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# MANAWATŪ REGION MANUFACTURING SECTOR

APRIL 2021



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# Executive Summary

**This purpose of these economic sector profiles for the Manawatū region is to describe the contribution of key sectors to the economic wellbeing of the region. Seven sectors are expected to contribute to a significant share of future growth in the number of jobs and incomes in the region over the next 25 years. They are healthcare, public administration (including defence), logistics, construction, tourism, professional, scientific and technical services, and manufacturing.**

Manufacturing has experienced significant change over the last forty years, beginning with rapid reform to import controls in the 1980s and the removal of trade barriers in many of the countries New Zealand exports to. Manufacturing has experienced growth in labour productivity and employee earnings but a decreasing share of GDP and jobs. Contributing factors to the decline in GDP and employment share have been increased outsourcing, a large decline in sheep numbers, an increase in dairy production (which is more capital intensive than meat processing), and increased import competition.

The manufacturing sector is a major source of employment in the Manawatū region, with a workforce of 5,060 people in February 2020, or 7.7% of total employment in the region. Total workforce numbers in the sector declined by 2% between 2000 and 2020, while total workforce growth in the region was 29% over this period. Nationally, the sector has a 9.4% share of total employment. Self-employment in the sector is small, accounting for 300 people; 6% of the total manufacturing workforce in 2018.

Employment in the sector peaked in 2002, when a workforce of 5,390 was recorded, but declined steadily through to 2012, when employment declined to 4,330

people. However, since 2012, employment in the sector has increased strongly, with manufacturing accounting for 12% of workforce growth in the region between 2012 and 2020.

The sector accounted for 10.2% of employment in the region in 2000, but the decline in its share of employment to 7.7% in 2020 does not reflect the current outlook for the sector. Infometrics' projections for workforce growth in the sector suggest the total manufacturing workforce will reach 6,714 by 2043, an increase of 36% from 2020, with an additional 1,794 people working in the sector. The overall workforce in the region is projected to increase by 31% over this time.

Total manufacturing sector earnings (salaries and wages and self-employment income) in the year ended March 2019 in the Manawatū region were \$312 million, or 8.5% of total earnings in the region. Earnings in the sector increased by 79% between 2000 and 2019, well below the average growth rate of 140% across all sectors in the region. Earnings in manufacturing grew by just 23% between 2000 and 2012, while overall growth for the region was 78%. However, since 2012 earnings growth in the sector has been stronger than overall earnings growth for the region, increasing by 44% between 2012 and 2019 compared with 34% growth for all sectors.

## WORKFORCE



**5,060**

7.7% of total employment

## BUSINESSES



**\$513**

4.3% of total earnings

## EARNINGS



**\$312M**

8.5% of total earnings

## GDP



**\$432M**

6.6% of total GDP

Earnings growth in the sector has also been stronger than for New Zealand manufacturing, where earnings growth was 32% over this period.

The contribution to earnings in the region from manufacturing is much higher than its share of employment because the sector has a higher share of full-time employment and a low self-employment share.

The contribution to GDP in the region by the manufacturing sector is estimated to have been \$432 million in the year to March 2020 (6.6% of regional GDP). GDP in the sector increased by 13% between 2000 and 2020, an average annual growth rate of 0.6%.

There were 513 businesses recorded in the manufacturing sector in 2020, a decline of 9% from 2000. In 2020 there were 177 businesses with no employees, 276 businesses with 1 – 19 employees, 48 businesses with 20 – 29 employees and 18 businesses with 50 or more employees.

The average size of manufacturing companies in the region is smaller than the average for New Zealand manufacturing.

**Table 1: Manufacturing employment by business size**

Number of employees	Manawatū region	New Zealand
1 - 19 employees	33%	28%
20 - 49 employees	27%	14%
50 employees and over	40%	58%

The region’s strengths in fabricated metal products, transport equipment and machinery and equipment manufacturing are likely to be a contributor to the small average business size in the region, due to the specialised nature of these companies. In 2020 Statistics New Zealand recorded 81 fabricated metal companies, 36 transport equipment companies and 129 companies making machinery and equipment in the region.

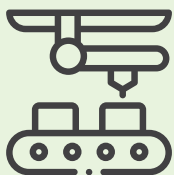
The Manawatū region has a greater proportion of manufacturing employment within the food product, fabricated metal product, machinery and equipment manufacturing, and polymer product and rubber product manufacturing sectors. The strength of these three sub-sectors is linked to the importance of agriculture in the Manawatū region and the strong research and development sector in Palmerston North.



**The largest components of the manufacturing sector are:**



**Food processing**, which had 1,950 employees in 2020, increasing by 31% from 2000. Job numbers declined from 1,490 in 2000 to 1,280 by 2008, but by 2020 the number of jobs had increased to 1,950. Meat and meat product manufacturing has been the main contributor to this growth, with the number of jobs in Manawatū District increasing from 310 in 2000 to 1,050 in 2019. The movement of Ovation to Feilding has been the largest contributor to growth in job numbers.



**Machinery and equipment**, which had 760 employees in 2020, declining by 5% from 2000. The sector experienced the loss of 235 jobs between 2000 and 2010, with the closure of the Ralta/Sunbeam factory the biggest contributor to job losses in this sector. However, since 2010, employee numbers have increased from 485 to 760 in 2020.



**Fabricated metal products**, which had 630 employees in 2020, increasing by 62% from 2000. The sector covers a diverse range of companies, including foundries, prefabricated metal buildings, aluminium joinery, structural steel fabricating and sheet metal products.



**Polymer product and rubber manufacturing**, which had 395 employees in 2020, increasing by 10% from 2000.



**Transport equipment**, which had 340 employees in 2020. Employment in the sector increased from 305 in 2000 to 340 in 2020, an increase of 11%. Key activities in the sector are motor vehicle body and trailer manufacturing, railway rolling stock repair and aircraft repair services.

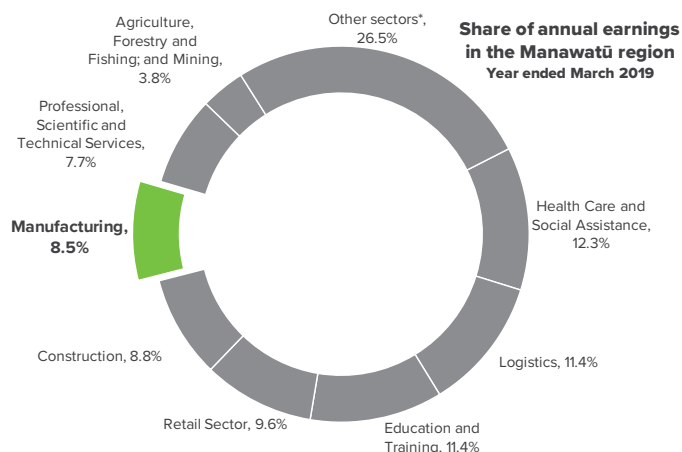
The biggest contributor to the decline in employment in the manufacturing sector in the period through to 2012 was the loss of 455 jobs in textiles, leather, clothing and footwear, a decline of 76% from 2000. Major company closures during this period included Feltex and Lane Walker Rudkin. The number of jobs in the sector has been stable since 2012.

Manawatū region data from the 2018 Census shows that 88% of the manufacturing workforce was employed full-time compared with 77% across all sectors in the region. The Census also showed that just 6% of the region’s manufacturing workforce was self-employed compared with 7.8% across all sectors in the region. While 20% of manufacturing sector employees in the region had no qualification, compared with 12.5% of the region’s working age population, average earnings in the sector were higher than overall earnings in the region.

**Conclusions**

The manufacturing sector did not contribute to employment growth in the Manawatū region between 2000 and 2020. However, there has been a strong recovery in manufacturing employment since 2012. The two sub-sectors contributing the most to this recovery have been food processing, and machinery and equipment manufacturing. The growth in food processing was boosted by Ovation moving its meat processing to Feilding and Goodman Fielder shifting the production of Irvines Pies to Palmerton North.

There is a diverse range of companies operating in the fabricated metal products, transport equipment and machinery and equipment manufacturing sub-sectors in the region, which will continue to drive economic growth in the region.



\* Other sectors includes: Public administration and safety services; Electricity, gas, water and waste services; Information media and telecommunications; Financial and insurance services; Rental, hiring and real estate services; Administrative and support services; Arts and recreation services; Other services

# Introduction

**Manufacturing in the new millennium has experienced significant restructuring, a continuation of significant change for the sector which accelerated when major reform to import protection began in the mid-1980s.**

The total number of employees in the sector declined by 2% between 2000 and 2020, well below the growth rate of 35% for all sectors in the region. Real (inflation adjusted) GDP growth in the sector between 2000 and 2020 was 13%, behind the 49% increase in total GDP in the region. Outsourcing has been an important factor in the decline in the share of GDP for the manufacturing sector and has contributed some of the growth which has been occurring in the services sector. Before outsourcing activities, manufacturing firms used to provide many of their own service activities in-house. Examples of activities which have been outsourced include; transport, warehousing, wholesale trade, accounting, data processing, cleaning, maintenance and engineering design. Firms have outsourced these due to the cost advantages provided by specialization. Due to the change in accounting, these previous activities are now shown to occur in the services sector. This has overestimated the growth taking place in services and overestimates the decline in manufacturing.

Therefore, there is a significant interdependence between the two sectors, implying one sector cannot exist without the other.

Dairy cow numbers increased by 18% between 2002 and 2020 while sheep and beef cattle numbers have declined by 34% and 12% respectively between 2002 and 2020. There has still been growth in employment in meat processing because of an increase in value-added processing of meat. This has resulted in a 5.1% increase in total jobs in the sector nationally between 2000 and 2020, and an increase of 188% in the Manawatū region.

The reduction of import tariffs by New Zealand has allowed low cost goods to enter New Zealand, forcing many manufacturing firms in New Zealand to close. The most obvious example is the textile, leather, clothing and footwear sub-division of manufacturing. This sub-division experienced a decline in employment nationally of 61% between 2000 and 2020.





# Definition

**A simple way of defining manufacturing is the act of making a product from raw materials. This includes activities such as bakeries, printing, food processing, clothing and textiles, refining of minerals, synthesizing chemicals and pharmaceuticals, metal products and machinery production.**

The definition of manufacturing using the Australia New Zealand Standard Industrial Classification<sup>1</sup> is as follows:

Manufacturing mainly includes units engaged in the physical or chemical transformation of materials, substances or components into new products (except agriculture and construction). The materials, substances or components transformed by units in this division are raw materials that are products of agriculture, forestry, fishing and mining, or products of other manufacturing units.

Activities undertaken by units incidental to their manufacturing industry, such as selling directly to the consumer products manufactured on the same premises from which they are

sold, such as bakeries and custom tailors, are also included in the division. If, in addition to self-produced products, other products that are not manufactured by the same unit are also sold, the rules for the treatment of mixed activities have to be applied and units classified according to their predominant activity.

Determination of the coverage of the manufacturing sector is ambiguous. There is a blurring of the boundary between other sectors of the economy and manufacturing. An example of this is the construction of wall frames and trusses for use in buildings. When the wall frames and trusses are pre-assembled off the construction site they are deemed to be a manufacturing activity, when they are built on site, they are included in the construction sector.

<sup>1</sup> ANZSIC 2006 aligns as far as practicable with the International Standard Industrial Classification of All Economic Activities (ISIC) (Revision 4) and the North American Industry Classification System (NAICS) at the subdivision level.



# Why is manufacturing vital?

**Manufacturing is vital to the economy because manufacturing is not an island. The manufacturing sector has many flow-on effects, to and from itself.**

Manufacturing is also vital through its contribution to research and development (R&D). This is because manufacturing R&D is a major contributor to economic growth in New Zealand. In 2000, the manufacturing sector contributed 13% of total New Zealand R&D but this had increased to 17.5% by 2018.



## Outsourcing by the manufacturing sector

Increased outsourcing by the manufacturing sector has contributed to a decline in the sector's share of total employment and GDP. A case study in France has shown that between 1980 and 1990 that the services sector grew while the manufacturing sector declined<sup>2</sup>. However, the level of manufacturing and industry related activities had not changed significantly. The study showed the same

activities were occurring, just more of the previously considered manufacturing activity is now considered to be part of the services sector. Increased demand for skilled labour in manufacturing has also increased demand for education services.

<sup>2</sup> OECD The Service Economy (2006)

# Manawatū region manufacturing indicators

## Workforce

In February 2020 the manufacturing sector workforce in the Manawatū region was 5,060 people, 2.1% of the New Zealand manufacturing workforce (244,400 people). Just over two thirds of the manufacturing jobs in the region were in Palmerston North City and over one third in the Manawatū District. Manufacturing employment in the region declined by 2% between 2000 and 2020 while New Zealand manufacturing employment increased by 2% over this time period.

The national manufacturing sector contributed 9.4% of total New Zealand employment in 2020 while 7.7% of total Manawatū employment was contributed by the manufacturing sector.

Infometrics employment projections prepared in March 2020 suggest there will be 6,614 jobs in the region's manufacturing sector by 2043, an increase of 36%, or 1,794 jobs. This is slightly higher than the 21% increase in the region's total workforce between 2018 and 2043.

## Ethnicity

The manufacturing workforce in the region in 2018 was predominantly European. However, compared to the total New Zealand manufacturing workforce, there were higher percentages of European and Māori ethnicity and lower proportions of Pacific peoples. Compared with other sectors in the Manawatū region, manufacturing has higher proportions of Māori and Pacific peoples.

## Qualifications

Data for the highest qualification gained by manufacturing employees shows more workers with no qualifications and fewer workers with university degrees than the average for all industries in the region. In 2018 the manufacturing sector had 20% of employees with no qualification, 69.2% with a school or post-school qualification (such as a trade course) and 10.8% with university degrees or higher qualification. The average for all industries was 12.5% with no qualifications, 60.9% with a post school qualification and 26.6% with degrees or higher (2018 Census).

## Gender

Manufacturing has a greater proportion of males, accounting for 76% of the workforce in 2018 compared with 52% for the total Manawatū region workforce. The male share has been increasing gradually, in part due to the decline in textile, leather, clothing and footwear manufacturing employment, where females accounted for 63% of the workforce in 2018.

## Employment status

Manufacturing employees are more likely to be in full time employment, with 88.3% employed full-time in 2018 compared with 77.2% for the overall Manawatū region workforce. The highest shares for part-time employment in the region's manufacturing workforce were in textile, leather, clothing and footwear manufacturing (22.4% part-time) and printing (20.5% part-time).

Self-employment is lower in the sector, accounting for 6% of the total manufacturing workforce in 2018. The share for self-employment for all sectors in the region was 7.8%.

## Gross domestic product (GDP)

The contribution to GDP by the manufacturing sector is estimated to have been \$432 million in the region in the year to March 2020 (6.6% of regional GDP). GDP in the sector increased by 13% between 2000 and 2020, an average annual growth rate of 0.6%. The largest contributors to manufacturing GDP in the region were:

- Food product manufacturing \$120 million
- Machinery and other equipment manufacturing \$85 million
- Polymer product and rubber product manufacturing \$48 million
- Fabricated metal product manufacturing \$46 million

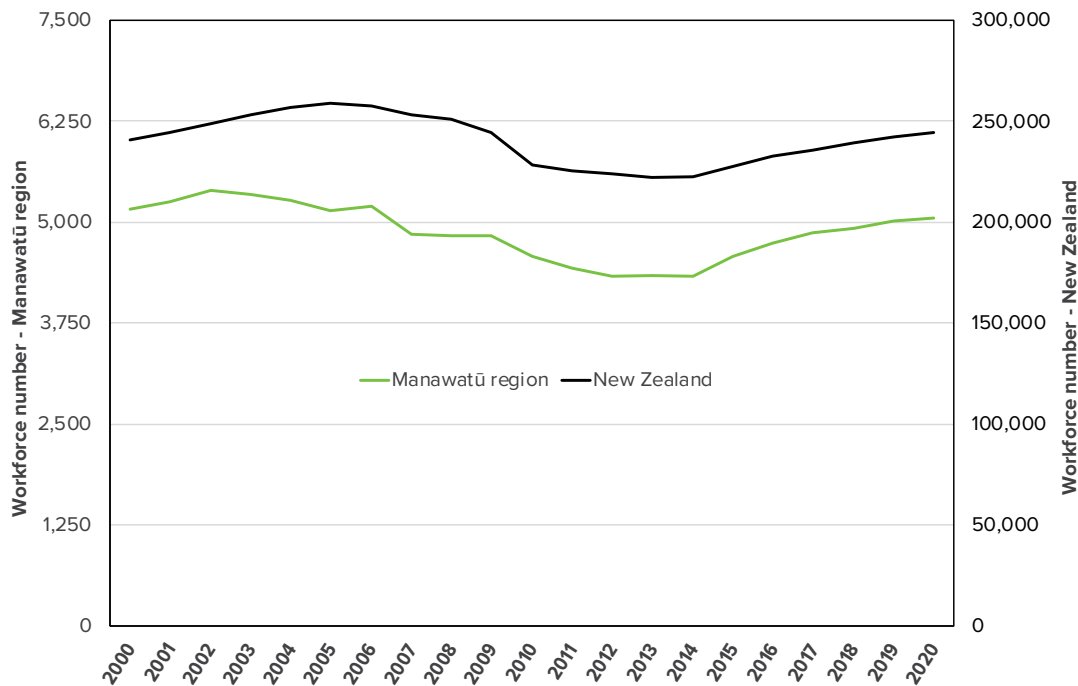
## Industry sectors within manufacturing

Employment in the Manawatū is reasonably similar to the national manufacturing structure, but three small sectors are absent from the region:

- Beverage and tobacco product manufacturing
- Pulp, paper and converted paper product manufacturing
- Petroleum and coal product manufacturing

The only sector where the Manawatū region shows a greater proportion of employment than the average for New Zealand is polymer product and rubber product manufacturing. The Manawatū region accounts for 3% of national employee numbers in the sector.

**Figure 2: Manufacturing employment**



**Table 2: Ethnicity of workforce<sup>3</sup>**

	European	Māori	Pacific peoples	Asian
New Zealand - all industries	71.6%	13.5%	6.5%	15.0%
New Zealand - manufacturing	65.8%	16.1%	10.1%	14.5%
Manawatū region - all industries	80.8%	15.1%	3.4%	8.5%
Manawatū region - manufacturing	77.6%	18.4%	4.2%	7.9%

Source: Statistics New Zealand

<sup>3</sup> Note: percentages for ethnicity add up to more than 100% because people can identify with more than one ethnic group.

## Number of businesses and business size

There were 513 businesses recorded in the manufacturing sector in 2020, a decline of 9% from 2000. The number of manufacturing businesses in New Zealand grew by 1% over the same period. In 2020 there were 177 manufacturing businesses in the region with no employees, 276 businesses with 1 – 19 employees, 48 businesses with 20 – 29 employees and 18 businesses with 50 or more employees.

The average size of companies in the region is smaller than the average for New Zealand manufacturing. In the region, 33% of employees in 2020 worked in businesses with between 1 and 19 employees, 27% worked in businesses with 20 to 49 employees, and 40% worked in businesses with 50 employees or more. New Zealand manufacturing employment data shows 28% of employees worked in businesses with between 1 and 19 employees, 14% worked in businesses with 20 to 49 employees, and 58% in worked businesses with 50 employees or more.

Estimates for the number of new businesses that survive more than three years after they were established shows that manufacturing companies are more likely to survive

than other businesses in the region overall. The average three-year survival rate for manufacturing businesses established between 2015 and 2017 is 67% compared with 57% for all businesses in the region. The survival rate was also higher than for the New Zealand manufacturing sector, which had an average survival rate of 60%.

## Research and development

The Palmerston North City Council has used Statistics New Zealand estimates to approximate the level of R&D in the Manawatū region, using national data and accounting for the significant contribution from Massey University, the Fonterra Research Centre and the Crown Research Institutes based in Palmerston North. The estimates suggest total R&D expenditure in the Manawatū was \$188 million in 2020, 4.1% of total national R&D expenditure. This shows a significant contribution of the Manawatū region to national research and development. The estimates suggest around 2,500 were people directly employed in research in the region (3.9 percent of total employment in the region in 2020).



# Manawatū region manufacturing sub-sectors

## Food product manufacturing

The food product manufacturing sub-division is the largest manufacturing employment sector within the Manawatū region, accounting for 39% of total manufacturing employment in the region in 2020. Employment in this sub-division has increased from 1,490 employees in 2000 to 1,950 employees in 2020, an increase of 31% or 460 additional employees. National growth was 19%.

There were 75 businesses in the sector in 2020, an increase of 19% from 2000. National business numbers increased by 47% over the same time period.

Food product manufacturing activities which account for most of the employment in this sub-sector in the Manawatū region are:

- Meat processing
- Dairy product processing
- Bakery product manufacturing
- Other food product manufacturing

Meat and meat product processing accounted for most of the growth in the food product manufacturing sector between 2000 and 2020, with 900 jobs recorded in 2020, an increase of 144% from 2000. The establishment of the Ovation meat processing plant in Feilding has been the biggest contributor to the growth in meat processing employment.

Dairy product processing accounted for 503 jobs in 2020 (36% increase from 2000) while bakery products accounted for 265 jobs (15% decline from 2000). Ernest Adams, a subsidiary of Goodman Fielder, is the largest business operating in the bakery products sector. It has increased employment in the region due to the transfer of the production of Irvines pies production to Palmerston North from Auckland. The decline in overall bakery products employment since 2000 is due to the closure of two bread manufacturing plants in the city since 2000.

## Textile, leather, clothing and footwear manufacturing

Employment in this sub-division declined by 77% between 2000 and 2020 due to the loss of 460 jobs in the region. However, employment in the sector has been stable since 2012. National employment in the sector declined by 61% between 2000 and 2020.

The number of business in the sector has declined from 45 in 2000 to 21 by 2020, a decline of 53%. National business numbers in the sector declined by 35%.

Textile, leather, clothing and footwear activities which account for most of the employment in this sub-sector in the Manawatū region are:

- Clothing manufacturing
- Knitted product manufacturing

A major reason for the national and regional decline in this sector has been the reduction of tariffs and other import protection since the mid-80s, resulting in increased competition from imports. The closure of Feltex and Lane Walker Rudkin due to financial issues also resulted in several major factory closures in the region.

## Wood product manufacturing

Employment declined in this sector to 165 employees in 2020, a decline of 13% from 2000. National employment in the sector declined by 8% over the same time period.

The number of business in the sector has declined from 54 in 2000 to 30 by 2020, a decline of 44%. National business numbers in the sector declined by 24%.

Wood product manufacturing sectors which account for most of the employment in this sub-sector in the Manawatū region are:

- Log sawmilling
- Wooden structural fitting and component manufacturing (e.g. wood door manufacturing, wooden kitchen cabinet making and roof trusses manufacturing).

## Printing (including the reproduction of recorded media)

The printing sector in the Manawatū Region includes off-set printing, digital printing and screen printing.

There were 78 employees in this sub-division in 2020, declining by 46% in the Manawatū between 2000 and 2020, with 67 job losses. National data shows a decline of 43% over the same time period. The number of businesses declined from 30 in 2000 to 24 by 2020, a decline of 20%. National business numbers in the sector declined by 26%.

## Basic chemical and chemical product manufacturing

Employment in this sector in the Manawatū region is concentrated in basic organic chemical manufacturing, although there has been growth in employment in pharmaceutical and medicinal product manufacturing. There has been a 29% reduction in employee numbers in the region from 2000 to 2020. This sector employed 180 workers in 2020, making up 3.1% of Manawatū manufacturing employment. Nationally, employment was unchanged between 2000 and 2020.

## Polymer product and rubber product manufacturing

Polymer product manufacturing is the only source of employment in this sector in the region, with 395 jobs in 2020. Employment in the sector increased by 10% between 2000 and 2020. National employment in the sector declined by 3%

The number of businesses operating in the sector declined from 33 in 2000 to 24 in 2020, a decline of 29%. National business numbers in the sector declined by 11%.

## Non-metallic mineral product manufacturing

Concrete product manufacturing (such as the production of ready mixed concrete and concrete products) is the key activity in the non-metallic mineral product manufacturing sector in the Manawatū Region.

Strong growth in the construction sector in the region has contributed to the number of jobs in the region increasing from 95 in 2000 to 175 in 2020, an increase of 84%. National employment increased by 34% over the same time period.

While there has been an increase in employment, the number of businesses in the sector has declined from 27 in 2000 to 18 in 2020, a decline of 33%. National business numbers in the sector increased by 7%.

## Primary metal and metal product manufacturing

Basic ferrous metal manufacturing (such as iron smelting and steel manufacturing) is the key activity in this sector in the Manawatū Region. Primary metal and metal product manufacturing has the smallest share of Manawatū manufacturing employment, contributing just 30 workers in 2020 employed in six businesses.

## Fabricated metal product manufacturing

The fabricated metal product manufacturing sector in the Manawatū Region includes a diverse range of activities involved in the production of metal products. Key activities in the region are:

- Structural steel fabricating for buildings and other structures
- Prefabricated metal building manufacturing
- Architectural aluminium product manufacturing
- Metal roof and guttering manufacturing (except aluminium)
- Other structural metal product manufacturing
- Other sheet metal product manufacturing
- Metal coating and finishing

There has been a strong increase in employment since 2000, with a 62% increase in employee numbers. This is the largest rate of increase of all sub-divisions, resulting in 240 new jobs. There were 630 people employed in 2020. The growth is linked to the strong growth in construction activity in the region and primary sector capital investment. National employment in the sector increased by 23% over the same time period.

While there has been an increase in employment, the number of businesses in the sector declined from 99 in

2000 to 81 in 2020, a decline of 18%. National business numbers in the sector declined by 9%.

### Transport equipment manufacturing

Transport equipment manufacturing sectors which account for most of the employment in this sub-sector in the Manawatū region are:

- Motor vehicle body and trailer manufacturing
- Aircraft manufacturing and repair services
- Other motor vehicle parts manufacturing
- Boatbuilding and repair services

Transport equipment manufacturing employed 340 people in the region in 2020, an increase of 11% from 2000. This was slightly stronger than the national increase of 8%. Motor vehicle body and trailer manufacturing is the largest component in the sector, and employee numbers have increased by 45% since 2000. The strength of this sector is linked to strength in commercial vehicle wholesaling in the city, particularly for trucks, and the strong growth that is occurring in the logistics sector in the region.

Aircraft manufacturing and repair services is also an important sector for employment in the region and has experienced a 216% increase in employee numbers since 2000.

The number of businesses in the sector has been stable over the past 20 years. National business numbers in the sector increased by 4%.

### Machinery and equipment manufacturing

Machinery and equipment manufacturing is the second largest sector within manufacturing in the Manawatū region, with 760 employees in 2020. Employment declined slightly between 2000 and 2020 due to the loss of domestic appliance manufacturing when Ralta/Sunbeam closed its manufacturing plant. However, there has been strong growth in employment since 2012, when there were 550 employees in the sector. National employment in the sector increased by 12% between 2000 and 2020.

Machinery and equipment manufacturing sectors which account for most of the employment in this sub-sector in the Manawatū region are:

- Electrical equipment manufacturing
- Specialised machinery and equipment manufacturing, including agricultural machinery

- Other machinery and equipment manufacturing

Agricultural machinery and equipment manufacturing is an area of strength for the region, with the 220 employees in the region, accounting for more than 10% of national employment in the sector. Links to Massey University and the other research institutes based in Palmerston North have contributed to this strength.

The number of businesses in the sector has increased from 96 in 2000 to 129 in 2020, an increase of 34%. National business numbers in the sector increased by 9%.

### Furniture and Other Manufacturing

There were 169 people employed in furniture and other manufacturing in 2020, a decline of 12% from 2000. National employment in the sector declined by 26%. This sub-division has experienced a decrease in furniture manufacturing employment both nationally and regionally in the Manawatū. The national decline was 34% while the Manawatū region had a smaller 22% decline between 2000 and 2020.

Key categories in the furniture and other manufacturing sector in the Manawatū region are:

- Wooden furniture and upholstered seat manufacturing
- Jewellery and silverware manufacturing
- Toy, sporting and recreational product manufacturing

The number of businesses in the sector has declined from 60 in 2000 to 51 in 2020, a decline of 15%. National business numbers in the sector declined by 17%.



