth, but it is not expected to be enough to keep up with rising demand.

- The growth in workforce supply between 2025 and 2035 of 0.7% is slightly down from the 1.1% increase over the preceding decade.
- This workforce is expected to lose 36% of the 2025 workforce (2,500 workers) through attrition as they retire by 2035.
- Workforce inflows from new joiners, other occupations across the labour market and migration are expected to offset the decline due to retirements. Additions are most significant through education (1,900 workers) and net movements (900 workers), with a smaller number through migration (300 workers).

Workforce supply and demand projections, 2015 to 2035



Change in workforce supply by channel, 2025 to 2035





Appendix - Workforce supply methodology

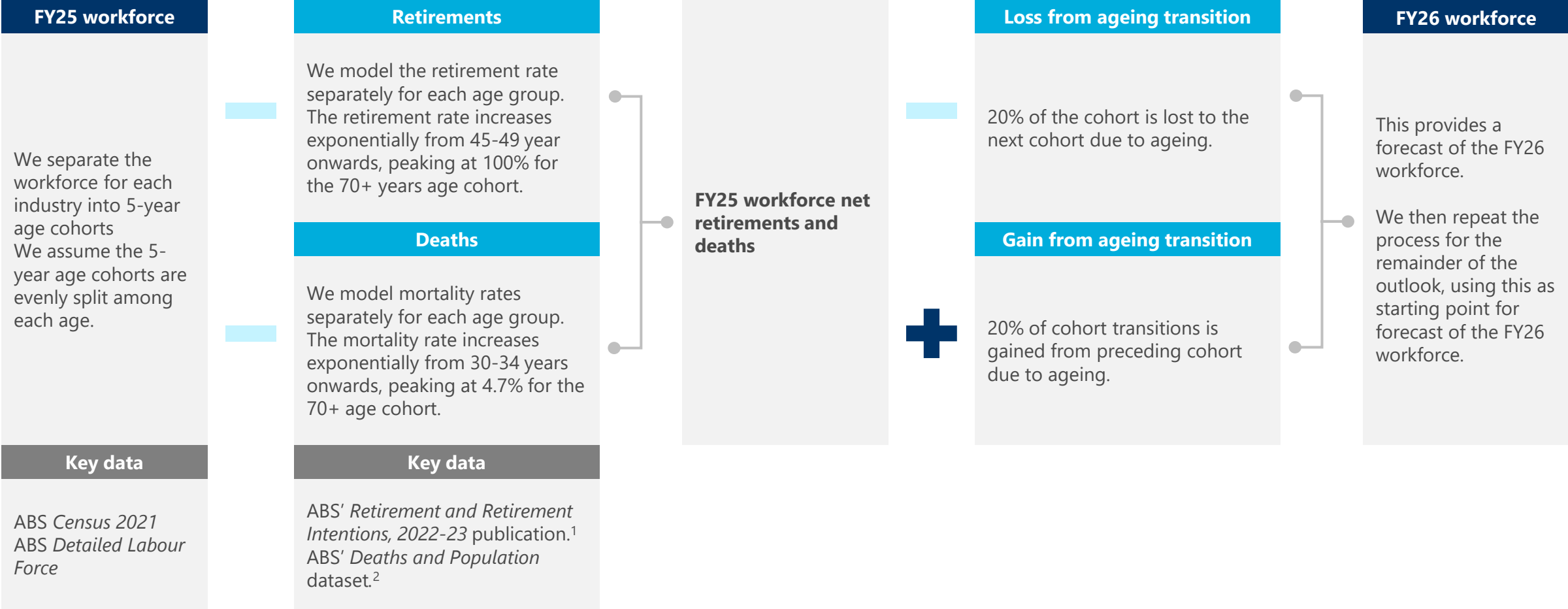
Key assumptions and data sources for workforce supply modelling

Each channel has a number of key assumptions that are used to estimate supply

Supply stream	Natural attrition	Education	Migration	Industry movements
Core assumptions	<ul style="list-style-type: none"> Retirement rate is estimated based on retirement intentions for each age cohort. Deaths are based on the individual mortality rates for each age cohorts. The age structure of the current workforce is used as the starting point. 	<ul style="list-style-type: none"> The education enrolment and completion rates are set at FY24 levels and held constant. The rate at which recent graduates enter the occupation within the food and grocery manufacturing sector is based on recent outcomes of census data. 	<ul style="list-style-type: none"> The share of citizen arrivals entering the occupation within the food and grocery manufacturing sector is held at current rates. The share of departures working in the food and grocery manufacturing sector is based on the population average. The number of migrant arrivals and departures increase based on our population projections. 	<ul style="list-style-type: none"> The movement rate is set at the FY19 level and held constant. Occupation movements grow at the same rate as workforce numbers.
Data sources	Census ABS retirement intentions ABS Deaths and Population	Department of Education NCVER VOCSTATS ABS Schools ACARA Census	Department of Home Affairs ABS recent migrants OE demographic analysis	Jobs and Skills Australia Census
Modelling basis	Modelled on an occupation within industry basis.	Modelled on a field of education basis and translated to occupation within industry.	Modelled on an occupation basis and mapped to industry.	Modelled on an occupation basis and mapped to industry.
Limitations	Australian average retirement and mortality rates may attrition in the workforce given the physical nature of the work, however we believe this will be picked up through industry movement data.	The model will use the latest rates of education completions but there are trends within the data which may suggest future supply through this stream is weaker / stronger than recent history.	The model will use the latest make up of migrant arrivals and their occupation destination on arrival.	The model uses a point in time estimate of job movements, but there is potential that the economic environment influences these results which is not captured.

Supply modelling methodology - Natural attrition

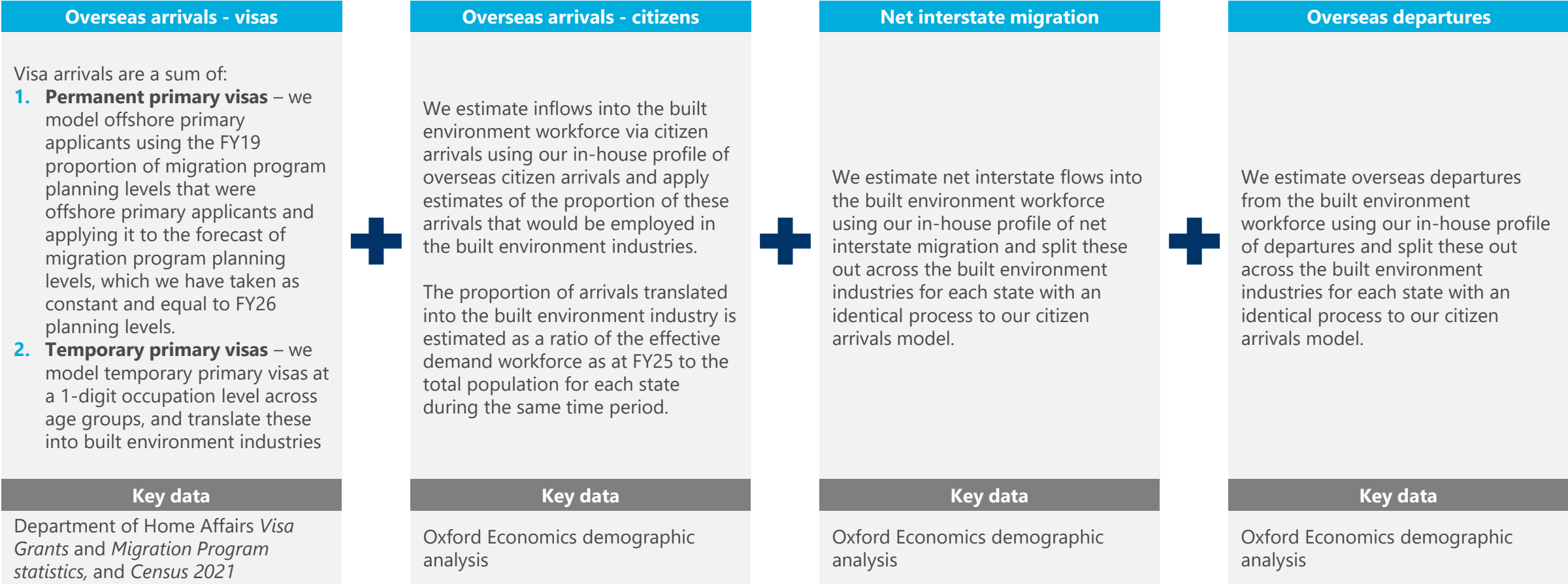
We model attrition of the workforce through ageing, retirements, and deaths



1. ABS (2024) Retirement and Retirement Intentions, Australia. Available [here](#).
 2. ABS (accessed 2024) Data Explorer. Available [here](#).

Supply modelling methodology - Migration

We forecast additions to the built environment workforce via migration as a sum of visa arrivals, citizen arrivals, net interstate migration, and overseas departures



Supply modelling methodology - Education

Workforce joiners through education channels are modelled separately for VET, Higher Education, and School leavers

1. Enrolments

We forecast enrolments by applying 2019 enrolment ratios to in-house forecasts of population for each state, field of education, level of education, and age group.

Enrolment ratios in 2019 are calculated as the proportion of the population enrolled in each program/degree type for each age group.

2. Completions

We forecast completions by applying 2019 completion ratios to enrolment forecasts.

Completion ratios in 2019 are calculated as the ratio of completions to enrolments for each program type for VET and Higher Education. For school leavers, we take ACARA attainment rates as at 2019 to estimate completions

3. Workforce joiners

We then forecast workforce joiners by estimating the propensity of program/degree completers for each field of education to join the workforces of the built environment industries.

The propensity to join is estimated based on the proportion of workers in each industry that held a qualification in each program/degree type for each age group according to the most recent Census.

Key assumptions and data

Key assumptions

- We have assumed enrolment ratios will be constant and equal to those observed in 2019.
- We have taken the 2019 enrolment ratios due to the significant but temporary impacts of COVID-19 to following years.

Key data

- Oxford economics population forecasts
- NCVET TVA program enrolments 2015-2022
- Department of Education *Selected higher education statistics*
- ABS Schools

Key assumptions

- As VET courses are typically shorter in duration, we assume enrolments in a program are completed in the same year.¹
- We stage completions for higher education degrees by 4-year, 6-year, and 9-year rates.

Key data

- NCVET TVA program completions 2015-2022
- Department of Education *Selected higher education statistics*
- ACARA Year 12 certification rates

Key assumptions

- We assume this propensity to join is held constant.
- We apply the propensity to join the built workforce supplied by BuildSkills

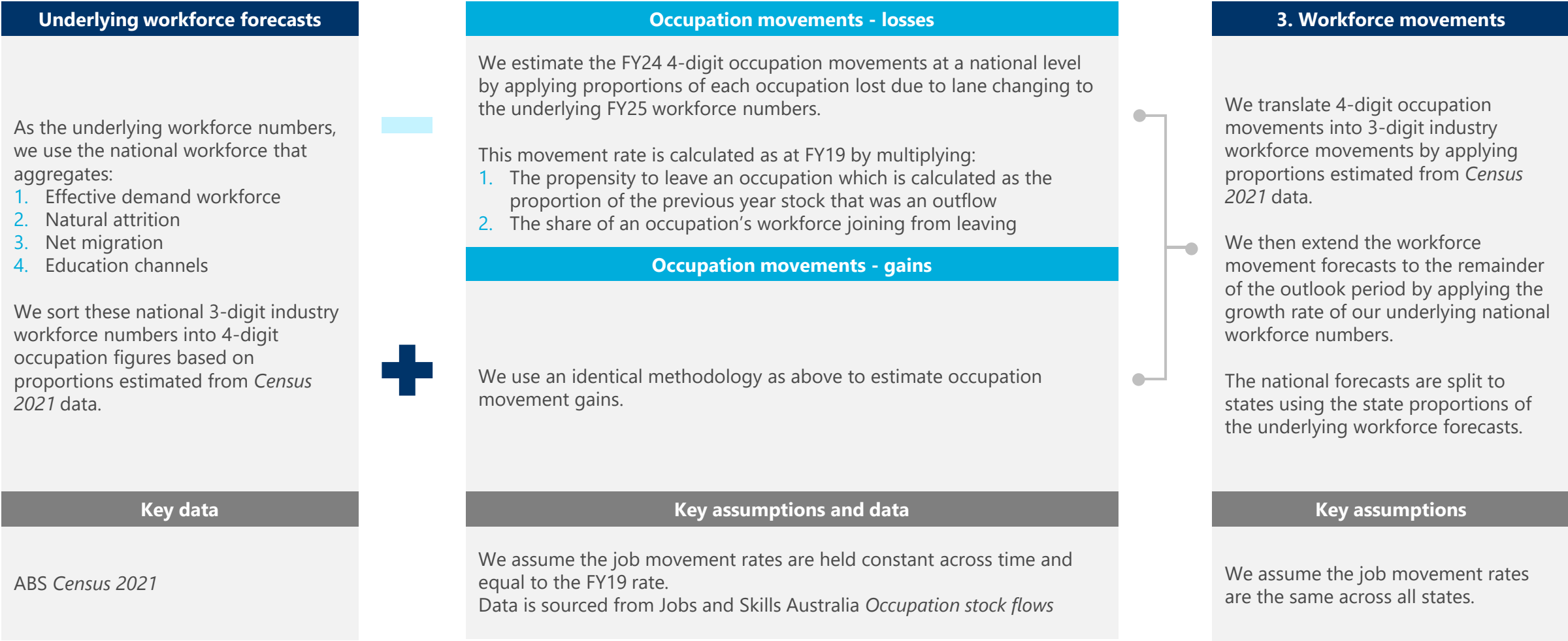
Key data

- ABS Census 2021

1. TAFE NSW (2020), *How long does a course take?*. Available [here](#).

Supply modelling methodology - Industry mobility

We model industry mobility at a 6-digit occupation level



1. Jobs and Skills Australia (2024) *Occupation Stock Flows*. Available [here](#).
2. Jobs and Skills Australia (2024) *Occupation Flows*. Available [here](#).

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Appendix – Workforce snapshot

Food and drink factory workers

This workforce spans a broad range of ages and formal qualification levels

ANZSCO 8311 Food and Drink Factory Workers

Food and Drink Factory Workers perform routine tasks in manufacturing food and beverages.

Indicative Skill Level: AQF Certificate I, or compulsory secondary education

Tasks Include:

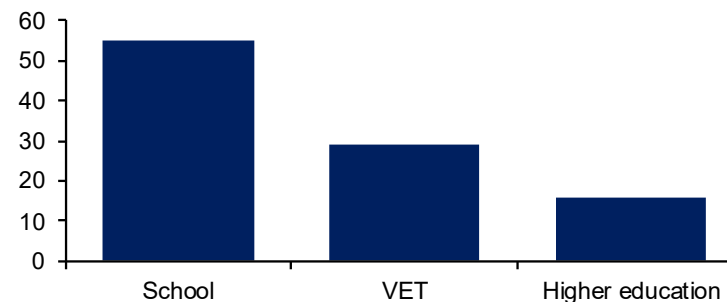
- weighing, measuring, mixing, dissolving and boiling ingredients
- adding materials, such as spices and preservatives, to food and beverages
- operating heating, chilling, freezing, pasteurising, carbonating, sulphuring and desulphuring plant
- monitoring product quality before packaging by inspecting, taking samples and adjusting treatment conditions when necessary
- operating machines to peel, core, slice, dice, pit and juice fruit and vegetables
- cleaning equipment, pumps, hoses, storage tanks, vessels and floors, and maintaining infestation control programs
- regulating speed of conveyors and crusher rollers, and adjusting tension of rollers to ensure total extraction of juice from sugar cane
- moving products from production lines into storage and shipping areas
- packaging and bottling products

Specialisations or common job titles

- Baking Factory Worker
- Brewery Worker
- Confectionery Maker
- Dairy Products Maker
- Fruit and Vegetable Factory Worker
- Grain Mill Worker
- Sugar Mill Worker
- Winery Cellar Hand
- Biscuit Factory Worker
- Bread Room Hand
- Chocolate Maker
- Butter Maker
- Cheese Factory Worker
- Cheese Maker
- Milk Processing Worker
- Milk Treater
- Pasteuriser Operator
- Yoghurt Maker
- Stockfeed Miller
- Coffee Roaster
- Egg Factory Worker
- Ice-cream Maker
- Margarine Maker
- Pasta Maker

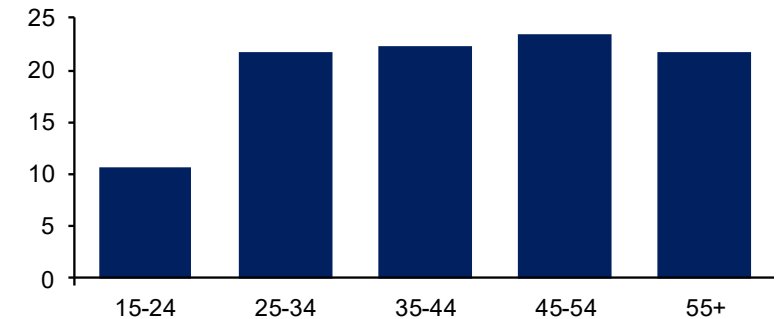
Highest qualification held

% of food and drink factory worker workforce



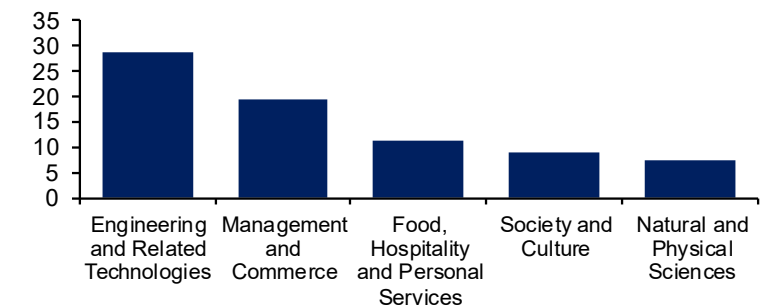
Age structure

% of food and drink factory worker workforce



Top 5 most common fields of education for non-school qualifications

% of food and drink factory worker workforce



Packers

This is a relatively young workforce that are mostly likely to have recently completed school

ANZSCO 8321 Packers

Packers weigh, wrap, seal and label chocolate, fruit, vegetables, meat, seafood and other products.

Indicative Skill Level: AQF Certificate I, or compulsory secondary education

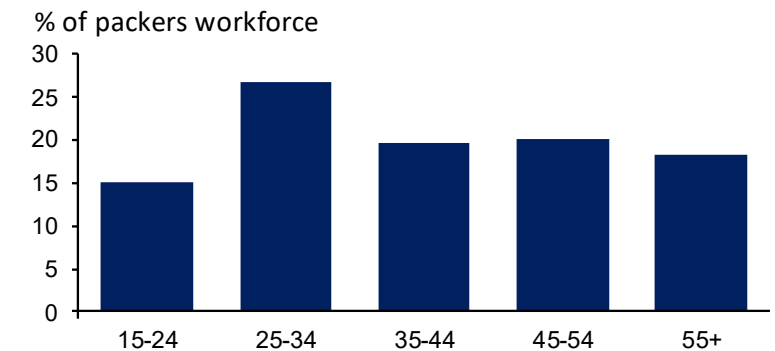
Tasks Include:

- obtaining supplies of products and assembling bags, package folders and cartons
- packing containers and bags with products, and counting, weighing and measuring amounts and adjusting quantities
- wrapping protective material around products, sealing bags and containers, and attaching pre-printed labels
- counting and placing bags and packages onto trays and racks, and into shipping cartons
- recording information such as numbers, weight, times and dates
- monitoring the filling of containers and adjusting machines to maintain volume and seal quality
- monitoring the supply and quality of containers and contents of holding tanks
- checking the cleanliness and operation of machines, equipment and containers

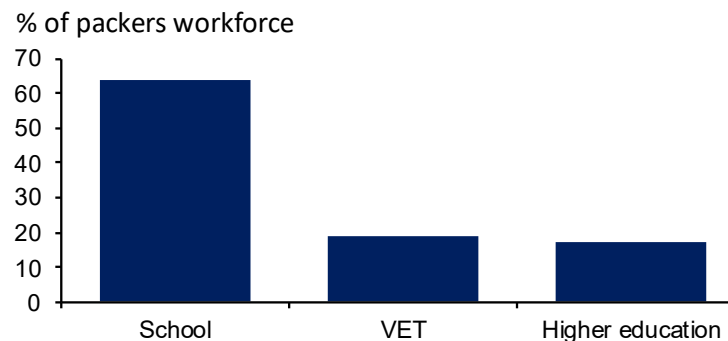
Specialisations or common job titles

- Chocolate Packer
- Container Filler
- Fruit and Vegetable Packer
- Meat Packer
- Seafood Packer
- Bottling Attendant
- Cannery Worker
- Labelling Machine Operator
- Biscuit Packer
- Bread Packer
- Cheese Packer
- Egg Packer

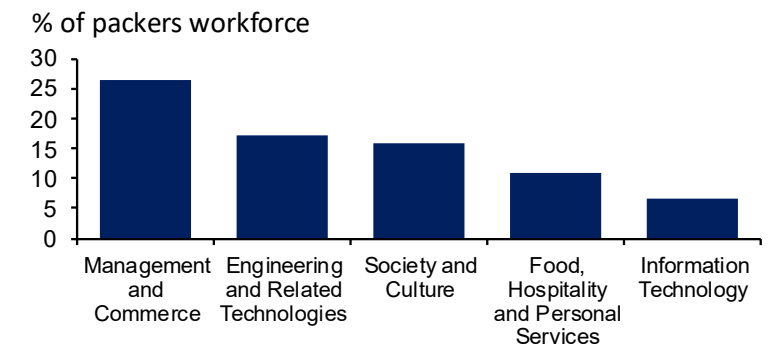
Age structure



Highest qualification held



Field of education, % of workforce



Forklift drivers

This is a relatively older workforce with minimal formal qualifications

ANZSCO 7213 Forklift Drivers

Forklift Drivers operate forklifts to move bulk materials, containers, crates, palletised goods, cartons and bales.

Indicative Skill Level: AQF Certificate II or III. Registration or licensing may be required.

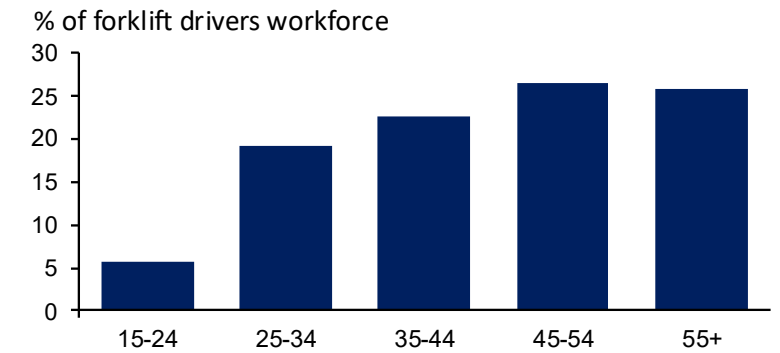
Tasks Include:

- operating controls to align forklifts and raise and lower forks to stack and unstack items in warehouses, factories, timber yards and shipping terminals
- operating forklifts which run on rails or use electronic guidance systems to control movements in narrow aisles
- transporting goods to designated areas in warehouses, factories, timber yards and shipping terminals
- ensuring goods are stored in correct areas so that they can be easily located when orders are made up
- monitoring equipment operation visually through gauges and instruments and through computerised monitoring equipment
- inspecting and controlling equipment to identify wear and damage
- servicing and performing minor repairs and adjustments to forklifts
- may operate specialised trucks to carry items beneath elevated frames

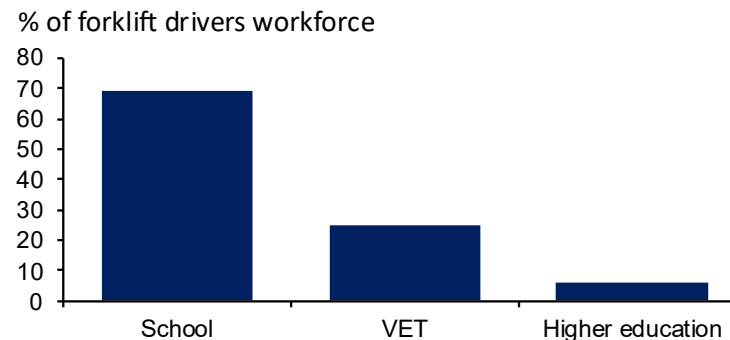
Specialisations or common job titles

- Forklift Operator
- Fork Truck Operator
- Reach Truck Operator

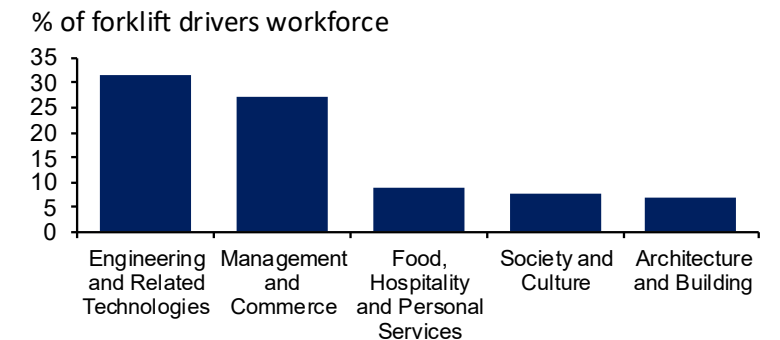
Age structure



Highest qualification held



Field of education, % of workforce



Purchasing and supply logistics clerks

This is a prime working aged workforce with both high school and tertiary qualifications

ANZSCO 5911 Purchasing and Supply Logistics Clerks

Purchasing and Supply Logistics Clerks prepare and process orders for goods and services, monitor stock levels and supply sources and maintain stock and inventory levels, record and coordinate the flow of materials between departments, prepare production schedules, and administer and coordinate storage and distribution operations within organisations.

Indicative Skill Level: AQF Certificate II or III

Tasks Include:

- requisitioning supplies from stock and sending orders to production departments and other firms
- confirming completion of orders and compliance with details specified, signing tally sheets and attaching to checked items
- receiving and checking purchase requests against inventory records and stock on hand
- examining orders and compiling data for production schedules
- checking inventories and preparing delivery schedules
- examining containers to ensure that they are filled, and recording quantities
- investigating and identifying supply sources and preparing and processing purchase orders
- providing price and other information about goods to prospective customers
- counting incoming stock and reconciling it with requisitions, and updating inventory and stock location records
- establishing and coordinating the operating procedures for receiving, handling, storing and shipping goods

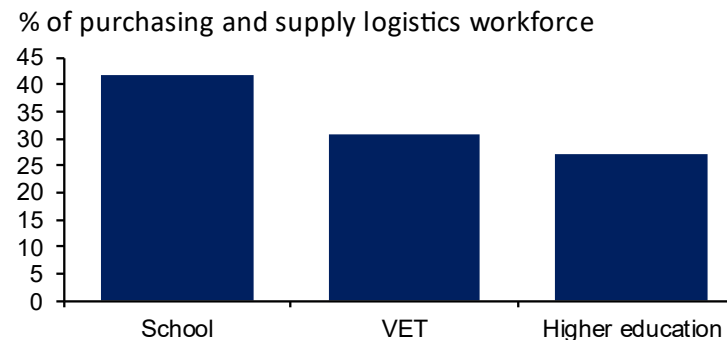
Specialisations or common job titles

- Production Recorder
- Schedule Clerk
- Delivery Clerk
- Logistics Clerk
- Procurement Officer
- Stock Control Clerk
- Stores Clerk
- Inventory Clerk
- Supply Clerk
- Warehouse administrator
- Customer Orders Clerk
- Sales Order Clerk
- Internal Salesperson
- Mail Order Clerk

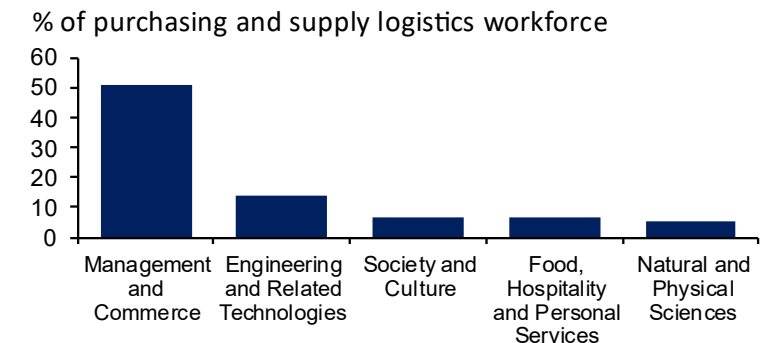
Age structure



Highest qualification held



Field of education, % of workforce



Note: Data is based on 2021 census.

Manufacturing production managers

This is a prime working aged workforce with both high VET attainment levels

ANZSCO 133512 Production Manager (Manufacturing)

Plans, organises, directs, controls and coordinates the manufacturing activities of an organisation including physical and human resources.

Indicative Skill Level: Most occupations in this unit group have a level of skill commensurate with a bachelor degree or higher qualification.

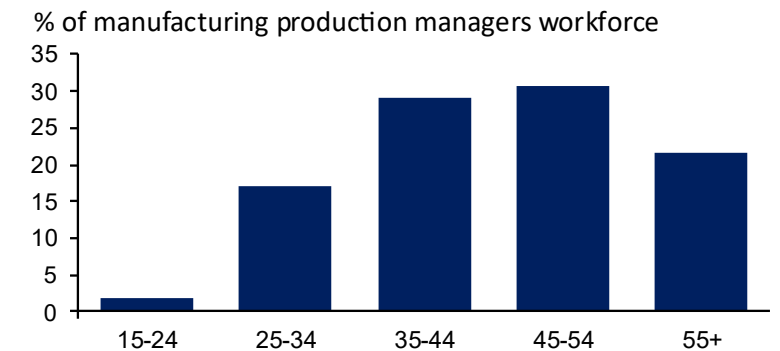
Tasks Include:

- determining, implementing and monitoring production strategies, policies and plans
- planning details of production activities in terms of output quality and quantity, cost, time available and labour requirements
- controlling the operation of production plant and quality procedures through planning of maintenance, designation of operating hours and supply of parts and tools
- monitoring production output and costs, and adjusting processes and resources to minimise costs
- informing other Managers about production matters
- overseeing the acquisition and installation of new plant and equipment
- directing research into production methods, and recommending and implementing initiatives
- controlling the preparation of production records and reports
- coordinating the implementation of occupational health and safety requirements
- directing staff activities and monitoring their performance

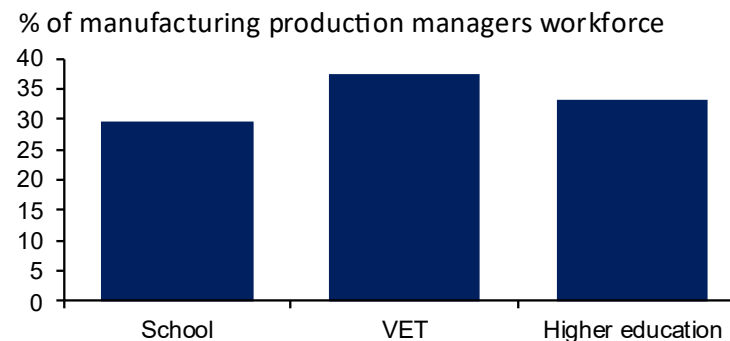
Specialisations or common job titles

- Operations Manager (Production)
- Plant Manager (Manufacturing)
- Sawmill Manager
- Timber and Wood Products Mill Manager
- Works Manager (Manufacturing)

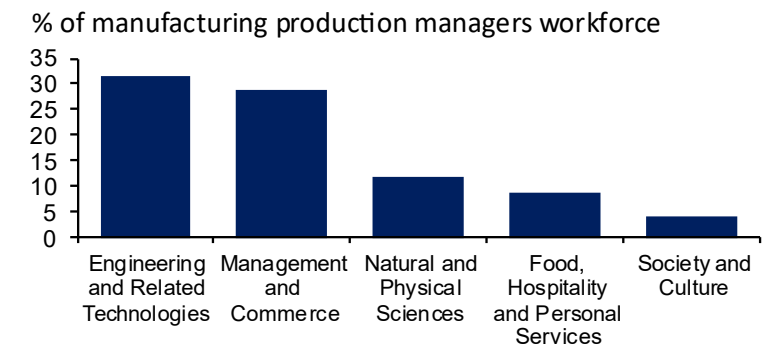
Age structure



Highest qualification held



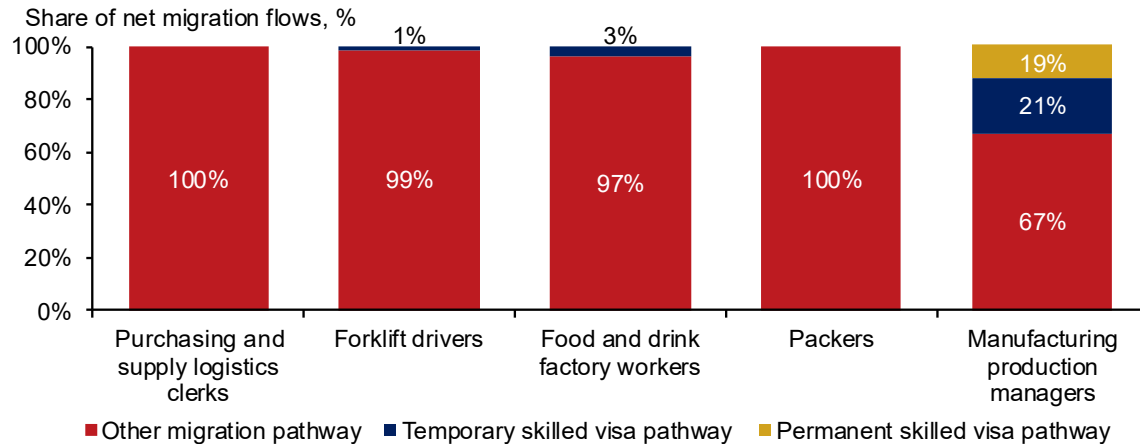
Field of education, % of workforce



Breakdown of migration and education channels

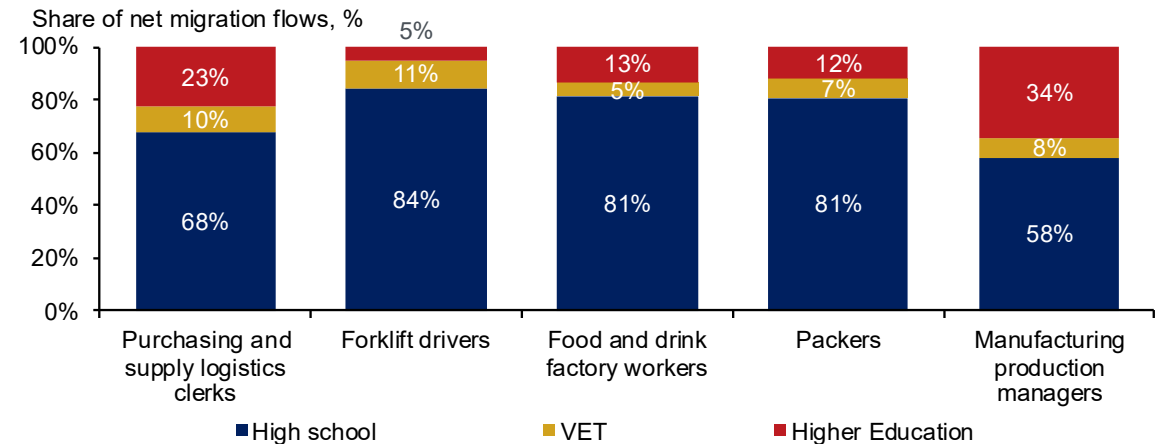
The role of migration and education is different across the key occupations

Share of net migration additions between 2025 and 2035 by occupation and pathway



- The majority of migration flows into these occupations are through general movement of citizens, New Zealand citizens and non-skilled visa pathways accounting for between 67% and 100% of migration additions to the workforce.
- Packers and purchasing and supply logistics clerks are not projected to have any migration additions through skilled temporary or permanent pathways.
- Forklift drivers and food and drink factory workers are projected to receive a small number of workers through temporary skilled visa pathways. This modelling is based on offshore temporary arrival assumptions derived from historic visa arrival data.
- Manufacturing production managers are the only occupations projected to receive migrants through both permanent and temporary skilled visa streams.

Share of education additions between 2025 and 2035 by occupation and pathway



- The education channel represents those workers entering the workforce for the first time after completing an education degree, which includes high school diplomas, VET degrees and higher education degrees. This channel does not include those workers who are working on a permanent basis in a role and at the completion of their degree transition into a new occupation or industry.¹
- High school is the primary pathway for workers to first enter these key occupations, accounting for between 58% and 84%. The higher skill level roles have a lower concentration of individuals entering straight from high school.
- Forklift drivers receive the largest share of workers through the VET system. Around 11% of workers entering through the education channel coming through the VET system. Manufacturing production managers (43%) and purchasing and supply logistics clerks both receive a sizeable share through the higher education system.

1. Workers that are currently employed on a permanent basis and at the completion of their degree move into a new role are captured through the job movement channel.

The background features several large, overlapping, light blue curved shapes that create a sense of depth and movement. These shapes are semi-transparent and vary in opacity, with some appearing as solid light blue and others as fainter washes. The overall composition is clean and modern.

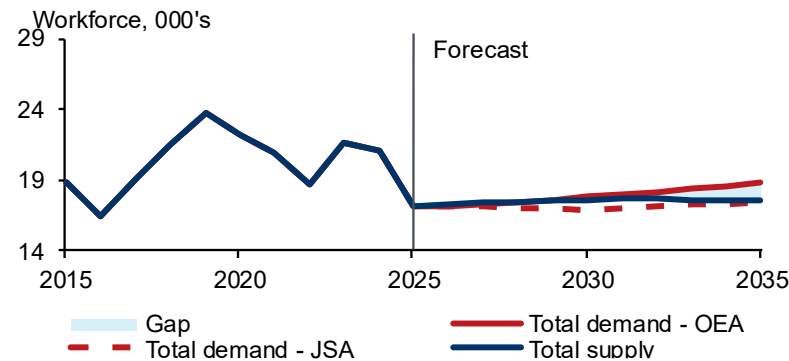
Appendix – Alternative workforce demand projections

Alternative demand projections

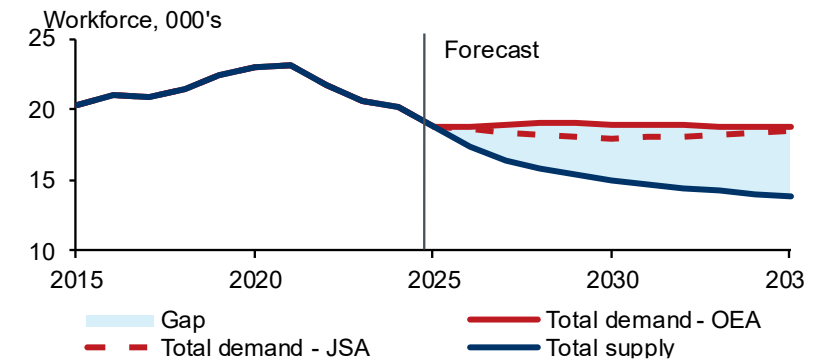
We have also considered government forecasts of workforce demand in the sector

- Oxford Economics has also produced demand projections using JSA's employment projections to present an alternative view on workforce pressures in these roles.
- JSA projections are generally weaker than OE projections, particularly in food and drink factory workers and forklift drivers.
- Long-term differences are minimal for packers, purchasing and supply logistics clerks and manufacturing purchasing managers.

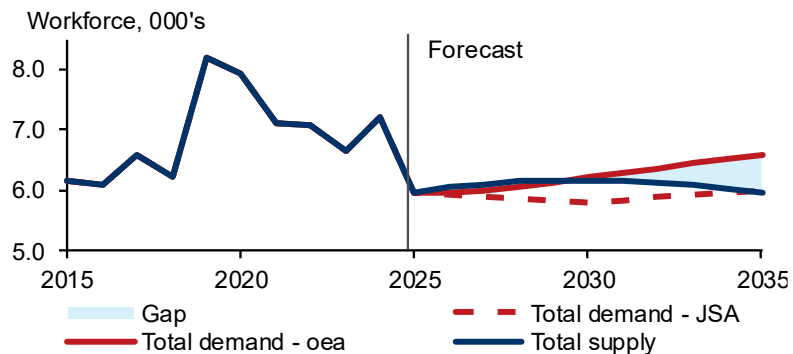
Food and drink factory workers, supply and demand projections



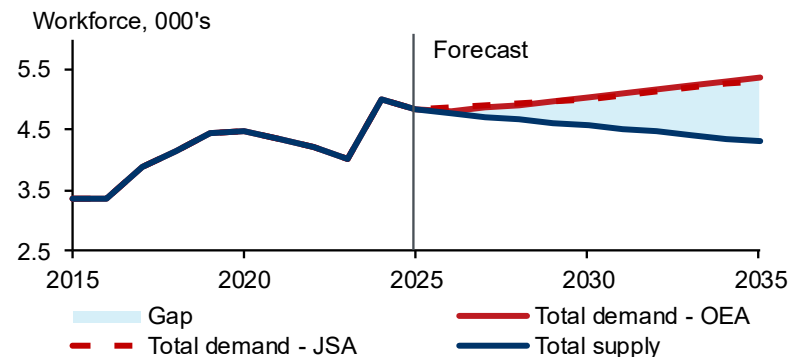
Packers, supply and demand projections



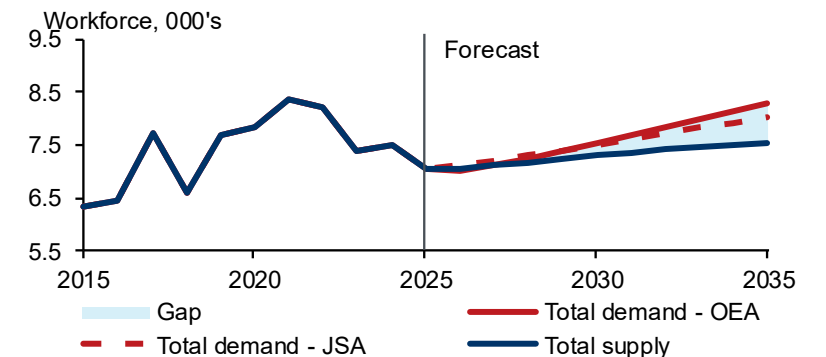
Forklift drivers, supply and demand projections



Purchasing and supply logistics clerks, supply and demand projections



Manufacturing production managers, supply and demand projections



Contacts

ASIA PACIFIC

Sydney

Tel: +61 (0)2 8458 4200

Singapore

Tel: +65 6850 0110

Hong Kong

Tel: +852 3974 8842

Tokyo

Tel: +81-(0)3-4588-2798

EUROPE

Oxford (Headquarters)

Tel: +44 (0)1865 268 900

London

Tel: +44 (0)20 3910 8000

Belfast

Tel: + 44 2892 635400

Milan

Tel: +39 02 8295 2521

Frankfurt

Tel: +49 69 96 758 658

Paris

Tel: +33 (0)1 78 91 50 52

Stockholm

Tel: +46 (0) 8 446 887 65

AFRICA AND MIDDLE EAST

Cape Town

Tel: +27(0)21 863-6200

Dubai

Tel: +971 56 396 7998

AMERICAS

New York

Tel: +1 (646) 786 1879

Philadelphia

Tel: +1 (646) 786 1879

Mexico City

Tel: +52 155 5419-4173

Boston

Tel: +1 (617) 780 2265

Chicago

Tel: +1 (847) 993-3140

Los Angeles

Tel: +1 (424) 303 3449

Toronto

Tel: +1 (905) 361 6573