Te Tāhuhu o te Mātauranga
Ministry of Education

2025 Teacher Demand and Supply Planning Projection

Summary Report

Abstract

The Teacher Demand and Supply planning projection (TDS) projects the number of teachers we expect to need in the future (demand) and compares this to the number of teachers we expect to have in the future (supply).

Te Kāwanatanga o Aotearoa
New Zealand Government

Published by the Ministry of Education, New Zealand, February 2026.
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Central Wellington, Wellington 6011, New Zealand.

www.education.govt.nz

ISSN 3021-1786 (ONLINE)

Contents

Summary: Primary sector projection

At a **national** level and across two of three scenarios (medium and high supply), the supply of primary teachers is **projected to exceed demand** from 2026 to 2028.

2026	2027	2028
-580 teachers (low)	-510 teachers (low)	-170 teachers (low)
+530 teachers (med)	+830 teachers (med)	+1,350 teachers (med)
+1,640 teachers (high)	+2,170 teachers (high)	+2,880 teachers (high)

2024 saw the **largest year-on-year increase** in regular teachers, and 2025 marks the **highest** recorded headcount since 2004. Total demand is projected to remain steady from 2026-2028 (38,330 to 38,310).

The **retention** rate of primary teachers in 2025 is projected to remain steady at **90.4%**.

From **2024 to 2025**, demand for primary teachers **increased by 990 teachers**, driven mainly by policy changes expanding classroom release time.

For **2025 to 2026**, demand is projected to **decrease by 103 teachers**, reflecting a roll-driven decline as primary student numbers fall by 5,500.

Impacts of **collective agreement allowances** which increase teacher release time have been included in this report.

These agreements result in the demand for primary teachers **increasing by 160 teachers**.

An **additional 445 to 730 primary teachers** are projected to be added to the current workforce in 2026 as a result of Ministry of Education **recruitment initiatives.**

The 2026 medium scenario surplus is **very small** – less than 1% of the workforce (around 0.25 of a teacher per school). It will not be evenly distributed with some regions and individual schools continuing to experience recruitment challenges.

Growing the supply of primary teachers through **new domestic, returning, and overseas-trained teachers** continues to be a priority.

Doing so will allow for **distribution** policies to be more effective, allowing us to better support schools with greater difficulty recruiting and/or retaining teachers – our 'hardest-to-staff' schools.

Continuing to invest in policies and actions to **retain** our teachers will mean we maintain a net-positive growth rate for the workforce.

Summary: Secondary sector projection

At a **national** level, across two of three scenarios (medium and low supply), the supply of secondary teachers is **projected to not meet demand** from 2026 to 2028.

2026	2027	2028
-1,630 teachers (low)	-1,630 teachers (low)	-1,480 teachers (low)
-710 teachers (med)	-510 teachers (med)	-190 teachers (med)
+280 teachers (high)	+670 teachers (high)	+1,180 teachers (high)

2025 marks both the largest year-on-year increases in regular teachers and the highest recorded headcount since 2004. Demand is projected to remain steady from 2026 to 2028 (30,650 to 30,520).

The retention rate of secondary teachers in 2025 is projected to increase to 90.0%.

From **2024 to 2025**, demand for secondary teachers increased by **1,876 teachers,** driven by both roll growth and policy changes (incl. non-contact time).

For **2025-2026**, demand is projected to increase by only **37 teachers**, with growth roll-driven as secondary student numbers are expected to rise by 2,000.

Impacts of **collective agreement allowances** which increase non-contact time have been included in this report. **As a result, demand** for secondary teachers has **increased by 552 teachers**.

An **additional 675 to 1,005 secondary teachers** are projected to be added to the workforce in 2026 as a result of Ministry of Education **recruitment initiatives**.

With 491 secondary schools across New Zealand, the medium scenario equates to a **shortfall of more than one teacher per school on average**. The shortfall is further complicated by subject specialisation

*Shortages in some **secondary subjects** and locations are likely to continue.*

*This tends to follow global shortage subjects, such **as Science, Technology and Mathematics**. In an Aotearoa New Zealand context, **te reo Māori** is also a subject area in demand.*

Growing the secondary teacher workforce will continue to be a priority – particularly in shortage subjects, **before** investing in distribution-based initiatives. Without greater supply at the national level, shortages will occur that distributional initiatives **will not effectively be able to address.**

Summary: Regional projection

This is the second time we have provided a regional Teacher Demand and Supply (TDS) projection. To give a more nuanced view of Auckland, this year Auckland has been split into the three education regions: Auckland Central and East (Tāmaki Herenga Tāngata), Auckland North and West (Tāmaki Herenga Tāngata) and Auckland South and Southwest (Tāmaki Herenga Waka).

We have grouped regions with similar supply and demand situations into four clusters for each sector. This facilitates understanding of where pressures are being felt and how they differ between regions. We have categorised supply and demand trends, and overall surplus or shortages, representing different degrees of pressure.

Primary

Continuous surplus driven by significant drop in demand	Persistent shortage due to rising demand, narrowing as demand declines	Transitioning to emerging surplus as increasing supply outpaces demand	Stable supply and demand, minimal supply shortage / surplus
Auckland Central and East, Canterbury	Bay of Plenty, Northland, Taranaki, Waikato	Auckland South and Southwest, Auckland North and West, Nelson, Manawatū-Whanganui, Wellington	Gisborne, Hawke's Bay, Marlborough, Otago, Southland, Tasman, West Coast

Secondary

Persistent and significant shortage as demand outpaces supply	Shortage narrowing due to declining demand	Transition from shortage to surplus driven by lower demand and higher supply	Stable supply and demand, minimal supply shortages / surplus
Auckland North and West, Auckland South and Southwest, Hawke's Bay, Otago	Canterbury, Manawatū-Whanganui, Marlborough, Northland, Southland	Auckland Central and East, Bay of Plenty, Gisborne, Waikato, Wellington	Nelson, Tasman, Taranaki, West Coast

The three regions with the largest projected teacher shortage from 2026 to 2028, by **percentage (% for 2026 shown)** of total teacher demand in that region, are:

- Primary: Taranaki (5.0%) | Northland (4.5%) | Bay of Plenty (3.7%)
- Secondary: Auckland South and Southwest (6.3%) | Otago (6.2%) | Auckland North and West (4.2%)

The three regions with the largest projected teacher shortage from 2026 to 2028, by **headcount (# for 2026 shown)**, are:

- Primary: Waikato (140) | Bay of Plenty (100) | Northland (70)
- Secondary: Auckland Noth and West (140) | Otago (90) | Auckland South and Southwest (140)

About this report

This is the eighth annual release of the Teacher Demand and Supply (TDS) Planning Projection. The projection is constructed to forecast the estimated number of teachers required by schools in the future (demand) and compare this with an estimate of how many teachers' schools will be able to employ (supply). The results of this report are used as an input into the Ministry's advice on teacher supply.

In 2024, the Ministry developed a regional projection for 16 regional councils, and this year Auckland has been split into the three education regions. This is in addition to the national projection that has been published previously. This additional information will provide greater understanding of teacher supply across the motu | country. It will also help facilitate more nuanced conversations with the education sector regarding teacher supply.

As with any projection, the projected outcomes outlined in this report are simply the illustration of what could happen if a particular set of assumptions happen. While we use best data and evidence available to inform the underlying assumptions, they can – and do – change and therefore should not be viewed as a guarantee for what is to happen.

At a high level, the projection is based on key inputs, including:

Demand	**Supply**
• # of students (school rolls) • # of new students through migration • Student / teacher ratios • Teachers employed 'above entitlement' • Additional allowances and release that require more teachers	• Retention rate of current teachers • # of new overseas teachers • # of returning teachers • Success of initiatives and investments • # of people undertaking teacher training (Initial Teacher Education and other pathways)

Consistent with previous years' reports, three scenarios are provided to project teacher supply – high, medium, and low supply. These scenarios are based on different assumptions about key inputs to the projection. The medium scenario is considered the most likely. An outline of these assumptions is included on pages 19-20.

These projections are at the national and regional level, so even in circumstances where supply meets demand at the national or regional level, there will still be schools that face ongoing difficulty recruiting and/or retaining teachers. This will particularly apply in some secondary subjects like te reo Māori and STM (Science, Technology, and Mathematics), in the Kaupapa Māori / Māori medium sectors, rumaki reo (immersion) and reo rua (bilingual) units, and in schools that have the greatest, most persistent difficulty recruiting staff – our 'priority staffing schools'. As a result, the projection may not replicate schools' individual experiences.

All results relate to qualified teachers and untrained teachers on a Limited Authority to Teach (LAT) employed on a permanent or fixed-term basis in English medium, Māori medium and Kaupapa Māori schools and kura in the state and state-integrated school sectors. They are based on teacher headcounts and exclude day-relief teachers. Results also include teachers that are employed 'over entitlement' i.e., teachers additional to the number of teachers that a school or kura is funded for through staffing entitlement.

Key changes impacting the 2025 TDS

Teacher demand is moving in opposite directions for primary and secondary schooling in 2026 – primary demand is projected to decline, while secondary demand is expected to continue growing though at a much slower pace (using the most up to date 2025 projections).

- **Primary**: demand increased by 990 teachers from 2024 to 2025, driven mainly by policy changes expanding classroom release time. For 2025 to 2026, demand is projected to decrease by 103 teachers, reflecting a roll-driven decline as primary student numbers fall.
- **Secondary**: demand increased by 1,876 teachers from 2024 to 2025, driven by both roll growth and policy changes (including non-contact time). For 2025-2026, demand is projected to increase by only 37 teachers, with growth roll-driven as secondary student numbers are expected to rise slightly.

The national trends presented in this report occur in the context of considerable changes which are impacting the demand for teachers. These key changes are outlined below.

School rolls and net migration

The latest 2025 National School Roll Projections (NSRP) show a significant downward revision compared to the 2024 projections, with the following changes:

- 7,100 fewer primary students (-1.38%), following which we continue to **project the primary roll to fall** from 2025 to 2026 by 5,500 students
- 1,600 fewer secondary students (-0.51%), following which we continue to project **the secondary roll to increase** from 2025 to 2026, by 2,000 students.

This reduction to the projected roll translates into 331 fewer primary teachers and 92 fewer secondary teachers than previously forecast for 2026.

This change to the roll projection is a result of Statistics New Zealand's revised migration assumptions following lower-than-expected migration.

This represents a major shift from 2024, when high net school-aged migration was a key driver of demand. Net school-aged migration has been volatile over the past five years:

- 2021 - 2022: net school-age migration was only several thousands
- 2023 - 2024: surged to over 25,000, driving strong demand in entitlements
- 2025: dropped sharply to around 12,000, well below projections.

This volatility has made net migration assumptions a critical factor in revising school roll projections and subsequently teacher demand projections.

Revised classroom release time / non-contact time assumptions

The 2024 TDS projection, it was assumed that 50% of classroom release time in primary schools and non-contact time (including pastoral care) in secondary schools would be covered by regular teachers. The actual data confirmed this assumption for primary schools but showed that in secondary schools, nearly 100% of release time is covered by regular teachers.

Therefore the 2025 updated assumptions are:

- primary schools remain at the 50% assumption
- secondary has been updated to 100%, which results in an increase of approximately 570 secondary teachers compared to the 2024 assumption.

Staffing entitlement adjustments

Staffing entitlements are allocated on an FTTE (Full-Time Teacher Equivalent) basis, requiring conversion to headcount for accurate demand forecasting. The latest 2025 entitlement-to-headcount ratios were applied as the base for projections, resulting in a revised 2026 forecast with an increase of 337 teachers in primary and a reduction of 216 teachers in secondary compared to 2024 estimates.

Actual 2025 entitlement data was also incorporated as the foundation for forward projections, replacing previously projected figures. This adjustment further increased forecasted demand by 171 teachers in primary and 589 teachers in secondary. Secondary growth is primarily driven by entitlements for curriculum delivery and the employment of part-time teachers.

Disestablishment of Kāhui Ako

The disestablishment of Kāhui Ako roles reduces the projected demand of teachers from 2026 by 200 in primary and 212 in secondary schools. This reduction is smaller than the total Kāhui Ako FTTE because these roles were typically small (e.g., 0.08–0.4 FTTE), meaning most schools lost only a minor entitlement that many will absorb into their wider headcount.

Consistent with our approach for non-contact time, we assume headcount demand changes by 50% of the FTTE reduction for primary and 100% for secondary

Learning Support Coordinators expansion

The implementation of the policy to have Learning Support Coordinators in all schools with learners in Years 1-8 is expected to increase demand by 216 primary teachers in 2026.

Targeted Maths, Pāngarau and structured literacy staffing increase

Budget 2025 provides for 143 additional primary teachers to deliver the Maths Acceleration Programme (MAP) and Hāpai Pāngarau and increases structured literacy staffing by 32 from 317 to 349 across primary schools and kura from 2026.

Primary sector analysis – National

The demand for primary teachers is projected to remain stable from 2026 to 2028 (38,330 to 38,310).

At a national level across two of the three projected supply scenarios – we are projecting a surplus of primary teachers from 2026 to 2028:

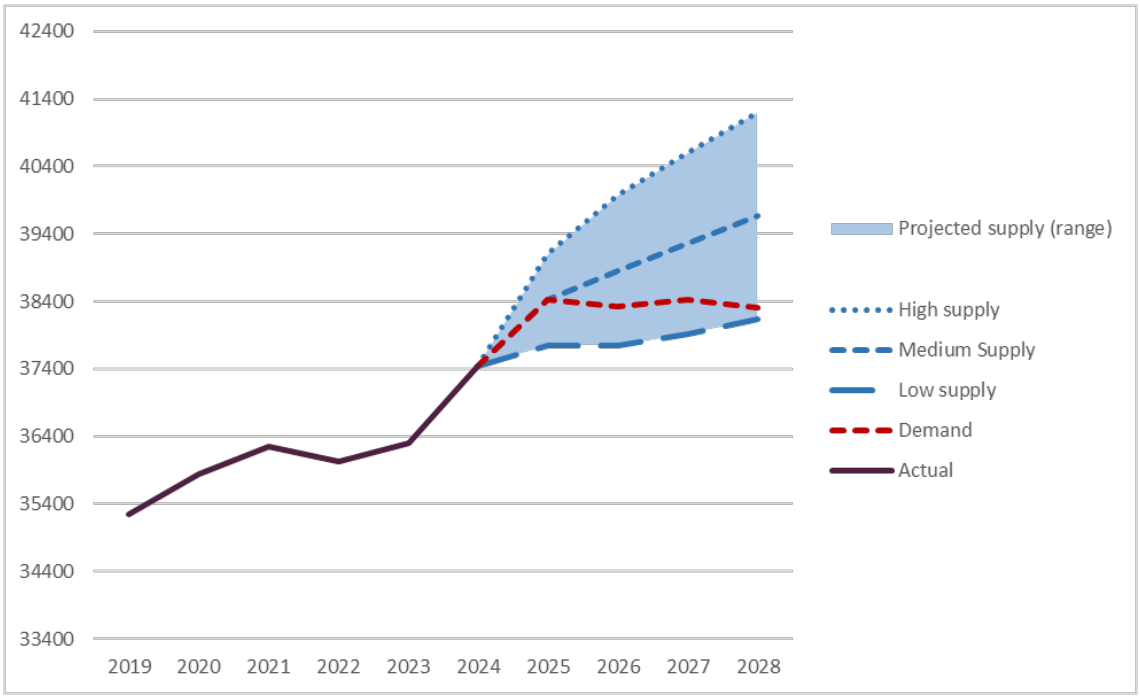
- **2026**: between -580 and +1,640 primary teachers
- **2027**: between -510 and +2,170 primary teachers
- **2028**: between -170 and +2,880 primary teachers.

Table 1. *Primary teacher demand and supply projection*

		High Supply Scenario		Medium Supply Scenario		Low Supply Scenario	
Year	**Demand**	**Supply**	**Gap**	**Supply**	**Gap**	**Supply**	**Gap**
2026	38,330	39,970	**1,640**	38,860	**530**	37,750	**-580**
2027	38,430	40,600	**2,170**	39,260	**830**	37,920	**-510**
2028	38,310	41,190	**2,880**	39,660	**1,350**	38,140	**-170**
2029	*Supply and demand not projected beyond 2028*						

All numbers rounded to nearest 10.

Figure 1: *Primary teacher demand and supply projection*



The medium supply scenario is considered the most likely. A national surplus of 530 primary teachers in 2026 is a significant improvement from the shortfall of 260 teachers projected in the 2024 TDS. However, the **2026 surplus is very small** – less than 1% of approximately 38,000 primary teachers and roughly equivalent to 0.25 of a teacher per school and is unlikely to be evenly distributed.

Some regions and individual schools, particularly those in rural or high-growth urban areas and Māori Medium and Kaupapa Māori kura, will continue to face supply challenges. Demand for te reo Māori proficient kaiako will continue to grow across both English medium and Kaupapa Māori / Māori medium settings, driven by the year-on-year increase in students enrolling in these settings[1].

The **national retention rates** for primary teachers in 2024 was 90.1%. It is projected to increase slightly to 90.4% in 2025 and 90.7% in 2026.This indicates that overall retention in the primary sector is strong, as some level of turnover is expected and can support a healthy, evolving workforce. Our data shows that most teachers move between schools rather than leaving the profession entirely. While this does not affect national retention rates, it can create challenges for individual schools or regions experiencing higher turnover, requiring additional teachers to maintain staffing levels.

The **average age** of all regular primary teachers in 2024 was 45.3 years, slightly higher than 44.7 in 2015 and 44.8 in 2019. The percentage of regular primary teachers **aged over 65** continues to increase slightly – 5.6% in 2024, compared to 4.4% in 2019, and 3.4% in 2015.

[1] "Māori Language in Schooling" | Education Counts | November 2024

Secondary sector analysis – National

The demand for secondary teachers is projected to remain stable from 2026 to 2028 (30,650 to 30,520).

At a national level and across two of the three scenarios we are projecting a shortage of secondary teachers from 2026 to 2028:

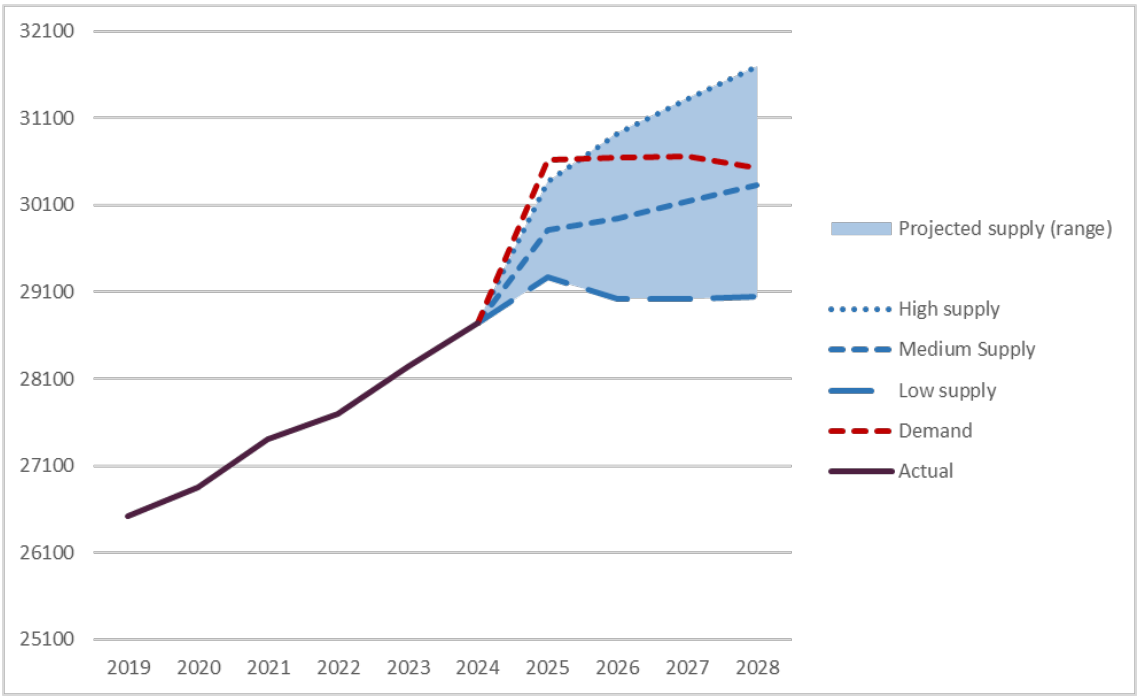
- **2026**: between -1,630 and +280 secondary teachers
- **2027**: between -1,630 and +670 secondary teachers
- **2028**: between -1,480 and +1,180 secondary teachers.

Table 2: *Secondary teacher demand & supply projection*

		High Supply Scenario		Medium Supply Scenario		Low Supply Scenario	
Year	**Demand**	**Supply**	**Gap**	**Supply**	**Gap**	**Supply**	**Gap**
2026	30,650	30,930	**280**	29,940	**-710**	29,020	**-1,630**
2027	30,650	31,320	**670**	30,140	**-510**	29,020	**-1,630**
2028	30,520	31,700	**1,180**	30,330	**-190**	29,040	**-1,480**
2029	*Supply and demand not projected beyond 2028*						

All numbers rounded to nearest 10.

Figure 2: *Secondary teacher demand & supply projection*



The secondary sector continues to present a more challenging picture compared to the primary sector. Under the medium scenario, we project a national shortfall of 710 secondary teachers in 2026. To put this in perspective, there are 491 secondary schools across New Zealand, meaning the shortfall equates to more than one teacher per school on average.

The impact of this shortfall is further complicated by subject specialisation. Secondary teachers are not easily interchangeable across subjects, and shortages in areas such as sciences, technology, mathematics and te reo Māori cannot be offset by surplus in other subjects. These patterns mirror global trends and are confirmed by sector feedback[2], which highlights ongoing difficulty recruiting qualified secondary teachers in some subjects. Separately, the Ministry is progressing analysis to better understand the supply of secondary-subject teachers.

Similar to primary schools, we know that there are some secondary schools that have greater, more persistent difficulty recruiting teachers than others, regardless of subject.

In 2024, the **national retention rate** for secondary teachers was 88.5%. It is projected to increase to 90.0% in 2025 and 90.5% in 2026. These figures indicate that retention is not a significant issue in the secondary sector, as some turnover is expected and contributes to a healthy, evolving workforce. Like primary, the data shows that most movement involves teachers changing schools rather than leaving the profession. While this mobility can be a problem for individual schools or regions, from a national perspective teachers remain in the system – they are simply teaching in different schools.

The **average age** of all secondary teachers in 2024 was 46.0 years – the same as both 2019 and 2015. The percentage of secondary teachers **aged over 65** continues to increase slightly – 6.1% in 2024, 5.3% in 2019, and 4.3% in 2015.

[2] PPTA Secondary school staffing survey report April 2025

Impact of investments on teacher supply

Budget commitments and funding reprioritisation have significantly strengthened teacher supply through new and reconfigured initiatives to attract, train, distribute, and retain teachers, particularly domestically. Uptake of centrally funded workforce initiatives increased to 91% in 2025 (up from 57% in 2024) driven by additional investment, better targeting and promotion. National retention also remains high - between 89% and 90% - which is critical for workforce stability.

As a result, both primary and secondary supply are in a stronger position to respond to demand pressures. Across the three projection scenarios, the uptake of supply initiatives over 2026–2028 is expected to add:

1. 445 to 730 primary teachers each year
2. 675 to 1,005 secondary teachers each year.

The improvements in supply reflect the success of Budget initiatives and targeted interventions that address priority areas, such as Initial Teacher Education (ITE), subject shortages and hard-to-staff schools. This includes:

- **marketing campaigns:** promoting the teaching profession to build a pipeline of domestic, returning and overseas teachers.
- **positive signs in ITE enrolments and recruitment of overseas teaches**
    - as of August 2025, first-time ITE enrolments rose from 2,300 in 2024 to 2,995 in 2025 (32% growth in primary, 27% in secondary)
    - competitive relocation packages and changes to immigration settings have increased arrivals of qualified teachers into NZ. As of 16 November 2025, 262 primary teachers and 496 secondary teachers have arrived – up from 164 and 446 for the whole of 2024
- **training new teachers** through programmes such as:
    - School On Site Training Programme (SOTP): expanding from 242 secondary places in 2025 to 533 primary and secondary places in 2026 – an increase of 291 places
    - Scholarships**:** over 400 scholarships offered each year to support young people and career changers to train as teachers
    - Employment-Based Training (EBITE): expanding to grow qualified Kaupapa Māori and Māori-medium teachers from 47 places in 2025 to 70 in 2026 – an increase of 23 places
- streamlining the pathways for **returning teachers and paying for practising certificate renewals**.

The TDS assumes that current investment in supply initiatives continues with the same uptake as 2025. These initiatives have been critical in improving resilience against demand pressures.

Without additional investment and the ability to actively promote and target audiences, the supply of teachers would be in a significantly worse position to meet demand. This is illustrated in the following graphs (Figure 3-4) in the TDS report, which show projected demand and supply before these investments were applied:

Figure 3: *Primary teacher demand and supply projection – before investment/initiatives*

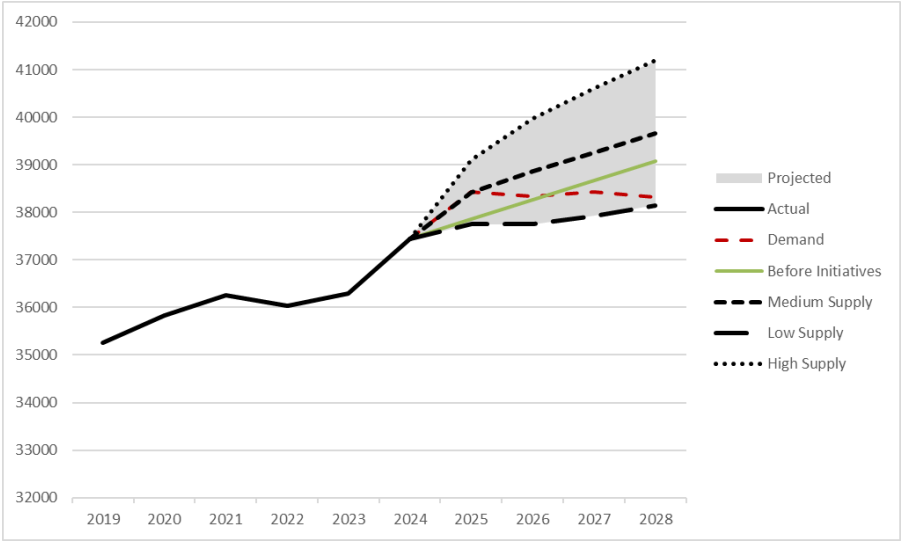
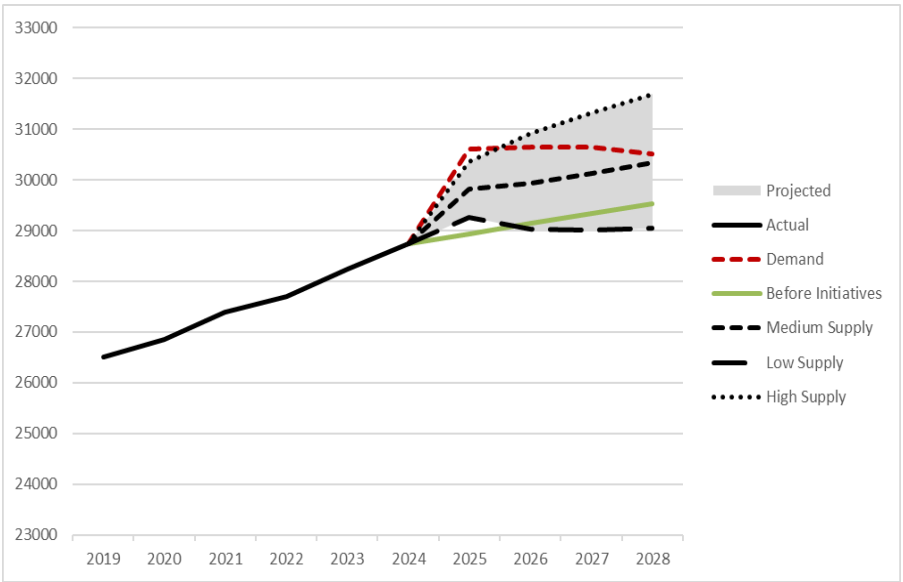


Figure 4: *Secondary teacher demand and supply projection – before investments/initiatives*



Regional analysis

The Ministry can now report on teacher supply and demand by each of the 15 regional councils and the three Auckland education regions: Auckland North and West (Tāmaki Herenga Tāngata), Auckland Central and East (Tāmaki Herenga Manawa) and Auckland South and Southwest (Tāmaki Herenga Waka).

Regional data provides deeper insight into where shortages occur and helps us design targeted interventions – it highlights localised pressures that national figures mask.

Regional variation remains significant. In 2026, primary teacher supply is projected to range from a surplus of 420 in Canterbury to a shortfall of 140 in Waikato. For secondary, projections span from a 30-teacher surplus in Auckland Central and East to shortfalls of 140 in Auckland North and West, and Auckland South and Southwest. To better understand these patterns, we have grouped regions into clusters based on similarities in demand and supply trends. The following table presents these clusters for both primary (Table 3) and secondary sectors (Table 4) highlighting key similarities and differences across regions. For a full outline of each region, including by primary and secondary sector, please refer to Annex 1 of this report and A3s on the public TDS page on the Education Counts website.

Table 3: *Regional primary sector analysis*

Similarity	Regions	Category (refer to A3s for more detail)
Cluster 1	Auckland Central and East, Canterbury	Continuous surplus driven by significant drop in demand
Cluster 2	Bay of Plenty, Northland, Taranaki, Waikato	Persistent shortage due to rising demand, narrowing as demand declines
Cluster 3	Auckland South and Southwest, Auckland North and West, Nelson, Manawatū-Whanganui, Wellington	Transitioning to emerging surplus as increasing supply outpaces demand
Cluster 4	Gisborne, Hawke's Bay, Marlborough, Otago, Southland, Tasman, West Coast	Stable supply and demand, minimal supply shortage / surplus

For primary, despite projected surpluses in most regions, large and persistent shortages (both headcount and percentage, Annex 2) are projected in: Northland, Waikato, Taranaki and Bay of Plenty. These regions are often characterised by smaller or more rural primary schools and more Kaupapa Māori and/or Māori Medium kura. For secondary, most regions are projected to experience ongoing shortages. These uneven pressures reflect broader dynamics – demographic shifts, housing trends and migration patterns. Urban growth intensifies competition for teachers, while rural areas continue to struggle with isolation and declining populations. Some regions (such as Waikato and Manawatū-Whanganui) increasingly rely on untrained teachers with Limited Authority to Teach (LAT). Meanwhile, Kaupapa Māori and Māori medium kura face persistent shortages of qualified kaiako, where language and cultural expertise make recruitment and retention especially challenging.

Table 4: *Regional secondary sector analysis*

Similarity	Regions	Category (refer to A3s for more detail)
Cluster 1	Auckland North and West, Auckland South and Southwest, Hawke's Bay, Otago	Persistent and significant shortage as demand outpaces supply
Cluster 2	Canterbury, Manawatū-Whanganui, Marlborough, Northland, Southland	Shortage narrowing due to declining demand
Cluster 3	Auckland Central and East, Bay of Plenty, Gisborne, Waikato, Wellington	Transition from shortage to surplus driven by lower demand and higher supply
Cluster 4	Nelson, Tasman, Taranaki, West Coast	Stable supply and demand, minimal supply shortages / surplus

2026 regional primary sector analysis

The outlook for the primary teaching workforce in **2026** highlights significant regional disparities in supply and demand.

1. Shortages are projected in Bay of Plenty, Northland, Taranaki, and Waikato, with Waikato and Bay of Plenty the most critical areas. In contrast, surpluses are concentrated in urban centres such as Auckland Central and East, and Canterbury.
2. Regional retention rates remain strong overall at 83-88%, but lower retention in West Coast and Nelson (around 83%) could exacerbate shortages. These patterns suggest that while large and urban regions maintain a robust supply, smaller and project areas face ongoing challenges.
3. Teacher mobility and recruitment dynamics further shape the workforce picture. All regions show positive net inflow, led by Auckland South and Southwest (+240), Auckland North and West (+170), and Canterbury (+140), though Auckland South and Southwest's reliance on overseas teachers (23% of inflow) and its high outflow to other regions (-50) signal vulnerability.
4. Domestic training pipelines are strongest in Auckland and Waikato, with Auckland Central and East producing 180 new teachers, compared to fewer than 20 in smaller regions like West Coast and Gisborne.
5. Canterbury and Nelson stand out for attracting teachers from other regions, while Auckland regions experience notable losses despite overall inflow gains.

While small surpluses were found in most regions due to declining rolls and improved supply initiatives, local pressures reinforce the need for targeted interventions. This is reflected in feedback from the sector.

2026 regional secondary sector analysis

The **2026** outlook for the secondary teaching workforce reveals widespread shortages across most regions. Subject specialisations add additional supply pressures.

1. Gaps are projected in 13 regions (Auckland North and West, Auckland South and Southwest, Bay of Plenty, Canterbury, Hawkes Bay, Manawatū-Whanganui, Marlborough, Nelson, Northland, Otago, Southland, Taranaki, and Wellington), with Auckland North and West, Auckland South and Southwest, Otago, Manawatū-Whanganui, Hawkes Bay, Northland, Canterbury and Wellington among the most critical.
2. Regional retention rates are generally high (81.8%-89.0%), but West Coast (81.8%) and Marlborough (83.6%) remain the lowest, which could exacerbate shortages in these areas.
3. Teacher mobility and recruitment patterns further shape the workforce dynamics. Net inflow is positive across all regions, led by Auckland Central and East (+220), Auckland North and West (+200), Waikato (+190), Canterbury (+150), and Auckland South and Southwest (+130), though Auckland South and Southwest's reliance on overseas teachers (12% of inflow) and its significant outflow (-40) highlight vulnerability.
4. Overseas recruitment also plays a notable role in Wellington (9%), West Coast (9%), and Northland (8%).
5. Canterbury and Otago stand out for attracting teachers from other regions (+30 and +10 respectively), while Auckland Central and East (-40) and Auckland South and Southwest (-40) experience the largest losses despite overall inflow gains.
6. Domestic training pipelines remain concentrated in urban regions, with Auckland Central and East (120), Canterbury (110), Auckland North and West (110), Waikato (90), and Wellington (80) leading, compared to minimal intake in Marlborough (<10), West Coast (<10), Tasman (<10), Nelson (<10), and Gisborne (10).

These trends underscore the need for targeted strategies: addressing shortage hotspots like Otago, Auckland North and West and Auckland South and Southwest and expanding ITE and /or graduate employment opportunities in these regions to strengthen the domestic pipeline.

Assumptions used in this projection

This section outlines the assumptions used in each of the three supply scenarios. It also outlines how demand is projected, and the basic inclusions/exclusions of the projection.

As with any projection, the projected outcomes outlined in this report are simply the illustration of what could happen if a particular set of assumptions happens. While we use best data and evidence available to inform the underlying assumptions, they can – and do – change and therefore should not be viewed as a guarantee for what is to happen.

Supply assumptions

To project future teacher demand and supply, we rely on different scenarios that are made up of different sets of assumptions. The table below sets out our key assumptions for each of the three supply scenarios, including what the assumption is, and what that means for the projection.

Scenarios	High supply	Medium supply	Low supply
The range of possible future teacher supply	The **High 80%** value represents the **high scenario,** an optimistic estimate of teacher supply.	The **Point Estimate** is the **medium scenario,** the most likely outcome based on historical trends.	The **Low 80**% value represents the **low scenario,** a conservative estimate of teacher supply.
Uptake of Ministry Workforce Initiatives [3]	Assumes full (100%) uptake of funded initiatives.	Assumes 2024 actual uptake rates of funded initiatives, up to a maximum of 80% uptake.	Assumes low (60%) uptake of funded initiatives.
Initiatives equate to (e.g. for 2026)	730 primary teachers 1,005 secondary teachers 1,735 teachers total	585 primary teachers 800 secondary teachers 1,385 teachers total	445 primary teachers 675 secondary teachers 1,120 teachers total

Demand inputs and assumptions

The demand for teachers is chiefly driven by the number of students projected to be in schools in future. This is driven by the National School Roll Projection (NSRP). Information on the School Roll Projection is publicly available on the Education Counts website. Additional factors generate additional demand such as additional release time provisions, changes to student to teacher ratios, and more.

National School Roll Projection | Education Counts

[3]The teacher supply initiatives used in this assumption are:
TeachNZ Scholarships for ITE students (Te Huarau, Te Huawhiti, Te Waka Whakarei, Te Tipu Whakarito and Iwi Māori Scholarships), Employment-based ITE programmes (Poutuarongo Whaakaakoranga Wharekura, Te Ahikāroa, Takiura Poipoia Kia Puawai, and Teach First NZ), Teacher Education Refresh, Overseas Relocation Grant, School Onsite Training Programme.

Key inputs underpinning the demand for teachers are outlined in the following table.

Staffing ratio changes	The reduction in English-medium curriculum staffing ratios for years 4-8 from 2025 onwards (i.e. this year's TDS applied the 1:28 ratio).
Net migration	The 2025 NSRP forecasts that in 2026 there will be 8,700 fewer students in schools beyond what was forecasted last year, including: • 7,100 fewer primary students • 1,600 fewer secondary students. This reduces demand by 331 primary and 92 secondary teachers.
International fee-paying students	The international fee-paying students (in state schools) forecast is manually estimated. In the 2024 report the number of fee-paying students was forecast to increase. In this year's report there has been small decline in fee-paying students. There is an assumption of 1 additional teacher per 15 fee-paying students. This means 90 fewer secondary teachers are forecasted to be needed in 2026 beyond what was forecasted last year. Primary schools attract few international fee-paying students compared to secondary, 10 fewer teachers in primary teacher demand are forecasted.

Summary of demand inputs and resulting teacher increases

Increases to teacher demand in 2025 forecast (# of teachers) for 2026	Primary	Secondary
Reduction in student forecast	-331	-92
Reduction in estimated foreign-paying students	-10	-90
Change due to using 2025 entitlement/headcount ratio	+337	-216
Updated CRT/NCT impact	+160	+552
Entitlement adjustments – updated figures	+171	+589
Kāhui Ako disestablishment	-200	-212
Learning Support Coordinators	+216	-
Maths/Pāngarau & structured literacy	+175	-
Total additional teachers needed:	**+518**	**+532**

How does the projection work?

The Projection compares the number of teachers we expect to need with the number of teachers we expect to have in the future. We look at patterns in the data we have and make assumptions on how these will inform the supply picture from 2026 onwards.

The main components of the teacher supply and demand projection in each region and at a national level are the same.

The Projection counts unique teachers on a headcount basis, recognising that a full-time teaching position in a school can be filled by more than one part-time working teacher. It includes both the teachers that are funded by government to meet teacher-student ratios, including teachers with a Limited Authority to Teach (LAT) and those that schools employ above entitlement from their own funds for a range of purposes, such as to cater for international students, to reduce the size of classes at certain year levels, or to offer additional programmes or support for certain students.

To estimate the demand for teachers, we start with the current number of students in schools and predict how that will change in future to inform our view of the changing demand for teachers. We also factor in additional demand from newly established roles within the workforce and other impacts on future demand driven by external changes in the educational environment.

How do we estimate the future supply of teachers?

The future supply of teachers is estimated using our payroll data and teacher annual data. This data is stored in the Education Data Warehouse (EDW).

Based on workforce trends and patterns over the last 20 years, we can estimate the number of teachers we can expect in 2026. We count the current number of teachers in our schools, as well as looking at how many people leave or enter teaching positions each year. This includes new teachers from ITEs, returning teachers returning to the profession, and overseas-trained teachers coming to New Zealand.

It should be noted that demand and supply forecast figures are rounded. In some regions where the anticipated change is small, we have used a rounded range.

The projections are underpinned by assumptions. These are based on trend information for key inputs and explicit modelling of initiatives designed to boost teacher supply in future. Our assumptions within the modelling of both demand and supply are aligned as closely as possible with those of other public sector agencies – such as The Treasury.

Demand for teacher projections created by the Forecasting and Modelling team | Te Pae Aronui. Teacher supply projections created by the Analysis & Insights team | Te Pou Ohumahi Mātauranga. Report authored by the Analysis and Insights team | Te Pou Ohumahi Mātauranga.

Annex 1: Regional projections – medium scenario 2026 to 2028

	2026				2027				2028			
	Primary		Secondary		Primary		Secondary		Primary		Secondary	
Auckland Central and East	350	8.4%	30	0.8%	410	9.8%	70	1.9%	470	11.4%	110	3.2%
Auckland North and West	0 to 10	0.0%	-140	-4.2%	40	0.9%	-160	-4.7%	120	2.6%	-170	-4.8%
Auckland South and Southwest	-10 to 0	-0.1%	-140	-6.3%	10	0.3%	-140	-6.1%	50	1.3%	-120	-5.2%
Bay of Plenty	-100	-3.7%	-30	-1.3%	-90	-3.4%	-10 to 0	-0.1%	-60	-2.3%	30	1.3%
Canterbury	420	9.4%	-50	-1.5%	440	9.7%	-30	-0.9%	470	10.3%	-10 to 0	-0.2%
Gisborne	0 to 10	2.1%	0 to 10	0.0%	0 to 10	1.0%	0 to 10	1.2%	0 to 10	0.2%	10	3.0%
Hawke's Bay	40	2.9%	-50	-4.1%	40	2.8%	-60	-4.7%	60	4.0%	-50	-4.0%
Manawatū-Whanganui	-20	-1.1%	-60	-3.8%	0 to 10	0.4%	-60	-3.4%	50	2.2%	-40	-2.6%
Marlborough	0 to 10	2.0%	-10	-4.5%	10	3.7%	-10 to 0	-3.9%	20	4.8%	-10 to 0	-2.8%
Nelson	-10 to 0	-1.9%	-10	-2.9%	-10 to 0	-1.1%	-10	-3.4%	0 to 10	1.6%	-10 to 0	-2.4%
Northland	-70	-4.5%	-50	-4.0%	-60	-4.0%	-40	-3.3%	-50	-3.3%	-30	-2.5%
Otago	30	2.1%	-90	-6.2%	40	2.8%	-100	-6.8%	80	5.1%	-100	-6.9%
Southland	20	2.4%	-30	-3.7%	20	2.5%	-20	-2.8%	20	3.1%	-20	-2.1%
Taranaki	-50	-5.0%	-20	-2.8%	-30	-3.0%	-10	-1.3%	-20	-1.5%	-10 to 0	-0.5%
Tasman	0 to 10	1.0%	-10 to 0	-1.5%	0 to 10	2.4%	-10 to 0	-0.1%	20	4.0%	0 to 10	1.6%
Waikato	-140	-3.3%	0 to 10	0.2%	-130	-3.0%	80	2.6%	-80	-2.0%	170	5.4%
Wellington	40	1.0%	-40	-1.3%	100	2.6%	-10	-0.5%	180	5.0%	30	1.2%
West Coast	-10 to 0	-0.6%	0 to 10	3.0%	0 to 10	0.1%	0 to 10	2.9%	0 to 10	3.7%	0 to 10	3.0%

***Note**: this table uses the **medium** supply scenario figures for simplicity. Please refer to each regional A3 for the full projection range.*

***Note:** when the anticipated change is close to zero, we have presented a range to capture issues from rounding small numbers.*