



SECTOR SKILLS PLAN 2027-2028

15 JUNE 2026



TABLE OF CONTENTS

A. FORWARD	III
B. ACRONYMS	IV
C. EXECUTIVE SUMMARY	V
D. RESEARCH PROCESS AND METHODS	VIII
CHAPTER 1: SECTOR PROFILE	1
1.1 Introduction	1
1.2 Scope of Coverage	1
1.3 Key Role Players	5
1.4 Employer Profile	10
1.5 Labour Market Analysis	11
1.6 Conclusion: Key Skills Issues	18
CHAPTER 2: KEY SKILLS CHANGE DRIVERS	19
2.1 Introduction	19
2.2 Factors Affecting Skills Demand and Supply	19
2.3 Policy Frameworks Affecting Skills Demand and Supply	22
2.4 Conclusion	25
CHAPTER 3: SECTORAL SKILLS DEMAND AND SUPPLY ANALYSIS	26
3.1 Introduction	26
3.2 Occupational Shortages and Skills Gaps	26
3.3 Supply-Side Analysis	35
3.4 Sectoral Priority Occupations and Interventions (SPOI)	43
3.5 Conclusion	48
CHAPTER 4: SETA PARTNERSHIPS	49
4.1 Introduction	49
4.2 The FP&M SETAs Approach to Partnerships	49
4.3 Existing FP&M SETA Partnerships	50
4.4 Proposed Partnerships	55
4.5 Conclusion	57
CHAPTER 5: SETA MONITORING AND EVALUATION	58
5.1 Introduction	58
5.2 Sector Skills Planning Reflections	58
5.3 Plan of Action - Areas Within the M&E Function that Need to be Prioritised Over the Next 5-Year Period	67
5.4 Conclusion	68
CHAPTER 6: STRATEGIC SKILLS PRIORITY ACTIONS	69
6.1 Introduction	69
6.2 Key Skills Findings from Previous Chapters	69
6.3 Strategic Skills Priorities	71
6.4 Conclusion	76
REFERENCES	77

LIST OF TABLES

TABLE 1: SUMMARY OF COMMISSIONED AND COMPLETED RESEARCH PROJECTS	XI
TABLE 2: FP&M SETA STANDARD INDUSTRIAL CLASSIFICATION (SIC) CODES	1
TABLE 3: KEY ROLE PLAYERS IN THE FP&M SECTOR	5
TABLE 4: NUMBER OF EMPLOYERS, 2025-2026	10
TABLE 5: REAL OUTPUT OF FP&M SUB-SECTORS, 2021-2024	12
TABLE 6: MAJOR NATIONAL STRATEGIES AND PLANS AFFECTING SKILLS DEMAND AND SUPPLY	22
TABLE 7: HARD TO FILL VACANCIES IN THE CTFL SUB-SECTORS	26
TABLE 8: HARD TO FILL VACANCIES IN THE FORESTRY VALUE CHAIN	27
TABLE 9: HARD TO FILL VACANCIES IN THE PRINTING, PRINT MEDIA, PUBLISHING AND PACKAGING SUB-SECTORS	28
TABLE 10: SKILLS GAPS	29
TABLE 11: LIST OF EMERGING OCCUPATIONS IN THE FP&M SECTOR DUE TO TECHNOLOGICAL ADVANCEMENTS	

.....	32
TABLE 12: EMERGING OCCUPATIONS DUE TO ENVIRONMENTAL CONCERNS.....	33
TABLE 13: EMERGING OCCUPATIONS DUE TO CHANGING CONSUMER BEHAVIOUR.....	34
TABLE 14: OVERVIEW OF POST-SCHOOL EDUCATION AND TRAINING, 2022-2024	36
TABLE 15: ENROLMENT FIGURES OF LEARNERS BY INSTITUTION TYPE, 2018-2024	36
TABLE 16: GRADUATION FIGURES OF LEARNERS BY INSTITUTION TYPE, 2018-2024.....	37
TABLE 17: LEARNING PROGRAMME PERFORMANCE BY PROGRAMME TYPE, 2022-2026.....	41
TABLE 18: SECTOR PRIORITY OCCUPATIONS AND INTERVENTIONS LIST (SPOI).....	46
TABLE 19: EXISTING PARTNERSHIPS	50
TABLE 20: PROPOSED PARTNERSHIPS	55
TABLE 21: STRATEGIC PRIORITY ACTIONS BEING CAPTURED IN SP AND APP AND THE STATUS OF IMPLEMENTATION	63
TABLE 22: FP&M SETAS ECONOMIC RECOVERY AND RECONSTRUCTION SKILLS PLAN – PLANNED INTERVENTIONS FOR THE MEDIUM TO LONG TERM	65

LIST OF FIGURES

FIGURE 1: FP&M SECTOR VALUE CHAIN.....	4
FIGURE 2: VALUE CHAIN LINKAGES	5
FIGURE 3: EMPLOYER GEOGRAPHICAL SPREAD, 2025-2026	11
FIGURE 4: SOUTH AFRICAN GDP GROWTH RATES, 2026.....	12
FIGURE 5: EMPLOYMENT IN FP&M SUBSECTORS, 2017-2026	13
FIGURE 6: EMPLOYMENT BY SUB-SECTOR 2016-2026	14
FIGURE 7: GENDER BREAKDOWN, 2025-2026.....	15
FIGURE 8: RACIAL BREAKDOWN, 2025-2026.....	15
FIGURE 9: AGE OF EMPLOYEES, 2025-2026.....	15
FIGURE 10: EMPLOYEES LIVING WITH DISABILITY, 2025-2026.....	16
FIGURE 11: GEOGRAPHICAL SPREAD OF EMPLOYEES, 2026	16
FIGURE 12: OCCUPATIONAL PROFILES, 2025-2026	17
FIGURE 13: GENDER BREAKDOWN PER OCCUPATIONAL GROUP, 2026	17
FIGURE 14: RACIAL BREAKDOWN PER OCCUPATIONAL GROUP, 2026	18
FIGURE 15: STUDENT ENROLMENTS AND GRADUATES IN PUBLIC HEIS BY MAJOR FIELD OF STUDY	37
FIGURE 16: NUMBER OF STUDENTS IN TVET COLLEGES WHO WROTE AND COMPLETED THE NC(V) LEVEL 4 QUALIFICATION, BY PROGRAMME, 2024.....	38
FIGURE 17: NUMBER OF STUDENTS IN TVET COLLEGES WHO WROTE AND COMPLETED THE REPORT 190/1 N6 PART-QUALIFICATION, BY PROGRAMME, 2024	39
FIGURE 18: NUMBER OF STUDENTS IN CET COLLEGES WHO WROTE AND PASSED GETC: ABET LEVEL 4 LEARNING AREAS BY CONTENT, 2024	40
FIGURE 19: LEARNING PROGRAMMES IMPLEMENTATION, 2019-2026.....	41
FIGURE 20: SKILLS SUPPLY-SIDE CHALLENGES AND SETA INTERVENTIONS.....	42
FIGURE 21: TYPES OF FP&M SETA PARTNERSHIPS	49
FIGURE 22: ROLE OF THE FP&M SETA AND PARTNERS	50
FIGURE 23: MONITORING AND EVALUATION FRAMEWORK.....	58
FIGURE 24: MANAGEMENT PERFORMANCE FRAMEWORK	59
FIGURE 25: FP&M SETAS APPROACH TO MONITORING.....	59
FIGURE 26: FUNCTIONS BEING MONITORED	60
FIGURE 27: EVALUATION FUNCTION	61
FIGURE 28: PLAN OF ACTION.....	67
FIGURE 29: LINKING THE HIGH IMPACT PROGRAMMES WITH THE FP&M SETAS STRATEGIC SKILLS PRIORITIES	71

A. FORWARD

The Fibre Processing and Manufacturing Sector Education and Training Authority (FP&M SETA) is pleased to present the 2027-2028 Sector Skills Plan (SSP), comprising the SSP, Cover Letter, Research Agenda, and Continuous Improvement Plan (CIP), in accordance with the requirements of the Department of Higher Education and Training (DHET). The SSP remains an important strategic tool that supports evidence-based planning, decision-making, and stakeholder collaboration across the sector. It also strengthens alignment between the SSP, the FP&M SETA Strategic Plan, and the Annual Performance Plan (APP), ensuring that skills development interventions remain responsive to both sectoral and national priorities.

This SSP is aligned to key national frameworks, including the National Development Plan (NDP) Vision 2030, the National Skills Development Plan (NSDP), and the Medium-Term Development Plan (MTDP) 2024–2029. Importantly, the SSP also responds to the priorities of South Africa's Just Energy Transition Implementation Plan (JET-IP), which emphasises inclusive economic growth, environmental sustainability, industrial transformation, and the development of skills required for a low-carbon and climate-resilient economy. The SSP recognises the increasing impact of technological transformation, environmental sustainability requirements, global competition, changing consumer behaviour, and infrastructure constraints on the FP&M sector. In response, the SETA seeks to support a workforce equipped with the technical, digital, and green skills required for a competitive, inclusive, and climate-resilient economy.

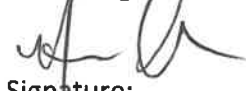
The 2027-2028 SSP provides a framework to guide skills development interventions that respond to current and emerging sector needs while supporting transformation, innovation, productivity, and sustainable growth. The FP&M SETA continues to work closely with employers, employer representatives, organised labour, government, and training providers to strengthen collaboration and expand access to workplace-based learning opportunities. Particular emphasis is placed on supporting unemployed youth through learning programmes and placements aligned to the objectives of the Presidential Youth Employment Initiative (PYEI).

The Accounting Authority and management of the FP&M SETA express their appreciation to all stakeholders who contributed to the development of this SSP. Continued collaboration remains critical in ensuring that the sector responds effectively to economic, social, technological, and environmental challenges. The FP&M SETA remains committed to contributing meaningfully towards the achievement of the NDP 2030, the NSDP, the MTDP, and the broader national agenda for inclusive growth, industrial resilience, and a just transition.

The Chief Executive Officer

On behalf of FP&M SETA

Dr Felleng Yende



Signature:

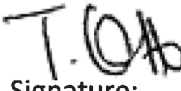
12 June 2026

The Chairperson

On behalf of the Accounting Authority

FP&M SETA

Ms. Theresa Otto



Signature:

12 June 2026

B. ACRONYMS

ACRONYM	FULL DESCRIPTION	ACRONYM	FULL DESCRIPTION
4IR	Fourth Industrial Revolution	MTDP	Medium-Term Development Plan
5IR	Fifth Industrial Revolution	NDP	National Development Plan
AfCFTA	African Continental Free Trade Area	NGP	New Growth Path
AGSA	Auditor-General of South Africa	NRF	National Research Foundation
AI	Artificial Intelligence	NSDP	National Skills Development Plan
AMSA	Apparel Manufacturers of South Africa	NTBC	National Textile Bargaining Council
APP	Annual Performance Plan	NTMA	National Textile Manufacturers' Association
ATR	Annual Training Report	OECD	Organisation for Economic Co-operation and Development
BBBEE	Broad Based Black Economic Empowerment	PC4IR	Presidential Commission on the Fourth Industrial Revolution
CAD	Computer-Aided Design	PACSA	Packaging Council of South Africa
CIP	Continuous Improvement Plan	PAMSA	Paper Manufacturers Association of South Africa
CNC	Computer Numerical Control	PASA	Publishers Association of South Africa
CoS	Centres of Specialisation	PDMA	Print and Digital Media South Africa
CSIR	Centre for Scientific and Industrial Research	PEASA	Printing Employers Association of South Africa
CTFL	Clothing, Textiles, Footwear, and Leather	PEYI	Presidential Youth Employment Initiative
DALRRD	Department of Agriculture, Land Reform and Rural Development	PIVOTAL	Professional, Vocational, Technical, and Academic Learning
DFFE	Department of Forestry, Fisheries and the Environment	PwC	PricewaterhouseCoopers
DHET	Department of Higher Education and Training	PwDs	Persons living with disabilities
DMRE	Department of Mineral Resources and Energy	QCTO	Quality Council for Trades and Occupations
DPE	Department of Public Enterprises	QLFS	Quarterly Labour Force Survey
DSTI	Department of Science, Technology and Innovation	R-CTFL	Retail-Clothing, Textile, Footwear, and Leather
DTIC	Department of Trade, Industry and Competition	RPL	Recognition of Prior Learning
DWA	Department of Water and Sanitation	SAFLEC	South African Footwear and Leather Export Council
ERRP	Economic Reconstruction and Recovery Plan	SAFLIA	South African Footwear and Leather Industries Association
FBUMA	Federation of Furniture Manufacturers' Association	SAFI	South Africa Furniture Initiative
FIBC	Furniture Industry Bargaining Council	SAIF	Southern African Institute of Forestry
FP&M SETA	Fibre, Processing and Manufacturing Sector Education and Training Authority	SARS	South African Revenue Services
FSA	Forestry South Africa	SATU	South African Typographical Union
GDP	Gross Domestic Product	SIC	Sector Industrial Classification
HE	Higher Education	SIPS	Strategic Infrastructure Projects
HEMIS	Higher Education Management Information Systems	SMME	Small Medium and Micro Enterprises
HOMTEX	South African Home Textiles Manufacturers Employers Organisation	SP	Strategic Plan
HRD-SA	Human Resource Development Strategy for South Africa	SPOI	Sector Priority Occupations and Interventions
ICT	Information and Communication Technology	SQMR	SETA Quarterly Monitoring Reports
ILDPA	International Leadership Development Programme	SSP	Sector Skills Plan
ILO	International Labour Organisation	TVET	Technical Vocational Education and Training
IoT	Internet of Things	UOT	University of Technology
IPAP	Industrial Policy Action Plan	WC	Western Cape
IPSA	Institute of Packaging South Africa	WIL	Work-Integrated-Learning
JET IP	Just Energy Transition Implementation Plan	WITS REAL	University of the Witwatersrand, Centre for Researching Education and Labour
KZN	KwaZulu-Natal	WSP	Workplace Skills Plan
LMIS	Learner Management Information System	WWF	World Wide Fund for Nature

C. EXECUTIVE SUMMARY

Introduction

The Skills Development Act of 1998 mandates the development and regular review of Sector Skills Plans (SSPs) to ensure alignment with national development priorities. In this regard, the FP&M SETA Sector Skills Plan (SSP) is aligned to the National Development Plan (NDP) Vision 2030, the National Skills Development Plan (NSDP) 2030, the Medium-Term Development Plan (MTDP) 2024–2029, the Economic Reconstruction and Recovery Plan (ERRP), and the Just Energy Transition Implementation Plan (JET-IP), amongst others. The SSP serves as the FP&M SETA's primary strategic planning instrument, providing an evidence-based assessment of sector performance, labour market trends, occupational demand and supply dynamics, and strategic skills priorities required to support inclusive growth, transformation, competitiveness, and sustainability within the sector.

Data Collection Tools and Methods

The data collection tools used for the update of the SSP included interview questionnaires specifically designed for the FP&M SETA, an employer survey, an impact study, and focus group discussion guides presented in the form of PowerPoint presentations. The study applied a mixed-methods approach to data and information collection. This included: (1) a review of available literature, including research commissioned by the FP&M SETA, national policy and strategy documents, industry plans, and sector performance reports; (2) analysis of available data sources, including sector employer data provided through the South African Revenue Service (SARS), Workplace Skills Plan (WSP) and Annual Training Report (ATR) data, economic and labour market trend data from Statistics South Africa (StatsSA) and Quantec databases, industry-provided data, SETA data on grant expenditure and learner enrolments and completions, as well as data from the Department of Higher Education and Training (DHET); (3) interviews with industry stakeholders, including trade unions and industry associations; (4) an employer survey; and (5) focus group discussions. Stakeholder engagements supported the validation of findings and ensured triangulation of data relating to occupational demand, skills shortages, and emerging labour market trends within the FP&M sector.

Sector Profile

The FP&M sector comprises 13 sub-sectors, namely Clothing, Dry Cleaning, Footwear, Forestry, Furniture, General Goods, Leather, Packaging, Print Media, Printing, Publishing, Pulp and Paper, Textiles, and Wood Products. According to SARS employer data, the sector consists of 28 431 employers in 2026, representing a 1% increase from 2025. Small and micro enterprises continue to dominate the sector, accounting for more than 90% of all employers. The highest concentration of employers remains in Gauteng, followed by the Western Cape and KwaZulu-Natal.

The sector employs approximately 506 976 people in 2026, representing 32% of total manufacturing employment and approximately 3% of national employment. Employment remains concentrated in the Clothing, Forestry, Textiles, Wood Products, Printing, Furniture, and Pulp and Paper sub-sectors. While employment growth was observed between 2022 and 2024, a downward trend has been recorded in 2025 and 2026.

The workforce remains predominantly male (59%), with females accounting for 41%. African employees constitute 72% of the workforce, followed by Coloured (15%), White (8%), and Indian/Asian (6%) employees. Youth aged 15–34 years account for just over 30% of total employment, while the proportion of employees aged 55 years and older increased from 11% to

14% between 2025 and 2026. Persons with disabilities represent approximately 2% of total employment.

The occupational structure remains concentrated in lower- and middle-skilled categories. Elementary occupations account for 33% of employment, plant and machine operators and assemblers 25%, and craft and related trades workers 13%. Managers and professionals collectively account for 11%, reflecting limited occupational mobility and highlighting the need for structured career progression pathways.

Key Skills Change Drivers

The FP&M sector continues to be shaped by five key drivers of change influencing both skills demand and supply: Technological Transformation; Environmental and Energy Concerns, including sustainability and Just Energy Transition (JET) requirements; Global Trade and Competitive Pressures; Infrastructure and Logistics Constraints; and Changing Consumer Behaviour and Market Demand. These drivers are reshaping occupational requirements across the sector and increasing demand for digital, technical, engineering, sustainability, and innovation-related competencies. The sector is increasingly required to respond to automation, digitalisation, resource efficiency imperatives, climate-related risks, supply chain inefficiencies, and shifting consumer preferences.

Sectoral Skills Demand and Supply Analysis

The SSP identifies persistent Hard to Fill Vacancies (HTFVs) across key occupations, including Sewing Machine Operators, Production/Operations Supervisors (Manufacturing), Apparel and Related Pattern Makers, Engineering Managers, Logging Plant Operators, Sales and Marketing Managers, Packaging Manufacturing Machine Minders, Textile, Clothing, Footwear and Leather Processing Machine Mechanics, Digital Artists, and Publishers, amongst others. Employers report that the primary drivers of recruitment difficulties include limited work experience, insufficient occupation-specific training, and shortages of specialised technical and digital skills.

Emerging occupations are increasingly driven by automation, digitalisation, sustainability transitions, and evolving consumer markets. These include roles such as Robotic Furniture Makers, Textile Process Automation Specialists, Packaging Automation Engineers, Digital Publishing Specialists, Sustainable Materials Specialists, and Green Supply Chain Analysts, amongst others.

The FP&M SETA continues to support skills development through funding learnerships, apprenticeships, internships, bursary interventions, skills programmes, and work-integrated learning opportunities. Impact evaluations indicate that these interventions have contributed positively to employability, workplace readiness, income generation, and career progression. However, access and participation remain uneven across provinces and sub-sectors, with ongoing challenges relating to programme completion rates, funding constraints, and alignment between training provision and occupational demand, amongst others.

The Sector Priority Occupations and Interventions (SPOI) process identified priority occupations requiring targeted interventions through structured training and workplace-based learning. These include Sewing Machine Operators, Production/Operations Supervisors (Manufacturing), Apparel and Related Pattern Makers, Engineering Managers, Logging Plant Operators, Sales and Marketing Managers, Packaging Manufacturing Machine Minders, Textile, Clothing, Footwear and Leather Processing Machine Mechanics, Digital Artists, and Publishers. These occupations remain central to improving productivity, competitiveness, innovation, and long-term sustainability within the FP&M sector.

SETA Partnerships

The FP&M SETA leverages a broad network of strategic partnerships with education and training institutions, industry stakeholders, professional bodies, government departments, and social partners to strengthen skills development and address scarce and critical skills needs within the sector. These partnerships enabled significant learner participation, lecturer development, institutional capacity building, and support for workers, cooperatives, and small businesses. The partnerships are closely aligned with national priorities such as the NDP 2030, NSDP, HRDS-SA, and emerging initiatives including the JET and 4IR and 5IR, ensuring that skills development interventions remain responsive to changing labour market demands.

While challenges persist, including limited employer-provider collaboration and capacity constraints within some institutions, the SETA has implemented targeted measures to strengthen partnership effectiveness through enhanced stakeholder engagement, capacity-building initiatives, continuous monitoring, quality assurance, and performance reviews. Overall, the partnership approach has enabled the FP&M SETA to bridge skills gaps, improve access and equity, promote innovation, strengthen workplace learning, and contribute to sector competitiveness and national development objectives.

SETA Monitoring and Evaluation

The FP&M SETA applies an integrated Monitoring and Evaluation (M&E) approach that combines performance monitoring of internal management systems with evaluations of skills development interventions. Using a Logical Framework Approach and Organisation for Economic Co-operation and Development (OECD) evaluation criteria, the SETA measures performance across the results chain from inputs and activities to outputs, outcomes, and impact. Through ongoing monitoring, research, and implementation and impact evaluations, the SETA assesses programme effectiveness, strengthens accountability, identifies good practices and areas for improvement, and generates evidence to inform strategic planning and decision-making.

Sectoral Skills Priority Actions

The FP&M SETA's strategic skills priorities focus on strengthening the sector's contribution to economic growth, competitiveness, employment creation, and sustainability. Key interventions include promoting advanced manufacturing, digital transformation, entrepreneurship, SMME development, workplace-based learning, and green skills aligned to the JET. The SETA also prioritises employer-responsive training, support for retrenched workers, flexible learning models, and stronger partnerships with industry, government, and education institutions to ensure skills development remains aligned with changing labour market needs, technological advancements, and national development priorities.

Conclusion

The SSP demonstrates the FP&M SETA's commitment to building a skilled, adaptable, and inclusive workforce that can respond to emerging economic, technological, and environmental challenges. Through evidence-based planning, strategic partnerships, and targeted skills development interventions, the SETA is well positioned to support sector growth, improve employment outcomes, and contribute to South Africa's broader industrial transformation and development objectives.

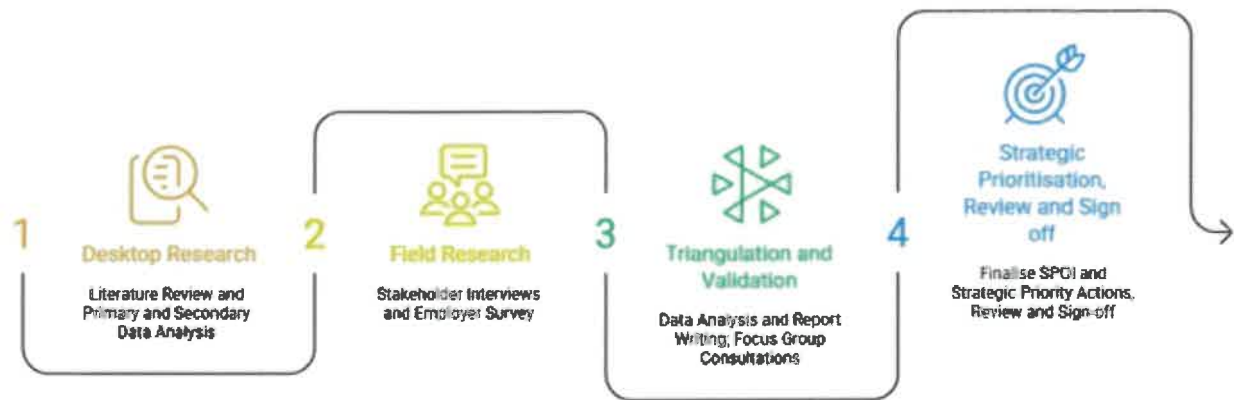
D. RESEARCH PROCESS AND METHODS

Introduction

In the development of the 2027-2028 SSP, the FP&M SETA followed the guidelines and requirements framework issued by the DHET for SSP development. The process was designed to ensure that the SSP was grounded in evidence-based research, informed by stakeholder consultation, responsive to sub-sector priorities, and aligned with strategic direction provided at Board level. Below are the key research objectives guiding the development of the SSP:



Broadly, as shown in the figure below, the research process commenced with an extensive desktop review, which included the analysis of key literature as well as primary and secondary data sources. This was followed by field research comprising interviews with key industry stakeholders and an employer survey. Findings from all research streams were analysed and integrated into a draft report, which was subsequently presented to stakeholders across the FP&M SETA's 13 sub-sectors through focus group consultations. Following validation of the findings with sector stakeholders and the FP&M SETA, a strategic prioritisation process was undertaken before the SSP was finalised and approved.



Data Collection Tools and Methods

A range of data collection tools and methods were utilised in the development of the SSP. These included interview questionnaires tailored specifically for the FP&M SETA, employer surveys, and focus group discussion guides presented through PowerPoint presentations. The study adopted a mixed-methods approach, combining both qualitative and quantitative research methodologies to ensure a comprehensive understanding of sector dynamics, labour market trends, occupational demand, and skills needs across the FP&M sector.

The research process incorporated several methods of data and information collection. Firstly, an extensive review of literature was undertaken, including research commissioned by the FP&M SETA, national policy and strategy documents, industry plans, and sector performance reports. Secondly, primary and secondary data analysis was conducted using multiple data sources, including employer data provided through SARS, economic and labour market data from StatsSA, Quantec databases, industry-provided datasets, WSP/ATR submissions, SETA grant expenditure data, learner enrolment and completion data, as well as DHET Post-School Education and Training (PSET) statistics and Higher Education Management Information System (HEMIS) data. Additional methods included interviews with key stakeholders such as trade unions and industry associations, employer surveys, and focus group discussions with representatives across the sector.

Particular attention was given to the identification of HTFVs and skills gaps. Findings relating to these areas were triangulated across multiple data sources and validated through stakeholder engagement during focus group discussions to strengthen the reliability and relevance of the results. The data collection methods are elaborated on below:

Review of Key Literature

The literature review drew on a wide range of national and international sources, including the current FP&M SETA SSP and broader labour market and sectoral research. The review ensured alignment of the 2027-2028 SSP with key national policy and strategic frameworks, including the National Development Plan (NDP), the National Skills Development Plan (NSDP), the Medium-Term Development Plan (MTDP), the New Growth Path (NGP), relevant sector master plans, the Just Energy Transition Implementation Plan (JET-IP), the White Paper on PSET, the Economic Reconstruction and Recovery Plan (ERRP) and its Skills Strategy, the Presidential Youth Employment Initiative (PYEI), and the Human Resource Development Strategy for South Africa (HRDS-SA), among others.

Primary and Secondary data analysis

The final submission date for the 2026/27 WSP/ATR data was 31 May 2026. At the FP&M SETA, submissions are completed through the Learner Management Information System (LMIS), an online platform that enables employers to upload WSP/ATR information directly onto an electronic data capture system. This process supports the collection of accurate and reliable employer-provided data. Analysis of the 2026/27 WSP/ATR submissions informed the development of the 2027-2028 SSP.

In addition, the study analysed employer data from SARS, labour market and economic trend data from StatsSA and Quantec, industry-supplied information, and DHET PSET and HEMIS datasets to provide a comprehensive overview of sector performance, employment trends, and skills demand.

In-depth Interviews and focus groups

Semi-structured interviews were conducted with industry associations and trade unions to obtain qualitative insights into sector challenges, emerging trends, occupational demand, and workforce development priorities. The semi-structured format allowed flexibility for deeper discussion where necessary and ensured that stakeholder perspectives were adequately captured.

Focus group discussions were also held with stakeholders across the FP&M sector. These engagements provided an opportunity to validate research findings, gather expert input, and ensure that the experiences and perspectives of affected role-players informed the SSP.

Employer survey

An employer survey was distributed across the FP&M sector to gather information directly from both levy-paying and non-levy-paying employers. The survey aimed to capture employer perspectives on skills needs, occupational demand, training priorities, and workforce development challenges to strengthen the evidence base informing the SSP.

Conclusion

The combination of qualitative and quantitative research methods provided a balanced and comprehensive evidence base for the 2027-2028 SSP. Applying multiple research methods enabled the research team to collect rich and representative data across all 13 FP&M SETA sub-sectors, thereby strengthening the accuracy and credibility of the findings.

While the research process yielded valuable insights, several data-related challenges were encountered. Firstly, additional data cleaning and alignment were required to ensure that certain StatsSA datasets were relevant and applicable to the FP&M sector context. Secondly, HEMIS enrolment and graduation data are typically released with an approximate two-year lag, which affected the availability of the most recent higher education data for analysis.

Table 1 provides a summation of the various research projects that the FP&M SETA conducted between 2024 and 2026 that have collectively informed this SSP. For each research project, the topic under discussion is provided followed by the nature and objectives of the study, the data collection tools adopted, data samples and data sources drawn from the project.

Table 1: Summary of Commissioned and Completed Research Projects

Topic	Nature (Design) of Study	Objectives of Study	Data Collection Tool	Sample Size and Scope	List of Data Sources and Data Sets	Time Frame	Chapters Informed
A Skills Development Plan for the Bed and Mattress Subsector	Qualitative and Quantitative	- Develop a skills development plan for the bed and mattress subsector that can be used as a proposal for funding to run or develop qualifications, skills and RPL programmes. - Develop a mapping report of scarce skills and occupations identified to existing qualifications on the South African Qualifications Authority (SAQA) registry. - Develop a report on the review of current qualification documents to determine if they are aligned to identified scarce skills and occupations in the subsector.	- A survey instrument was designed and administered via Survey Monkey - Interview instruments were developed and tested before being used on stakeholders in the sector.	12 employers were consulted to gain qualitative data through interviews which were semi-structured. 5 employers responded to the survey.	- FP&M SETA WSP/ATR and SQMR data - Employer Survey - Quantec Data - SARS Data - FIBC Data - National Career Advice Portal - Interview analysis	November 2023 – April 2025	Chapters 2, 3 and 6
FP&M sector Impact Study	Quantitative	- To determine the destinations of learners who have completed learnerships, internships, apprenticeships, bursaries, skills programmes, RPL, AET, and WBL programmes. - To understand the factors associated with employment/unemployment. - To determine the nature of employment of learners who secured employment i.e. which industries are they employed in, and if they went to entrepreneurship route, in which industry?	Quantitative data was collected through two structured surveys, one targeting programme beneficiaries and another aimed at employers who trained learners.	For employers, the sample size consisted of 121 participants. For learners, the sample size of the survey consisted of 532 participants, supplemented by 28 telephonic interviews, resulting in a final sample size of 560 participants.	- Employer Survey - Learner Survey - FP&M SETA Quarterly Monitoring Reports (SQMR) Data - Interview analysis	April 2025 – September 2025	Chapters 2, 3 and 6
FP&M TVET College Partnership	Quantitative and Qualitative	- Assess the alignment of TVET-supported programmes with FP&M SETA's strategic priorities (APP, SP, SSP). - Identify gaps in access for rural and underserved communities. - Evaluate the adequacy of M&E and quality assurance mechanisms in supporting programme success. - Analyse how clearly roles and responsibilities are defined between the FP&M SETA, public TVET colleges, and employers.	- Quantitative data from employers were collected through a structured electronic survey to employers who hosted or engaged with learners during 2023–2025. - Qualitative data were collected through interview instruments with seven TVET colleges that have partnerships with the FP&M SETA.	Seven TVET colleges were interviewed. For employers, the sample size consisted of 121 participants.	- Employer Survey - Interviews with TVET College partners	April 2025 – September 2025	Chapter 2, 3 and 6

Topic	Nature (Design) of the Study	Objectives of Study	Data Collection Tool	Sample Size and Scope	List of Data Sources and Data Sets	Time Frame	Chapters Informed
PAMISA Forestry Value Chain SSP	Qualitative and Quantitative	- Provide an overview of the sector in terms of the economic and labour market performance and profile. - Identify factors influencing and driving change in the sector from a skills perspective. - Identify Hard to Fill Vacancies (HTFVs) and skills gaps in the sector currently and in the future and estimate the extent of need. - Outline key strategic interventions to address identified skills needs and constraints to effective recruitment, utilisation, and development of skills.	- Quantitative data was collected from databases such as StatsSA, the FP&M SETA WSP/ATR, and SARS. - Qualitative data was collected through PowerPoint presentations during engagements with sector stakeholders.	1 350 employers submitted their WSPs to the FP&M SETA, of which 246 were in the forestry value chain. Around 100 participants in total attended stakeholder engagement sessions.	- FP&M SETA WSP/ATR data - SARS Data - Statistics South Africa - Stakeholder engagement sessions	June 2025 – In progress	Chapter 2, 3 and 6
International Benchmarking Study: Austria (FP&M SETA Research Chair Initiative)	Qualitative	- Explore collaboration opportunities between FP&M SETA, Tshwane University of Technology (TUT), and Austrian universities. - Benchmark the South African fibre processing and manufacturing sector against Austria's sector. - Identify opportunities for research partnerships, student exchange programmes, curriculum development, and capacity building. - Assess opportunities for internationalisation, skills development, technology transfer, and qualification recognition. - Identify potential bursary opportunities for South African learners at Austrian institutions.	- Desktop research and literature review - Secondary data review and comparative sector analysis. - Review of university programmes, industry reports, and policy documents.	The study focused on selected Austrian universities and the Austrian fibre processing and manufacturing sector. The scope included the clothing and textiles, forestry and wood products, furniture and general goods, leather and footwear, and packaging and printing sub-sectors.	- TUT documentation - Austrian university websites and programme information. - Austrian manufacturing sector profiles and reports. - International higher education literature. - Government and industry association publications.	Not specified (Desktop benchmarking study)	Qualitative
Printing Industry Report	Quantitative and Qualitative	- Assess the current state of the printing industry in South Africa, including market size, key players, and major sectors. - Evaluate the industry's contribution to the South African economy. - Investigate the impact of digitalisation, automation, and AI on printing processes in SA. - Identify key challenges faced by the industry. - Examine the industry's environmental footprint and sustainability initiatives. - Identify key job roles and skill requirements within the sector, including the appetite for industry to engage in.	- Desktop research and industry analysis. - Secondary data analysis. - Industry benchmarking and market assessment.	National scope covering the South African printing industry, including commercial printing, packaging, labelling, and digital printing segments. The study considered industry-wide trends, firms, and employment patterns across the sector.	- Printing SA industry data. - Industry and market reports. - Company and industry profiles. - Manufacturing and printing sector statistics. - Industry stakeholder inputs.	2025	Chapters 2, 3 and 6

CHAPTER 1: SECTOR PROFILE

1.1 Introduction

The Skills Development Act mandates the development of Sector Skills Plans (SSPs) as evidence-based tools to guide sector skills planning and responsiveness. These plans are aligned to national priorities outlined in the National Skills Development Plan (NSDP), which emphasises inclusive growth, employment creation, and improved alignment between skills supply and industry demand (DHET, 2019).

This chapter presents an updated profile of the Fibre Processing and Manufacturing (FP&M) sector. It outlines the scope of the sector, identifies key role players, and examines economic performance alongside labour market trends. The analysis draws on data from the South African Revenue Service (SARS), Workplace Skills Plans and Annual Training Reports (WSP/ATR), and Statistics South Africa (StatsSA), including the Quarterly Labour Force Survey (QLFS) and Gross Domestic Product (GDP) data, as well as Quantec, among other sources.

1.2 Scope of Coverage

The FP&M sector comprises 77 industries classified according to the Standard Industrial Classification (SIC) framework, as determined by the Minister of Higher Education and Training. These SIC codes are grouped into 13 sub-sectors to reflect the structure and organisation of the FP&M sector (Table 2).

Table 2: FP&M SETA Standard Industrial Classification (SIC) Codes

Sub-sector	SIC Code	Main Activity Description
Clothing	31111	Preparatory activities in respect of animal fibres, including washing, combing and carding of wool.
	31120	Finishing of textiles.
	31210	Manufacture of made-up textile articles, except apparel.
	31214	Manufacture of made-up textiles articles and fibres except apparel.
	31220	Manufacture of carpets, rugs and mats.
	31291	Manufacture of textiles, clothing, leather goods and other textiles n.e.c.
	31292	Fashion clothing, textiles and footwear manufacture and design.
	31300	Manufacture of knitted and crocheted fabrics and articles.
	31400	Manufacture of wearing apparel, except fur apparel.
	31500	Dressing and dyeing of fur; manufacture of artificial fur; fur apparel and other art.
Dry Cleaning	99010	Washing And (Dry) Cleaning of Textiles and Fur Products.
	99904	Washing And (Dry) Cleaning of Textiles and Fur Products.
Footwear	31700	Manufacture of footwear.
	31701	Manufacture of footwear from material other than leather.
Forestry	12101	Establishment.
	12102	Re-establishment.
	12104	Fire protection, fire suppression, fire prevention.
	12105	Forest conservation.
	12106	Forest protection.

Sub-sector	SIC Code	Main Activity Description
	12107	Forest management.
	12108	Forestry and tree nurseries.
	12201	Harvesting.
	12202	Road construction and maintenance.
	12203	Transport (short haul and long haul).
	12204	Fire protection, fire suppression and fire prevention in forest, bush and velds.
	87144	Forest research.
Furniture	32291	Coffins (excluding the manufacture of coffins by funeral undertakers).
	39103	Manufacture of furniture made of materials other than metal, plastic or concrete.
	39105	Furnishing of ships.
	39106	Cane furniture.
	39107	Bedding.
	39110	Caravan furniture.
	39111	Curtaining where the core business of the enterprise is upholstery and furniture.
General Goods	12103	Maintenance.
	35591	Manufacture of metal containers, e.g. cans and tins.
Leather	31610	Tanning and dressing of leather.
	31620	Manufacture of luggage, handbags and the like, saddlery and harness.
Packaging	12101	Establishment.
	32322	Manufacture of containers of paper and paperboard.
	32323	Manufacture of packing material.
	88950	Packaging activities.
Print media	32600	Reproduction of recorded media.
	36504	Graphic design, manufacture and display of laminated signs and advertising displays and other graphic media outputs and products.
	88993	Stenographic, duplicating, addressing, mailing list and similar activities.
	8899B	Stenographic, duplicating, addressing, mailing list and similar activities.
Printing	32391	Stationery.
	32392	Books and stationery.
	32393	Printing and embossing of stationery and labels.
	32510	Printing.
	32520	Service activities related to printing.
Publishing	32410	Publishing of books, brochures, musical books and other publications.
	32420	Publishing of newspapers, journals and periodicals.
	32430	Publishing of recorded media.
	32490	Other publishing.
Pulp & Paper	32310	Manufacture of pulp, paper and paperboard.
	32311	Manufacture of pulp, paper, paperboard, tissues and paper recycling.
	32320	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard.
Textiles	31230	Manufacture of cordage, rope, twine and netting.
	31231	Curtaining excluding where the core business of an enterprise is upholstery or furniture.
	31290	Manufacture of other textiles n.e.c.
	39108	Curtaining.
Wood	32101	Saw-milling and preserving of timber.

Sub-sector	SIC Code	Main Activity Description
Products	32102	Saw doctoring.
	32103	Wet milling.
	32104	Lumber drying.
	32105	Lumber grading.
	32106	Dry milling.
	32107	Finger jointing and laminating.
	32108	Mill maintenance.
	32110	Charcoal.
	32111	Wattle extracts manufacturing.
	32210	Manufacture of veneer sheets; manufacture of plywood, laminated board, and particle board and other panels and boards.
	32211	Fibreboard and chipboard products.
	32220	Manufacture of builders' carpentry and joinery.
	32221	Truss manufacturing.
	32293	Match manufacturing.
	32294	Pallets and bulk bins.
	32299	Other articles of wood, cork, straw and plaiting materials, including woodcarving and woodturning.

Source: Department of Higher Education and Training, *The re-establishment of Sector Education and Training Authorities from 1 April 2020 to 31 March 2030, The new SETA Landscape*

As shown in Table 2 above, there are 13 sub-sectors that make up the FP&M sector. These are Clothing; Dry Cleaning; Footwear; Forestry; Furniture; General Goods; Leather; Packaging; Print Media; Printing; Publishing; Pulp & Paper; Textiles and Wood Products. Secondary and tertiary industry activities form the bulk of the sector, as shown in the figure below. The FP&M sector has value chain linkages with other sectors based on the exchange and feeder relationships between primary and secondary production during manufacturing, and with the tertiary sector in the marketing and sale of produced goods. The value chain linkages are highlighted in Figure 1.

The diagram illustrates the Forest Products and Manufacturing (FP&M) SETA value chain, organized into three main sectors: Primary, Secondary, and Tertiary.

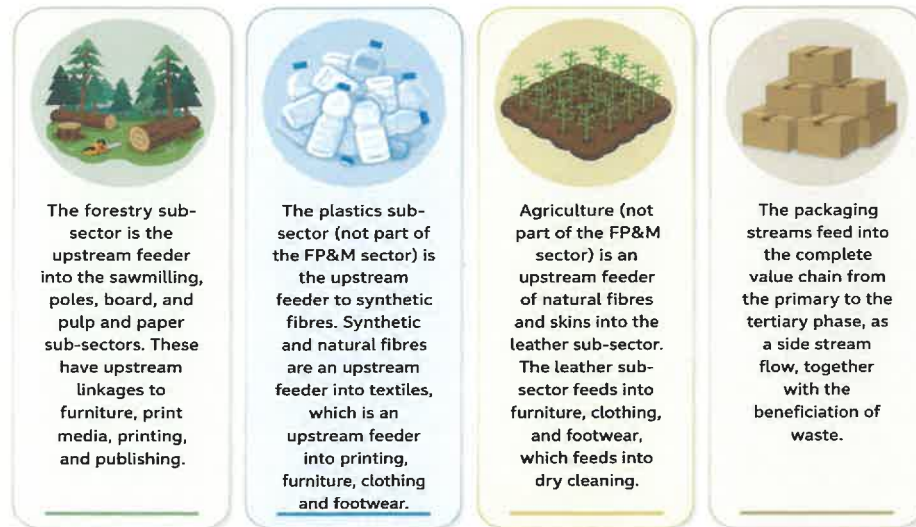
- Primary Sector:**
 - Forestry (Roundwood/Bark):** The main source of raw materials, feeding into the Secondary sector.
 - Sugar Cane:** A separate raw material source.
 - Plastic Industry:** Feeds into Synthetic Fibres.
 - Link to Agriculture:** Feeds into Natural Fibres and Hide and Skins.
- Secondary Sector:**
 - Pulp/Paper:** Derived from Forestry, leading to Pulp and Paper products.
 - Paper:** Derived from Pulp, leading to various paper products.
 - Cellulose/Tissue:** Derived from Pulp, leading to Tissue products.
 - Wood Products:** Derived from Forestry, including Sawmills, Board Mills, Pole Plants, Milling Timber, Charcoal/Matches, and Tannin Plants.
 - Synthetic Fibres:** Derived from the Plastic Industry.
 - Natural Fibres:** Derived from the Link to Agriculture.
 - Hide and Skins:** Derived from the Link to Agriculture.
- Tertiary Sector:**
 - Printing:** Derived from Paper, leading to Print Media.
 - Publishing:** Derived from Paper, leading to Publishing.
 - General Goods:** Derived from various wood products, leading to Furniture, Wooden Products, Clothing, Footwear, and Dry Cleaning.
 - Leather:** Derived from Hide and Skins, leading to Leather goods.

Notes: Items in Grey either feed into or from into the FP&M SETA, they do not form part of the FP&M SETA value chain.

4

Some of the linkages highlighted in Figure 1 are explained in Figure 2 below:

Figure 2: Value Chain Linkages



A value chain approach to profiling and analysing the sector exposes holistic and integrated opportunities for sector development. There are also points in the value chain that overlap with other sectors, where collaboration could result in the expansion of jobs and a greater level of labour absorption than is currently taking place. Opportunities for reskilling across the sub-sectors can also be identified, e.g. machine operators working in one sub-sector could move horizontally to another sub-sector within the sector.

1.3 Key Role Players

The key role players within the FP&M sector include industry bodies, employer associations, government departments, and trade unions, amongst others (Table 3). These stakeholders contribute to sector governance, policy development, and regulatory oversight. Industry bodies and employer organisations are represented within the FP&M SETA in line with the SETA's constitution.

Table 3: Key Role Players in the FP&M Sector

Organisation type	Name of organisation	Role of organisation and its link to NSDP Outcomes
Government	Department of Agriculture, Land Reform and Rural Development (DALRRD)	DALRRD supports agricultural producers involved in cotton, wool, mohair and other fibre production. It contributes to rural development, extension services and skills development, particularly in upstream parts of the value chain. Its role aligns with NSDP Outcomes 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
	Department of Trade, Industry and Competition (the dtic)	The dtic drives industrial policy and sector-specific growth initiatives across the economy, including the FP&M sector. Through the Industrial Policy Action Plan (IPAP) and sector master plans, it supports the development of competitive, sustainable value chains. This contributes to NSDP Outcome 6 by supporting entrepreneurship and enterprise development, and Outcome 3 by fostering skills

Organisation type	Name of organisation	Role of organisation and its link to NSDP Outcomes
		improvement across manufacturing-related sectors.
	Department of Forestry, Fisheries and the Environment (DFFE)	DFFE is the line department for natural resource-based sectors, including commercial forestry and fibre production. It supports environmental sustainability, climate resilience, and skills development related to green technologies. This aligns with NSDP Outcomes 1 (Identify and increase production of occupations in high demand) and 3.
	Department of Small Business Development (DSBD)	DSBD provides support for small, medium and micro enterprises (SMMEs), many of which are active in clothing, footwear, furniture, printing, and related FP&M sectors. The department enables training access, market support, and enterprise development. Its role aligns with NSDP Outcome 6.
	Department of Water and Sanitation (DWS)	The FP&M sector relies increasingly on water for manufacturing processes. The Department is the custodian of the country's water resources and provides policy direction in the preservation and use of freshwater resources. The DWA engages in various skills development initiatives to enhance the skills of its workforce and improve the overall water and sanitation services. These initiatives include learnerships, skills programs, and other training programs aimed at improving the employability of individuals and ensuring a competent workforce. This directly responds to NSDP outcome 3 (Improving the level of skills in the South African Workforce).
	Department of Science, Technology and Innovation (DSTI)	The Department has agencies such as the Council for Scientific and Industrial Research (CSIR) and the National Research Foundation (NRF) whose purpose is to advance research in areas including those covered by the FP&M sector. It is important that the SETA maintains a focus on new developments and the skills required to support them as indicated in the NSDP, especially outcome 1 (Identify and increase production of occupations in high demand).
	Department of Mineral Resources and Energy (DMRE)	Coordinates the exploration, development, processing, utilisation and management of South Africa's energy sources. Given the energy intensiveness of the FP&M sector and the country's recent challenges in power generation, the DMRE's policy setting and investment decisions in the energy sector to improve energy security through supply and demand side management has a bearing on the sector's sustainability and the development of skills which promote sustainability aligned to the NSDP outcome 2 (Linking education and the workplace).
	Department of Higher Education and Training (DHET)	DHET is the lead department in post-school education and training. It oversees SETAs, ensures policy coherence, and provides funding and planning guidance through the National Skills Development Plan (NSDP). It plays a cross-cutting role aligned to all NSDP outcomes, particularly Outcomes 1, 2 and 3.
	South African Revenue Services (SARS)	The government agency is responsible for enforcement and inspection of imported goods at South Africa's customs points. As the local sector bleeds jobs because of cheap and illegal imports, the apparent lack of enforcement costs the fiscus at least R3 billion in unpaid import taxes per year. It also assists in the management of the Skills Development Levy system that enables the distribution of funds for the realisation of the NSDP, especially outcome 3 (Improving the level of skills in the South African Workforce).
Clothing	Apparel Manufacturers of South Africa (AMSA)	AMSA represents five out of every six garment manufacturers in the country. It advocates for fair labour practices and plays an active role in skills development for the sector, contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand), 2 (Linking education and the workplace) and 3 (Improving the level of skills in the South African Workforce).
	South African Clothing and Textiles Workers Union (SACTWU)	SACTWU is the biggest union in the clothing, textile and leather industry, with more than 100 000 members. It negotiates wages and conditions for the vast majority of workers in the clothing, textile and leather industry and views skills development for its members as an important objective that contributes to the goals of the NSDP outcome 3 (Improving the level of skills in the South African Workforce).

Organisation type	Name of organisation	Role of organisation and its link to NSDP Outcomes
	National Textile Bargaining Council (NTBC)	The bargaining councils consist of representatives from the major unions and employer groups within each of the sectors. The NTBC promotes collective agreements, wage negotiations, and sectoral training initiatives, focusing on NSDP outcome 3 (Improving the level of skills in the South African Workforce).
Textiles	South African Cotton Textile Processing Employers' Association (SACTPEA), South African Carpet Manufacturing Employers' Association (SACMEA), National Manufactured Fibres Employers' Association (NMFEA), National Association of Worsted Textile Manufacturers (NAWTM) Narrow Fabric Manufacturers Association (MFMA), South African Wool and Mohair Processors' Employers' Organisation (SAWAMPEO), National Textile Manufacturers' Association (NTMA), South African Home Textiles Manufacturers Employers' Organisation (HOMETEX), South African Yarn Producers Association (SAYPA), South African Spinners Association	The nine employer associations are parties to the National Textile Bargaining Council (NTBC), and their main purpose is to reach agreement on wages and Terms and Conditions of Employment in the various sub-sectors. The associations are registered with the Department of Employment and Labour as National Employer Organisations in terms of the Labour Relations Act. Members of the Council participate in skills development within the FP&M sector, contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand) and 3 (Improving the level of skills in the South African Workforce).
Footwear	South African Footwear and Leather Industries Association (SAFLIA)	SAFLIA is formally registered with the Department of Employment and Labour as a national employer organisation in terms of the Labour Relations Act. SAFLIA represents employers and contributes to curriculum development and workplace-based training, aligning with NSDP outcomes 1 and 4 (Increasing skills and industry-specific training).
	National Footwear and Leather Cluster - Vaal University of Technology	The National Footwear and Leather Cluster is a not-for-profit company established by the dtic within the administration of Vaal University of Technology. It seeks to promote and support the expansion of manufacturing in the sector and associated skills development as indicated in the NSDP outcome 3 (Improving the level of skills in the South African Workforce).
	South African Footwear and Leather Export Council (SAFLEC)	SAFLEC facilitates the growth of exports of South African manufactured leather footwear, handbags, belts and other associated products thereby increasing the growth in the number of exporters, contributing to NSDP outcome 6 (Skills Development support for entrepreneurship and cooperative development).

Organisation type	Name of organisation	Role of organisation and its link to NSDP Outcomes
Forestry	Forestry South Africa (FSA)	FSA is the largest forestry organisation representing growers of timber in South Africa. Membership includes all 11 corporate forestry companies active in the industry, commercial timber farmers and emergent small-scale growers etc. FSA also participates in skills development initiatives by hosts learners for workplace-based training in the attainment of skills, thereby contributing to the NSDP outcomes 1 (Identify and increase production of occupations in high demand) and 2 (Linking education and the workplace).
	South African Forestry Contractors Association (SAFCA)	SAFCA offers assistance to all contractors regarding public liability and other insurance, forestry technical, business related assistance and training (capacity development), thus contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand), 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
	Southern African Institute of Forestry (SAIF)	SAIF is a professional association of forestry related professionals geared towards delivering a professional service to forestry. Its mission is to achieve excellence in the practice of forestry, to promote growth and sustainability in the industry thus contributing to the NSDP outcome 1 (Identify and increase production of occupations in high demand).
Paper and Pulp	The Paper Manufacturers Association of South Africa (PAMSA)	PAMSA promotes the renewability and recyclability of paper products both locally and in collaboration with industry associations around the world. They also participate in skills development initiatives thereby contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand), 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
Furniture	Federation of Furniture Manufacturers' Association (FBUMA)	FBUMA serves as the collective entity of employers (businesses) in this Industry and is registered (in terms of the Labour Relations Act) as an Employers Organisation. FBUMA represents its members in collective bargaining with Unions at Industry level. Members participate in FP&M sector skills development initiatives thereby contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand), 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
	Furniture Industry Bargaining Council	This body regulates employment terms in the furniture sector and supports training initiatives aligned with collective agreements, contributing to NSDP outcome 3 (Improving the level of skills in the workforce).
	South Africa Furniture Initiative (SAFI)	SAFI is a joint initiative of industry, labour and government and is formally constituted as a Non-Profit Company (NPC). The initiative has the common interest of providing the development, growth and transformation of the SA furniture manufacturing industry for the benefit of all stakeholders. The organisation plays its part in the development of relevant furniture industry occupational qualifications thereby contributing to NSDP outcome 4 (Increase access to occupationally directed programmes).
Leather	Southern African Footwear and Leather Industries Association (SAFLIA)	SAFLIA plays its part in the development of relevant occupational qualifications, curriculum design, and workplace-aligned training thereby contributing to NSDP outcome 4 (Increase access to occupationally directed programmes).
	National Footwear and Leather Cluster - Vaal University of Technology	The National Footwear and Leather Cluster is a not-for-profit company established by the dtic within the administration of Vaal University of Technology. It seeks to promote and support the expansion of manufacturing in the sector and associated skills development as indicated in the NSDP outcome 2 (Linking education and the workplace).

Organisation type	Name of organisation	Role of organisation and its link to NSDP Outcomes
	South African Footwear and Leather Export Council (SAFLEC)	SAFLEC facilitates the growth of exports of South African manufactured leather footwear, handbags, belts and other associated products thereby increasing the growth in the number of exporters. The council also participates in skills development activities, thus contributing to the NSDP outcome 1 (Identify and increase production of occupations in high demand).
Packaging	The Institute of Packaging South Africa (IPSA)	IPSA was established in February 1970. One of its key objectives is to advance the standards and methods of education in the field of packaging and related subjects, thus playing its role in the development of skills in the sector, contributing to NSDP outcomes 1 (Identify and increase production of occupations in high demand) and 4 (Increase access to occupationally directed programmes).
	The Packaging Council of South Africa (PACSA)	PACSA, founded in 1984, is a voluntary industry body which aims to provide effective leadership and representation on major external and internal issues in the packaging sector. Thus, ensuring the skills development of its members, contributing to NSDP outcome 1 (Identify and increase production of occupations in high demand).
Printing	Printing South Africa (PSA)	PSA represents the interests of printing, paper/flexible packaging and newspaper industries to be globally competitive and socially responsible. Its mission is to promote the sector's interests with government, sectoral bodies and any other relevant entity, in policy matters that affect the operations of its member organisations. They also assist by hosting learners as their contribution to the NSDP outcome 2 (Linking education and the workplace).
	Printing Employers Association of South Africa (PEASA)	An employer association looking after the interests of employers in the printing industry. Thus, ensuring the skills development of its members, contributing to NSDP outcome 1 (Identify and increase production of occupations in high demand).
	South African Typographical Union (SATU)	SATU has traditionally organised workers in the Printing Newspaper and Packaging Industry but has extended its scope to include workers in Stationary Outlets, Book Shops, Publishing Houses, Advertising Agencies, Screen and Sign Display Sectors, Photocopy Shops, Printing Suppliers. They also participate in skills development initiatives to promote NSDP outcomes 1 (Identify and increase production of occupations in high demand) and 3 (Improving the level of skills in the South African Workforce).
Print Media	Print and Digital Media South Africa (PDMSA)	PDMSA is dedicated to promoting a free and independent press through close interaction with members and by working together across print and digital media. It promotes and supports compliance with internationally recognised good governance practices and effective stakeholder management. They contribute to skills development initiatives that promote NSDP outcomes 1 (Identify and increase production of occupations in high demand), 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
Publishing	Publishers Association of South Africa (PASA)	PASA represents publishers, promotes professional development, and plays a role in industry policy, aligned with NSDP outcomes 1 (Identify and increase production of occupations in high demand) and 3 (Improving the level of skills in the South African Workforce).
Wood Products	South African Wood Preservers Association (SAWPA)	These associations promote the sustainable growth of the sector through training initiatives and encourage innovation to ensure a more sustainable future for harvested wood. The associations directly contribute to NSDP outcomes 1 (Identify and increase production of occupations in high demand), 3 (Improving the level of skills in the South African Workforce) and 6 (Skills Development support for entrepreneurship and cooperative development).
	South African Utility Pole Association (SAUPA)	
	Sawmilling South Africa (SSA)	

1.4 Employer Profile

The SARS database is used to determine the number of employers in the FP&M sector. This is because the WSP/ATR captures a much smaller proportion of employers in the sector. The submissions declined from 1 313 submissions in 2020/21 to 1 262 in 2023/24, with an increase recorded to 1 345 in 2024/25, 1 349 in 2025/26, and to 1 359 in 2026/27. Thus, the SARS database is more comprehensive.

According to the SARS database, in 2026 there are a total of 28 431 employers distributed across the 13 sub-sectors within the FP&M sector. This is a 1% increase from the number of employers in 2025 (28 152 employers). Table 4 reveals that small employers constitute over 90% of the total employers in the sector, both in 2025 and in 2026.

The Dry Cleaning, Leather and General Goods sub-sectors have the lowest number of employers within the FP&M sector, with only 435 employers, 582 employers, and 618 employers in 2026, respectively, whereas the Clothing sub-sector has the largest share, consisting of 5 018 employers in 2025 and 5 873 employers in 2026.

Table 4: Number of Employers, 2025-2026

Sub-sector	Number of Employers							
	Large		Medium		Small		Total	
	2025	2026	2025	2026	2025	2026	2025	2026
Clothing	143	91	244	217	4 631	5 565	5 018	5 873
Dry Cleaning	2	-	8	2	413	433	423	435
Footwear	38	22	57	35	783	829	878	886
Forestry	113	68	175	132	2 905	3 412	3 193	3 612
Furniture	39	26	91	53	1 888	2 032	2 018	2 111
General Goods	10	4	8	11	496	603	514	618
Leather	12	11	19	14	500	557	531	582
Packaging	46	10	72	18	844	879	962	907
Print Media	18	6	24	8	857	1 019	899	1 033
Printing	68	33	146	59	4 756	4 870	4 970	4 962
Publishing	26	14	35	21	1 908	2 111	1 969	2 146
Pulp and Paper	32	14	46	38	542	652	620	704
Textiles	163	23	209	62	2 411	1 935	2 783	2 020
Wood Products	83	39	138	101	2 264	2 398	2 485	2 538
Blank	16	-	13	-	860	4	889	4
Grand Total	809	361	1 285	771	26 058	27 299	28 152	28 431

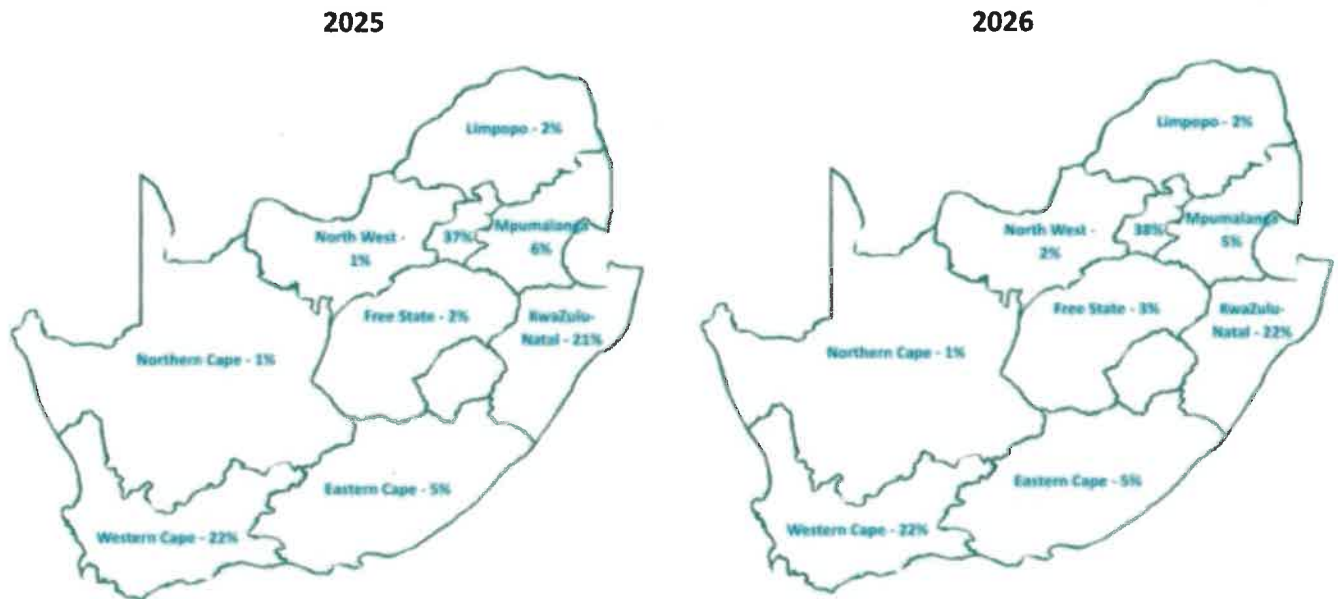
Source: SARS database, 2025-2026

Between 2025 and 2026, the number of employers increased in the clothing, forestry, furniture, dry cleaning, footwear, general goods, leather, print media, pulp and paper, publishing, and wood products sub-sectors. The remaining sub-sectors declined in employers.

Figure 3 shows the geographical spread of the employers in the FP&M sector in 2025 and 2026. The majority of employers are in Gauteng province, capturing 38% of the employer share in 2026. This is followed by the Western Cape and the KwaZulu-Natal provinces. The

lowest number of employers are from the Northern Cape province.

Figure 3: Employer Geographical Spread, 2025-2026



Source: SARS database, 2025-2026

1.5 Labour Market Analysis

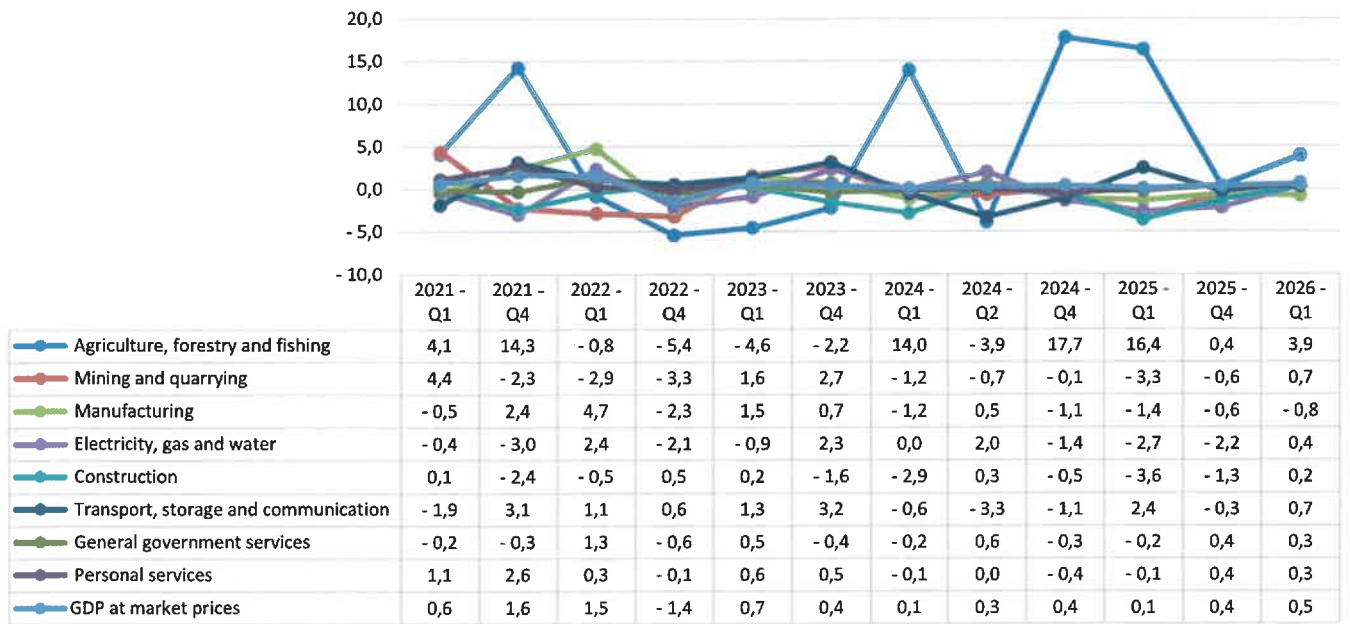
The following section outlines the economic performance of the sector in relation to the labour market. Thereafter, an analysis is provided of the employee profile of the sector in terms of race, gender, age, and disability status. The section also includes a breakdown of employees by subsector, geographical location and occupational profile. The chapter concludes with key skills issues found.

1.5.1 Economic performance in relation to the labour market performance of the sector

In 2026Q1, the South African economy experienced an increase in growth, from 0.4% in 2025Q4 to 0.5% in 2026Q1 (Figure 3). The manufacturing sector (the sector that captures the FP&M sector) was the only sector that contributed negatively to the growth of the economy, with a GDP growth rate of -0.8% in 2026Q1.

The low national GDP growth performance of only 0.5% coincides with the increase in the unemployment rate of the country, which increased from 31.4% in 2025Q4 to 32.7% in 2026Q1, a 1.3 percentage point increase. Highlighting the negative relationship between GDP growth and unemployment.

Figure 4: South African GDP Growth Rates, 2026



Source: Statistics South Africa, 2026

In line with the national performance, Table 5 shows that real output for most FP&M SETA sub-sectors declined between 2021 and 2025. Real output is largest for the paper and paper products sub-sector, however a decline in real output is recorded between 2021 and 2025 for this sub-sector. Real output is lowest for the footwear sub-sector; recording an increase between 2021 and 2023, before declining in 2024 and 2025.

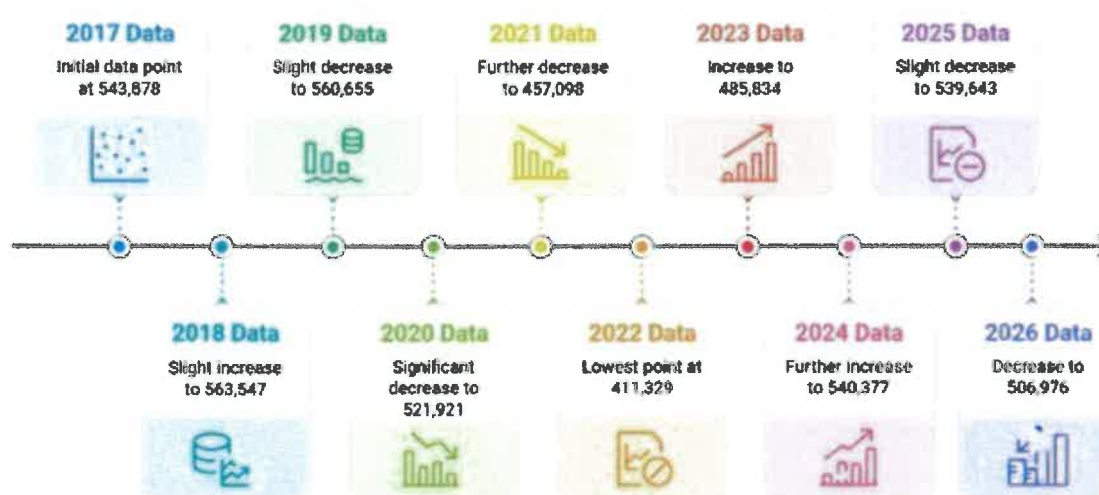
Table 5: Real Output of FP&M Sub-sectors, 2021-2025

Real Output Rm (2015 Prices)	Forestry	Textiles and Other Textile Products	Wearing Apparel	Leather and fur products	Footwear	Wood and Wood Products	Paper and Paper Products	Printing, Recorded Media	Furniture
2021	15 786,19	21 007,94	34 117,20	6 661,64	4 376,53	32 581,55	73 338,81	44 535,34	13 989,77
2022	16 210,83	21 500,70	31 362,11	7 035,16	5 337,55	28 783,67	75 603,91	42 229,68	14 739,59
2023	15 923,04	20 849,79	30 357,49	6 449,51	5 367,62	29 964,30	74 927,92	40 936,36	15 739,44
2024	15 470,64	19 719,54	30 024,49	6 524,35	4 977,49	29 166,56	74 942,56	42 002,54	15 654,94
2025	16 420,04	20 311,98	29 975,45	6 312,61	4 973,75	27 906,12	71 522,96	40 744,13	15 833,16

Source: StatsSA, 2026

When looking at the number of employees in the FP&M sector, Figure 4 shows that employment increased between 2022 and 2024, from 411 329 employees in 2022 to 540 377 employees in 2024, thereafter a slight decrease was recorded in 2025 to 539 643 employees and again in 2026 to 506 976 employees.

Figure 5: Employment in FP&M Subsectors, 2017-2026



Source: StatsSA, 2017-2025, SARS Database, 2026

The figures above show that the national picture of declining GDP growth rates and increasing unemployment rates coincide with what is occurring in the FP&M sub-sectors. Real output in the sub-sectors declined overtime and the number of employees in the sector declined between 2024 and 2026.

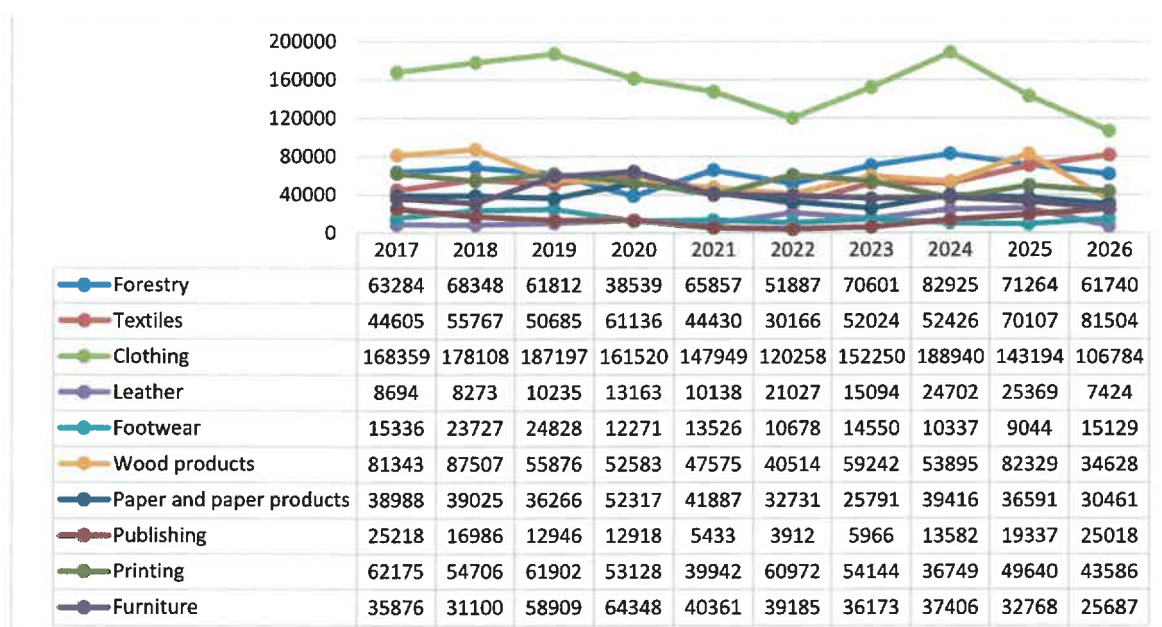
1.5.2 Total employment in the sector

Total employment in the FP&M sector by sub-sector is shown in Figure 6 below. Between 2017 and 2025, StatsSA data was used however, for the year 2026 the DHET database is used to report on the number of employees by sub-sector¹.

In 2026, the FP&M sector employs approximately 506 976 people (Figure 5). This is 32% of the 1.587 million people employed in the manufacturing sector and 3% of those employed in South Africa (16.754 million). Employment in the FP&M sector declined between 2016 and 2022, before increasing in 2024. However, a decline is recorded in 2025 and again in 2026, as shown in the figure below and in Figure 5 above.

¹ The SuperWeb platform on the StatsSA database, which allows for the disaggregation of data by FP&M sub-sectors, is currently down. This resulted in the relevant data not being downloaded. However, the DHET database is comprehensive and allows for a disaggregation of employees by sub-sector.

Figure 6: Employment by Sub-sector 2016-2026



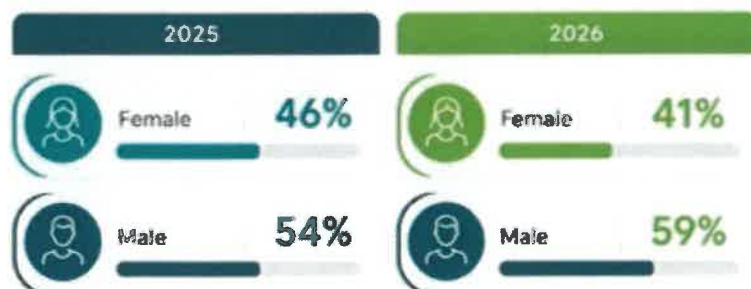
Source: Stats SA, 2017-2025, DHET Database, 2026

Figure 5 shows that the clothing sub-sector has the biggest share of employees in the FP&M sector, and this has been the case throughout the 2017-2026 period. Despite significant employment in the clothing sub-sector, a stakeholder from the Apparel Manufacturers of South Africa (Interview, 2025) warned that many in the sub-sector are transitioning from the formal sector to the informal sector and this has negative implications in relation to employee protection such as minimum wages, and social security. Employment for this sub-sector, the forestry, the leather, the paper and paper products, wood products, printing, and the furniture sub-sectors declined between 2025 and 2026. The South African Furniture Initiative (SAFI) (2025) indicated that the share of wallet spent by households on furniture, appliances and equipment has decreased from 8,3% in 2005 to 3,5% in 2024. This, together with the large increase in imported furniture, had negative effects on employment in the sub-sector. The remaining sub-sectors increased in employment for the same time period.

1.5.2.1 Employee demographics

In terms of the gender of employees in the FP&M sector, Figure 7 shows that over the 2-year period (2025-2026) there are more males employed in the sector than females, with 59% of FP&M sector employees being male in 2026 and 41% being female. There is an almost 50/50 split between males and females. This is because there are sub-sectors dominated by females such as clothing and textiles, and then there are sub-sectors dominated by males such as forestry and wood products.

Figure 7: Gender Breakdown, 2025-2026



Source: StatsSA Data, 2025; FP&M SETA WSP Data, 2025

The figure above further shows that the female proportion declined between 2025 and 2026, from 46% to 41%.

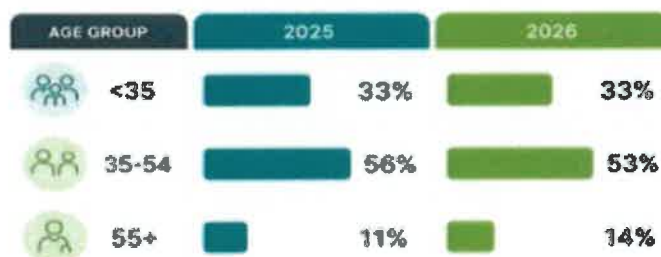
Figure 8: Racial Breakdown, 2025-2026



Source: StatsSA Data, 2025; FP&M SETA WSP Data, 2026

With regards to the race of employees, Figure 8 shows that employees in the sector are predominantly African, with a 72% share in 2026, a slight decline from the 73% recorded in 2025. Coloureds make up the second biggest share of employees in the sector, increasing from 13% in 2025 to 15% in 2026. The share of White employees remained consistent between 2025 and 2026 at 8%. The Indian/Asian population group have the smallest share of employees' overtime, remaining at 6% in 2026.

Figure 9: Age of Employees, 2025-2026



Source: StatsSA Data, 2025; FP&M SETA WSP Data, 2026

The majority of employees in the sector are middle-aged, between 35 and 54 years old, and this share decreased between 2025 and 2026, from 56% to 53% (Figure 9). Youth accounts

for just over 30% of the employees in the sector (15–34-year-olds). The proportion of youth remained unchanged between 2025 and 2026. The 55+ age group make up a small proportion of employees in the sector, increasing from 11% in 2025 to 14% in 2026.

In the FP&M sector, the proportion of persons with disabilities (PwDs) declined between 2025 and 2026, from 4% to 2%. However, the sector still meets the 2% Employment Equity target.

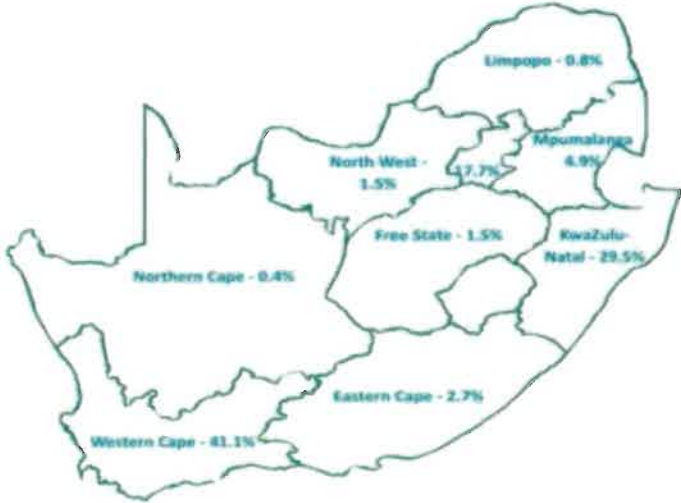
Figure 10: Employees Living with Disability, 2025-2026

	2025	2026
 Yes	4%	2%
 No	96%	98%

Source: FP&M SETA WSP Data, 2025-2026

In terms of the geographical spread of employees in the sector, the Western Cape province has the highest share in 2026 at 41.1% (Figure 11). This is followed by the KwaZulu-Natal (29.5%) and the Gauteng (17.7%) provinces. The remaining provinces capture much smaller shares of FP&M sector employment.

Figure 11: Geographical Spread of Employees, 2026



Source: SARS Database, 2026

1.5.2.2 Occupational profile of employees

Figure 12 shows that employees in the FP&M sector are predominantly employed as elementary workers; plant and machine operators and assemblers; and craft and related trades workers.

Figure 12: Occupational Profiles, 2025-2026

	2025	2026
Manager	7%	7%
Professional	1%	4%
Technicians and Associate Professionals	7%	8%
Clerical Support Workers	6%	7%
Service and Sales Workers	2%	3%
Skilled Agricultural, Forestry, Fisheries, Craft and Related Trades Workers	29%	13%
Plant and Machine Operators and Assemblers	27%	25%
Elementary	21%	33%

Source: StatsSA Data, 2025; FP&M SETA WSP Data, 2026

In 2026, 33% of FP&M sector employees are employed in the elementary occupational category, this is followed by 25% as plant and machine operators and assemblers, and 13% as craft and related trades workers. Managers and professionals together account for 11% of employees in the sector, indicating that the sector is largely reliant on middle to lower-level skilled workers.

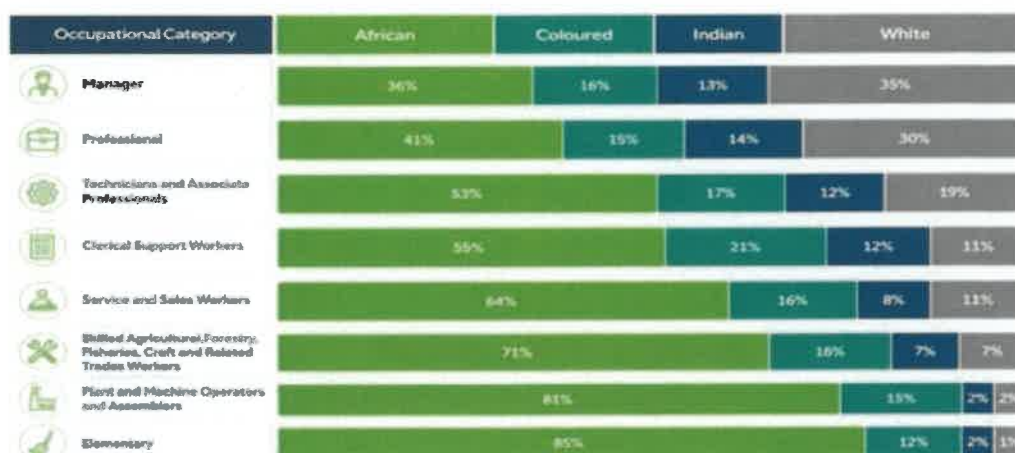
Figure 13: Gender Breakdown Per Occupational Group, 2026

OCCUPATIONAL CATEGORY	FEMALE	MALE
Manager	39%	61%
Professional	50%	50%
Technicians and Associate Professionals	43%	57%
Clerical Support Workers	54%	46%
Service and Sales Workers	60%	40%
Skilled Agricultural, Forestry, Fisheries, Craft and Related Trades Workers	30%	70%
Plant and Machine Operators and Assemblers	37%	63%
Elementary	44%	56%

Source: FP&M SETA WSP Data, 2026

Figure 13 shows that there are significantly more males employed in the manager occupational category than females in 2026, with 61% of managers being male and 39% being female. However, for the professional occupational category there is an equal proportion of males and females. Males dominate the technician, craft and related trades, plant and machine operators and assemblers, as well as the elementary occupational categories whilst females dominate the clerical support and service and sale worker occupational categories.

Figure 14: Racial Breakdown Per Occupational Group, 2026



Source: FP&M SETA WSP Data, 2026

African employees in the FP&M sector dominate all occupational categories in 2026, however the proportion of African employees is largest in the elementary occupational category at 85% in 2026. Whites make up a significant share of the manager and professional occupational categories at 35% and 30% in 2026, respectively (Figure 14).

In response to the demographic and occupational profile changes of employees in the FP&M sector, the FP&M SETA funds programmes to further its transformational agenda. Based on the FP&M SETA Impact and Tracer Study (2023–2025), the SETA's learning interventions have contributed positively to skills development, employability, and workplace readiness across the sector. The study found high levels of learner satisfaction, with participants reporting improved technical and soft skills, increased confidence, and enhanced workplace exposure. The findings further revealed that youth and females were well represented across most learning interventions. The study also found that training interventions supported employment, self-employment, income growth, and career progression among beneficiaries, while employers reported improvements in productivity, technical competence, and workplace readiness.

1.6 Conclusion: Key Skills Issues

The FP&M sector remains a significant contributor to South Africa's manufacturing employment despite recent declines in overall employment. The predominance of small employers, the concentration of employment in a few provinces and sub-sectors, and the sector's reliance on elementary, machine operator, and trade-related occupations highlight the ongoing need for technical, occupational, and workplace skills development. The ageing workforce, declining female representation, and reduced participation of PwDs underscore the importance of targeted interventions to support workforce renewal, transformation, and inclusion. These trends point to the need for continued investment in youth development, artisan and technical training, and programmes that strengthen productivity, employability, and competitiveness across the FP&M sector.

CHAPTER 2: KEY SKILLS CHANGE DRIVERS

2.1 Introduction

This chapter examines the key drivers of change influencing occupational and skills demand and supply across the FP&M SETA sector. According to the DHET (2026) SSP Framework, change drivers refer to factors that influence how a sector develops and affect skills demand and supply. As the FP&M sector continues to evolve within a changing economic, technological, environmental, and regulatory environment, these drivers are reshaping production systems, business operations, occupational structures, and skills requirements across all 13 FP&M sub-sectors.

The analysis identified five key change drivers affecting the sector, namely technological transformation and digitalisation; global competition, trade dynamics, and localisation pressures; environmental sustainability and the green transition; changing consumer behaviour and market expectations; and infrastructure constraints, logistics disruptions, and rising production costs. The identification of these change drivers was informed by a literature review, analysis of the FP&M SETA employer survey, stakeholder consultations with industry associations and organised labour, focus group discussions with industry and education and training providers across the country, as well as engagements with senior management and the Accounting Authority.

2.2 Factors Affecting Skills Demand and Supply



2.2.1 Technological transformation and digitalisation

Technological transformation is reshaping production systems, operations, logistics, and customer engagement across the FP&M sector. Firms are increasingly adopting automation, robotics, artificial intelligence (AI), Computer Numerical Control (CNC) technologies, cloud computing, Internet of Things (IoT), and data-driven manufacturing systems to improve efficiency, quality, productivity, and competitiveness. Digital technologies are also enabling greater product customisation, faster production cycles, and stronger supply chain integration. While adoption is accelerating, significant disparities remain, with many SMMEs

constrained by infrastructure limitations, high costs, and limited digital capabilities.

2.2.1.1 Demand-related implications for skills planning and supply-side considerations

Demand: Increasing digitalisation and automation are driving demand for skills in automation, robotics, computer-aided manufacturing, data analytics, digital maintenance systems, and advanced manufacturing technologies. Occupations such as automation technicians, mechatronics technicians, CNC machine operators, industrial engineers, robotics specialists, systems integrators, and digital marketing professionals are becoming increasingly important. Digital troubleshooting, process optimisation, and Computer Aided Design (CAD) skills are also growing in importance across several sub-sectors.

Supply: Education and training providers will need to modernise curricula to incorporate Industry 4.0 technologies, AI, smart manufacturing systems, and digital production processes. Greater emphasis will also be required on interdisciplinary technical training, workplace-based learning, and continuous upskilling to support workers in increasingly technology-driven workplaces.

2.2.2 Global competition, trade dynamics, and localisation pressures

Global competition and changing trade dynamics continue to place pressure on South Africa's FP&M sector. Domestic manufacturers face increasing competition from lower-cost imports, particularly in clothing, textiles, footwear, furniture, leather products, and packaging. At the same time, localisation strategies, regional integration initiatives, and opportunities arising from the African Continental Free Trade Area (AfCFTA) are shaping future growth. However, exchange-rate volatility, logistics challenges, rising transport costs, and supply chain disruptions continue to constrain competitiveness, requiring firms to improve quality, innovation, efficiency, and sustainability.

2.2.2.1 Demand-related implications for skills planning and supply-side considerations

Demand: Increasing exposure to international competition and regional trade integration is reshaping occupational demand across the FP&M sector. Firms increasingly require skills in export management, product innovation, quality assurance, trade compliance, logistics coordination, procurement systems, and supply chain resilience. Demand is growing for export coordinators, compliance officers, supply chain analysts, product designers, quality assurance specialists, and sustainability reporting professionals.

Supply: From a supply-side perspective, education and training institutions will need to strengthen programmes related to export readiness, international standards compliance, procurement systems, localisation strategies, entrepreneurship, and industrial competitiveness. Greater collaboration between industry stakeholders, government departments, and education and training providers will also be necessary to ensure that skills development initiatives remain aligned with evolving trade dynamics and industrial policy priorities.

2.2.3 Environmental sustainability and the green transition

Environmental sustainability and climate-related pressures are increasingly influencing production systems and value chains across the FP&M sector. Growing expectations from consumers, investors, governments, and international markets are encouraging firms to adopt sustainable production systems, reduce waste, improve recycling, and embrace circular economy practices. Environmental compliance requirements related to emissions, waste, water use, renewable energy, and responsible sourcing are becoming more stringent, while South Africa's JET agenda is accelerating the move towards greener manufacturing systems.

2.2.3.1 Demand-related implications for skills planning and supply-side considerations

Demand: The transition to sustainable production is increasing demand for environmental compliance officers, sustainability managers, renewable energy technicians, carbon accounting specialists, waste management practitioners, environmental scientists, and resource-efficiency specialists. Demand is also growing for skills in sustainable sourcing, circular economy systems, environmental auditing, and cleaner production technologies.

Supply: To support the sector's sustainability transition, education and training institutions will need to integrate green skills into technical, vocational, engineering, and manufacturing programmes. Greater investment will also be required in training related to renewable energy systems, waste valorisation, water-use efficiency, carbon reporting, environmental compliance, and sustainable manufacturing technologies, while workplace-based learning opportunities linked to green production systems will become increasingly important.

2.2.4 Changing consumer behaviour and market expectations

Changing consumer behaviour and evolving market expectations continue to reshape production, marketing, and distribution systems across the FP&M sector. Consumers increasingly demand affordable, customised, ethically sourced, sustainable, and high-quality products delivered within shorter timeframes. Digitalisation, e-commerce growth, social media influence, and changing demographics are also transforming purchasing behaviour, while economic pressures are increasing price sensitivity. As a result, firms must strengthen innovation, flexibility, customer responsiveness, and digital engagement capabilities.

2.2.4.1 Demand-related implications for skills planning and supply-side considerations

Demand: Evolving consumer preferences and expanding digital commerce are increasing demand for product designers, digital marketing specialists, customer relationship managers, multimedia content developers, online merchandising specialists, user experience designers, and market analysts. Skills related to digital engagement, sustainable product development, and customer-centred innovation are becoming increasingly important.

Supply: Consequently, education and training providers will need to strengthen programmes related to digital commerce, branding, customer analytics, sustainable design, e-commerce systems, and innovation management. Greater emphasis should also be placed on

combining technical manufacturing competencies with creative, digital, and commercial skills to improve responsiveness to changing market conditions and evolving consumer trends.

2.2.5 Infrastructure constraints, logistics disruptions, and rising production costs

Infrastructure inefficiencies, logistics disruptions, rising production costs, energy insecurity, and water supply challenges continue to affect operational performance across the FP&M sector. Port congestion, rail inefficiencies, freight delays, and unreliable municipal services are increasing supply chain instability and operating costs. Rising costs associated with energy, fuel, transportation, imported inputs, financing, and regulatory compliance are further pressuring firms to improve operational efficiency, resource management, and business continuity.

2.2.5.1 Demand-related implications for skills planning and supply-side considerations

Demand: These challenges are increasing demand for logistics coordinators, procurement specialists, maintenance planners, supply chain managers, operational risk managers, transport analysts, warehouse automation technicians, and energy management specialists. Skills related to infrastructure risk management, lean manufacturing, process optimisation, and renewable energy technologies are also becoming more important.

Supply: To improve organisational resilience, training systems should strengthen programmes related to logistics optimisation, operational efficiency, energy management, procurement systems, infrastructure risk management, and business continuity planning. Industry stakeholders and training institutions will also need to collaborate more closely to expand practical training opportunities that strengthen problem-solving, systems-thinking, and operational adaptability within increasingly constrained production environments.

2.3 Policy Frameworks Affecting Skills Demand and Supply

This section examines major national plans and strategies that influence the FP&M sector, with emphasis on their implications for skills demand and supply. The FP&M SETA recognises the significance of strong alignment between its skill development interventions with national priorities to ensure relevance, responsiveness and impact. Table 6 provides a summary of the key policy frameworks, their implications for skills planning in the sector, and the measures put in place by the FP&M SETA to support the national strategies and plans.

Table 6: Major National Strategies and Plans Affecting Skills Demand and Supply

National Plans and Strategies	Demand and Supply related Implications for Skills Planning in the Sector	Measures planned in support of National Skills Strategies and Plans
The National Development Plan (NDP) 2030	The NDP 2030 is a plan for the country to eliminate poverty and reduce inequality by 2030. The goals of the plan include building a capable state; fostering a competent and inclusive workforce to accelerate economic growth; promoting youth employment and entrepreneurship; and improving education, skills development and innovation. Demand-side implications include an increase in the need for skills to support the outcomes of the NDP. Supply-side implications emphasise the need for funding support to	The FP&M SETA plans to support the NDP by focusing on skills development for economic sustainability and global competitiveness within the manufacturing sector. The 2027/28 planning cycle emphasises strengthening value-chain linkages and addressing critical skills shortages within the FP&M sector. The SETA's planned initiatives include implementing artisan development, learnerships, internships, bursaries interventions and workplace-based learning aimed

National Plans and Strategies	Demand and Supply related Implications for Skills Planning in the Sector	Measures planned in support of National Skills Strategies and Plans
	students in need; improving the participation of youth, women, and people with disabilities; creating programs that improve employability, entrepreneurship, and adaptability; and expanding access to artisan and technical training.	at improving employability and opportunities, while ensuring inclusivity. In addition, the SETA supports youth development, women empowerment, entrepreneurship training and inclusion of people with disabilities in line with the NDP transformation agenda.
New GrowthPath (NGP)	The NGP is a policy framework aimed to foster inclusive growth, decent work, and equity by focusing on job-drivers, infrastructure investment, and enhancing labour absorption. Within the FP&M sector, the framework focuses on expanding the agriculture, green economy, infrastructure development, and manufacturing sectors. Demand-side implications include increasing the demand for technical, vocational and artisan skills; the need to upskill workforce to support economic growth as well as the need to support cooperatives and local economies. Supply-side implications emphasise supporting the apprenticeship system and workforce upskilling; developing training models that are location-specific; strengthening capacity for SMMEs and cooperatives; and strengthening the public-private partnerships to improve workplace-based learning.	The SETA focuses on aligning with the NGP by prioritising job creation, workplace skills development, and expanding artisan training. Key measures include 1) facilitating training for 10% of the workforce annually; 2) supporting apprenticeship and artisan development programmes to improve accessibility for youth; 3) supporting work experience and internship opportunities for TVET and HET graduates; 4) strengthening governance, accountability and SETA performance systems; and 5) supporting infrastructure and industrial development initiatives linked to Strategic Integrated Projects (SIPs), Industrial Development Zones (IDZs) and Special Economic Zones (SEZs).
National Skills Development Plan (NSDP)	The NSDP is the overarching strategic guide for skills development, which is intended to provide direction to sector skills planning and implementation in the SETAs. Demand-side implications include addressing scarce and critical skills; improving the skills of the workforce as well as opening workplaces to accommodate unemployed people to gain experience. Supply-side implications requires the expansion of the SETAs role in sector intelligence; the development of industry-aligned occupational qualifications; strengthening of TVET and CET college capacity; strengthening the linkage between education and the workplace; as well as supporting high-impact skills programs, and artisan training opportunities.	In line with the NSDP, the FP&M SETA plans to support the Centres of Specialisation (CoS), strengthen linkages between education institutions and workplaces, and improve access to occupationally directed programmes through TVET colleges. In support of occupational qualification development, the SETA reported 130 occupational qualifications, trades and part-qualifications registered with SAQA, while 113 occupational qualifications and part-qualifications were identified for review and alignment with the QQSF framework. The SETA also plans to continue supporting entrepreneurship, worker-initiated training and career guidance initiatives in line with the NSDP outcomes.
Economic Restructuring and Recovery Plan (ERRP) and its Skills Strategy	The ERRP was developed to deal with immediate actions towards economic recovery amid Covid-19 and to rebuild and grow the economy ensuring sustainability, resilience and inclusion. The skills strategy outlines the ways in which the PSET system will ensure that the skills required to implement this plan are available. Demand-side implications for the FP&M sector include increasing demand for occupations linked to technology and innovation, entrepreneurship, upholstery, garment construction and furniture making. The sector also requires skills related to automation and digital manufacturing to respond to the 4IR and changing production systems. Supply-side implications emphasise the need for more funding towards workplace-based learning programmes that are aligned to the priorities of the ERRP.	In line with the ERRP, the FP&M SETA supports incubation, coaching, and mentoring, specifically focusing on improving the sustainability and productivity of township and rural enterprises. The SETA is prioritizing high-demand occupations through skills development and has identified technology, innovation, entrepreneurship, upholstery, garment construction, and furniture making as key areas to support economic restructure and recovery. The SETA also has an Economic Recovery and Reconstruction Skills Plan with occupations and planned interventions for the medium to long term.
The Medium-Term Development Plan 2024-2029	The MTDP is a five-year strategy used to implement the NDP. The MTDP 2024-2029 has three approved Strategic Priorities: (1) Inclusive Growth and Job Creation; (2) Reduce Poverty and Tackle the High Cost of Living; and (3) A Capable, Ethical, and Developmental State. Demand-side implications include the growing demand for critical skills, such as technical, creative, green, and digital skills, the need to resolve skill mismatches, and the fostering of SMMEs expansion. Supply-side implications	The FP&M SETA has a key priorities to support SMMEs and foster economic competitiveness through targeted skills development. To achieve this the SETA continues to fund occupations in high demand. In 2025/26, approximately 779 TVET learners entered WIL programmes and 697 completed, while 336 university learners entered WIL programmes and 312 completed. In addition, 750 unemployed learners entered work experience and internship programmes, with 671

National Plans and Strategies	Demand and Supply related Implications for Skills Planning in the Sector	Measures planned in support of National Skills Strategies and Plans
	emphasise the importance of collaboration between government, the private sector, and other stakeholders to ensure that skills development initiatives are relevant and effective.	completing.
R-CTFL Masterplan	The Masterplan is a strategic initiative designed to revitalise the local industry, boost manufacturing, and create jobs through increased localisation. Demand-side implications include the growing need for factory skills such as Garment Technology, Patternmaking, Tailored Apprenticeships. Supply-side implications are focused on scaling entry-level employment; strengthening skills for localisation and transformation (including support for Black-owned enterprises); and enhancing technological capabilities for competitiveness and sustainability.	The SETA plans to support skills and technology advancement, 4IR readiness, sector-focused training academies, and occupational qualification development to strengthen manufacturing capacity and productivity.
Furniture Industry Masterplan	Key objectives of the Furniture Industry Masterplan include increasing local production by 50% from current baseline levels; improving domestic and export sales by 100% from current baseline; and increasing formal employment from current levels by 25%. Demand-side implications include transitioning from traditional labour-intensive processes toward a hybrid of modernised, high-design, and competitive manufacturing, requiring workers skilled in operating and maintaining advanced digital equipment (e.g., CNC machinery), coding, and automating furniture production. Supply-side skills implications include offering technical skills programmes for all firms to match skills supply with demand; and implementing experiential learning and mentorship on a large scale by also involving SMMEs in on-the-job training for learners.	In support of the Furniture Masterplan, the FP&M SETA committed R1.4 million towards skills development initiatives. The SETA further supports research, innovation, and digital transformation initiatives aimed at improving competitiveness and supporting growth across FP&M industries.
Forestry Masterplan	The goal of the Forestry Masterplan is to increase investment and competitiveness, underpinned by greater inclusivity in the forestry sub-sector. Seven key focus areas give effect to the achievement of the goal statement. Of significance is Focus Area Five (Research, Development, Innovation and Skills Development). Demand-side implications include the growing demand for advanced technical expertise, increased capacity for small-scale grower integration, and specialised skills in specialised manufacturing. Supply-side implications emphasise the need for targeted skills development interventions to the occupations and skills needed to implement the Masterplan.	The FP&M SETA supports the Forestry Masterplan through interventions aimed at employment creation, skills development, transformation and sector competitiveness within the forestry value chain. The measures include supporting research, innovation, as well as skills development initiatives linked to the forestry sector. The SETA also supports reskilling programmes to improve employability and address changing sector needs.
White Paper on Post-School Education and Training	The White Paper sets out strategies to improve the capacity of the PSET system to meet South Africa's needs. Focusing on building a responsive, integrated, and high-quality PSET system. Demand-side implications include the need for flexible, lifelong learning pathways and improved system responsiveness to industry needs. Supply-side implications include strengthening articulation across TVET, higher education, and occupational systems; expanding RPL and modular learning; and improving quality assurance and certification alignment.	The SETA continuously entered into partnerships with TVET/and or CETs, HEIs, and employers. In 2025/26 alone, 29 TVET, 6 CET, 19 HEIs, and 26 employer partnership agreements were entered into. This is planned to continue.
Just Energy Transition Implementation Plan 2023-2027 (JET IP)	The JET IP is a roadmap approved by Cabinet in November 2023 to operationalize the R1.5 trillion investment plan. It aims to transition the economy from fossil fuels to cleaner energies and accelerate the decarbonisation of key sectors. Demand-side implications include the growing demand for green skills related to decarbonisation, sustainable production, and environmentally responsible manufacturing. Supply-side implications include	To support transition efforts, the FP&M SETA and its stakeholders are expanding training in green manufacturing, sustainable resource use, and environmental risk management. Planned measures include supporting the Energy Action Plan, including renewable energy procurement and skills initiatives to improve energy availability. The SETA also plans to support the official launch and implementation

National Plans and Strategies	Demand and Supply related Implications for Skills Planning in the Sector	Measures planned in support of National Skills Strategies and Plans
	integrating green skills into training programmes; promoting circular economy practices; and supporting the adoption of renewable energy and sustainable technologies within production systems.	of the JET Skills Desk, SDZs, the National JET Skills Advisory Forum, and the Multi-Donor Initiative on Skills for a Just Transition. In addition, the SETA prioritises future skills geared toward climate change adaptation, technological advancement, and sustainable industrial development.
HRD Strategy of South Africa (HRDS-SA)	The HRDS-SA aims to align educational output with labour market needs through a comprehensive skills pipeline, prioritising improving foundational literacy and numeracy, mathematics, science, and technical skills. Demand-side implications include increasing demand for technical, digital, and sustainability-related skills to enhance competitiveness. Supply-side implications include strengthening foundational education (especially maths and science); expanding short courses and upskilling opportunities; and improving partnerships between education institutions and industry to facilitate work-integrated learning.	The FP&M SETA funds skills development programmes in line with the priority occupations identified on the SPOI list which is researched and developed in the annual SSP update. The SPOI list consists of occupations that are in demand in the sector. By allocating funding in line with the SPOI list, the SETA ensures that funding is allocated to occupations needed in the sector.
Presidential Youth Employment Initiative (PYEI)	The PYEI aims to address youth unemployment and facilitate youth transition from education into the labour market. Demand-side implications include increased need for entry-level, transferable, and future-ready skills in response to high NEET rates. Supply-side implications include expanding access to basic, digital, and life skills programmes; improving career guidance and work exposure; and strengthening employer partnerships to create structured youth pathways.	The FP&M SETA is focused on strengthening youth and community-based programs, offering life-skills and entrepreneurship training to empower young people. Through public-private partnerships, the SETA drives investment in labour intensive sectors, ensuring opportunities for rural youth, unemployed youth, young women, students, out-of-school youth, and youth with disabilities. Its Youth Development Strategy targets individuals between 14 and 35 years, providing skills training and community participation opportunities to enhance employability and economic growth.
Fourth Industrial Revolution (4IR) Strategy	The 4IR Strategy drives structural shifts in skills demand toward digital and cognitive capabilities. Demand-side implications include increased demand for advanced digital, analytical, and problem-solving skills, alongside declining demand for routine tasks due to automation. Supply-side implications include promoting lifelong and interdisciplinary learning; integrating digital skills into curricula; and strengthening adaptability and innovation capabilities within the workforce.	The FP&M SETA is embracing 4IR technologies by ensuring that the SETA funds training programs that upskills the employed and unemployed in digital and automation skills needed in today's evolving industries. As the sector shifts towards smart manufacturing, AI-driven processes, and digital transformation, new competencies are essential. To keep the FP&M sector competitive, the SETA is focusing on reskilling and upskilling and partnering with businesses and educational institutions to align training with the latest technology advancements. Additionally, digital learning platforms have been launched, making skills training more accessible and better suited for the demands of the 4IR and 5IR.

2.4 Conclusion

The FP&M sector operates in a rapidly evolving environment shaped by technological change, global competition, sustainability demands, shifting consumer patterns, and infrastructure constraints, all of which continue to reshape occupational structures and skills needs. National strategies such as the NDP 2030, NSDP, MTDP, ERRP, JET IP, and the 4IR Strategy provide a clear policy direction, with strong emphasis on digitalisation, green skills, localisation, entrepreneurship, and inclusive growth. In response, the sector requires a more agile, technical, digitally capable, and environmentally aware workforce supported through strengthened partnerships and expanded skills development interventions to enhance employability and long-term competitiveness.

CHAPTER 3: SECTORAL SKILLS DEMAND AND SUPPLY ANALYSIS

3.1 Introduction

Chapter 3 examines HTFVs, skills gaps, and emerging occupations within the FP&M sector. HTFVs are defined as “a vacancy (occupation) that an employer was unable to fill within 12 months, or where it took longer than 12 months to secure a suitably qualified and experienced candidate” (DHET SSP Framework and Guidelines, 2026). The chapter further analyses the scale and nature of skills supply within the sector and outlines the methodology used to identify Emerging Occupations and the Sectoral Priority Occupations and Interventions (SPOI) list, which are also presented in the chapter.

The findings presented in this chapter are informed by a range of primary and secondary research sources. These include FP&M SETA-commissioned studies on the forestry value chain (2026), covering the forestry, pulp and paper, and wood products sub-sectors, as well as a 2025 study on the skills needs of the bed and mattress sub-sector. Primary data sources comprised employer surveys, WSP/ATRs for 2026/27, FP&M SETA Quarterly Monitoring Reports (QMRs), interviews, and focus group discussions with industry representatives and internal FP&M SETA stakeholders. Secondary sources included data from the DHET on the Post-School Education and Training (PSET) system, as well as Higher Education Management Information Systems (HEMIS) data.

3.2 Occupational Shortages and Skills Gaps

The tables below present the FP&M SETAs HTFVs in three groups. The first group captures the CTFL subsectors (Clothing, Textiles, Footwear, and Leather) (Table 7); the second group captures the forestry value-chain subsectors (Forestry, Wood products, Pulp and paper, Furniture) (Table 8); and the third group captures the Printing, Print media, Publishing, and Packaging subsectors (Table 9).

Table 7: Hard to fill Vacancies in the CTFL Sub-sectors

OFO Code	Occupation	Number needed	Reason
2021 - 715301	Sewing Machine Operator	338	Lack of relevant experience
2021 - 683202	Apparel and related pattern maker	282	Lack of relevant qualifications
2021 - 312201	Production / Operations Supervisor (Manufacturing)	190	Lack of relevant experience
2021 - 684901	Textile, Clothing, Footwear and Leather Processing Machine Mechanic	72	Lack of relevant experience
2021 - 132102	Manufacturing Operations Manager	64	Lack of relevant qualifications; unattractiveness of the industry
2021 - 121908	Quality Systems Manager	29	Lack of relevant qualifications
2021 - 683201	Clothing, Home Textiles and General Goods Cutter	26	Lack of relevant experience
2021 - 122101	Sales and Marketing Manager	45	Lack of relevant experience; unattractiveness of the industry

OFO Code	Occupation	Number needed	Reason
2021 - 715302	Clothing, Textile and Leather Goods Production Operator	26	Lack of relevant qualifications
2021 - 313903	Clothing, Textile and Footwear Manufacturing Process Control Technician	15	Lack of relevant experience
2021 - 216301	Fashion Designer	12	Lack of relevant experience
2021 - 715204	Knitting Machine Operator	7	Lack of relevant qualifications
2021 - 122301	Research and Development Manager	5	Lack of relevant experience; transformation challenges; unattractiveness of the industry
2021 - 214104	Textile Production Technologist	4	Lack of relevant qualifications
2021 - 122101	Business Development Manager	3	Lack of relevant experience; unattractiveness of the industry

Source: FP&M SETA WSP data 2026, online employer survey 2026, stakeholder interviews 2026, Focus Group 2026

Table 8: Hard to Fill Vacancies in the Forestry Value Chain

OFO Code	Occupation	Number needed	Reason
2021-132104	Engineering Manager	196	Lack of relevant experience
2021-734102	Logging Plant Operator	115	Lack of relevant experience
2021-714301	Paper Products Machine Operator	84	Lack of relevant experience
2021-214401	Mechanical Engineer	48	Lack of relevant experience
2021-131103	Forestry Operations Supervisor	44	Lack of relevant experience
2021-671202	Millwright	24	Lack of relevant qualifications
2021-133101	Forestry Operations Manager	20	Lack of relevant experience
2021-122101	Sales and Marketing Manager	20	Lack of relevant experience
2021-132401	Supply and Distribution Manager	14	Lack of relevant experience
2021-621101	Tree Feller	9	Lack of relevant experience
2021-653306	Diesel Mechanic	8	Lack of relevant qualifications
2021-682303	Wood Machinist	7	Lack of relevant experience
2021-215101	Electrical Engineer	5	Lack of relevant experience
2021-652403	Saw Maker and Repairer	4	Lack of relevant qualifications
2021-682101	Wood Preparer and Treater	4	Lack of relevant experience
2021-122301	Research and Development Manager	3	Lack of relevant experience
2021-313917	Pulp and Paper Manufacturing Process Control Technician	3	Lack of relevant experience
2021-651302	Boiler Maker	3	Lack of relevant qualifications
2021-652302	Fitter and Turner	3	Lack of relevant qualifications
2021-682201	Cabinet Maker	3	Lack of relevant qualifications

Source: Forestry Sector Critical Skills Needs Analysis 2023, Furniture Industry Skills Needs Assessment and Analysis 2024, Bed and Mattress Skills Development Plan 2025, Kitchen and Built-in Units Skills Development Plan 2024, Forestry Value Chain SSP 2026, FP&M SETA WSP data 2026, online employer survey 2026, stakeholder interviews 2026, Focus Group 2026

Table 9: Hard to Fill Vacancies in the Printing, Print Media, Publishing and Packaging Sub-sectors

OFO Code	Occupation	Number needed	Reason
2021-312201	Production / Operations Supervisor (Manufacturing)	100	Lack of relevant experience
2021-216601	Digital Artist	36	Lack of relevant experience
2021-216603	Multimedia Designer	26	Lack of relevant experience
2021-122101	Sales and Marketing Manager	20	Lack of relevant qualifications
2021-714301	Paper Products Machine Operator	20	Lack of relevant experience
2021-121908	Quality Systems Manager	10	Lack of relevant qualifications
2021-332201	Commercial Sales Representative	9	Lack of relevant qualifications
2021-264202	Editor	8	Lack of relevant experience
2021-662216	Commercial Digital Printer	5	Lack of relevant experience
2021-672107	Special Class Electrician	4	Lack of relevant experience
2021-122101	Business Development Manager	3	Lack of relevant experience
2021-242214	Intellectual Property Special Advisor	3	Lack of relevant qualifications
2021-652302	Printers Mechanic	2	Lack of relevant experience
2021-333903	Print Cost Estimator	2	Lack of relevant experience
2021-134917	Commissioning Editor	1	Lack of relevant qualifications

Source: FP&M SETA WSP data 2026, online employer survey 2026, stakeholder interviews 2026, Focus Group 2026

3.2.2 Skills Gaps in the sector

According to the DHET SSP framework (2025), skills gaps refer to “skills deficiencies in employees or lack of specific competencies by employees to undertake job tasks successfully to required industry standards. Skills gaps may arise due to lack of training, new job tasks, technological changes, or new production processes, to list a few. The term ‘top up skills’ also refers to skills gaps and usually requires a short training intervention”. A similar methodology to the HTFVs list was used to derive the skills gaps list. Data was first sourced from the 2026/27 WSP submissions, online employer survey, and through interviews with Industry Associations and Trade Unions. This data was then verified and updated during stakeholder focus groups.

All FP&M SETA sub-sectors report that there are investments in new technology and training of staff to use such technology. It is therefore a key skills driver for the sector, as noted in Chapter 2. Furthermore, many sub-sectors are competing in the global arena currently, and improved labour productivity is becoming an increasing priority thereby highlighting the need for upskilling employees in the sector. Table 10 lists the prevalent skills gaps that exist across all the major groups in the FP&M sector.

Table 10: Skills Gaps

Major Group	Occupations		Skills Gaps
Managers	112101 - Director (Enterprise / Organisation)	122105 - Customer Service Manager	Remote Management; Communication; Change Management; Active Learning; Active Listening; Complex Problem Solving; Coordination; Critical Thinking; Digital Literacy; Equipment Maintenance; Judgment and decision Making; Learning Strategies; Management of Financial Resources; Management of Material Resources; Management of Personnel Resources; Mathematics; Coaching & Mentoring; Operation and Control; Operation Monitoring; Resource Management Skills; System Skills; Systems Analysis; Systems Evaluation; Technical Skills; Technology Design; Time Management
	121101 - Finance Manager	122301 - Research and Development Manager	
	121201 - Human Resource Manager	131102 - Forestry Operations Manager	
	121206 - Health and Safety Manager	132102 - Manufacturing Operations Manager	
	121901 - Corporate General Manager	132106 - Manufacturing Quality Manager	
	121905 - Programme or Project Manager	132401 - Supply and Distribution Manager	
	121909 - Sustainability Manager	132402 - Logistics Manager	
	122101 - Sales and Marketing Manager	133101 - Chief Information Officer	
	134917 - Publisher	133105 - Information Technology Manager	
	Professionals	214101 - Industrial Engineer	
214104 - Production Engineering Technologist		243402 - ICT Business Development Manager	
216302 - Industrial Designer		251201 - Software Developer	
216603 - Multimedia Designer		251301 - Multimedia Specialist	
226302 - SHE&Q Practitioner		251302 - Web Developer	
242103 - Business Development Officer		252101 - Database Designer and Administrator	
242303 - Human Resource Advisor		252201 - Systems Administrator	
243102 - Market Research Analyst		252301 - Computer Network and Systems Engineer	
252901 - ICT Security Specialist			
Technicians and Associate Professionals		311501 - Mechanical Engineering Technician	313903 - Clothing, Textile and Footwear Manufacturing Process Control Technician
	311801 - Draughtsperson	313916 - Manufacturing Production Technicians	
	311904 - Manufacturing Technician	314301 - Forestry Technician	
	312201 - Production / Operations Supervisor (Manufacturing)	333905 - Supply Chain Practitioner	
	313901 - Integrated Manufacturing Line Process Control Technician	335402 - Import-export Administrator	
		351301 - Computer Network Technician	
Clerical Support Workers	411101 - General Clerk	432201 - Production Coordinator	Active Learning; Communication; Active Listening; Complex Problem Solving; Coordination; Critical Thinking; Equipment Maintenance; Judgment and decision Making; Learning Strategies; Management of Financial Resources; Management of Material Resources; Management of Personnel Resources; Mathematics; Monitoring; Operation and Control; Operation Monitoring; Quality Control Analysis; Reading Comprehension; Resource Management Skills; System Skills; Systems Analysis; Technical Skills; Digital Literacy; Time Management; Writing
	413201 - Data Entry Operator	441502 - Office Machine Operator	
	422206 - Call or Contact Centre Agent	441601 - Human Resources Clerk	
	431101 - Accounts Clerk	441602 - Skills Development Administrator	
	432104 - Warehouse Administrator / Clerk	441903 - Program or Project Administrators	

Major Group	Occupations	Skills Gaps
Service and Sales Workers	522201 - Retail Supervisor 522301 - Sales Assistant (General) 524401 - Call Centre Salesperson	524903 - Sales Clerk / Officer 532901 - First Aid Attendant
Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	621101 - Tree Feller 641502 - Carpenter 643201 - Industrial Spraypainter 652204 - Patternmaker 652301 - Metal Machinist 653301 - Industrial Machinery Mechanic 662202 - Small Offset Lithography Operator 662215 - Stationery Machine Technician 662216 - Commercial Digital Printer	672103 - Business Machine Mechanic 682101 - Wood Preparer and Treater 682201 - Cabinet Maker 682301 - Furniture Finisher 682303 - Wood Machinist 683201 - Clothing, Home Textiles and General Goods Cutter 683202 - Apparel and related pattern maker 683401 - Upholsterer
Machine Operators and Assemblers	714204 - Plastics Production Machine Operator (General) 714301 - Paper Products Machine Operator 715201 - Weaving Machine Operator 715206 - Textile Dry Finishing Machine Operator 715301 - Sewing Machine Operator 715302 - Clothing, Textile and Leather Goods Production Operator	717201 - Wood Processing Machine Operator 718302 - Packing Machine Operator 721101 - Machinery Assembler 721901 - Product Assembler 734102 - Logging Plant Operator 734301 - Crane or Hoist Operator 734402 - Forklift Driver
Elementary workers	821501 - Forestry Worker 821502 - Logging Assistant 832101 - Packer (Non-Perishable Products)	832903 - Timber and Wood Process Worker 832905 - Footwear and Leather Factory Worker 832909 - Textile, Clothing and Footwear Factory Worker

Source: FP&M SETA WSP data 2026, online employer survey 2026, stakeholder interviews 2026, Focus Group 2026

3.2.3 Emerging occupations in the sector

The lists of emerging occupations presented below were developed from desk research looking at the emerging occupations in the 13 FP&M sub-sectors, including FP&M SETA sector commissioned research. This was supported by an analysis of the FP&M SETAs employer survey, interviews,

as well as stakeholder engagements during focus group discussions.

3.2.3.1 Emerging occupations as a result of technological advancements

In the FP&M sector, technological transformation is driving new occupational demands. Desk research, employer surveys, interviews, and stakeholder engagements identified emerging roles such as robotic furniture engineers, IoT and smart integration technicians, AI integration specialists, and smart textile developers, amongst others.

To anticipate these changes, the FP&M SETA commissioned several studies on emerging occupations. The Printing SA Industry Report (2025) highlights the growing importance of digital printing, automation, AI-driven workflows, packaging and labelling, additive manufacturing, and data-driven production systems. The study identifies increasing demand for multi-skilled machine operators, digital printing technicians, packaging and labelling specialists, AI-assisted print production specialists, sustainability and green printing specialists, and e-commerce packaging and logistics specialists. It emphasises that future competitiveness will depend on digital adaptability, automation, workflow optimisation, and advanced technical skills.

The Understanding Skills Mismatch in South Africa with the F&PM SETA Environment in Mind: A Cross-Cutting Approach (2025) study highlights how 4IR technologies, 3D printing, automation, and advanced digital technologies are reshaping labour market requirements. It identifies growing demand for occupations linked to smart manufacturing, industrial automation, digital production coordination, technology integration, and advanced manufacturing systems, while emphasising the importance of digital competencies, innovation, technological adaptability, and lifelong learning.

Similarly, the Exploration of Possible FP&M SETA Collaboration with Austrian Universities (2025) study identifies technological innovation, sustainable manufacturing, product customisation, and research and development as key future drivers. Emerging occupations include roles in textile innovation, materials science, sustainable forestry technologies, advanced packaging design, industrial research and development, and smart manufacturing. The study also highlights the importance of international collaboration, technology transfer, and advanced technical training.

In addition, PAMSA's Forestry, Pulp and Paper, and Wood Products SSPs (2026) identify growing demand for workers capable of operating in digitally enabled and automated production environments. Emerging occupations include smart manufacturing technicians, industrial automation specialists, mill maintenance technicians, sustainable forestry specialists, process automation technicians, biomass and biofuel specialists, recycling and circular economy specialists, digital production coordinators, timber processing technologists, and environmentally focused production specialists. Table 11 summarises the emerging occupations associated with technological transformation in the FP&M sector. Table 11 lists the emerging occupations brought about by technological transformation in the FP&M sector.

Table 11: List of Emerging Occupations in the FP&M Sector Due to Technological Advancements

SEIA Name	Period	Occupation Code	Occupation	Intervention (s) planned	NQF Level	NQF Aligned	Quantity Needed	Quantity to be Supported	Rationale
FP&M SETA	2027/28	N/A	Robotic Furniture Engineer	Bachelor of Science in Engineering in Mechanical and Mechatronic Engineering	7	Y	N/A	N/A	The occupations emerged due to the 4IR and technological advancements in the FP&M sector. These occupations are new hence they do not have an OFO code. The number needed in the sector is not yet known. This will be the topic of future research.
FP&M SETA	2027/28	N/A	Smart Space & Layout Planner	Bachelor's degree in Architecture or Interior Design	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	IoT & Smart Integration Technician	Occupational Certificate: Internet-of-Things Developer	4				
FP&M SETA	2027/28	N/A	Drone Operator for Forest Monitoring	Skills Development and Innovation in Forestry Technology. Drone Licensing and Certification: Remote Pilot Licence (RPL)	5	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	AI Integration Specialist	Bachelor's Degree in Computer Science/ Data Science	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	CNC & Digital Wood Manufacturing Technician	Learnership: National Certificate in Furniture Making (Wood) Occupational Certificate: CNC Milling Machinist Occupational Certificate: Wood Processing Machine Operator	4	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Digital Twin Technician	Bachelor's Degree in Mechatronics, Mechanical Engineering, Computer Science, or Information Technology Certifications: Enterprise Architecture certifications	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Additive Manufacturing Technician	BTech, or Advanced Diploma in Mechanical or Mechatronics Engineering Short Learning Programme in Additive Manufacturing (3D Printing)	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Manufacturing Process Optimisation Specialist	Master's degree in Engineering Management	9	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Smart Textile Developer	Bachelor of Applied Science in Textile Science Advanced Diploma in Clothing and Textile Technology	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Bioeconomy Process Technician	Bachelor of Science in Biotechnology, Biochemistry, Microbiology, or Chemical/Biochemical Engineering	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	AR Packaging Designer	Bachelor's Degree or National Diploma in Graphic Design, Multimedia Design, or Packaging Design	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Industrial Cybersecurity Technician	Certification: CompTIA Network+ & Security+	N/A	N	N/A	N/A	

Source: Online employer survey 2026, stakeholder interviews 2026, Focus Group 2026, Desk research 2026

3.2.3.2 Emerging occupations as a result of the environmental concerns

There is increasing pressure on the FP&M sector to improve its environmental performance in response to stricter environmental regulations and growing demand for sustainable products. At the same time, the JET is placing increased pressure on businesses to adopt more sustainable, resource-efficient, and low-carbon production practices. This is driving a shift towards cleaner production processes, resource efficiency, and circular economy practices, which in turn requires new and specialised skills. As a result, emerging occupational roles are developing in areas such as resource efficiency, sustainable design, eco-friendly packaging, materials innovation, waste management, environmental compliance sustainability, and energy efficiency. Table 12 presents some of the emerging occupations linked to environmental concerns and the JET.

Table 12: Emerging Occupations Due to Environmental Concerns

SETA Name	Period	Occupation Code	Occupation	Intervention (s) planned	NQF Level	NQF Aligned	Quantity Needed	Quantity to be Supported	Rationale
FP&M SETA	2027/28	N/A	Resource Efficiency Analyst (Energy, Water, Materials)	Skills Programme	6–7	Y	N/A	N/A	These occupations have emerged in response to increasing environmental pressures and sustainability requirements within the FP&M sector.
FP&M SETA	2027/28	2021-211403	Sustainable Specialist	Bursary: Bachelor of Science in Materials Science	8	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Designer	Skills Programme: Certificate in Sustainable Packaging Design	N/A	N/A	N/A	N/A	
FP&M SETA	2027/28	N/A	Environmental Compliance Officer	Bursary: Bachelor of Science in Environmental Management	8	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Green Supply Chain Analyst	Bursary: BCom in Supply Chain Management (Sustainability Focus)	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Waste Management Specialist	Diploma in Waste Management	5	Y	N/A	N/A	They reflect the growing demand for skills in sustainable materials, eco-design, waste reduction, resource efficiency, environmental compliance as well as the influence of the JET.
FP&M SETA	2027/28	N/A	Biodegradable Materials Scientist	Bachelor of Science in Materials Science	8	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Fashion Designer	Bachelor of Design in Sustainable Fashion	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Designer	Skills Programme: Footwear Sustainability and Design	6	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Designer	Skills Programme: Furniture Sustainability and Design	6	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Recycling Process Technician	Certificate in Recycling Operations	5	Y	N/A	N/A	Most of these roles are still evolving and may not yet be formally classified within the OFO system. The number of workers
FP&M SETA	2027/28	N/A	Sustainable Pulp Technologist	National Diploma in Pulp and Paper Technology	6	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Timber Specialist	Diploma in Wood Technology (Sustainable Forestry)	6	Y	N/A	N/A	

SETA Name	Period	Occupation Code	Occupation	Intervention (s) planned	NQF Level	NQF Aligned	Quantity Needed	Quantity to be Supported	Rationale
FP&M SETA	2027/28	N/A	Bio-Leather Developer	Diploma in Bio-Materials Development	6	Y	N/A	N/A	required will be determined through further research and ongoing labour market analysis.
FP&M SETA	2027/28	N/A	Sustainability Specialist	Bachelor's Degree in Environmental Science	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Sustainable Packaging Technologist	Bursary: Packaging / Engineering Qualification	6-7	Y	N/A	N/A	

Source: Online employer survey 2026, stakeholder interviews 2026, Focus Group 2026, Desk research 2026

3.2.3.3 Emerging occupations as a result of changing consumer behaviour

Consumer needs and expectations are changing, driven by the rise of online platforms and digital technologies. Customers now expect faster service, more personalised products, and continuous digital engagement. In response, businesses in the FP&M sector are adapting how they design, market, and deliver products across the value chain. This shift is contributing to the emergence of new and evolving occupational roles in areas such as digital content creation, product and packaging design, e-commerce and social media engagement. Many of these roles are still developing and are best understood as emerging occupational specialisations. Table 13 presents the emerging occupations linked to changing consumer behaviour.

Table 13: Emerging Occupations Due to Changing Consumer Behaviour

SETA Name	Period	Occupation Code	Occupation	Intervention (s) planned	NQF Level	NQF Aligned	Quantity Needed	Quantity to be Supported	Rationale
FP&M SETA	2027/28	2021-683202	Digital Pattern Maker	Apprenticeship	3	Y	N/A	N/A	These occupations have emerged as businesses in the FP&M sector respond to shifting consumer preferences, including increasing demand for faster service, personalised products, and enhanced online engagement.
FP&M SETA	2027/28	N/A	3D Footwear Modeler	Bursary: Diploma in Footwear Designing and Manufacturing Technology	6	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Product Lifecycle Analyst	Skills Programme: Certificate	N/A	N/A	N/A	N/A	
FP&M SETA	2027/28	N/A	Smart Packaging Developer	Bursary: Advanced Packaging Diploma	7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Colour Management Specialist	Skills Programme: Short Courses	N/A	N/A	N/A	N/A	
FP&M SETA	2027/28	N/A	Social Media Strategist	Skills Programme: Social Media Management Course	N/A	N/A	N/A	N/A	They reflect new and evolving areas of work in digital content creation, product and packaging
FP&M SETA	2027/28	N/A	Technical Textile Designer	Bursary: National Diploma in Textile Design	6	Y	N/A	N/A	

SETA Name	Period	Occupation Code	Occupation	Intervention (s) planned		NQF Level	NQF Aligned	Quantity Needed	Quantity to be Supported	Rationale
FP&M SETA	2027/28	N/A	Wood Product Designer	National Certificate in Wood Processing	Product	3	Y	N/A	N/A	design, e-commerce, marketing, and customer engagement. Most of these roles are still developing and may not yet be formally classified within the OFO system.
FP&M SETA	2027/28	N/A	AR Content Creator	Short Learning Programme in Digital Media and AR	Digital Media	5	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Digital Marketer (including videographer)	BCom in Digital Marketing		7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Marketing Intelligence Specialist	BCom in Digital Marketing		7	Y	N/A	N/A	
FP&M SETA	2027/28	N/A	Digital Platform Developer	BSc Honours in Computer Science		8	Y	N/A	N/A	The number of workers required will be determined through further research and ongoing labour market analysis.
FP&M SETA	2027/28	N/A	Digital Sales Specialist	BCom in Digital Marketing		7	Y	N/A	N/A	

Source: Online employer survey 2026, stakeholder interviews 2026, Focus Group 2026, Desk research 2026

3.3 Supply-Side Analysis

The section begins with a general representation of the extent of supply at PSET institutions. While there is no disaggregated PSET data specifically representing the FP&M sector, the QMR data from the SETA is outlined.

3.3.1 The extent of occupational supply

3.3.1.1 Post School Education and Training Institutions

The PSET landscape in South Africa comprises 26 public universities providing undergraduate and post-graduate qualifications, differentiated into 11 general academic universities, 9 comprehensive universities and 6 universities of technology; 50 TVET colleges providing vocational and occupational qualifications; 9 CET institutions; and a vast number of private institutions with the total number of institutions at 368 in 2024, a decrease from the 372 from the previous year.

In Table 14 PSET provision is presented with the bulk of students in public universities and universities of technology for 2024. These institutions together with the private HEIs have over 65% of students enrolled compared to 64% in the previous year. The TVET colleges have 26% of the students enrolled in 2024 compared to 27% in the previous year, down by 1 percentage point. A total of 2 183 147 students were enrolled in PSET institutions in 2024.

Table 14: Overview of Post-School Education and Training, 2022-2024

Number of PSET Institutions			
Type of Institution	2022	2023	2024
Public HEIs	26	26	26
Private HEIs	125	138	137
Total HEIs	151	164	163
TVET Colleges	50	50	50
CET Colleges	9	9	9
Private Colleges	161	149	146
Total Colleges	220	208	205
Total PSET	371	372	368
Number of Students Enrolled in PSET Institutions			
Type of Institution	2022	2023	2024
Public HEIs	1,077,768	1,071,715	1,115,580
Private HEIs	258,215	286,454	313,186
Total HEIs	1,335,983	1,358,169	1,428,766
TVET Colleges	518,584	564,089	560,446
CET Colleges	130,752	120,081	128,541
Private Colleges	85,787	80,785	65,374
Total Colleges	735,123	764,955	754,381
Total PSET	2,071,106	2,123,124	2,183,147

Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

Table 15 shows the number of student enrolments by institution type between 2018 and 2024. Student enrolments increased between 2023 (2 123 124 students) and 2024 (2 183 147 students). This increase is mostly due to an increase in enrolments at Public and Private HEIs, whereas enrolments declined at TVET Colleges and at Private colleges (DHET, 2026).

Table 15: Enrolment Figures of Learners by Institution Type, 2018-2024

Institution	2018	2019	2020	2021	2022	2023	2024
Public Higher Education Institutions (HEIs)	1,085,568	1,074,912	1,094,808	1,068,046	1,077,768	1,071,715	1,115,580
Private Higher Education Institutions (HEIs)	197,898	208,978	219,031	232,915	258,215	286,454	313,186
TVET colleges	657,133	673,490	452,277	589,083	518,584	564,089	560,446
Community Education and Training (CET) colleges	100,286	171,409	142,538	143,031	130,752	120,081	128,541
Private colleges	219,837	151,136	96,754	85,787	85,787	80,785	65,374
Annual PSET Totals	2,260,722	2,279,925	2,005,408	2,118,862	2,071,106	2,123,124	2,183,147

Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

Table 16 shows the number of graduates by institution type between 2018 and 2024. The number of students graduating is well below the number of student enrolments over time. However, graduations increased between 2023 and 2024, from 354 710 students in 2023 to

382 130 students in 2024. The increase in graduates is most prominent in Public and Private HEIs.

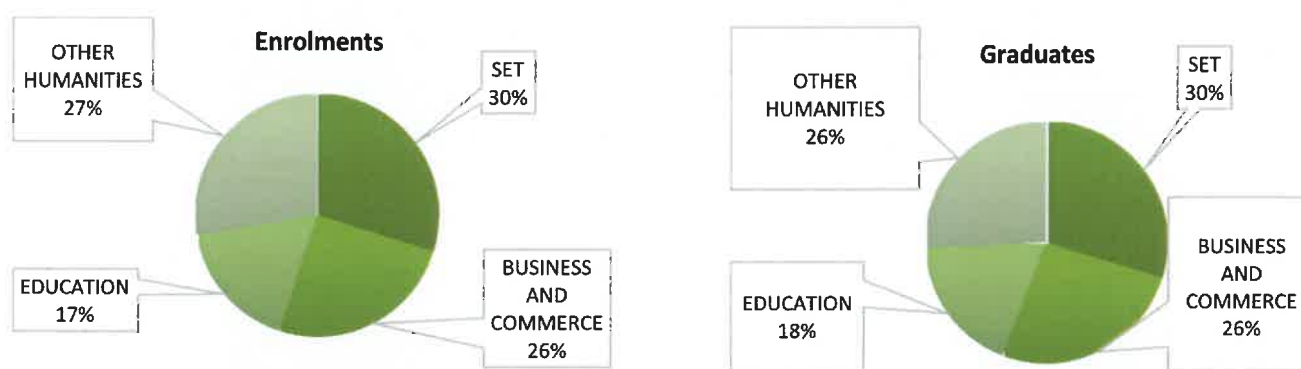
Table 16: Graduation Figures of Learners by Institution Type, 2018-2024

Institution	2018	2019	2020	2021	2022	2023	2024
Public Higher Education Institutions (HEIs)	227,188	221,942	237,882	233,257	225,702	220,758	237,571
Private Higher Education Institutions (HEIs)	33,972	42,526	47,085	54,551	57,302	60,927	69,616
TVET colleges	120,007	162,176	104,310	47,750	45,209	50,572	51,237
Community Education and Training (CET) colleges	28,154	41,638	22,764	25,780	10,383	10,535	11,652
Private colleges	31,844	54,712	41,446	9,848	10,900	11,915	12,054
Annual PSET Graduation Totals	441,165	522,994	453,487	371,186	349,496	354,710	382,130

Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

Figure 15 shows enrolments and graduations by major field of study in public HEIs. For both enrolments and completions, the Science, Engineering and Technology (SET) programme captures the highest rates at 30%, respectively. This is followed by Humanities and then Business and Commerce.

Figure 15: Student Enrolments and Graduates in Public HEIs by Major Field of Study

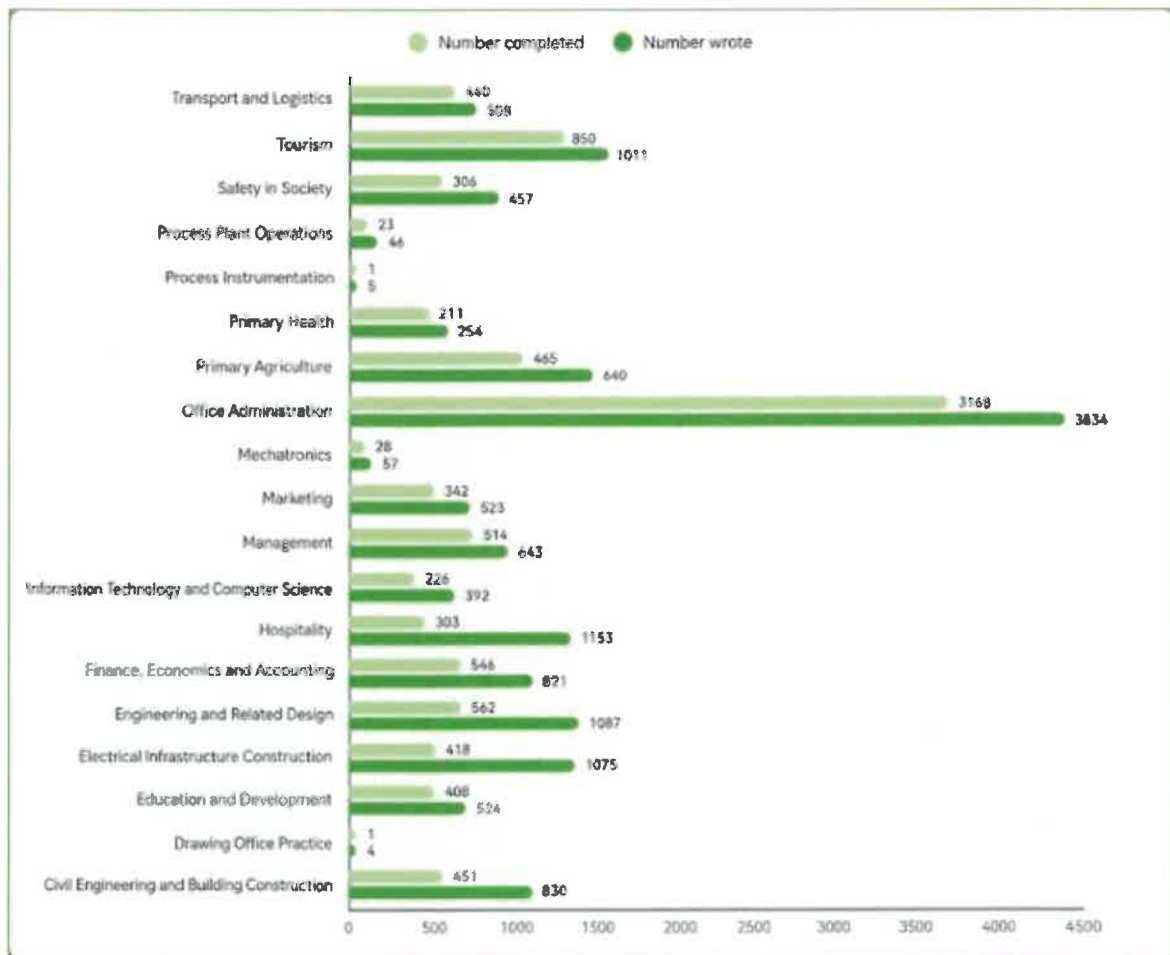


Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

The Business and Commerce programme captures 26% of enrolments and completions, respectively. This shows that a large proportion of students in public HEIs enrol in and graduating from SET, Humanities, and Business and Commerce programmes.

Figure 16 shows the number of students in TVET colleges who wrote and completed NC(V) Level 4 qualifications by programme. The Office Administration programme had the highest number of students who wrote and completed at 3 834 and 3 168, respectively. Other key programmes include Tourism, Hospitality, Engineering and Related Design, and Electrical Infrastructure Construction.

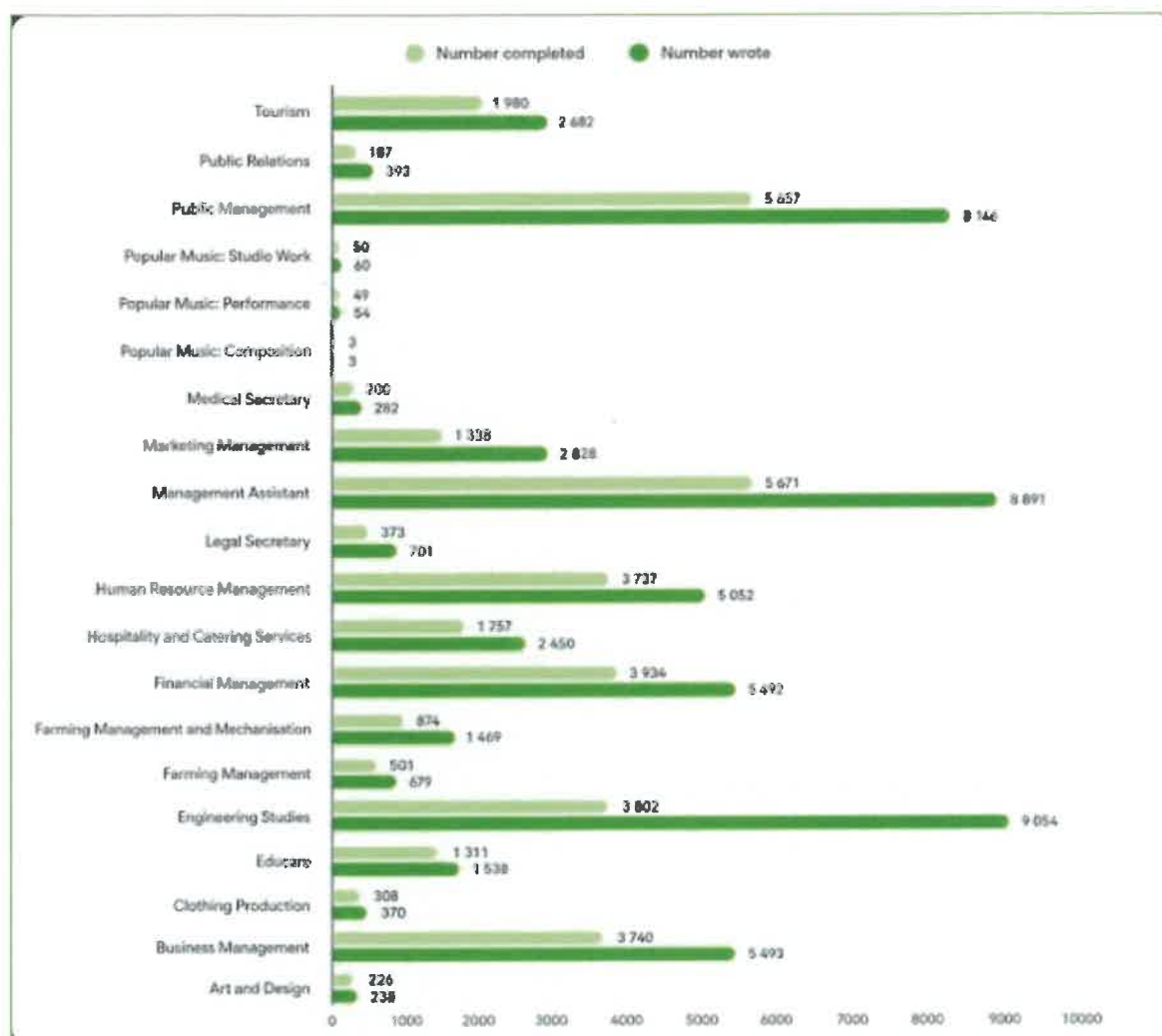
Figure 16: Number of students in TVET colleges who wrote and completed the NC(V) Level 4 qualification, by programme, 2024



Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

Figure 17 shows the number of students who wrote and completed Report 190/1 N6 part-qualification programmes at TVET colleges. The programmes with the highest activity are Engineering Studies, Management Assistant, and Public Management. This is closely followed by Business Management, Financial Management, and Human Resource Management. In all but one case, completions are always lower than registrations (Popular Music: Composition has a 100% completion rate). The total completion rate is 63.9%.

Figure 17: Number of students in TVET colleges who wrote and completed the Report 190/1 N6 part-qualification, by programme, 2024

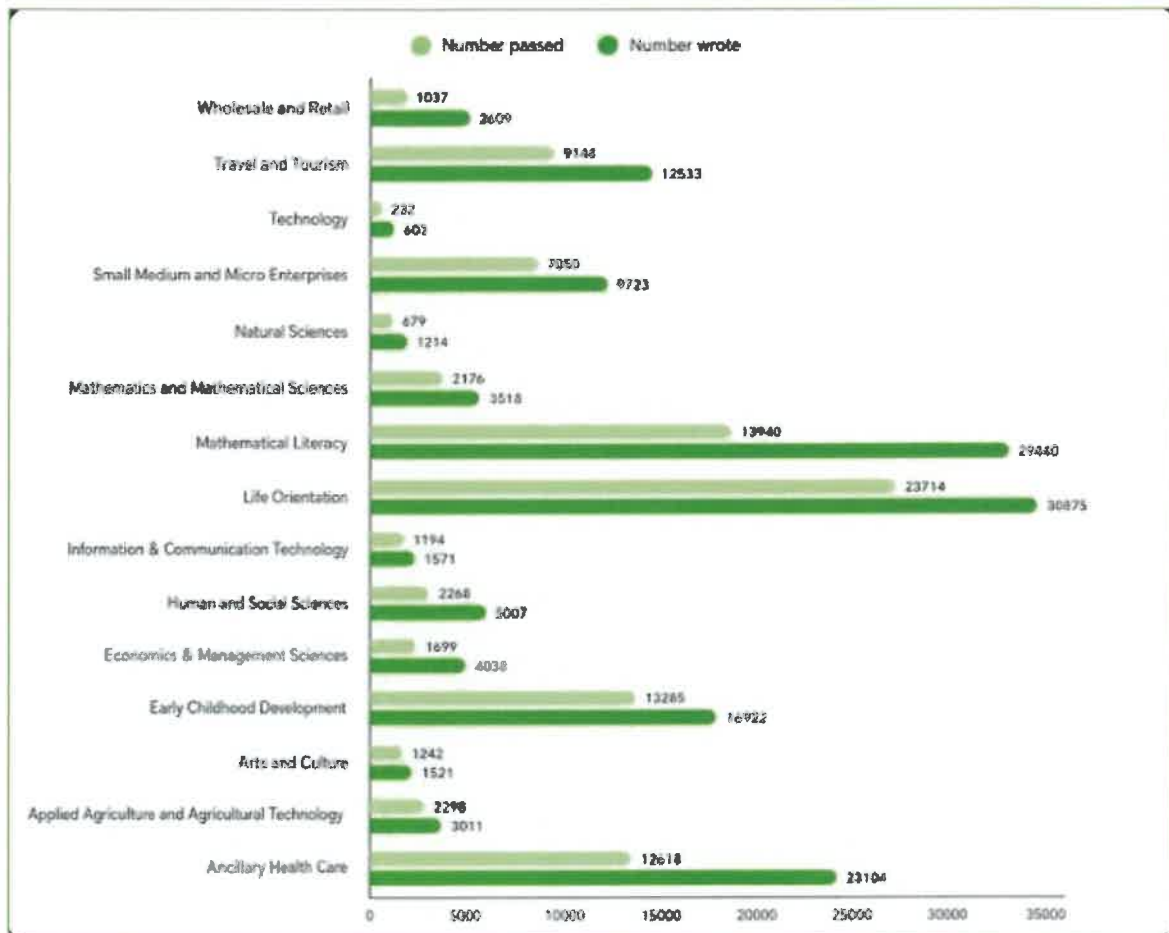


Source: *Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)*

Figure 18 shows the number of students in CET colleges who wrote and passed ABET Level 4 learning areas by content. Life Orientation, Mathematical Literacy, Ancillary Health Care, and Early Childhood Development have the highest number of students who wrote and passed.

Completion rates are highest for Arts and Culture, Early Childhood Development, Life Orientation, Applied Agriculture and Agricultural Technology, and Information and Communication Technology.

Figure 18: Number of students in CET colleges who wrote and passed GETC: ABET Level 4 Learning Areas by Content, 2024



Source: Statistics on Post-School Education and Training in South Africa, 2024 (DHET 2026)

3.3.1.2 FP&M sector learning programmes

Within the FP&M sector, both public and private education and training institutions contribute to skills development. Universities and universities of technology provide degree and diploma programmes in areas such as engineering, forestry, industrial design, manufacturing management, and printing, equipping learners with advanced technical and professional skills for specialised occupations.

Public TVET colleges primarily provide entry- to intermediate-level training historically through NATED programmes and, increasingly, occupational qualifications aligned to industry needs. However, their utilisation within the sector remains limited and concentrated in clothing, textiles, wood products, and furniture manufacturing, particularly in the Western Cape, Gauteng, and KwaZulu-Natal. Factors such as limited specialised infrastructure, outdated equipment, and programme misalignment with evolving industry

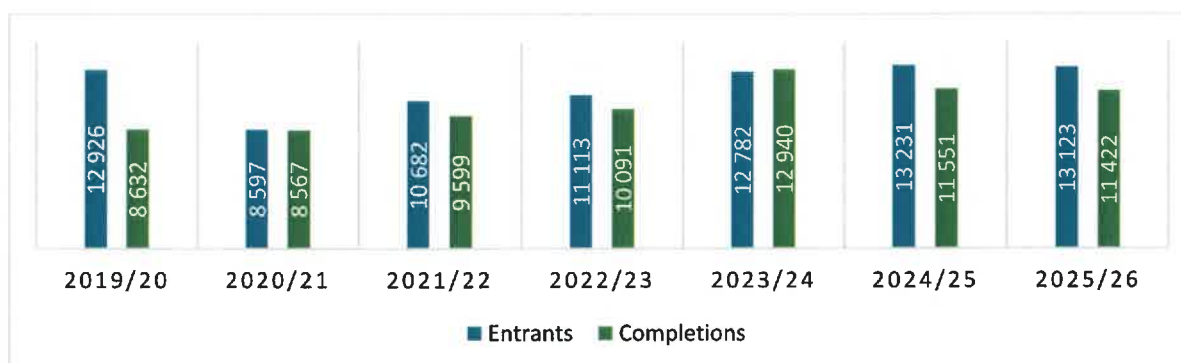
technologies have constrained broader uptake.

Many large employers increasingly rely on private training providers due to their ability to customise programmes, adapt curricula quickly, and deliver flexible training solutions that respond to changing technologies and production requirements.

In addition, substantial workplace-based and non-accredited training takes place across the clothing and textiles, wood products, forestry, printing, pulp and paper, and leather sub-sectors. Delivered by experienced employees and supervisors on factory floors, this training enables firms to respond rapidly to production needs, develop skills on specific machinery and technologies, minimise disruptions, and provide practical, hands-on learning. Employers regard this approach as cost-effective, flexible, and closely aligned to workplace skills requirements.

Across FP&M SETA learning programmes, Figure 19 shows that learner registrations and completions have remained high over the years, apart from the dip recorded in the COVID-19 period. Enrolments was at 12,926 in 2019/20, declined significantly to 8,597 in 2020/21, recovered to 13,231 in 2024/25, and then declined slightly to 13,123 in 2025/26. Completions increased from 8,632 in 2019/20 to 12,940 in 2023/24. The year 2024/25 recorded a decline to 11,551 completions and this further declined to 11,422 in 2025/26.

Figure 19: Learning Programmes Implementation, 2019-2026



Source: FP&M SETA Quarterly Monitoring Reports, 2026

Table 17 shows the learning programme performance of the FP&M SETA by programme type. Both enrolments and completions increased overtime for most programme types. The biggest programmes in terms of enrolments and completions are skills programmes and learnership programmes.

Table 17: Learning Programme Performance by Programme Type, 2022-2026

Programme	2022/23	2023/24	2024/25	2025/26
Number of unemployed learners entered skills programmes	1805	2413	3010	2396
Number of unemployed learners completed skills programmes	1737	2801	2205	2188
Number of unemployed learners entered learnership programmes	2365	2705	2819	2735
Number of unemployed learners completed learnership programmes	2126	2446	2571	2527

Programme	2022/23	2023/24	2024/25	2025/26
Number of unemployed learners entered bursary programmes as first-time entry learners	182	244	235	265
Number of unemployed learners completed bursary programmes	518	456	465	481
Number of workers entered learnership programmes	1014	1031	1196	1130
Number of workers completed learnership programmes	822	958	978	985
Number of workers entered bursary programmes	136	167	164	148
Number of workers completed bursary programmes	100	106	107	110
Number of workers entered skills programmes	1415	1959	1761	1948
Number of workers completed skills programmes	1392	2548	1908	1512
Number of learners entered apprenticeship programmes	605	811	801	1131
Number of learners completed apprenticeship programmes	508	682	687	1101
Number of TVET students entered work-integrated-learning programmes	656	752	759	779
Number of TVET students completed work- integrated- learning programmes	527	525	648	697
Number of university students entered work- integrated- learning programmes	276	321	333	336
Number of university students completed work- integrated-learning programmes	239	249	266	312
Number of unemployed learners entered work experience /Internship programmes	603	672	730	750
Number of unemployed learners completed work experience /internship programmes	509	533	632	671
Number of learners who entered AET programmes	682	718	763	861
Number of learners who completed AET programmes	580	694	672	706
Number of learners entered RPL programmes	117	149	120	156
Number of learners completed RPL programmes	126	117	142	126

Source: FP&M SETA SQMR Data, 2026

3.3.1.3 Skills supply challenges in the sector and interventions to address the challenges

The skills supply challenges are discussed in Figure 20 below:

Figure 20: Skills Supply-Side Challenges and SETA Interventions

Funding Challenge

- Business profitability is impacted by declining national economic conditions. Many resort to cutting training budgets. Additionally, SMMEs face difficulty accessing funding for training. This is largely due to the lack of administrative capacity and unfamiliarity with regulatory requirements which limits their participation in skills development interventions.
- **SETA Interventions:** The FP&M SETA continuously provides Mandatory and Discretionary Grant funding to aid in the upskilling of both employed and unemployed persons. Employers are encouraged to submit funding applications to the FP&M SETA who will fund relevant skills development interventions that will ensure that people are trained in skills relevant to the FP&M sector. Furthermore, the SETA provides workshops to assist businesses in submitting their WSP/ATR submissions. The aim is to capacitate employers to submit necessary applications to the SETA.

Low Youth Interest and High Learner Drop Out Rates

- Research points to low interest amongst youth in FP&M sector programmes and this is largely because the sector is perceived as low income and limited career progression opportunities. Furthermore, employer feedback in the FP&M SETA Impact Study (2025) highlights the negative impact that learner drop-outs have on programme completion rates (current supply of skills), programme continuity since employers are discouraged (future supply of skills), and return on investment.
- **SETA Interventions:** The SETA developed marketing & communications plans to elevate awareness of the FP&M SETA's skills development initiatives and programmes. The strategy includes: Career guidance events; various media channels such as print media, social media, outdoor advertising, email marketing and digital marketing; and a career portal has been developed and is being marketed to provide youth, women and people with disabilities opportunities.

TVET College Challenges

- Employers are concerned with the quality of provision at public TVET colleges. One of the main reasons for this concern is the resource and capacity constraints faced by the institutions. Public TVET colleges have struggled to meet the demands of industry due to limited human and financial resources, equipment, and infrastructure.
- **SETA Interventions:** Specific interventions include the SETA-TVET Strategy, DG partnership agreements with TVET/CET Colleges, targets for lecturer development, and DHET Coordinating SETA-TVET Office (CSTO) Guidelines. Furthermore, the SETA plans to introduce capacity-building workshops for college staff on project management and reporting requirements as well as develop a capacity rating system for TVET/CETs to identify high-risk institutions early and target interventions accordingly.

Graduate Work Readiness

- During the field research conducted stakeholders highlighted that graduates leaving education and training institutions are not work-ready. There is a gap between the skills and knowledge they leave education and training institutions with and what they need in the workplace.
- **SETA Interventions:** The FP&M SETA funds workplace-based learning skills development interventions, including internships to bridge this gap. The SETA understands the importance of graduates obtaining industry experience and thus highlights this as a key priority area.

Challenges with the Development, Registration and Implementation of Qualifications and Programmes

- Stakeholders in the sector highlight long qualification development and registration timelines; a shortage of accredited trainers, assessors, moderators, and workplaces; and numerous implementation challenges such as long timelines associated with the validation of results.
- **SETA Interventions:** The SETA continuously supports the development of new qualifications that are in alignment with industry needs and standards. Further to this, the SETA continuously reviews legacy qualifications to align these qualifications to the curriculum requirements and the new qualifications framework of the QCTO. The SETA assigned dedicated qualification development personnel to assist in unlocking challenges and to fast-track development timelines. Also, the SETA aims to implement a risk monitoring dashboard to track expiry dates of qualifications and escalate red flags early as well as enter into co-development partnerships with employers/ SMEs to pool resources and speed up qualification development. In the 2025/26 period, 3 FP&M SETA occupational qualifications were registered with the QCTO, 9 skills programmes are at the QCTO for review and evaluation, a total of 130 qualifications are registered with SAQA, and 113 occupational qualifications/trades and part qualifications are to be reviewed. Also, the QA Division will conduct capacity building workshops across the country to assist workplaces and providers with the accreditation process, certification and results management, amongst others.

3.4 Sectoral Priority Occupations and Interventions (SPOI)

The SPOI section within the WSP/ATR submission template requires employers to provide information on the priority training interventions needed for both employed and unemployed individuals within the FP&M sector. Employers are required to indicate the relevant occupation, the associated NQF level, and the most suitable type of intervention or training required to address identified skills needs. During stakeholder engagements, including focus groups and workshops, additional clarification is provided on the purpose and definition of SPOI to ensure consistency in reporting.

The information collected through the SPOI process enables the FP&M SETA to identify sectoral occupational priorities and skills development requirements across the different industries and sub-sectors within the sector. The interventions reflected in the SPOI List are intended to address critical skills shortages, support workforce development, and strengthen the sector's capacity to meet current and future labour market demands.

3.4.1 Consultative processes to arrive at the occupations identified in the Sector Priority Occupations and Interventions List and Lists of Emerging Occupations

The development of the consolidated SPOI List follows a multi-step and consultative process

designed to ensure that identified occupational priorities are evidence-based and reflective of sector needs. The process begins with the identification of HTFVs within the FP&M sector. Each year, levy-paying employers submit WSP/ATRs, and SPOI information to the FP&M SETA by 31 May. This data is analysed to identify occupations experiencing recruitment difficulties and skills shortages within the sector.

To strengthen and validate the findings from the WSP/ATR data, additional research methodologies are used. Through the employer survey, employers are requested to identify occupations that are difficult to fill within their organisations. A frequency analysis is then conducted to determine the occupations most commonly identified as HTFVs across the sector. These findings are used to refine and validate the preliminary HTFV list generated from WSP/ATR submissions.

Further validation is undertaken through interviews with industry associations and trade unions operating within the FP&M sector. Stakeholders are consulted on sectoral skills shortages, occupational demand, and workforce challenges experienced across the value chain. In addition, virtual Mandatory and Discretionary Grant workshops, together with sector focus group discussions involving employers and industry representatives, provide an additional platform for stakeholders to identify and validate HTFVs. Inputs from these engagements are consolidated and analysed to produce a revised and evidence-based SPOI List.

Once the consultation and validation processes have been completed, a draft SPOI List is presented to FP&M SETA management for review and refinement. The final list is thereafter submitted to the FP&M SETA Board for approval as part of the SSP approval process.

The identification of Emerging Occupations follows a similar consultative and research-driven approach. The process begins with extensive desktop research and a review of available literature to identify occupations likely to emerge as a result of technological advancements, changing production processes, sustainability requirements, and evolving industry practices within the FP&M sector. Employer survey findings are then analysed to identify occupations that employers perceive as emerging or becoming increasingly important within the sector.

This process is further strengthened through consultations with industry associations, trade unions, employers, and other sector stakeholders during interviews and focus group discussions. Stakeholder inputs are consolidated with findings from the desktop review and employer survey analysis to develop the final Lists of Emerging Occupations for the sector.

3.4.2 Main findings that informed the Sector Priority Occupations and Interventions List

One of the key findings informing the development of the SPOI List is that WSP/ATR submissions alone are insufficient to fully determine sectoral skills priorities and occupational demand. Although WSP/ATR data provides an important foundation for identifying employer-reported skills needs, these findings require verification and validation through additional research methods such as employer surveys, focus groups, and interviews with industry experts.

Engagements with employers across the sector demonstrated that organisations were not only

able to identify occupations experiencing recruitment difficulties but were also able to recommend appropriate interventions required to address these shortages. These interventions included learnerships, apprenticeships, skills programmes, workplace-based learning, and targeted upskilling initiatives. The employer survey further assisted in validating occupational demand and sectoral skills requirements across sub-sectors.

The triangulation of information obtained from multiple data sources and research methodologies strengthened the credibility and reliability of the findings used in developing the SPOI List. This integrated approach ensured that the final list reflects both immediate and emerging sectoral skills priorities.

3.4.3 Quantities indicated in the Sector Priority Occupations and Interventions List

The quantities reflected in the SPOI List are derived primarily from information submitted by employers through the WSP/ATR process, where organisations indicate the number of individuals needed. Employers participating in the employer survey are also requested to provide the number of employees needed.

These quantitative inputs are subsequently verified during interviews and focus group discussions. As part of the verification process, the reported training needs are assessed against organisational size and workforce profiles to determine the reasonableness and credibility of the quantities submitted. This process assists in ensuring that the training demand reflected in the SPOI List is realistic and aligned with sectoral workforce requirements.

3.4.4 Sector Priority Occupations and Interventions List priority listing

The FP&M SETA's SPOI List is prioritised according to the relative importance and extent of occupational demand within the sector. Occupations are ranked after a range of validation criteria have been considered, including the frequency with which occupations are identified as HTFVs, the scale of training demand reported by employers, and the consistency of findings across different research streams.

The number of individuals needed for a particular occupation serves as an important indicator of the magnitude of sectoral demand. Occupations repeatedly identified across WSP/ATR submissions, employer surveys, interviews, and focus group discussions are regarded as having a higher level of sector-wide significance. This frequency analysis assists in distinguishing widespread occupational shortages from challenges experienced only within specific organisations or geographic regions.

In addition, occupations that are consistently validated through multiple research methodologies and stakeholder engagements are assigned a higher level of confidence and prioritisation within the final SPOI List. This evidence-based prioritisation approach enables the FP&M SETA to direct skills development interventions towards occupations that are most critical to sector growth, productivity, and long-term sustainability (Refer to Table 18).

Table 18: Sector Priority Occupations and Interventions List (SPOI)

SETA NAME	PERIOD	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE	INTERVENTION PLANNED BY SETA	NQF LEVEL	NQF ALIGNED	QUANTITY NEEDED	QUANTITY TO BE SUPPORTED BY THE SETA
FP&M SETA	2027/28	2021-715301	Sewing Machine Operator	Sewing Machine Attendant, Sewing Machinist	Learnership: Occupational Certificate: Sewing Machine Operator	Level 4	Yes	338	330
FP&M SETA	2027/28	2021-312201	Production / Operations Supervisor (Manufacturing)	Manufacturing Foreman, Production Plant Supervisor, Assembly Supervisor, Beneficiation Plant Foreman, Shift Manager (Production)	Production and Operations Supervision Skills Programme	Level 3	Yes	290	280
FP&M SETA	2027/28	2021-683202	Apparel and Related Pattern Maker	General Goods Pattern Maker	Learnership: Occupational Certificate: Pattern Maker (Clothing and Apparel Manufacturing)	Level 3	Yes	282	280
FP&M SETA	2027/28	2021-132104	Engineering Manager	Engineering Maintenance Manager	Bursary: Bachelor of Engineering/Engineering Management Qualification	Level 8	Yes	196	190
FP&M SETA	2027/28	2021-734102	Logging Plant Operator	Forestry Processor Operator, Forestry Loader Operator, Tree Feller Operator, Feller Buncher Operator, Cable Yarder Operator, Forwarder Operator, Timber Carrier Driver, Skidder Operator	Internship: Forestry Operations Programme	Level 3	Yes	115	100
FP&M SETA	2027/28	2021-122101	Sales and Marketing Manager	Business Development Manager, Key Account Manager, Business Support Manager	Bursary: Bachelor of Commerce in Marketing Management	Level 7	Yes	85	80
FP&M SETA	2027/28	2021-718304	Packaging Manufacturing Machine Minder	Packaging Machine Operator, Sack Maker, Corrugated Board Minder, Manufacturing Machine Minder, Packaging Machine Minder, Corrugated	Learnership: Occupational Certificate: Packaging Operator	Level 4	Yes	78	75

SETA NAME	PERIOD	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE	INTERVENTION PLANNED BY SETA	NQF LEVEL	NQF ALIGNED	QUANTITY NEEDED	QUANTITY TO BE SUPPORTED BY THE SETA
				Board and Container Machine Minder, Corrugated Board Printing and Finishing Machine Technician, Laminator, End Maker, Metalised Packaging Paper Machine Setter, Can Maker, Cigarette Packaging Machine Setter, Bag Maker, Cigarette Manufacturing Machine Setter, Carton Maker					
FP&M SETA	2027/28	2021-684901	Textile, Clothing, Footwear and Leather Processing Machine Mechanic	Sewing Machine Mechanic, Footwear Machine Mechanic / Fitter, Weaving Mechanician, Spinning Mechanician, Knitting Mechanician	Apprenticeship: Occupational Certificate: Sewing Machine Operator/CTFL Mechanician Apprenticeship	Level 4	Yes	72	70
FP&M SETA	2027/28	2021-216601	Digital Artist	Display Artist, Advertising Artist / Designer, Lettering Designer, Lithographic Artist, Graphic Artist, Film and Video Graphics Designer, Commercial Artist, Calligrapher, Publication Designer, Exhibition / Display Designer	Bursary: Bachelor of Arts in Digital Design/Graphic Design	Level 7	Yes	36	30
FP&M SETA	2027/28	2021-134917	Publisher	Publishing Manager, Commissioning Editor, Publishing Production Manager, Publishing Director, Print Manager	Internship: Publishing and Editorial Internship Programme	Level 3	Yes	19	15

3.5 Conclusion

The FP&M SETA remains an important driver of skills development within the sector and contributes significantly towards the achievement of the national objectives. Through the implementation of learnerships, apprenticeships, internships, bursary interventions, work-integrated learning, and skills programmes, the SETA supports the development of occupationally directed skills and promotes workplace-based learning opportunities. The consistently high enrolment and completion rates achieved across FP&M SETA-funded interventions demonstrate the sector's ongoing commitment to developing a skilled and employable workforce. Occupations on the SPOI List include Sewing Machine Operator, Production/Operations Supervisor (Manufacturing), Apparel and Related Pattern Maker, Engineering Manager, Logging Plant Operator, Sales and Marketing Manager, Packaging Manufacturing Machine Minder, Textile, Clothing, Footwear and Leather Processing Machine Mechanic, Digital Artist, and Publisher. This highlights the need for targeted skills development interventions to address occupational need and ensure a sustainable pipeline of skilled workers to support the sector's productivity, competitiveness, and long-term sustainability.

CHAPTER 4: SETA PARTNERSHIPS

4.1 Introduction

This chapter outlines the FP&M SETA's approach to partnerships and collaboration, including its current partnership model, existing partnerships, implementation challenges, measures to address these challenges, and proposed future partnerships and their strategic focus areas.

The DHET SSP Framework (2026) defines a partnership as "a documented and signed collaborative agreement between two or more parties intended to achieve specified outcomes directed towards addressing mutually inclusive skills priorities or objectives within a specified time frame." The FP&M SETA views partnerships as a key mechanism for strengthening skills development delivery, expanding access to training opportunities, and improving alignment between education and labour market needs.

The importance of partnerships is reinforced by the NSDP 2030, which emphasises active, implementation-oriented collaboration among social partners to achieve national skills development objectives. Accordingly, the FP&M SETA prioritises partnerships with employers, industry associations, education and training institutions, organised labour, government departments, and other strategic stakeholders to address sector skills needs, support economic growth, and improve employability. The chapter draws on data from partnership agreements, employer surveys, stakeholder interviews, and virtual focus group discussions with key sector stakeholders.

4.2 The FP&M SETAs Approach to Partnerships

Through its partnership approach, the FP&M SETA has entered different types of partnerships with stakeholders in the FP&M sector. The different types of SETA partnerships are shown below (Figure 21):

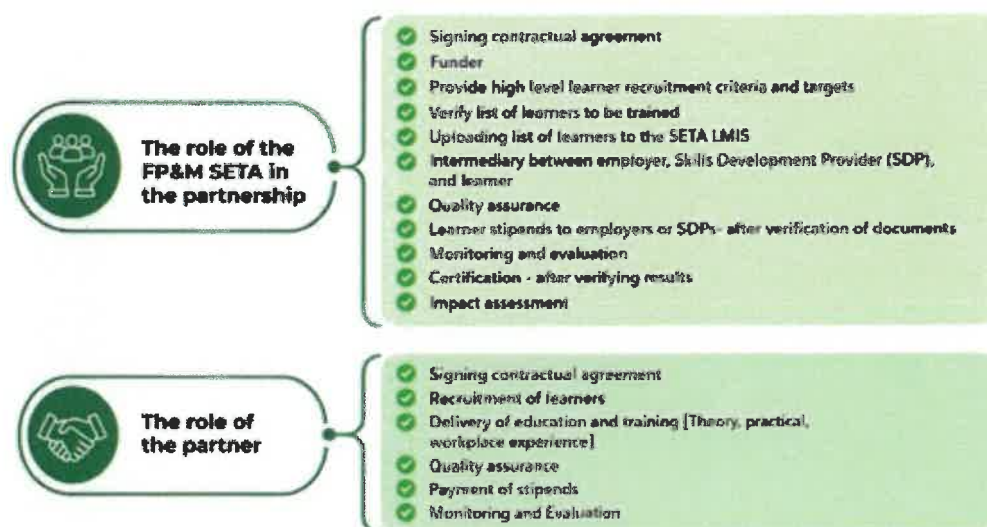
Figure 21: Types of FP&M SETA Partnerships



The FP&M SETA has education and training delivery partnerships; industry and professional bodies partnerships; and strategic and special projects partnerships. Through its partnerships, the FP&M SETA has worked to bridge the skills gap, create workplace-based learning opportunities, share resources to achieve maximum efficiency, improve access and promote equity, strengthen innovation and research, enhance monitoring and evaluation, as well as promote entrepreneurship and SMME development.

Each of these partnership types reflect the FP&M SETAs commitment to the SETA Integrated High Impact Programmes launched at the SETA Skills Summit in April 2024. The FP&M SETAs partnerships are in the strategic areas of need as reflected by the High Impact Programmes, closely aligned to national development imperatives as outlined in the White Paper on PSET, NSDP, IPAP, JET-IP, NGP, NDP, MTDP, and ERRP. The role of the FP&M SETA and partners in partnership agreements are briefly described below (Figure 22).

Figure 22: Role of the FP&M SETA and Partners



4.3 Existing FP&M SETA Partnerships

Table 19 lists the FP&M SETA partnerships. It shows the type of partnership, the name of the institution the SETA is partnering with, the nature of the partnership, the objectives of the partnership and the value of the partnership.

Table 19: Existing Partnerships

Name of Partner Organisation	Nature of Partnership (Start & End Dates)	Objectives of Partnership	Value of Partnership
Education and training delivery partnerships			
Boland College	2 Feb 2026 – 2 Feb 2028	To facilitate WIL for learners	Partnerships between the FP&M SETA and education and training providers play a
Capricorn TVET College	1 Dec 2025 – 1 Dec 2027	To facilitate bursaries and WIL for learners	
Central Johannesburg TVET	19 Jan 2026 – 19 Jan 2028	To facilitate apprenticeships and WIL for	

Name of Partner Organisation	Nature of Partnership (Start & End Dates)	Objectives of Partnership	Value of Partnership
College		learners	critical role in strengthening the skills development pipeline by expanding access to intermediate and middle-level skills that are essential for industry growth and economic development. These partnerships enhance the capacity of colleges to deliver quality learning programmes, particularly in technical scarce and critical skills areas, ensuring that training is aligned with industry needs and labour market demands. By supporting curriculum delivery, workplace-based learning opportunities, and institutional capacity development, these collaborations contribute to a more skilled, employable, and industry-ready workforce.
Coastal KZN TVET College	27 Nov 2025 – 30 Sep 2028	To facilitate apprenticeships, learnerships, and WIL for learners	
College of Cape Town	2 Feb 2026 – 2 Aug 2028	To facilitate WIL for learners	
Ekurhuleni East TVET College	2 Feb 2026 – 2 Aug 2028	To facilitate WIL for learners	
Esayidi TVET College	1 Nov 2025 – 30 Dec 2026	To provide skills programmes.	
False Bay TVET College	17 Nov 2025 – 17Nov 2027	To facilitate WIL for learners.	
Gauteng CET College	15 Sep 2025 – 15 Sep 2026	To provide skills programmes.	
Gert Sibande TVET College	8 Aug 2024 – 8 Aug 2026	To facilitate WIL for learners. To provide bursary, skills programmes and learnership programmes.	
Lephalale TVET College	2 Feb 2026 – 2 Aug 2028	To provide apprenticeship programmes	
Letaba TVET College	1 Dec 2025 – 1 Dec 2027	To facilitate apprenticeships and WIL for learners	
Majuba TVET College	25 Mar 2026 – 31 Dec 2027	Non Pivotal / Sectoral Priorities	
Mnambithi TVET College	27 Nov 2025 – 30 Sep 2028	To facilitate WIL for learners.	
Mthashana TVET College	12 Jan 2026 – 12 Jan 2028	To provide learnership programmes	
Northlink College	1 Sep 2024 – 1 Sep 2026	To facilitate WIL for learners.	
North West Community Education and Training College	5 Aug 2024 – 5 Aug 2026	To provide upskilling for unemployed learners on a learnership programme	
Orbit TVET College	2 Feb 2026 – 2 Feb 2027	To provide skills programmes	
Sekhukhune TVET College	1 Dec 2025 – 1 Dec 2027	To facilitate WIL for learners.	
South West Gauteng TVET College	1 Apr 2025 – 31 Dec 2026	To provide bursary programmes	
Thekwini TVET College	27 Nov 2025 – 30 Sep 2028	To facilitate WIL for learners.	
Tshwane North TVET College	12 Jan 2026 – 12 Jan 2028	To provide learnership programmes. To facilitate WIL for learners.	
Tshwane South TVET College	27 Mar 2026 – 27 Mar 2027	To provide apprenticeship programmes	
Umgungundlovu TVET College	1 Nov 2025 – 30 Sep 2028	To facilitate WIL and internship programmes for learners.	
West Coast TVET College	17 Nov 2025 – 17 Nov 2027	To facilitate WIL for learners.	
Industry and professional bodies partnerships			
Forest Owners Association	7 Nov 2025 – 7 Nov 2026	To provide skills development training	Partnerships between the FP&M SETA, industry stakeholders, and professional bodies are essential for ensuring that skills development initiatives respond directly to the sector's current and emerging workforce needs. These collaborations help address scarce and critical skills by aligning training programmes with industry requirements, occupational standards, and technological advancements. They also enhance opportunities for workplace-based learning
Paper Manufacturers Association of South Africa	30 Mar 2026 – 30 Mar 2027	To provide WIL opportunities for TVET students	
National Bargaining Council for The Wood and Paper Sector	5 Feb 2025 – 5 Feb 2027	To provide skills development training	
National Bargaining Council for The Clothing Manufacturing Industry	11 Nov 2025 – 11 Nov 2026	To provide a skills programmes for the employed and learnership programmes for the unemployed	
Printing Industries Federation Of South Africa	14 Nov 2025 – 14 Nov 2026	To upskill employed learners on skills programme and bursary programmes	
Publishers' Association Of South Africa	13 Nov 2025 – 13 Nov 2026	To upskill unemployed learners on a bursary programme To provide Workplace Experience/Internship opportunities for learners	
Apparel and Textile Association of South Africa	11 Dec 2025 – 11 Dec 2026	To upskill employed learners in bursary and skills programmes	
Forestry and Agriculture Training Organisation NPC	28 Nov 2025 – 28 Nov 2026	To upskill unemployed learners in learnership programmes	

Name of Partner Organisation	Nature of Partnership (Start & End Dates)	Objectives of Partnership	Value of Partnership
SA Apparel Association	1 Dec 2025 – 1 Dec 2026	To provide a skills programmes for the employed and learnership programmes for the unemployed	and professional exposure, thereby increasing the availability of competent, work-ready graduates who are equipped with the practical skills and experience required to contribute effectively to the FP&M sector.
SA Clothing Industry Training Institute	25 Feb 2026 – 31 Mar 2028	To provide WIL, skills programmes, bursary, and learnership programmes to employed and unemployed learners	
Strategic and special project partnerships			
DHET	20 Sep 2025 – 30 Sep 2026	The World Skills International Competition is an important mechanism aimed at promoting artisan skills in the industry	Address scarce and critical skills gaps in the sector.
South African Furniture Initiative	6 Dec 2024 – 6 Dec 2026	Research and benchmarking of the furniture industry	Broaden research capacity with regard to:
Tshwane University of Technology (TUT)	31 Mar 2025 – 31 Mar 2028	FP&M SETA Chair in Sustainable Value Chains, Entrepreneurship, and Climate Resilience (SERS)	Economic performance information – RoI. Benchmarking – productivity and competitiveness with best practice countries. Skills Development – World-Class Manufacturing / Lean Manufacturing / Greener Production / Learnership provision. Interventions to support the industry. Creation of world-class workforce.
University of Cape Town	1 Apr 2025 – 31 Dec 2026	Skills development for students on bursary programmes	Addresses scarce and critical skills in the FP&M sector
University of Free State	22 Jan 2026 – 22 July 2027	Skills development for students on bursary programmes	Increases the availability of work-ready graduates in the FP&M sector Increases access to credible sector research
University of Pretoria	2 Jan 2026 – 2 July 2026	Skills development for students on bursary programmes	
Cape Peninsula University of Technology	2 Feb 2026 – 2 Aug 2027	Skills development for students on bursary programmes and WIL	
Durban University of Technology	20 Jan 2026 – 27 July 2027	Skills development for students on bursary programmes, internships, and WIL	
Fort Cox Agriculture And Forestry Training Institute	28 Jan 2026 – 28 July 2027	Skills development for students on bursary programmes	
Stellenbosch University	9 Feb 2026 – 9 Aug 2027	Skills development for students on bursary programmes	
Nelson Mandela University	2 Jan 2026 – 2 July 2027	To facilitate WIL opportunities, and skills development for students on bursary programmes	
University of Venda	5 Jan 2026 – 5 Jan 2027	To facilitate WIL opportunities	
Vaal University of Technology	12 Jan 2026 – 12 July 2027	Skills development for students on learnership programmes	

4.3.1 The FP&M SETAs successful partnerships

All of the partnerships mentioned in the table above are broadly working successfully but there are three categories of strategic partnerships that gave the SETA the most success in 2025/26.

These partnerships are successful because of the continuous communication, monitoring, quality assurance, and reporting throughout the lifecycle of the partnerships.

1 TVET partnerships:

These are partnerships with colleges such as Orbit TVET College, Northlink College, Central Johannesburg TVET College, College of Cape Town, and Gert Sibande TVET College, amongst many others. The list below contains some of the ways these partnerships have assisted the SETA in achieving its strategic intentions in 2025/26:

- 1 office established in a TVET college;
- 5 TVET Centres of Specialization funded;
- 30 TVET Lecturers exposed to the industry through skills programmes;
- 5 CET college lecturers awarded skills development programmes;
- 29 TVET partnership agreements signed;
- 6 CET partnership agreements signed;
- 779 TVET students entered work-integrated-learning programmes and 697 TVET students completed work- integrated-learning programmes.

2 University partnerships:

These are partnerships with universities such as the TUT, Cape Peninsula University of Technology, Stellenbosch University, and Nelson Mandela University, amongst others. The list below contains some of the ways these partnerships have assisted the SETA in achieving its strategic intentions in 2025/26:

- 19 HEI partnership agreements signed;
- 336 university students entered work- integrated-learning programmes and 312 university students completed work- integrated-learning programmes

3 Employer partnerships:

These are partnerships with Employers. The list below contains some of the ways these partnerships have assisted the SETA in achieving its strategic intentions in 2025/26:

- 26 SETA Employer partnership agreements signed;
- 861 workers entered AET programmes, and 706 workers completed;
- 1 130 workers entered learnership programmes and 985 workers completed;
- 148 workers entered bursary programmes and 110 completed;
- 1 948 workers entered skills programmes and 1 512 completed;
- 65 cooperatives supported with training or funding; and
- 214 small businesses supported with training or funding.

4.3.2 Partnerships to address the skills implications of National Strategies and Plans

FP&M SETA has established strategic partnerships with the DHET, TVET and CET colleges such as Orbit TVET College, Northlink College, Central Johannesburg TVET College, College of Cape Town, and Gert Sibande TVET College, as well as universities such as the Nelson Mandela, Stellenbosch, and Cape Peninsula Universities, amongst others, to strengthen the skills pipeline and align training provision with national priorities such as the NDP 2030, the NSDP, and the HRDS-SA.

These partnerships support demand-side requirements for scarce and critical skills linked to inclusive growth, youth employment, industrialisation, and digital transformation, while expanding supply-side interventions through occupational qualifications, work-integrated learning, and artisan development programmes.

To respond to sectoral and industrial policy frameworks, the SETA partners with the Forest Owners Association, PAMSA, National Bargaining Council for the Wood and Paper Sector, SAFI, National Bargaining Council for The Clothing Manufacturing Industry, Printing Industries Federation of South Africa, PASA, amongst others, to support industry Masterplans. These collaborations also extend to sector employers and associations across clothing, textiles, footwear, leather, furniture manufacturing, and forestry value chains. Through these partnerships, the SETA supports localisation, automation, green skills development, and advanced manufacturing capabilities, while strengthening workplace-based learning and SMME participation to meet evolving labour market demands.

The SETA further collaborates on transversal national programmes such as the PYEI with the Presidency and implementing employers, as well as 4IR and JET IP initiatives with relevant public entities, industry partners, and technical institutions. These include preliminary engagement with the Presidential Climate Commission (PCC) and digital skills and innovation partners to support emerging skills in green technologies, digitalisation, and automation. Collectively, these partnerships ensure alignment between national strategies and sector skills planning, while improving labour market absorption and responsiveness to future skills needs.

4.3.3 Challenges experienced with existing partnerships

There are several challenges experienced within existing FP&M SETA partnerships that affect the effectiveness of skills development delivery. A key challenge is the low participation of learners in partnership-based programmes, largely driven by the limited attractiveness of the FP&M sector. The sector is often perceived as offering low-wage, informal, and non-preferred career pathways, which reduces youth uptake and overall demand for training opportunities. In addition, within tripartite arrangements between the SETA, employers, and education and training providers, engagement between employers and training institutions is often insufficient, resulting in weak coordination in programme design, implementation, and workplace exposure opportunities. Partnerships with TVET colleges also present challenges, particularly limited understanding of SETA funding and implementation processes, as well as weaknesses in evidence-based reporting and compliance requirements.

4.3.4 Measures to address identified challenges in order to strengthen partnerships

To address the above challenges, the FP&M SETA has implemented targeted measures to strengthen and improve partnership effectiveness. In response to low participation, the SETA has intensified career awareness and advocacy initiatives to improve the sector's attractiveness, including the rollout of 40 urban and 36 rural career development events in the 2025/26 period, with continued expansion planned. The SETA has also increased the use of digital platforms to enhance stakeholder engagement, improving access to information and broadening the reach of awareness campaigns beyond traditional roadshows. To strengthen TVET college partnerships,

the SETA is implementing structured capacity-building interventions, including a SETA–TVET Strategy, DG partnership agreements with TVET/CET Colleges, lecturer development targets, and DHET CSTO Guidelines. Additional measures include planned training workshops on project management and reporting, as well as the introduction of a TVET/CET institutional capacity rating system to identify and support underperforming institutions.

Furthermore, the FP&M SETA applies a continuous improvement approach to all partnership agreements through periodic contract reviews to assess performance, relevance, and data integrity. Where partnerships are found to be underperforming, corrective action is taken, including the reallocation of funds to priority and high-impact interventions. This ensures that partnerships remain aligned to sector priorities, improve accountability, and contribute more effectively to skills development outcomes within the FP&M sector.

4.4 Proposed Partnerships

The table below lists proposed partnerships that the SETA can enter with various stakeholders to advance skills development in the sector and across communities (Table 20). Partnerships are always needed because the SETA has limited resources, and to ensure that the outreach and impact of SETA initiatives are as far and wide as possible, partnerships are key.

Table 20: Proposed Partnerships

Name of Partner Organisation	Intended Strategic Focus	Rationale and Objectives of Partnership
TVET Colleges: Westcol, Thekwini, Umfolozi, Umgungundlovu, Capricorn, Sekhunkune, Ikhalala, Emfuleni	Develop strategy to establish linkages with TVETs. Facilitate Partnerships between TVETs and employers.	Increase access to intermediate / middle level skills. Increase capacity for quality learning provisioning for technical scarce and critical skills. National Strategy in place to provide work experience and improve employability.
Private Colleges: Aranda Learnership College, TVET SA, Forestry Industry Training Providers Association, PASA, Paarl Media Academy, Namtech	Develop strategy to establish links with colleges. Facilitate Partnerships with employers and communities.	Increase access to intermediate / middle level skills. Increase capacity for quality learning provisioning for technical scarce and critical skills. National Strategy in place to provide work experience and improve employability.
DTIC: Directorate / Sector Desk for Clothing and Textiles, Directorate / Sector Desk for Footwear and Leather, Directorate / Sector Desk for Forest Industries, Directorate / Sector Desk for Printing and Packaging	To upgrade scarce and critical skills across occupational categories. Strengthen linkages between sector strategies and skills development plans.	Implement key action programmes, especially skills development programmes. Develop collaboration projects and lodge funding proposals with NSF and Provincial Governments. Promote and collaborate on research for the sector with regard to product and skills development.
DFFE	Promote partnership to address higher order scarce and critical skills.	Develop skills development strategy to complement sector strategies. Implement collaboration projects.
Department of Sports, Arts and Culture	To upgrade scarce and critical skills across occupational categories.	Promote and collaborate in research for the sector with regard to sector and skills development. Develop collaboration projects.
SACTWU and Employer organisations	Address scarce and critical skills in the sector.	Engage with both employer and labour organisations in the FP&M sector to promote and consolidate the skills development strategy for the sector.

Name of Partner Organisation	Intended Strategic Focus	Rationale and Objectives of Partnership
NULAW and Employer organisations	Address scarce and critical skills in the sector.	Engage with both employer and labour organisations in the FP&M sector to promote and consolidate the skills development strategy for the sector.
CEPPWAWU, NUFAWSA, FAWU, SAEWA and Employer organisations and large companies such as SAPPI, MONDI, Kimberley Clark	Address scarce and critical skills in the sector.	Scarce and critical skills in the sector addressed. Proactive engagements and agreements in regard to the absorption of artisans, learnerships and internships
SATU, CEPPWAWU and Employer organisations and large companies such as PSA, PASA, Nampak, Paarl media, CTP	Address scarce and critical skills in the sector.	Address scarce and critical skills. Explore and adopt strategies for accommodating these under the NQF/Skills Development Strategy where appropriate. Explore new forms of ABET (accelerated ABET, the Foundational Learning Certificate, etc.). Explore the improvement of critical outcomes (systems thinking and problem-solving) in the existing qualifications and curriculum. Develop, test and adopt RPL strategies for all occupations where it is cost-effective to do so. Use the CEPs and other strategies to build a knowledge-management approach in the sector.
CET Colleges	To promote growth of stronger Community Education colleges	To offer programmes that are responsive to the needs of communities that will enable individuals to find work, start businesses and progress into other educational institutions
CSIR: Clothing and Textiles Centre of Excellence	Increase postgraduate research capacity within the sector	Participate in research activities of CSIR: Clothing and Textiles Centre of Excellence. Implement collaboration projects to increase access to clothing and textiles higher education and training programmes.
Public Higher Education Institutions: Durban University of Technology, Cape Peninsula University of Technology, University of Johannesburg, Nelson Mandela Metropolitan University, University of Stellenbosch, UNISA, University of Venda, Fort Cox Agricultural College, University of Pretoria, Rhodes university, Tshwane University of technology	High level scarce skills needs are addressed	Strategy in place to increase access for work experience / internships by work-ready graduates. Develop research and development capacity within the sector. Encourage continuous professional development of the workforce. Broaden ISOE Strategy to include HEIs. Two key opportunities for growth in the clothing and textile sector: World Class Manufacturing- Fast response to product supplied mainly to the domestic market; and Specialised textiles for the local and international market. Developing career path information and providing career advice services for potential new entrants. Including marketing at education and training service providers on social networking sites, through job board functionality on industry web sites. An advocacy programme to target learners at school-leaving level to promote careers in the sector, including job shadowing at organisations. Development of an industry-level talent watch programme to identify top students/graduates for internship and other learning opportunities with employers. Developing a national database of graduates for the purpose of internship placements and ultimately hiring.
Provincial Governments: KZN: Department of Economic Development and Tourism (DEDAT), Gauteng: DEDAT, Western Cape: DEDAT, Mpumalanga: DEDAT	High level scarce skills needs are addressed.	Develop provincial strategies and establish collaboration projects to address provincial HRD scarce and critical skills.

4.4.1 New partnerships to address the skills implications of the Just Energy Transition Implementation Plan

Further to the table above, the FP&M SETA is aware that new partnerships are required with institutions driving South Africa's JET IP, particularly the PCC, the Department of Electricity and Energy, and the JET Project Management Unit in the Presidency. These relationships are critical to align skills planning with decarbonisation priorities affecting FP&M value chains such as forestry, pulp and paper, wood products, and packaging, amongst others. Strengthened collaboration is also needed with renewable energy and green economy actors, including independent power producers (IPPs), the South African Renewable Energy Council, and industry bodies linked to energy efficiency and circular economy initiatives. These partnerships will support the identification of emerging green skills demand, particularly in sustainable production processes, energy-efficient manufacturing, and environmentally compliant industries.

On the supply side, FP&M SETA requires expanded partnerships with education and training providers to develop and deliver green occupational qualifications relevant to the sector, including sustainable manufacturing, waste reduction, and digitalised production systems. Stronger collaboration with industry is also needed to scale workplace-based learning and reskilling programmes for workers transitioning from traditional production systems, to ensure that training remains responsive to evolving environmental and technological requirements.

4.5 Conclusion

The FP&M SETA places strong emphasis on strategic partnerships as a central mechanism for advancing skills development and ensuring responsiveness to current and emerging scarce and critical skills needs in the FP&M sector. These needs are shaped by key drivers of change, including technological advancement, environmental sustainability, and evolving production systems, and are further informed by national priorities set out in the NDP, NSDP, MTDP, and JET-IP, amongst others. The SETA is committed to continuously entering into and strengthening relevant partnerships with government departments, education and training institutions, industry stakeholders, and social partners to improve the relevance and impact of skills development interventions. These partnerships are regularly reviewed and refined to ensure alignment with strategic objectives, improve implementation effectiveness, and respond to changing sector demands. Through this approach, the FP&M SETA leverages collective capacity to close occupational and skills gaps, strengthen workplace-based learning, and support inclusive participation, thereby enhancing sector competitiveness and contributing to national development priorities.

CHAPTER 5: SETA MONITORING AND EVALUATION

5.1 Introduction

The purpose of this chapter is to examine the approach used by the FP&M SETA in its Planning, Monitoring, Reporting and Evaluation cycle, as well as to assess the extent to which the strategic priorities identified in the previous SSP were achieved. This assessment is intended to inform planning for the upcoming financial period. The chapter begins by outlining the SETA's approach to Monitoring and Evaluation (M&E), followed by a discussion on how M&E data is utilised to support research and planning processes. It then reviews progress made against the priorities and interventions identified in the previous planning cycle. The final section presents a plan of action to address key areas within the M&E function that require prioritisation over the next five-year period. The chapter draws on information from previous evaluations, SSPs, Annual Reports, the SP, and the APP.

5.2 Sector Skills Planning Reflections

5.2.1 Monitoring and evaluation approach

The FP&M SETA established a framework which underpins the Monitoring Framework or the Management Performance Framework (Inputs) as well as the Evaluation Framework (Outputs, outcomes, and impact), as shown in Figure 23 below.

Figure 23: Monitoring and Evaluation Framework



The FP&M SETAs approach to Monitoring: The Management Performance Framework is concerned with monitoring the effectiveness of internal inputs as it relates to: Strategic Management; Project Management; Human Resource Management; Financial Management; Information Technology and Data Management; and Governance and Compliance, as shown in Figure 24 below:

Figure 24: Management Performance Framework

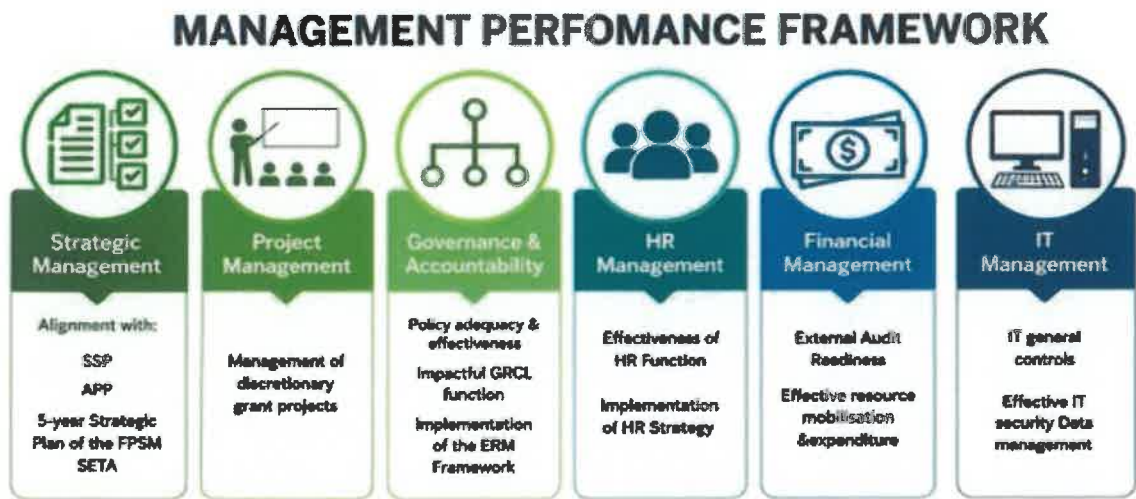
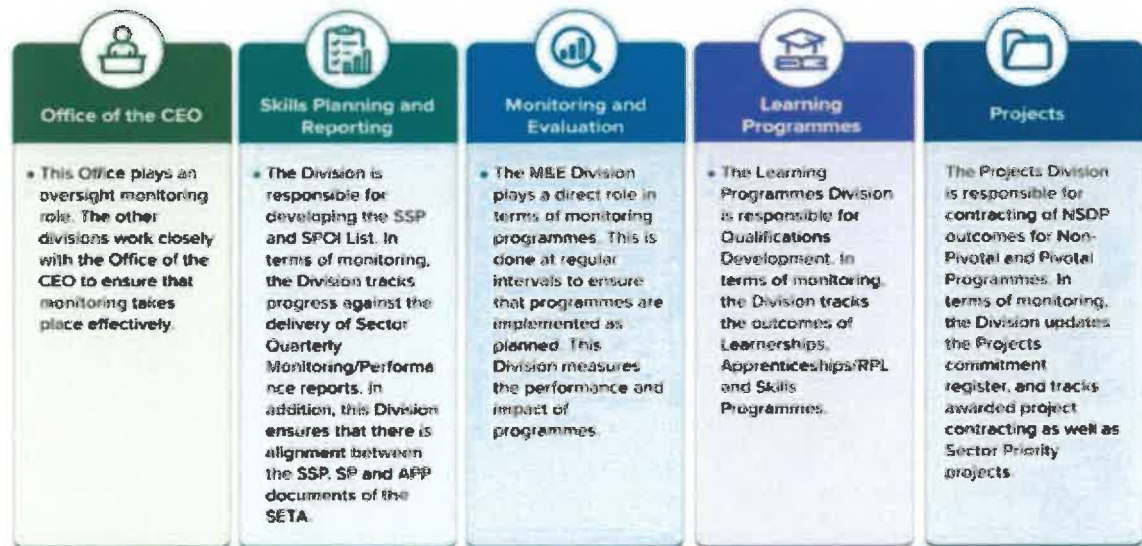


Figure 25 depicts the monitoring role of the relevant divisions of the FP&M SETA, as it relates to the above monitoring functions:

Figure 25: FP&M SETAs Approach to Monitoring



It is through the continuous monitoring of the performance of the organisation that the SETA gains assurance on the effectiveness of its inputs. The Divisions described above monitor the functions below (Figure 26):

Figure 26: Functions Being Monitored



The FP&M SETAs approach to Evaluation: the Evaluation Framework of the FP&M SETA seeks to critically measure the effect the inputs (Implementation of the Management Performance Framework) has had on skills development in the sector (outputs, outcomes, and impact).

Measuring the outputs, outcomes, and long-term impact of skills development interventions is a key priority for the FP&M SETA. To assess the effectiveness and value of its programmes, the SETA conducts a range of implementation and impact evaluations. These evaluations are aimed at systematically assessing the extent to which the SETA's investments and interventions contribute to positive changes among the stakeholders it serves, including employers, employees, unemployed individuals, and broader society.

The increased use of evaluations has strengthened the SETA's ability to monitor programme performance and improve decision-making. Through these evaluations, the FP&M SETA has been able to identify examples of good practice, high-performing projects, and successful beneficiaries that demonstrate strong developmental outcomes. At the same time, the evaluation process has assisted the SETA in identifying underperforming projects and programmes requiring additional support, oversight, or corrective interventions to ensure that implementation remains aligned with agreed targets and deliverables.

To support the effective implementation of the evaluation function and strengthen the measurement of organisational performance, the FP&M SETA has developed a monitoring and evaluation model that considers the full results chain of skills development interventions (Figure 27). The model incorporates the following components:

- Inputs - the financial, human, and material resources invested in a skills development intervention;
- Activities – the actions and processes undertaken using these resources to achieve intended programme objectives. For example, funding skills development providers to deliver training programmes.
- Outputs - the immediate and direct results of an intervention. For example, learners

enrolled and participating in a skills development programme.

- Outcomes – the medium-term effects or changes resulting from the intervention. For example, learners successfully completing training programmes and obtaining qualifications or competencies.
- Impact – the long-term developmental effects of interventions on individuals, organisations, and society. Examples include improved employability, reduced unemployment, poverty reduction, and broader socioeconomic development outcomes.

Figure 27: Evaluation Function



The M&E functions of the FP&M SETA allows for the assessment of the effectiveness and efficiency of skills development projects and the extent to which these interventions contribute to the desired developmental outcomes. These functions support the provision of accurate and reliable information to governance structures and key stakeholders, thereby strengthening accountability and informed decision-making. M&E processes also assist the SETA in assessing the quality of skills development provision, including the relevance of curricula, the adequacy of resources, and the expertise of staff. In addition, the system provides valuable evidence and insights that enable the FP&M SETA to strengthen organisational learning, identify and share best practices, and continuously improve programme implementation and overall performance.

5.2.2 The use of M&E to support research and planning

The FP&M SETA applies the Logical Framework Approach to its planning, monitoring, and evaluation processes. This approach focuses on establishing a clear programme logic by identifying the relationship between inputs, activities, outputs, outcomes, and long-term impacts. The framework further requires the identification of indicators at each stage of the value chain, together with potential risks that may affect the achievement of programme objectives. Within this approach, input indicators relate to the financial, human, and material resources allocated to interventions; process indicators focus on how projects and programmes are

implemented; output indicators measure the immediate deliverables produced; and outcome indicators assess the results and changes achieved through the interventions.

The FP&M SETA's research agenda outlines a range of research, monitoring, and evaluation activities that are undertaken on an ongoing basis to support evidence-based planning and decision-making. These activities include the commissioning of data collection processes on the implementation of learning programmes, the generation of monitoring reports to track implementation progress, and the regular updating of the commitment register using project and financial information. The SETA also conducts snap surveys with employers where specific information is required and undertakes periodic evaluations covering all implemented learning programmes, informed by monitoring data and programme performance trends. In addition, targeted evaluations are conducted for strategic or special projects, such as the International Leadership Development Programme. All evaluations undertaken by the SETA are guided by the OECD evaluation criteria, with assessments focusing on relevance, efficiency, effectiveness, impact, and sustainability.

The findings generated through these research and evaluation processes serve as critical inputs into the SETA's planning framework and strategic decision-making processes. They directly inform the development and review of the organisation's five-year SP, SSP, and APP. These planning documents are aligned to the NSDP, which provides the overarching national framework for skills development in South Africa. Collectively, these documents form the core of the SETA's integrated planning, implementation, reporting, and evaluation cycle.

During programme implementation, performance information is collected and reported on a monthly, quarterly, and annual basis to the DHET. As part of the accountability and assurance process, performance information against predetermined objectives is audited annually by the Auditor-General of South Africa (AGSA). The audited performance data is then incorporated into the SETA's Annual Report, which serves as an important source of evidence on organisational and programme performance. Information generated through the Annual Report subsequently feeds back into the SSP and broader planning processes.

Furthermore, data on planned enrolments, learner participation, and actual programme achievements contained in the Annual Report directly informs the Chapter on occupational shortages and skills gaps presented in the SSP. The extent to which the SETA achieves its planned targets provides important insights into programme effectiveness, implementation challenges, and future sectoral skills priorities. In this way, the strategic priorities identified in the SSP are translated into the SP and APP, ensuring alignment and integration across the SETA's planning and performance management systems.

5.2.3 The extent of which strategic priorities from the previous SSP were captured in the Strategic Plan and Annual Performance Plan

The FP&M SETA operates on the basis of the SSP being the sector strategy which influences the SETA's five-year SP and APP on a rolling medium-term expenditure framework (MTEF) period. The strategic priority actions find expression in the business model of the organisation as well as in the SP and APP. This together with the status on implementation is captured in Table 21 below.

Table 21: Strategic Priority Actions Being Captured in SP and APP and the Status of Implementation

SSP Action	Priority	Captured in SP and APP	Status on Implementation
Expanding the economic contribution of the FP&M sector		SP: Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcome Indicators: Number of established or emergent cooperatives trained on sector and national priority occupations or skills; Number of small and emerging enterprises trained on sector and national priority occupations or skills. Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcome: Increased funding support for co-operatives, small enterprises, NGOs, CBOs and NPOs to implement skills development programmes. APP: Programme 2: Skills Planning of the FP&M SETAs APP has the following Outputs: Cooperatives trained on sector and national priority occupations or skills; Small and emerging enterprises trained on sector national priority occupations or skills. Programme 3: Learning Programmes and Projects of the FP&M SETAs APP has an Outcome: Increased funding support for cooperatives, small enterprises, NGOs, CBOs and NPOs to implement skills development programmes.	20 established or emergent cooperatives were trained in sector and national priority occupations or skills; and 30 small and emerging enterprises were trained in sector national priority occupations or skills in 2025/26. 622 learners entered entrepreneurial programmes and/or business coaching & mentoring programmes in 2025/26. 92 CBOs, NGOs and/or NPOs have been supported with training interventions or funding in 2025/26. 115 rural development projects have been funded in 2025/26. 65 cooperatives have been supported with training interventions or funding in 2025/26. 214 small businesses have been supported with training interventions or funding in 2025/26. The latest impact study (2025) demonstrated that a significant proportion of learners who completed funded learning programmes were starting small businesses and creating employment opportunities.
Addressing demand-side challenges		SP: Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcomes: Quality research and skills planning activities to address occupations in high demand; Increased foundational learning opportunities; Improved skills level of workers in occupations in high demand; Increased access to occupationally directed programmes through effective partnerships. APP: Programme 2: Skills Planning of the FP&M SETAs APP has an Outcome: Quality research and skills planning activities to address occupations in high demand, supports this strategic priority. Specific outputs include research reports completed and support SSP development, and SETA impact study research report completed. Programme 3: Learning Programmes and Projects of the FP&M SETAs APP has Outcomes: Increased foundational learning opportunities; Improved skills level of workers in occupations in high demand; Increased access to occupationally directed programmes through effective partnerships.	The latest impact study (2025) has shown that whilst high proportions of learners are finding employment upon completion of programmes, dropouts and non-completions remain a problem. The FP&M SETA has started working closely with employers to address this and as such thousands of learners are funded annually to access occupationally directed programmes. Furthermore, the FP&M SETA has worked to facilitate RPL for learners in the sector. In 2025/26, 8 research agreements were signed, and 1 impact study was completed. 861 workers entered AET programmes in 2025/26, and 706 workers completed these programmes. 1 130 workers entered learnership programmes in 2025/26, and 985 completed. 148 workers entered bursary programmes in 2025/26, and 110 completed. 1 948 workers entered skills programmes in 2025/26, and 1 512 completed. 156 learners entered RPL programmes in 2025/26, and 126 completed. The FP&M SETA prioritises artisan training because of the nature of the specific middle-level

SSP Action	Priority	Captured in SP and APP	Status on Implementation
			occupational skills required by the sector. 1 131 apprentices entered apprenticeship programmes in 2025/26, and 1 101 completed. Furthermore, the SETA prioritises the development of fit-for-purpose occupational programmes. 3 FP&M SETA occupational qualifications were registered by the QCTO during the 2025/26 period.
Addressing supply-side challenges		SP: Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcome Indicator: Number of unemployed learners who completed work-based learning programmes (WBL) absorbed into employment or self-employment post training. Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcomes: Increased workplace-based learning opportunities to address priority occupations; Improved exposure for learners and career development practitioners to FP&M sector priority occupations; Increased supply of quality, relevant and fit-for-purpose education and training programmes. APP: Programme 2: Skills Planning of the FP&M SETAs APP has the following Output: Employment absorption rates post training on WBL programmes. Similarly, Programme 3: Learning Programmes and Projects of the FP&M SETAs APP has an Outcomes: Increased WBL opportunities to address priority occupations; Improved exposure for learners and career development practitioners to FP&M sector priority occupations	503 unemployed learners completed WBL programmes and were absorbed into employment or self-employment post training in 2025/26. The number of TVET students who entered WIL programmes was 779 in 2025/26, and the number completed was 697. The number of university students who entered WIL programmes was 336, and those who completed were 312 in 2025/26. The number of unemployed learners who entered work experience/internship programmes was 750, and those who completed were 671 in 2025/26. 40 career development events have been conducted in urban areas in 2025/26. 36 career development events have been conducted in rural areas in 2025/26.
Measures to Support National and Sectoral Strategies and Plans		SP: Priority 2: Education, Skills and Health of the FP&M SETAs SP has the following Outcome: Increased access to occupationally directed programmes through effective partnerships. APP: Programme 3: Learning Programmes and Projects of the FP&M SETAs APP has an Outcome: Increased access to occupationally directed programmes through effective partnerships.	29 TVET partnership agreements signed in 2025/26. 6 CET partnership agreements signed in 2025/26. 19 HEI partnership agreements signed in 2025/26. 26 SETA Employer partnerships agreements signed in 2025/26.

5.2.4 Status on implementation of interventions and measures in support of National Strategies and Plans

The FP&M SETA has an Economic Recovery and Reconstruction Skills Plan. The plan has the following interventions listed in Table 22.

Table 22: FP&M SETAs Economic Recovery and Reconstruction Skills Plan – Planned Interventions for the Medium to Long Term

OFO-Code	Occupations	Sub-sector	Intervention	Numbers supported
2021-213203	Forest Scientist	Forestry	Bursary	150
2021-621101	Tree Feller	Forestry	Learnership, Skills programme	1 000
2021-682201	Cabinet Maker	Furniture	Learnership, Skills programme	1 000
2021-832903	Furniture Finisher	Furniture	Learnership, Skills programme	500
2021-216603	Timber and Wood process worker	Furniture	Learnership, Skills programme	1 000
2021-682303	Multimedia Designer	Printing	Bursary, Internship/Work experience	750
2021-682303	Packaging machine operator	Packaging	Apprenticeship	100
2021-717102	Wood machinist	Wood products	Learnership, Skills programme	250
2021-313903	Paper and Pulp mill operator	Pulp & paper	Learnership, Skills programme	500
2021-718305	Clothing, Textile and Footwear Manufacturing Process Control Technician	Clothing	Skills programme	500
2021-684901	Textile, Clothing, Footwear and Leather Processing Machine Mechanic	Clothing, Footwear, Textiles, Leather, General Goods	Learnership, Skills programme	100
2021-683201	Clothing, Home Textiles and General Goods Cutter	Clothing, Footwear, Textiles, Leather, General Goods	Learnership, Skills programme	250
2021-683202	Apparel and related pattern maker	Clothing, Home textiles	Learnership, Skills programme	250
2021-715605	Leather Finishing Operator	Leather	Learnership, Skills programme	200
2021-216304	Footwear Designer	Footwear	Learnership, Skills programme	250
2021-715602	Footwear Closing Production Machine Operator	Footwear	Learnership, Skills programme	250
2021-715603	Footwear Bottom Stock Production Machine Operator	Footwear	Learnership, Skills programme	250
2021-715201	Weaving Machine Operator	Textiles	Apprenticeship, Learnership, Skills programme	100
2021-214101	Industrial Engineer	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Bursary, Internship	100
2021-671202	Millwright	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper	Apprenticeship	100
2021-213302	Environmental Scientist	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Skills programme	100
2021-214104	Production Engineering Technologist specialising as Leather and Footwear Production Technologists)	Footwear and Leather	Bursaries	100
2021-715601	Footwear Cutting Production Machine Operator	Footwear	Learnership, Skills programme	250
2021-715605	Footwear Finishing Production Machine Operator	Footwear	Learnership, Skills programme	250
2021-715604	Footwear Lasting Production Machine Operator	Footwear	Learnership, Skills programme	250

OFO-Code	Occupations	Sub-sector	Intervention	Numbers supported
2021-216302	Industrial Designer	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Bursaries, Skills programme	200
2021-313901	Integrated Manufacturing Line Process Control Technician	Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Bursaries, Skills programme	150
2021-715301	Sewing Machinist	Clothing, Textiles, Footwear and Leather	Learnership, Skills programme	1 700
2021-652302	Fitter and Turner	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Apprenticeship	200
2021-683401	Upholsterer	Leather, Furniture	Learnership, Skills programme	750
2021-226302	Safety, Health, Environment and Quality (SHE&Q) Practitioner	Forestry, Clothing, Textiles, Footwear, Leather, Pulp & Paper, Printing, Packaging, General Goods, Furniture, Wood Products	Bursary, Learnership, Skills programme	350
2021-715501	Leather Processing Machine Operator	Leather	Learnership, Skills programme	250

In addition, the FP&M SETA participated in the implementation of the following industry Masterplans focusing on key skills development activities:

- 1 Forestry Masterplan.
 - a. Commissioned a skills needs analysis of the forestry sector and currently in the process of implementing the recommendations.
- 2 Furniture Industry Masterplan.
 - a. Commissioned a skills needs analysis of the furniture industry and currently in the process of implementing the recommendations.
 - b. Commissioned two further research studies on the Bed and Mattress and the Kitchen and Built-in Units Furniture Industry Sub-sectors. The reports are approved and currently in the process of implementing its recommendations.
- 3 Publishing Masterplan
 - a. Commissioned a salary benchmarking and skills assessment study of the Printing Industry.

In support of the MTDP (2024-2029) priority one: Inclusive growth and job creation, the FP&M SETA contributed to job creation in the 2025/26 period:

- 503 unemployed learners completed WBL and were absorbed into employment or self-employment post training;
- 779 TVET students entered WIL programmes and 697 completed;
- 336 university students entered WIL programmes and 312 completed; and
- 750 unemployed learners entered work experience programmes and 671 completed.

Furthermore, in support of the MTDP (2024–2029), the FP&M SETA has implemented a Rural Growth and Development Strategy aimed at addressing poverty and promoting socio-economic transformation in rural communities through BBBEE and Corporate Social Investment (CSI) initiatives. The strategy seeks to empower rural communities by equipping individuals with skills

that improve income-generating opportunities, support community development, and contribute to the maintenance of key infrastructure. The strategy also prioritises support for SMMEs, co-operatives, NGOs and community-based organisations with a rural focus. To strengthen local training delivery, the SETA aims to accredit these organisations to facilitate community-based training initiatives. Training interventions include life skills, AET, entrepreneurship, new venture creation, and technical and scarce skills linked to employment opportunities within the FP&M sector.

5.3 Plan of Action - Areas Within the M&E Function that Need to be Prioritised Over the Next 5-Year Period

The M&E Plan provides guidelines on how the implementation of the Discretionary Grant funded projects, Skills Development Providers, Core Departments including Quality Assurance, Projects, and Skills Planning and Reporting would be monitored and evaluated. As previously indicated, the M&E Plan of the FP&M SETA has been designed with the following specific objectives in mind: Alignment to the NSDP, NDP, JET-IP, MTDP, SSP, SP, and APP; and explicate the relationship between organisational performance and the performance of the sector through SETA interventions. By implementing the following steps, the SETA can work towards a more cohesive and efficient M&E process, leading to improved project management and better decision-making across the organisation. The plan of action involves the following (Figure 28):

Figure 28: Plan of Action

Mechanisms to Strengthen the Monitoring and Evaluation Function

The FP&M SETA will review the monitoring and evaluation practices within the organisation with a view of identifying detailed process gaps. These process gaps will be increasingly addressed.

Due to the diverse nature of FP&M SETA projects, each project will have a tailor-made project M&E plan to best suit the operational, data collection and reporting needs of the project. Emphasis will be given to reporting needs of FP&M SETA's key stakeholders to ensure that accountability data is readily available.

To prevent project failure, the Projects Division will implement an automated monitoring system for early warnings of targets not being met.

A Projects and M&E linkage has been created through the enlisting of Independent Sector Skills Advisors (ISSA) to strengthen M&E. These ISSAs continuously conduct site visits, assess discretionary grant project implementation, identify project implementation risks & incidents, undergo capacity building, produce reports for remedial actions, and conduct robust due diligence reviews to assess the compliance of stakeholders with SETA standards of good practice. This is planned to continue.

There is a continuous challenge with reliable data on SETMIS, the SETA thus plans for the Projects Division to enhance processes related to physical verification of documents to ensure the reporting will be accurate. SPRR will conduct Quarterly review of QMR, LMIS and learner documents with feedback given to Divisions on exceptions noted. QA to conduct weekly capacity building sessions to clarify business processes. Also, physical verification of learners will be conducted during M&E site visits.



Measures to improve Skills Planning

For the MTEF period (2026/27-2028/29), the SETA plans to conduct 12 research studies to support SETA Skills Planning. Furthermore, the SETA contributes to the update of the WSP/ATR (ESS) Tool which will improve Skill Planning by collecting accurate data from employers.

FP&M SETA has implemented LMIS to manage SETA administrative, financial and performance information. SETA staff are trained on an ongoing basis on IT modules for their Divisions. Training is extended to external stakeholders in order to capacitate them to ensure accurate data is uploaded onto the LMIS. This is planned to continue.

It is planned to regularly update the FP&M SETA website, email banners, and social media platforms to ensure that they are interactive to keep stakeholders informed and engaged. Stakeholder engagement is key to enable the SETA to make informed decisions regarding Skills Planning.



Measures to improve the Implementation of SETA Planning Documents

Planned strengthening of the M&E function will enable focused implementation of the APP, SP, and SSP.

In addition, the planned continuous updating of the comprehensive Risk Register that reflects both strategic, operational and external risks, on the electronic risk monitoring module, will ensure that the SETA Planning Documents are implemented as planned.

Moreover, continuous engagement with employers through field research within planned research studies, SETA workshops and focus groups ensure that Skills Planning Documents reflect current industry need which will positively contribute to its implementation.

Furthermore, the various committees of the FP&M SETA including, the SETA Board, Executive Committee, Audit Risk Committee, Governance and Strategy Committee, Finance and IT Governance Committee, Projects Committee, HR and Remunerations/Ethics Committee, and the Quality Assurance Committee, sit to allow departments to present and account for the work underway and plans to improve the implementation where required. This practice is planned to continue and will improve SETA Planning Documents.

5.4 Conclusion

Like other public entities, the FP&M SETA has experienced an increasing emphasis on achieving measurable results in fulfilling its mandate, particularly in driving transformation within the sector. In this context, results-based monitoring has become an important mechanism for strengthening accountability and improving performance. Through the adoption of a results-based monitoring approach, the SETA has been able to align its processes and services with clearly defined strategic outcomes. The M&E approach implemented by the FP&M SETA provides a comprehensive framework for strategic planning, performance management, learning, and accountability, thereby supporting continuous improvement in organisational performance and the achievement of intended results.

CHAPTER 6: STRATEGIC SKILLS PRIORITY ACTIONS

6.1 Introduction

This chapter presents a summary of the key findings that emerged across the preceding chapters of the SSP. The previous chapters provided the evidence base, analysis, and contextual insights necessary to inform planned actions that are realistic, coherent, achievable, and responsive to the needs of the FP&M sector.

The chapter draws on a range of data sources utilised throughout the SSP, including research commissioned by the FP&M SETA; primary data sources such as the employer survey, WSP/ATRs for 2026/27, FP&M SETA QMRs, interviews, and focus group discussions with industry representatives and SETA stakeholders; as well as secondary data sources, including information obtained from the DHET and other relevant institutions. Based on this evidence, the chapter outlines the strategic skills priority actions required to address current and emerging sector challenges and opportunities. These strategic skills priorities will directly inform the strategic planning and annual performance planning processes of the FP&M SETA.

6.2 Key Skills Findings from Previous Chapters

Chapter Number	Key Skills Findings in Chapter
Chapter 1	This chapter presents the labour market and employer profile of the FP&M sector, highlighting key structural and skills-related challenges. The number of employers in the FP&M sector increased slightly between 2025 and 2026, suggesting a marginal increase in workplace capacity. This has implications for skills development, as it increases the pool of workplaces available for workplace-based learning and expands absorption opportunities for graduates from FP&M SETA-funded programmes. In 2026, total employment in the sector stood at 506 976. The sector remains highly concentrated in a few provinces, with the Western Cape, KwaZulu-Natal, and Gauteng accounting for the majority of employment. This indicates uneven spatial distribution of employment and training opportunities across the country, with limited participation from other provinces. Employment is also concentrated in a few key sub-sectors, particularly clothing, forestry, printing, wood products, paper and paper products, leather, and furniture, with several of these sub-sectors experiencing employment declines over the period under review. The occupational structure continues to be dominated by lower- and mid-skilled occupations, with 33% of employees in elementary occupations, 25% as plant and machine operators and assemblers, and 13% in craft and related trades occupations. Only 11% of employees are in managerial and professional roles, indicating limited occupational mobility and highlighting the need for structured pathways into supervisory, technical, and higher-level occupations. From a transformation perspective, the sector remains male dominated at 59% compared to 41% female, with a decline in female representation between 2025 and 2026. Youth account for just over 30% of total employment, showing limited change over time, while the increase in older workers (55+) from 11% to 14% raises concerns regarding succession planning and future skills replacement. PwDs remain at the 2% threshold, although their representation has declined from 4% to 2%. In terms of race, Africans remain the majority at 72%, followed by Coloureds at 15%, Whites at 8%, and Indian/Asian employees at 6%. Overall, the findings indicate that the FP&M sector continues to face key skills challenges related to limited occupational mobility, uneven geographic distribution of employment, and transformation imbalances affecting females and PwDs. These findings reinforce the need for targeted and inclusive skills development interventions across the sector.
Chapter 2	The FP&M sector is operating within an increasingly complex and rapidly changing environment shaped by technological transformation, global trade pressures, environmental sustainability requirements, evolving

Chapter Number	Key Skills Findings in Chapter
	consumer expectations, and ongoing infrastructure and logistics constraints. These factors continue to influence the competitiveness, productivity, and sustainability of firms across all 13 FP&M sub-sectors, while simultaneously reshaping occupational profiles and workforce skills requirements. As production systems and business models continue to evolve, the sector will require a workforce that is adaptable, digitally capable, environmentally conscious, and responsive to changing market demands. At the same time, national policies and strategic frameworks such as the NDP 2030, NSDP, MTDP, ERRP, JET IP, 4IR Strategy, and various sector masterplans continue to provide strategic direction for skills development and industrial growth within the sector. These frameworks place increasing emphasis on digital transformation, localisation, green skills, workplace-based learning, entrepreneurship, and inclusive economic participation.
Chapter 3	The FP&M sector has identified a range of occupations that are classified as hard-to-fill, as well as a growing set of emerging occupations driven by technological, environmental, and market changes. These priority occupations will be targeted for the allocation of skills development funding to address critical shortages and future capability needs. The Sectoral Priority Occupations and Interventions (SPOI) list includes roles such as Sewing Machine Operator, Production/Operations Supervisor (Manufacturing), Apparel and Related Pattern Maker, Engineering Manager, Logging Plant Operator, Sales and Marketing Manager, Packaging Manufacturing Machine Minder, Textile, Clothing, Footwear and Leather Processing Machine Mechanic, Digital Artist, and Publisher. These occupations reflect both core production functions and specialised technical and creative capabilities required across the value chain. In addition, new occupations are emerging as a result of technological advancement, including roles such as robotic furniture maker, textile process automation specialist, packaging automation engineer, and digital publishing specialist. Environmental sustainability is also reshaping occupational demand, giving rise to roles such as sustainable materials specialist, sustainable packaging designer, green supply chain analyst, and waste management innovator. Furthermore, shifts in consumer behaviour and digitalisation are driving demand for occupations such as social media strategist, marketing intelligence specialist, digital platform developer, and digital sales specialist. Despite these evolving occupational demands, the sector continues to face supply-side constraints, including limited funding for training, high learner dropout rates, and challenges related to programme completion. The FP&M SETA is actively addressing these constraints and will continue to strengthen interventions aimed at improving access, retention, and successful completion within skills development programmes.
Chapter 4	The FP&M SETA places strong emphasis on partnerships as a critical enabler for the effective implementation of skills development initiatives, the responsiveness of education and training systems to industry needs, and the advancement of South Africa's broader socioeconomic development objectives. In this regard, the SETA maintains a structured partnership model comprising education and training delivery partnerships, industry and professional body collaborations, and strategic and special project partnerships. These partnership categories reflect the FP&M SETA's commitment to the SETA Integrated High Impact Programmes launched at the SETA Skills Summit in April 2024. Going forward, the SETA will continue to expand and strengthen its partnership ecosystem to enhance the scale, reach, and impact of its skills development interventions. These collaborations are essential for improving access to education and training, strengthening infrastructure development, and advancing transformation objectives across the FP&M sector.
Chapter 5	The FP&M SETA has placed increasing emphasis on achieving measurable results in fulfilling its mandate, particularly in driving skills development transformation. In response, it has adopted a results-based M&E approach to strengthen accountability, improve performance, and ensure alignment with strategic outcomes. This framework supports systematic tracking of progress, assessment of skills development quality (including curriculum relevance, resources, and provider expertise), and the provision of reliable information to governance and stakeholders. It also enables organisational learning, continuous improvement, and the identification of areas requiring enhancement.

6.3 Strategic Skills Priorities

Each of the SETA Integrated High Impact Programmes launched at the SETA Skills Summit in April 2024 finds expression in the FP&M SETA strategic skills priorities and sub-priorities discussed below. The High Impact Programmes find expression in the FP&M SETAs strategic skills priorities as follows (Figure 29):

Figure 29: Linking the High Impact Programmes with the FP&M SETAs Strategic Skills Priorities



Furthermore, The FP&M SETA Strategic Priorities are aligned with national policy frameworks such as the NDP 2030, the MTDP 2024–2029, the IPAP, the ERRP and its Skills Strategy, the PYEI, and the JET-IP, amongst others. Collectively, these priorities seek to strengthen sector competitiveness, improve workforce adaptability, support sustainable industrialisation, and address both current and future occupational and skills needs.

6.3.1 Expanding the economic contribution of the FP&M sector

A central strategic priority of the FP&M SETA is to expand the economic contribution of the sector through industrial competitiveness, technological advancement, entrepreneurship development, and environmental sustainability. This priority recognises the role of the FP&M sector in supporting manufacturing growth, employment creation, export development, and regional economic inclusion.

6.3.1.1 Building on the value-chain approach

A key component of this strategic priority is strengthening the value-chain approach. The FP&M SETA continues to promote integrated value-chain development by collaborating with other SETAs, government departments, and industry stakeholders across interconnected production systems. Through partnerships with the DTIC, the DSBD, and other strategic institutions, the SETA

seeks to align skills development interventions with industrial policy objectives, economic recovery initiatives, and sector revitalisation strategies. This approach enables stronger coordination between upstream and downstream industries while improving productivity and competitiveness across the sector.

6.3.1.2 Incorporating skills development into the Cluster Model

The SETA further prioritises the incorporation of skills development into industrial cluster models and economic hubs. International experience demonstrates that cluster-based industrial development enhances innovation, resource sharing, collective efficiency, economies of scale, and intra-firm collaboration. Within the South African context, the FP&M SETA aims to support industry clusters by identifying emerging skills requirements, promoting collaborative training interventions, and strengthening regional industrial ecosystems. These interventions are particularly important in responding to changing market conditions, supply chain disruptions, and evolving technological demands.

6.3.1.3 Expanding industry competitiveness and exports

Expanding industry competitiveness and exports also forms a critical component of this strategic priority. Productivity improvement, innovation capability, and advanced manufacturing practices are increasingly necessary for firms to compete in both domestic and international markets. The SETA therefore prioritises training linked to science, technology, innovation, automation, and future production methods. Through its partnerships with the DTIC and industry stakeholders, the SETA supports sector-specific action programmes, research initiatives, and occupational development interventions that strengthen export readiness and industrial upgrading. This aligns closely with the MTDP 2024–2029 Strategic Priority on inclusive growth, industrialisation, and innovation-driven economic expansion.

6.3.1.4 Training for technology-driven production

Technological transformation and digitisation represent another major focus area. The FP&M sector is undergoing significant structural changes due to automation, digital manufacturing, artificial intelligence, robotics, additive manufacturing, and data-driven production systems associated with the 4IR and 5IR. The SETA therefore prioritises reskilling and upskilling initiatives to ensure workers can adapt to changing occupational requirements and transition into higher-skilled roles. Particular emphasis is placed on digital skills development, advanced manufacturing technologies, and innovation-oriented training. Research initiatives commissioned by the SETA, including occupational and skills audits within forestry and furniture manufacturing, further support evidence-based planning for emerging occupations and future skills needs.

This focus area is in line with the MTDP 2024–2029 Strategic Priority one outcome around the growth and transformation of South Africa's science, technology and innovation capabilities, human resources, and research infrastructure. Also, the increased training for young people in digital skills.

6.3.1.5 Growing quality SMMEs and Cooperatives

The development of sustainable SMMEs and cooperatives is another important sub-priority. The

SETA recognises the role of entrepreneurship and small enterprise development in promoting inclusive growth, local economic development, and employment creation. Skills development interventions are therefore structured to support micro-enterprises, cooperatives, informal enterprises, and emerging entrepreneurs. These interventions include digital entrepreneurship programmes, mentoring and coaching for technology start-ups, digitisation workshops, and training in advanced technologies such as 3D printing, robotics, drone technology, and the Internet of Things (IoT). The integration of digital transformation into SMME development is increasingly important in enhancing business sustainability and market competitiveness.

6.3.1.6 Promoting environmental sustainability

Environmental sustainability and green industrial development are also prioritised. The sector faces growing pressure to adopt sustainable production practices, improve resource efficiency, reduce waste, and support climate resilience. The SETA therefore supports skills development linked to sustainable manufacturing, recycling, ecosystem management, waste reduction, and environmental compliance. This aligns directly with the JET-IP, which seeks to support South Africa's transition to a low-carbon and climate-resilient economy while ensuring social inclusion and decent work opportunities. Within the FP&M sector, the JET-IP creates opportunities for green skills development in renewable energy integration, sustainable forestry management, circular economy initiatives, energy-efficient manufacturing, waste beneficiation, and environmentally sustainable production technologies.

6.3.1.7 Promoting world-class manufacturing

The promotion of world-class manufacturing and leadership development further supports this strategic priority. Programmes such as the International Leadership Development Programme (ILDP) are designed to strengthen leadership capability, innovation management, entrepreneurship, and strategic decision-making within the sector. Developing a highly skilled leadership cohort is regarded as essential for driving industrial transformation, innovation adoption, and global competitiveness.

6.3.2 Addressing demand-side challenges

The second strategic priority focuses on addressing demand-side challenges through employer-responsive skills development interventions, occupational planning, and workforce transition support. The FP&M SETA recognises that changing production systems, demographic shifts, and economic uncertainty require more responsive and agile skills planning mechanisms.

6.3.2.1 Employer driven programmes to address company needs

One key focus area is the implementation of employer-driven programmes that address company-specific occupational needs. The SETA works closely with employers, labour representatives, and industry bodies to identify scarce and critical skills, particularly in occupations vulnerable to skills loss due to retirement and workforce ageing. Succession planning, mentoring systems, internships, and structured workplace learning programmes are promoted to facilitate skills transfer between experienced workers and younger entrants into the labour market. These interventions aim to preserve institutional knowledge while improving

workforce sustainability.

Research also plays a central role in identifying future areas of economic growth and job creation. Through ongoing labour market analysis and stakeholder engagement, the SETA seeks to ensure that skills development interventions remain aligned with emerging industrial trends, technological shifts, and changing occupational profiles. Integrated programmes combining theoretical training and workplace experience are prioritised to improve employability outcomes and labour market responsiveness.

6.3.2.2 Programmes to support retrenched workers

The SETA also prioritises support for retrenched workers and displaced employees. Economic restructuring, global competition, technological change, and the impacts of the COVID-19 pandemic have contributed to job losses across several FP&M sub-sectors. In response, the SETA supports retraining and reskilling programmes that enable affected workers to transition into new employment opportunities or entrepreneurial activities. These interventions are aligned with the broader goals of economic recovery, labour market resilience, and social protection. Workers establishing enterprises or cooperatives are further supported through the SETA's entrepreneurship and SMME development strategies.

6.3.3 Addressing supply-side challenges

The third strategic priority focuses on strengthening the supply side of the skills development system by improving training accessibility, workplace-based learning opportunities, and training quality. The SETA recognises that effective skills development requires responsive education and training systems that can adapt to changing production environments and occupational requirements.

6.3.3.1 Developing flexible training methods required for flexible production

A key focus area is the development of flexible training methods suited to modern production systems and diverse learner needs. The SETA supports practical, affordable, and modular training interventions that minimise disruption to production while improving access to learning opportunities. This includes support for blended learning, online learning platforms, simulation-based training, and modular occupational programmes. Digital learning approaches became particularly important following the COVID-19 pandemic and continue to shape new models of workforce training.

6.3.3.2 Expanding workplace-based training

The expansion of workplace-based training is another strategic sub-priority. Workplace learning remains essential for developing occupational competence, improving employability, and strengthening industry relevance within the PSET system. The SETA therefore prioritises apprenticeships, internships, workplace-based learning, and experiential learning opportunities across the sector. Partnerships between employers, TVET colleges, universities, and private training providers are strengthened to improve the integration of theoretical and practical learning.

This priority aligns closely with the MTDP 2024–2029 objective of strengthening partnerships with industry to improve workplace-based learning opportunities for artisans, TVET graduates, and young entrants into the labour market. Expanding workplace learning is also critical for improving youth employability and supporting inclusive economic participation.

6.3.3.3 Managing the quality of training and associated perceptions

The SETA additionally prioritises the quality and relevance of training provision. Stronger collaboration between employers, education and training institutions, and industry bodies is necessary to ensure that qualifications and programmes remain responsive to evolving occupational demands. The SETA therefore supports the development and registration of fit-for-purpose qualifications linked to emerging technologies, production systems, and business operations. Collaboration with industry stakeholders also assists in addressing perceptions around vocational education and improving the attractiveness of technical and occupational career pathways.

6.3.4 Measures to support National and Sectoral Strategies and Plans

The fourth strategic priority focuses on supporting broader national development frameworks, industrial strategies, and sectoral plans through coordinated stakeholder engagement and aligned skills development interventions. The FP&M SETA recognises that sustainable sector development requires collaboration between government, industry, labour, education and training institutions, and development agencies.

6.3.4.1 Supporting implementation of Industrial Policy Action Plan

Support for industrial policy implementation remains a critical area of intervention. The clothing, textile, furniture, leather, and related manufacturing industries remain strategically important within South Africa's industrial policy agenda due to their employment intensity and localisation potential. The SETA therefore supports the development of both technical production skills and advanced design-oriented capabilities needed to strengthen manufacturing competitiveness and support high-value production. Partnerships between industry, TVET colleges, universities, and private providers are promoted to improve technical skills pipelines and strengthen industry relevance.

6.3.4.2 Supporting small businesses

The SETA also supports entrepreneurship and small business development through collaboration with institutions such as the Small Enterprise Development and Finance Agency (SEDFA). Industry-specific incubators, enterprise development programmes, and entrepreneurship training interventions are prioritised to strengthen the sustainability and growth of SMMEs within both formal and informal sectors.

6.3.4.3 Support of Economic Reconstruction and Recovery Plan and its Skills Strategy

The ERRP was developed to deal with immediate actions towards economic recovery amid COVID-19 and to rebuild and grow the economy ensuring sustainability, resilience and inclusion. It also aspires to build a strong social compact that unlocks scarce resources, both human and

financial, and further facilitates trade-offs in society as well as building consumer and business confidence. In support of the ERRP, the SETA implements interventions aimed at economic recovery, entrepreneurship promotion, innovation support, and employability enhancement. These include innovation labs at TVET colleges, support for entrepreneurship development, and interventions targeting occupations in high demand.

6.3.4.4 Interventions in support of the Presidential Youth Employment Initiative

Youth employment remains a significant national priority. Through support for the PYEI, the SETA promotes career awareness through targeted career awareness campaigns and career guidance, as well as provides funding for skills development interventions, designed to improve labour market participation among young people. These interventions are particularly important given South Africa's high youth unemployment rate and the increasing demand for digital and technical competencies.

6.3.4.5 Interventions in support of the Medium-Term Development Plan 2024-2029

The FP&M SETA also aligns its strategic priorities with the MTDP 2024–2029, particularly the objectives related to inclusive growth, job creation, poverty reduction, industrial transformation, and building a capable developmental state. Skills development interventions are therefore designed not only to address immediate labour market shortages, but also to support broader structural transformation within the economy.

6.3.4.6 Interventions in support of the Just Energy Transition Implementation Plan

The JET-IP further provides an important strategic framework for the FP&M sector. The transition towards a greener and more sustainable economy requires substantial investment in new skills, green occupations, sustainable production systems, and climate adaptation capabilities. The FP&M SETA supports this transition through funding skills development interventions linked to renewable energy integration, green manufacturing, sustainable forestry, circular economy practices, waste management, energy efficiency, and low-carbon production systems. Importantly, the SETA's approach to the just transition emphasises social inclusion, worker protection, and equitable access to emerging economic opportunities.

6.4 Conclusion

The FP&M SETA Strategic Priorities provide a comprehensive framework for addressing the current and future occupational and skills needs of the sector within a rapidly changing economic, technological, and environmental landscape. Through its focus on industrial competitiveness, digital transformation, workplace-based learning, entrepreneurship development, environmental sustainability, and inclusive economic growth, the SETA seeks to strengthen the resilience and adaptability of the FP&M sector. The integration of national priorities such as the MTDP, ERRP, PYEI, IPAP, and the JET IP further positions the SETA as a key institutional actor in supporting South Africa's industrial transformation and socio-economic development objectives. Ongoing research, stakeholder engagement, and evidence-based planning remain critical to ensuring that skills development interventions continue to respond effectively to emerging occupational and labour market demands.

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