

Infrastructure & The Economy CETANZ Conference 2025

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The Reality on the Ground



Increased competition for fewer jobs



Pressure on pricing and QA standards



Need to protect quality and team capability

Global Tensions, Local Impacts



Ongoing global instability:
conflict, supply chains, trade

China, US and EU growth slowing
has ripple effects for NZ

NZ is small, open and exposed so
we feel the shock quickly.

Tariffs we thought were 10% a
week ago, now 15%

The 'why': Economic Headwinds



NZ in recession in 2024, forecast to return to growth in 2026

Inflation back to 2.7%, OCR tracking to 3%

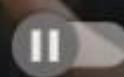
Conditions setting up for investment recovery



Sarah Amoores
Laboratory Manager Opus NZ



3:11 / 7:46



The Civil Infrastructure Silver Lining



Residential sector contracting (−7%)



Civil infrastructure steady - roads, three waters, resilience



Long-term pipeline: \$200B+ still planned

Navigating the Squeeze



Temptation to cut corners is a real risk

Pipeline gaps in short term = price pressure

Reputation for quality is your advantage

Strategic Opportunity- Invest Now



20% tax deduction on
new capital investment

OCR down = cheaper
financing

Upgrade gear, systems,
train your team

Your People are your greatest asset



Unemployment up, but experienced people still scarce

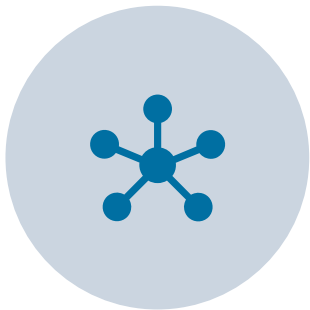


Upskill during quiet periods



Build loyalty and future readiness

Your Lab 2025–26 Playbook



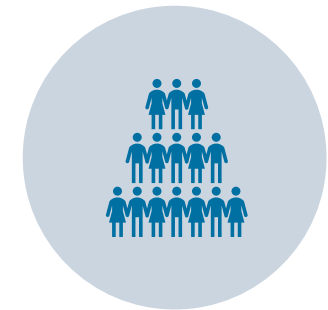
PIVOT TO
INFRASTRUCTURE
AND RESILIENCE
PROJECTS



INVEST IN
EFFICIENCY NOW



GUARD QA AND
REPUTATION



UPSKILL YOUR
TEAM

Facts and Figures with References

- "Inflation back to 2.5%" — Stats NZ — CPI data, March 2025

- "OCR tracking to 3.25%" — Reserve Bank of New Zealand — Monetary Policy Statement, July 2025

- "Residential construction expected to fall ~7%" — GlobalData NZ Construction Outlook, 2025

- "Long-term infrastructure pipeline: \$200B+" — Infrastructure Commission — 30-Year Infrastructure Strategy, 2025

- "20% tax deduction on capital investment" — Budget 2025 — Inland Revenue 'Investment Boost' Policy, May 2025

- "Unemployment ~5.1%" — Stats NZ — Labour Market Statistics, Q1 2025

- "Construction sector contraction ~1–4%" — Oxford Economics NZ Construction Forecast, Q2 2025

- "Consumer confidence index ~99" — ANZ-Roy Morgan Consumer Confidence Survey, June 2025

- "Wage growth easing to ~2.9%" — Stats NZ — Quarterly Employment Survey, Q1 2025

- "Aggregate shortage warning" — Aggregate & Quarry Association NZ — Press Release, March 2025

- "OCR peak was 5.5% in 2023" — Reserve Bank of New Zealand — Historical OCR data, 2023

