

# 2009 CENSUS SUMMARY

## PRESENTATION AND DISCUSSION OF RESULTS

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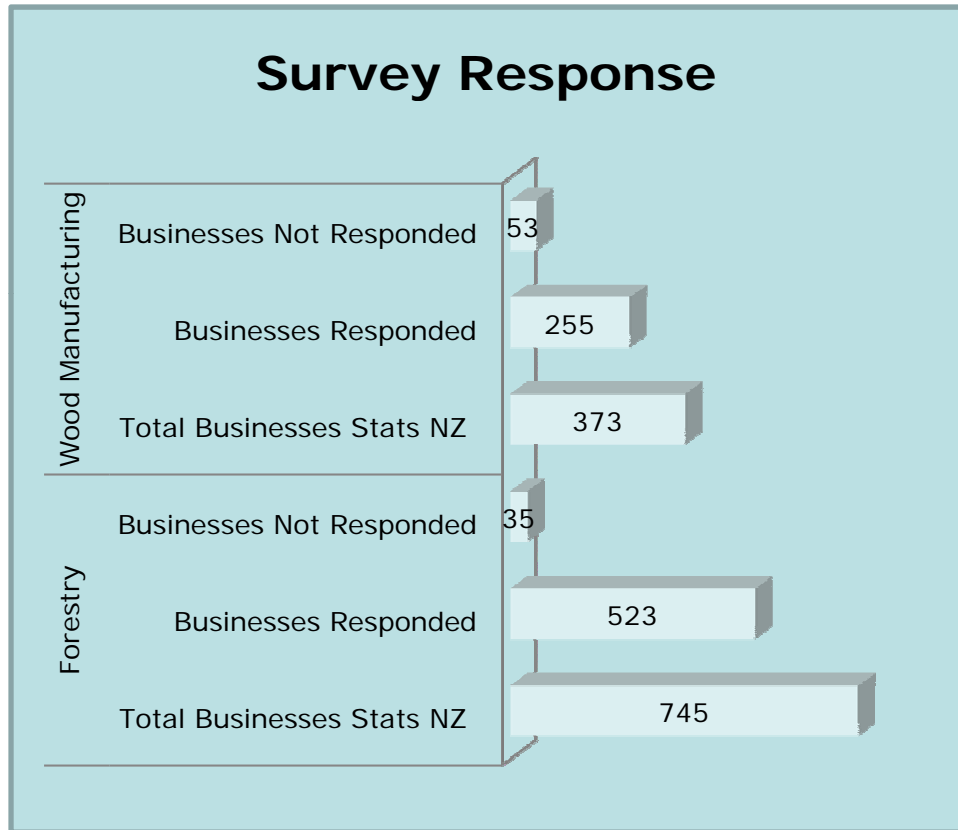
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## WHY A CENSUS ???

- Detailed labour force information from stakeholders
- Understand job levels and operations in forest industries
- Increase awareness of training opportunities by sector and region
- Base data for modelling impact of wood flow changes on workforce and trainee numbers
- Forestry and wood manufacturing sectors only

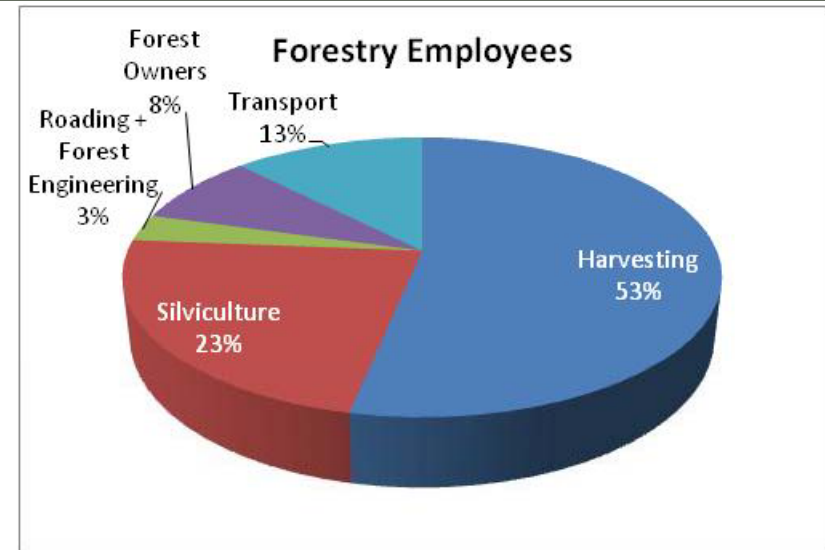
# SURVEY RESPONSES



- Majority of businesses captured
  - Forestry: 94% success rate
  - Wood manufacturing: 83% response rate
- 50 companies ceased operations in past 12 months
- Some employee numbers estimated

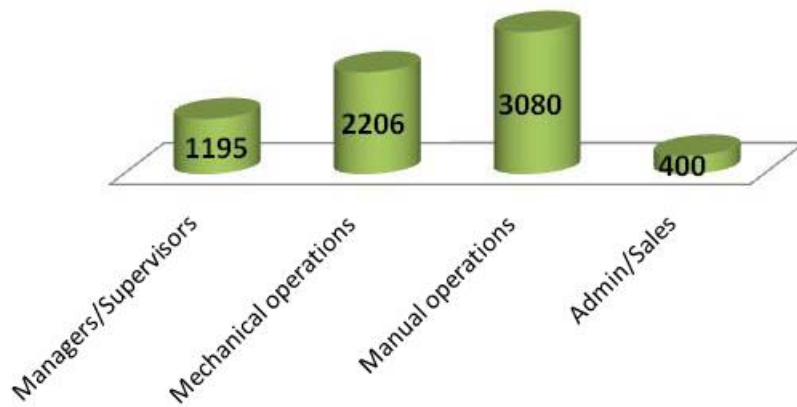
# TOTAL EMPLOYEES BY SECTOR

- 18730 employees in forest industries
- Forestry employs 37%, wood manufacturing 63% of the work force
- Forestry firms reported almost 6900 employees
- Forestry staff work mainly in harvesting + silviculture
- Wood manufacturing industry had 11850 employees – 1000 less than 12 months ago
- Wood manufacturers work mostly in solid wood processing and wood remanufacturing
- Employees / company vary:
  - Forestry 2 – 220
  - Wood Manufacturing 1 - 359
- Average staff / business vary:
  - Forestry: 13
  - Wood Manufacturing: 46



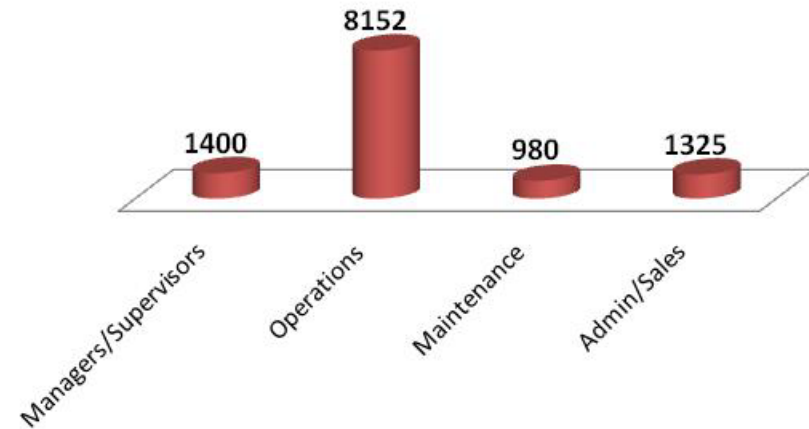
# EMPLOYEES BY OCCUPATION TYPE

## Forestry Employees



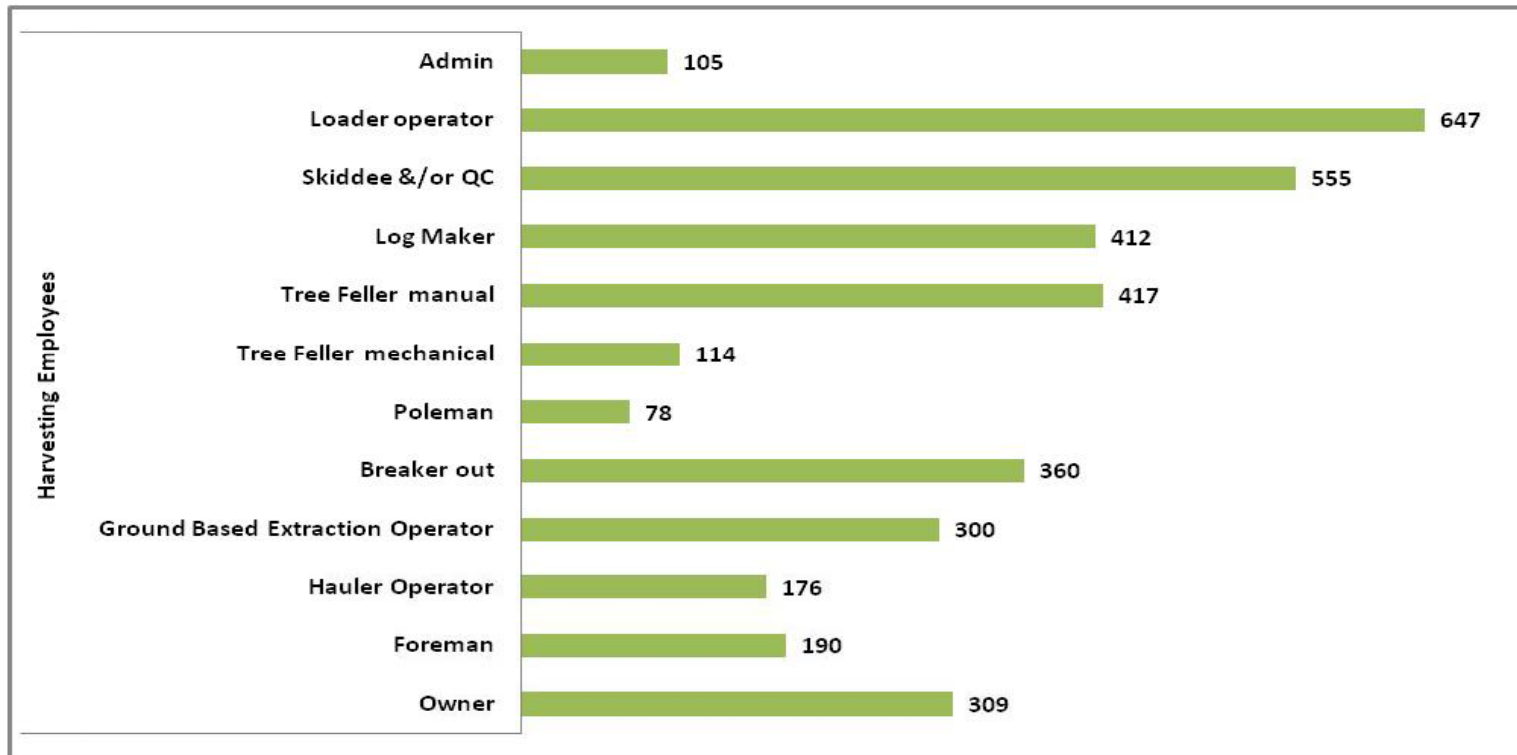
1. 77 % of staff in ground operations – 40% mechanical and 60% manual
2. 17 % managers and supervisors
3. Low administrative staff component

## Wood Manufacturing Employees



1. 70% are operators
2. Similar proportions of managerial and administrative staff

# EMPLOYEES IN HARVESTING



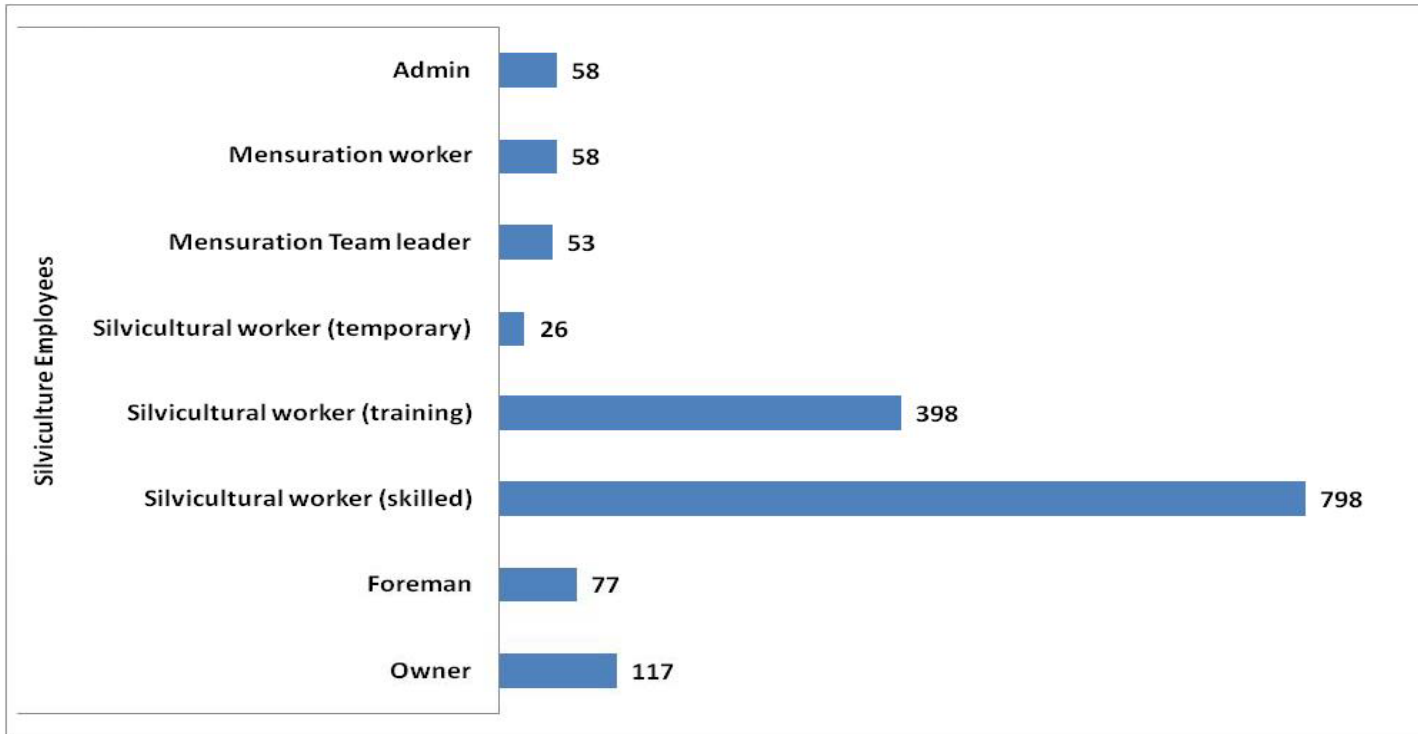
1. An increasing share of employees operate mechanised equipment
2. Small contracting business rarely employ administrative staff

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# EMPLOYEES IN SILVICULTURE



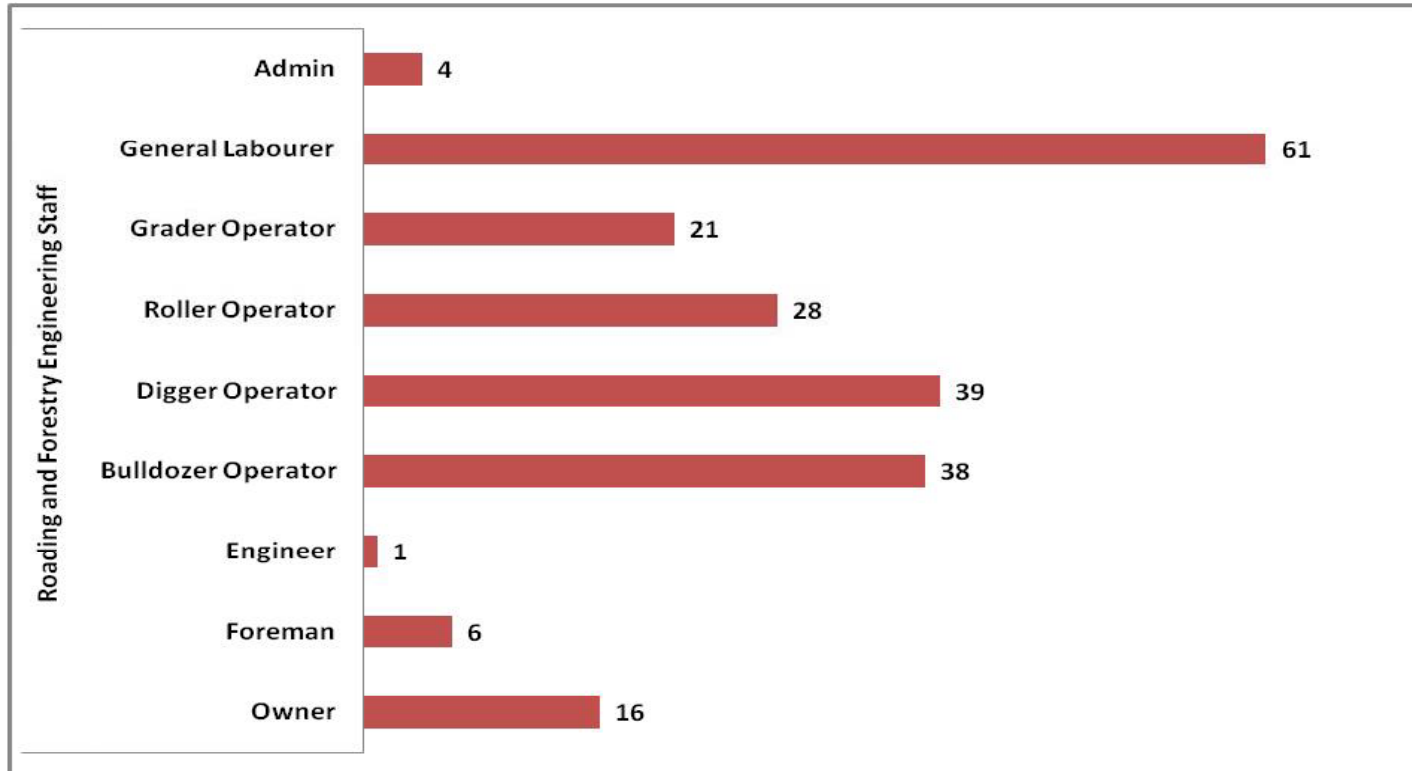
1. More than  $\frac{3}{4}$  of staff do manual work requiring level 3 skills
2. Employment diminished in recent years
3. Mensuration employees require higher skills

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# EMPLOYEES IN ROADING+FOREST ENGINEERING



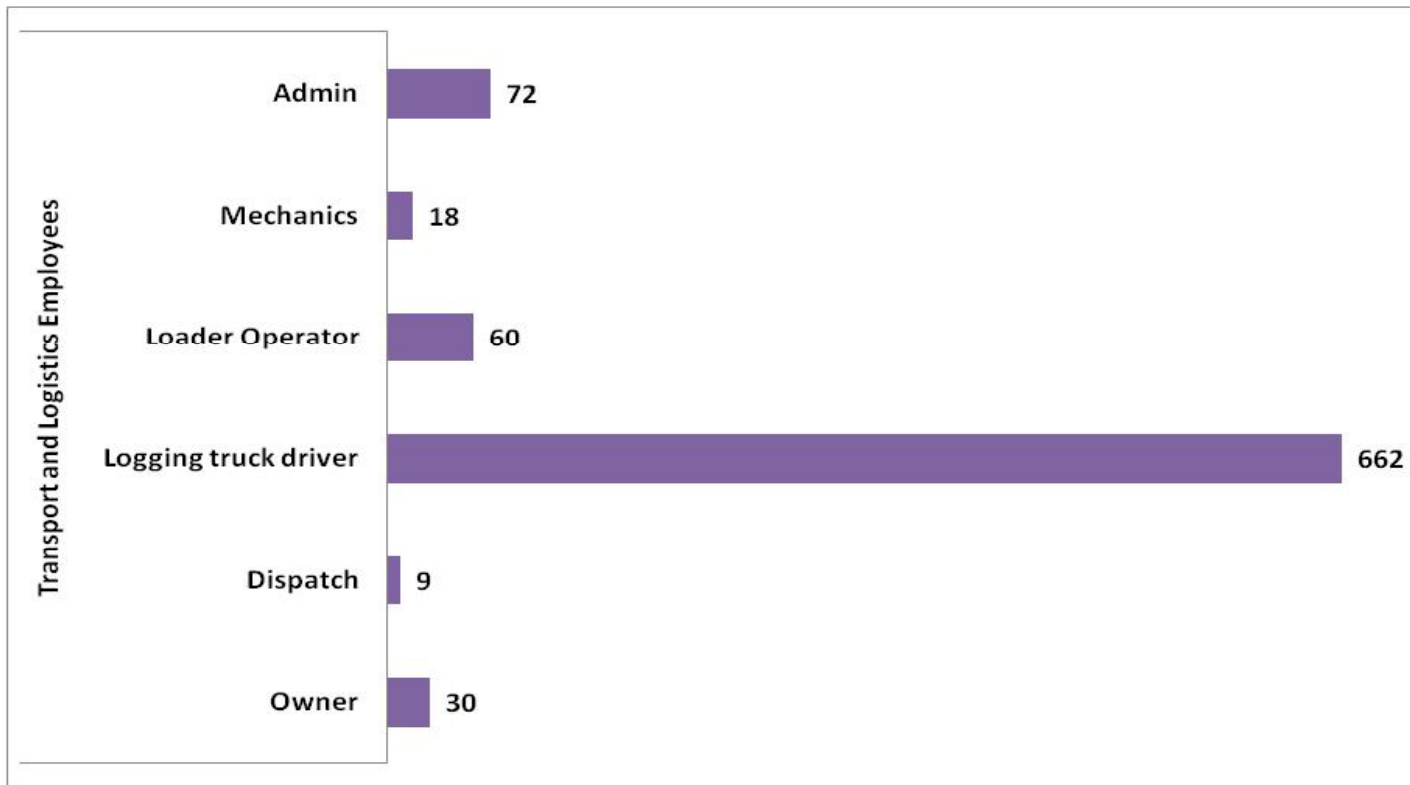
1. Partial sample; only businesses engaging with FITEC
2. Limited training opportunities exist

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# EMPLOYEES IN TRANSPORT AND LOGISTICS



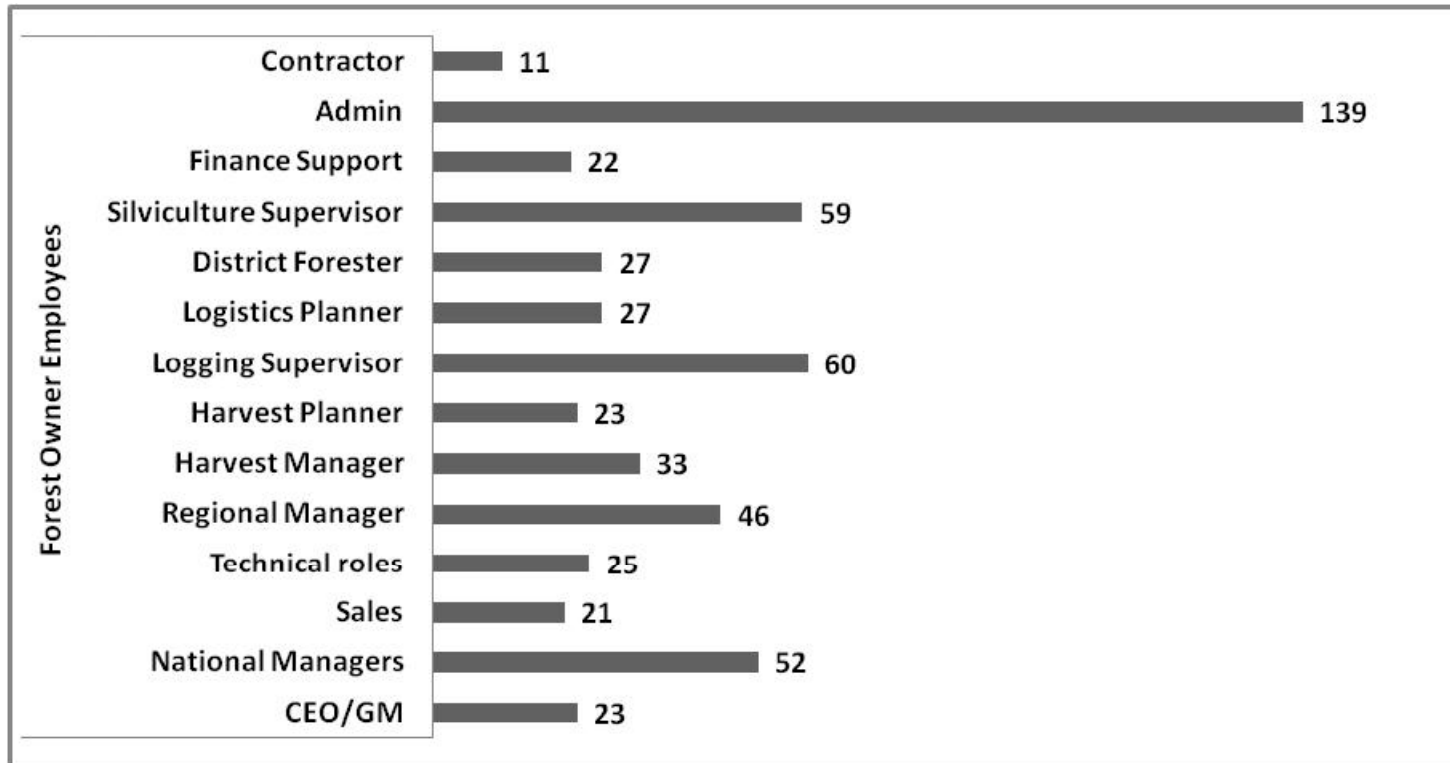
1. Over  $\frac{3}{4}$  are logging truck drivers
2. FITEC engagement limited to generic and loader operator units

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# FOREST OWNER + MANAGERS EMPLOYEES



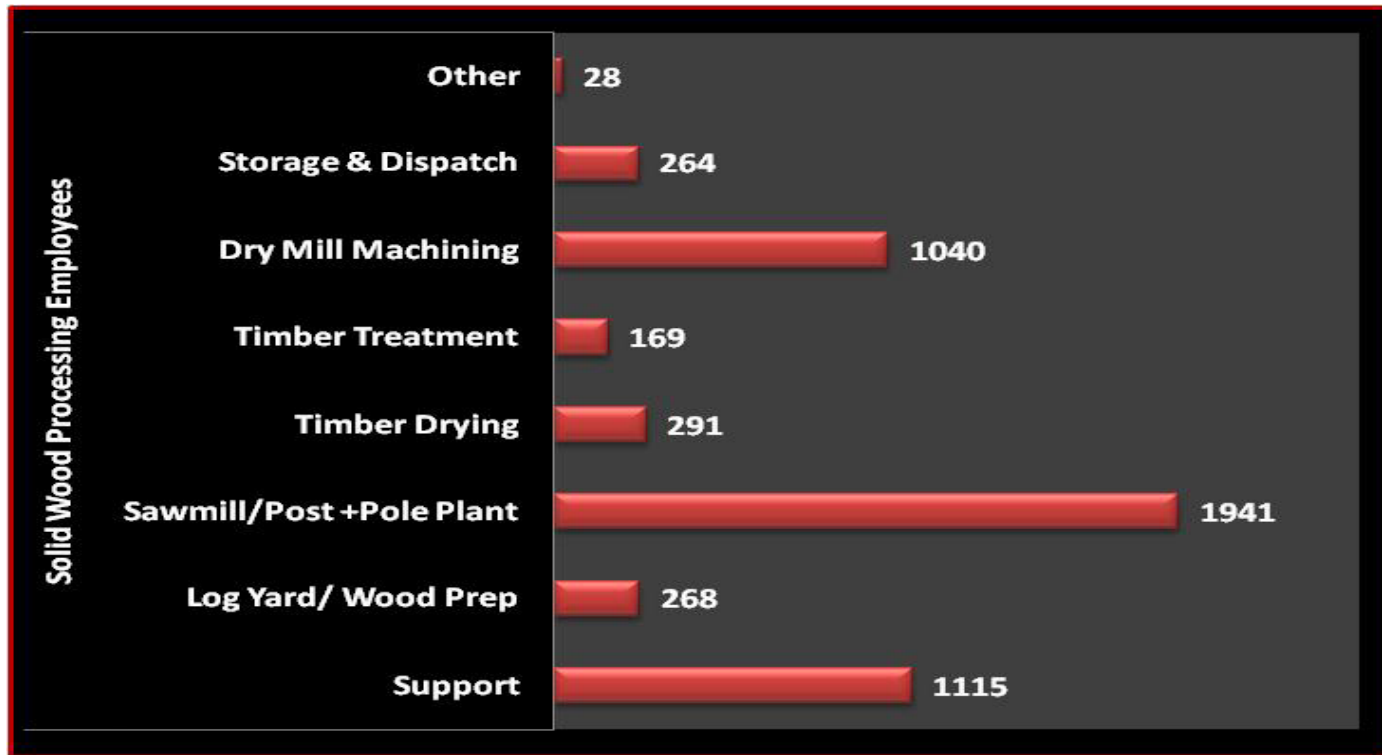
1. Nearly 50% in supervisor / management positions
2. 20% in technical roles – many tertiary qualified
3. Forest owners' staff look for help with generic skills & harvest planning

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# SOLID WOOD PROCESSING EMPLOYEES



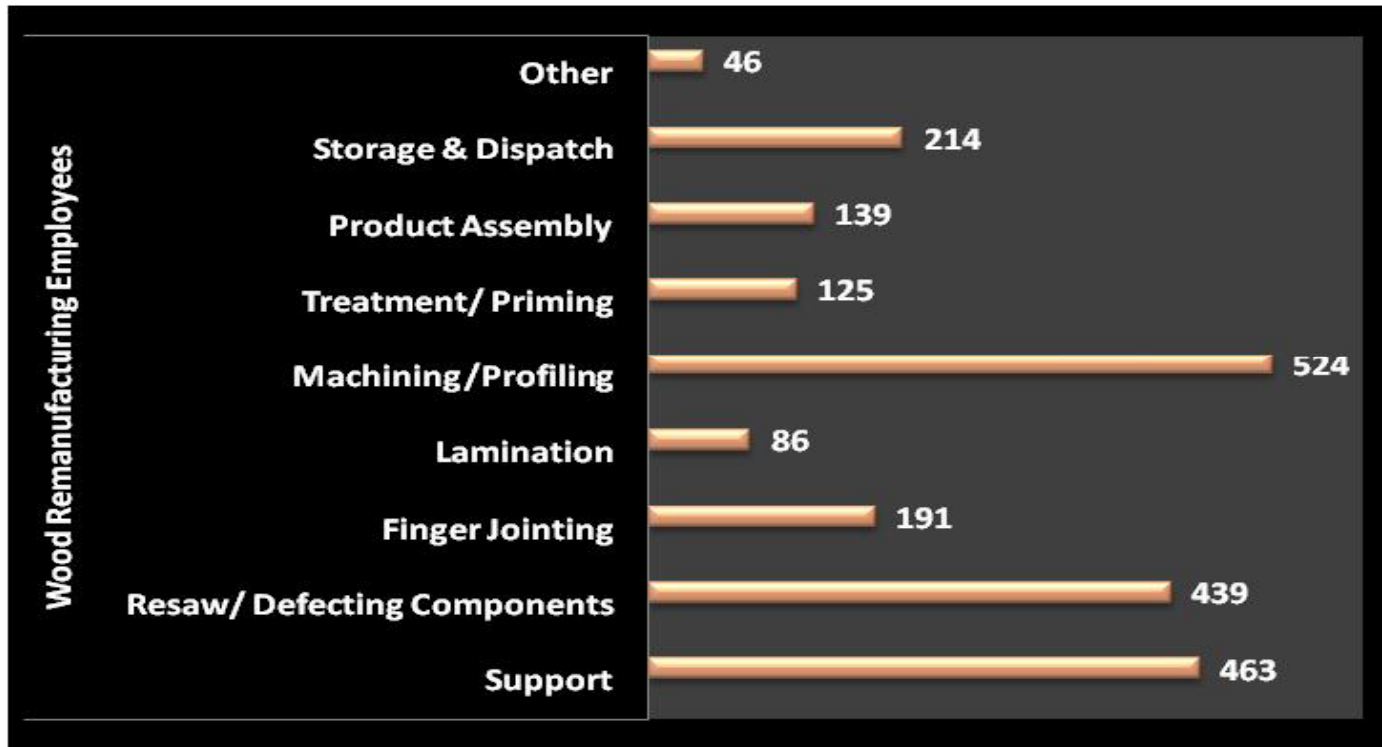
1. 60% of 5100 staff are setting up and operating equipment
2. Twice as many saw doctors as timber machinists
3. Sawmilling/wood preparation employ 43%; dry mill 35%
4. Support covers a group of occupations

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# WOOD REMANUFACTURING EMPLOYEES



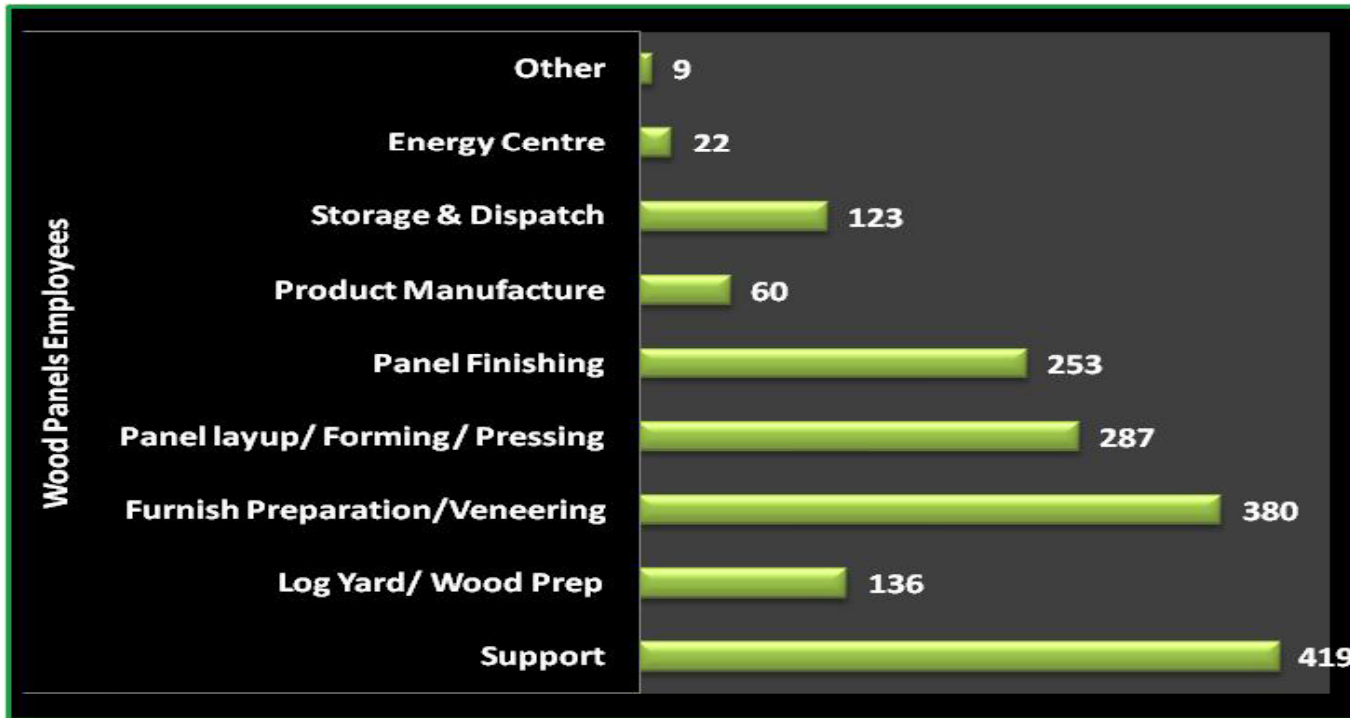
1. Nearly 2/3 of 2200 employees are operating equipment
2. Timber machinists dominate technical trades
3. Machining / Resaw / Defecting staff dominate (44%)

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# WOOD PANELS EMPLOYEES

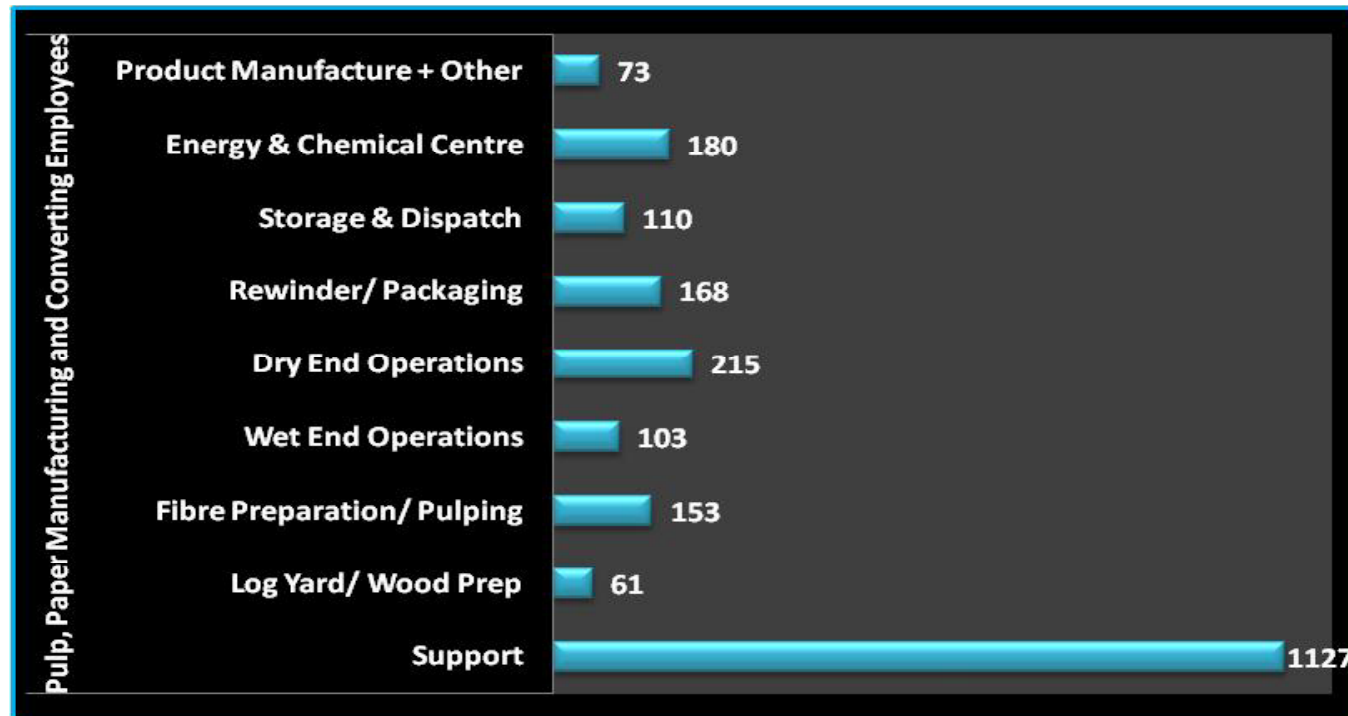


1. Over 60% of 1700 employees are plant operators
2. High numbers of professional specialists, maintenance and supervisors
3. One third of staff each in product preparation, and in manufacturing and finishing

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# PULP AND PAPER EMPLOYEES INCL. CONVERTING



1. Less than 50% are plant operators or drivers
2. High support staff ratio
3. Staff spread over a large number of process areas

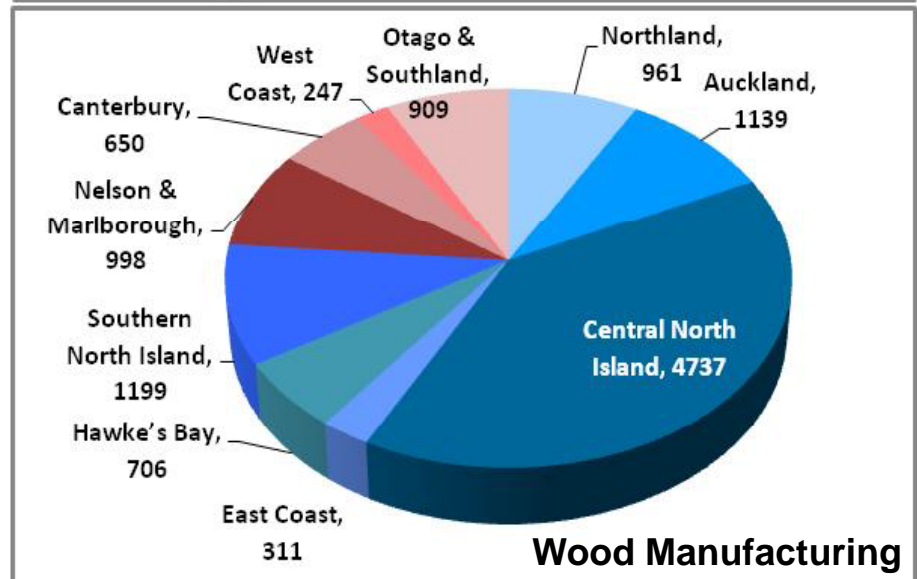
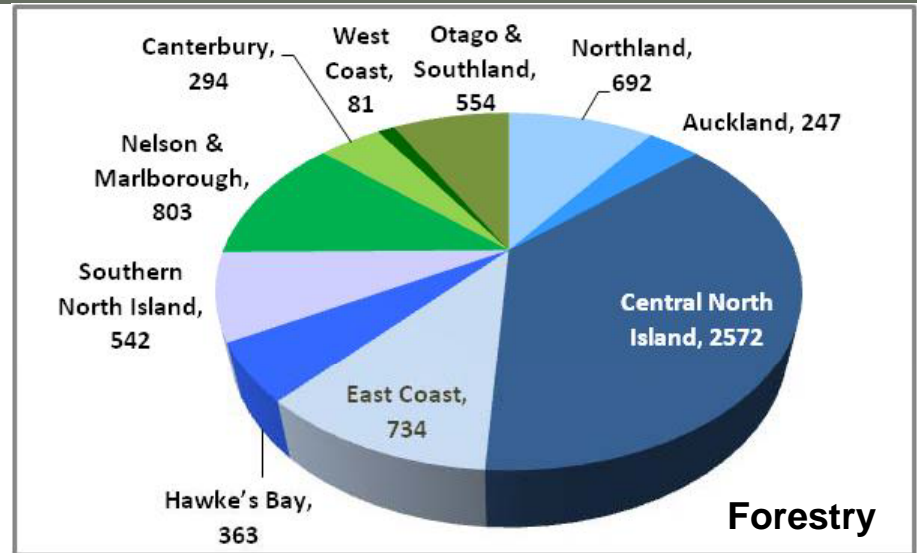
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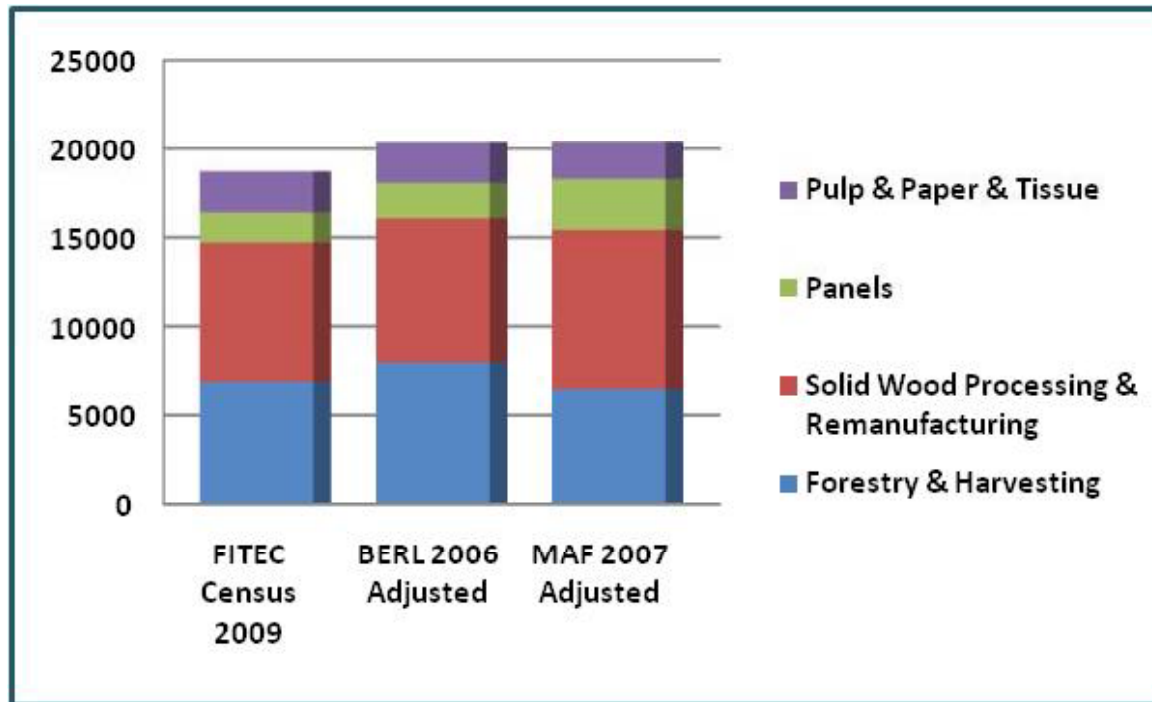
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# TOTAL EMPLOYEES BY WOOD SUPPLY REGION

- $\frac{3}{4}$  of the workforce in the North Island
- Central North Island employs half the NI workforce
  - Forestry 40%
  - Wood Manufacturing 37%
- Regions with low employee numbers:
  - Forestry: Auckland, West Coast
  - Wood Manufacturing: East Coast, West Coast



# COMPARISON OF DIFFERENT DATA SETS



- Datasets use different combinations of industry codes – adjustment required
- Lower FITEC totals reflect the industry downturn (2007-08)

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## SUM UP

- Information shared on an aggregate level to avoid release of confidential data (available on request)
- Data also available by NZ Statistics or by TEC regions
- Some additional data collected:
  - Forestry:
    - regional harvesting types and systems
    - annual harvest production for most regions
    - limited silviculture production information
  - Wood Manufacturing:
    - raw material inputs and log usage
    - staff losses / gains over last 12 months
    - productivity information (shift patterns, operational hours, 2009 production performance)