SCOTTS INTERNATIONAL

New Zealand Infrastructure Sector - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 150 pages | Mordor Intelligence

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Report description:

New Zealand Infrastructure Sector Market Analysis

The New Zealand infrastructure sector is valued at USD 14.60 billion in 2025 and is forecast to reach USD 17.37 billion by 2030, advancing at a 3.54% CAGR. Moderate growth reflects a deliberate pivot toward resilience and sustainability, even as fiscal headwinds and material-supply volatility persist. Government commitment to close an estimated USD 210 billion infrastructure gap, a USD 120 billion National Infrastructure Pipeline, and a sharpened focus on digital asset management are prime growth catalysts. Transport remains the largest opportunity set, yet utilities-buoyed by 100%-renewable targets-are accelerating fastest. An uptick in renovation spending over greenfield builds signals a new lifecycle strategy, while refreshed PPP rules and foreign-capital outreach are widening funding channels. Intensifying labour shortages and lingering input-cost volatility place a ceiling on delivery capacity, but strategic digitalisation and stronger private-sector participation are raising productivity potential.

New Zealand Infrastructure Sector Market Trends and Insights

Nationwide infrastructure surge backed by NZ Upgrade Programme

The National Infrastructure Pipeline has surpassed USD 120 billion, with USD 44 billion under construction and USD 11.6 billion earmarked for 2025 expenditure. Seventy percent of listed projects already hold secure funding, underscoring sustained political backing despite budget pressures. More than 1,300 projects valued above USD 10 million illustrate broad agency participation, while the emerging 30-year National Infrastructure Plan is embedding climate resilience and digital integration at the core of future prioritisation.

National renewable-energy commitments driving investment

A 100% renewable-electricity goal is catalysing grid upgrades such as the USD 144 million STATCOM facility at Otahuhu, deployed by Transpower and Hitachi Energy. Forecast electricity demand is set to rise 70% by 2050, prompting over 150 generation, storage, and transmission projects announced in 2024 alone. Consolidation is accelerating; Contact Energy's planned USD 1.86 billion purchase of Manawa Energy exemplifies scale-building across the value chain.

Severe skilled-labour shortages limiting project execution

31.9% of construction firms list labour scarcity as their main constraint, even though 25,000 workers seek additional hours, pointing to allocation inefficiencies. Migration curbs worsen gaps in specialist trades, especially across simultaneous megaprojects in Auckland and Canterbury. Industry training initiatives are ramping up, but the skill-pipeline lag is expected to cap execution capacity through 2028.

Other drivers and restraints analyzed in the detailed report include:

Rising demand for urban transit solutions in Auckland / Adoption of digital asset management and predictive maintenance / Persistent material-cost volatility disrupting budgets /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Transportation infrastructure generated 36% of the New Zealand infrastructure sector market in 2024, led by the City Rail Link and a USD 20.16 billion National Land Transport Programme. Nonetheless, utilities infrastructure is forecast to grow 4.03% annually thanks to grid upgrades, hydro refurbishment, and water-services reform linked to Local Water Done Well.

Renovation dominates utilities spending. The Local Water Done Well initiative channels capital to leak reduction, storm-resilience retrofits, and nutrient-runoff controls. Mandatory carbon-counting from 2025 is nudging utility owners toward low-embodied-carbon materials and circular-procurement models. Transport still claims the lion's share of new construction, but lifecycle digitalisation enables mergers of renewal and expansion workstreams, compressing maintenance backlogs and freeing CapEx for capacity projects.

The New Zealand Infrastructure Sector Report is Segmented by Infrastructure Segment (Transportation Infrastructure, Utilities Infrastructure, Social Infrastructure and Extraction Infrastructure), by Construction Type (New Construction and Renovation), by Investment Source (Public and Private) and by Key City (Auckland and More). The Report Offers Market Size and Forecasts in Value (USD) for all the Above Segments.

List of Companies Covered in this Report:

Fletcher Construction / Fulton Hogan Ltd / Downer Group / CPB Contractors Pty Ltd / Hawkins Limited / Obayashi Corp / Citycare Ltd / Naylor Love Enterprises Ltd / Omexom / Visionstream Pty Ltd / Fletcher Building Infrastructure Investments / McConnell Dowell Constructors / Broadspectrum NZ / Beca Group / WSP New Zealand / GHD Ltd / Infratil Ltd / Transpower New Zealand Ltd / Watercare Services Ltd / Vector Ltd /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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