

Pipeline snapshot

June 2025

The Pipeline at a glance

The **National Infrastructure Pipeline** (Pipeline) is New Zealand's national dataset of infrastructure initiatives providing transparency on investments and activity to maintain, renew, and improve the infrastructure we all rely on. This important evidence base includes thousands of projects and programmes at various stages of planning, commitment, and delivery from central government, local government, and private sector infrastructure providers.

A more comprehensive view of infrastructure activity with confirmed funding sources, including maintenance programmes

The June 2025 Pipeline update ¹ included \$125.1 billion of initiatives underway and in planning which were reported as funded, part funded, or with a funding source confirmed. This value represents an increase of \$13.5 billion relative to the March 2025 Pipeline update, which included \$111.6 billion of initiatives with the same funding status.

The Pipeline also includes initiatives that are earlier in the planning cycle without confirmed funding sources. These initiatives highlight important activity in the system and offer early insights to the construction industry and infrastructure providers to coordinate and inform their planning. The information helps to signal potential demand, highlighting market constraints and opportunities, and supporting investment in capability and in workforce development.

The combined value of all initiatives in the Pipeline, regardless of funding status, is \$237.1 billion. This value represents an increase of \$30.2 billion, up from \$206.9 billion in the March 2025 Pipeline update. This increase improves the transparency of initiatives that are underway and in planning and is largely driven by improvements in the number of reported initiatives and the quality of submitted information. The Pipeline's view of committed investments, unfunded investment options (and opportunity costs) is important to inform funding decisions.

¹ The information release for the June update was published through our online facilitation tools on 30 June 2025.

In June, information about New Zealand-wide state highway maintenance activity spanning 2024-2034 has been added for the first time. This contributed to the increase in total Pipeline value between March and June quarters.

Informing the National Infrastructure Plan

The Pipeline continues to inform the **National Infrastructure Plan**. A draft of the Plan was released in June including, forward guidance on a sustainable investment path for infrastructure, insight into large Pipeline initiatives that are unfunded and in planning and signal upcoming choices, and a range of recommendations to improve the infrastructure system.

To continue informing the Plan and infrastructure decision-making across the system it's crucial the Pipeline progresses toward a complete picture of regional and sectoral infrastructure investment activity across project lifecycle stages.

Minister highlights importance of the Pipeline

The Minister for Infrastructure spoke about the importance of having a comprehensive Pipeline at our Symposium in June, and subsequently sent **letters to mayors and chairs** of councils (co-signed by the Minister for Local Government) requesting all Councils and Council-controlled organisations with a role in infrastructure to regularly update the Pipeline with their investment intentions.

Commercial sector infrastructure providers support approximately 31% of New Zealand's infrastructure and their information remains important, and is a recognised gap that needs to be filled. Private providers are impacted by policy and regulation across the infrastructure system and rely on workforce capacity and its development in the same way as other government infrastructure stakeholders.

Timely updates are required to build and maintain a clear picture on the state, activity, and challenges within the infrastructure system. Infrastructure providers yet to contribute information to the Pipeline should do so in September 2025 to ensure their intentions, needs and resource requirements are represented in the final Plan. These submissions and updates are particularly important for the 11 councils yet to contribute information for their regions.

Please reach out to contribute, update data, or if you have a question regarding the information in the Pipeline at: pipeline@tewaihanga.govt.nz.

Interactive tool



Login or register for access at
insights.tewaihanga.govt.nz



What's in the Pipeline? Initiative search

Search the Pipeline initiative list by upcoming procurement opportunities, estimated timings, sectors, regions, and more, and download Pipeline data on our insights platform.

Total value of Pipeline initiatives with a funding source confirmed is \$125 billion

The Pipeline includes project and programme initiatives at various stages of planning and commitment. In June 2025 the Pipeline included information on over 9,200 infrastructure initiatives underway and in planning for 133 infrastructure providers.

The value of initiatives reported as funded, part funded or with a confirmed funding source was \$125.1 billion, up \$13.5 billion from March 2025. The value of initiatives in planning and without a funding source was \$112 billion, up \$16.7 billion from March 2025 ².

The combined value of all Pipeline initiatives was \$237.1 billion, this includes \$5.9 billion of initiatives reported as 'on hold' or 'under review'.

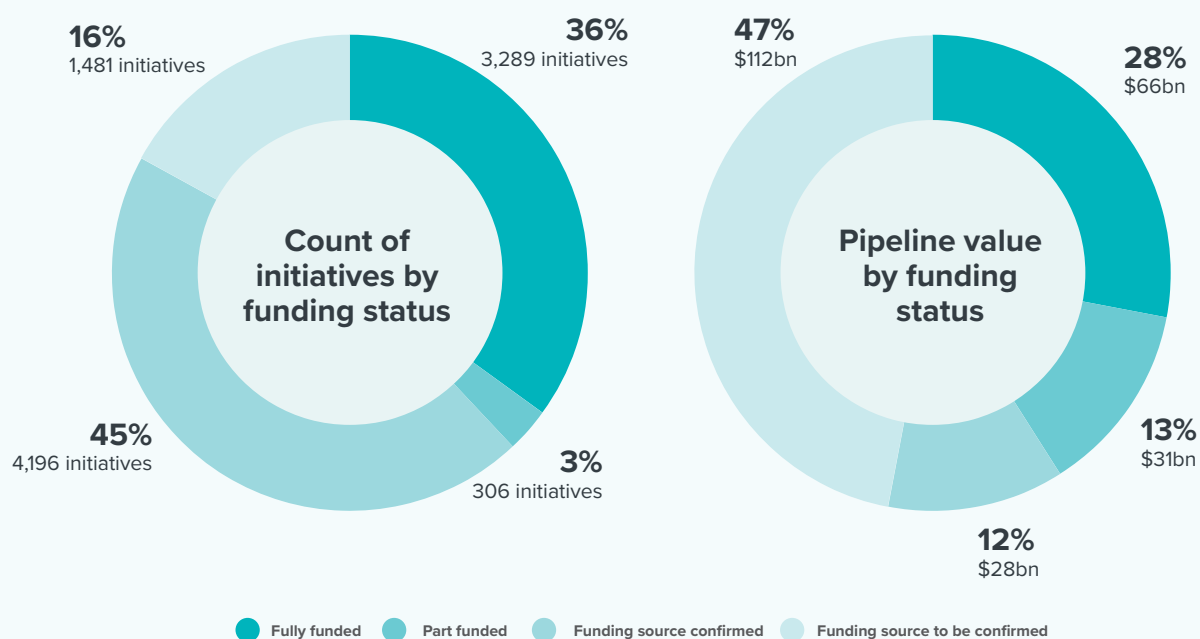
Over 2,500 initiatives (totalling \$52.8 billion in expected cost) were reported as currently under construction. Our modelling indicates work to progress the delivery of these initiatives will result in \$4.5 billion spend from July until the end of 2025, and a further \$5.7 billion of spend in 2026 as the initiatives progress.

Figure 1 highlights the funding status for initiatives in the Pipeline by value and initiative count. It's encouraging to see improving transparency of maintenance programmes as well as initiatives in the early planning stages which are yet to secure funding.

Figure 1:

\$125.1 billion of Pipeline initiatives are funded, part funded or have a funding source confirmed

Pipeline value and initiative count by funding status, June 2025



² The Pipeline is a live system that is updated regularly. Our snapshot reports are based on best known information at the time of publication. This may cause differences in reported values over time and between publications.

Figure 2 shows the distribution of initiatives in the Pipeline by scale and funding status. The figure highlights that 23% of total Pipeline value comes from 9,011 initiatives that are expected to cost below \$100 million (97% of all Pipeline initiatives). Breaking this down further, 3,963 initiatives (43% of all Pipeline initiatives) have reported expected costs of between \$1 and \$25 million, and 4,466 initiatives (48% of all Pipeline initiatives) have reported expected costs of less than \$1 million.

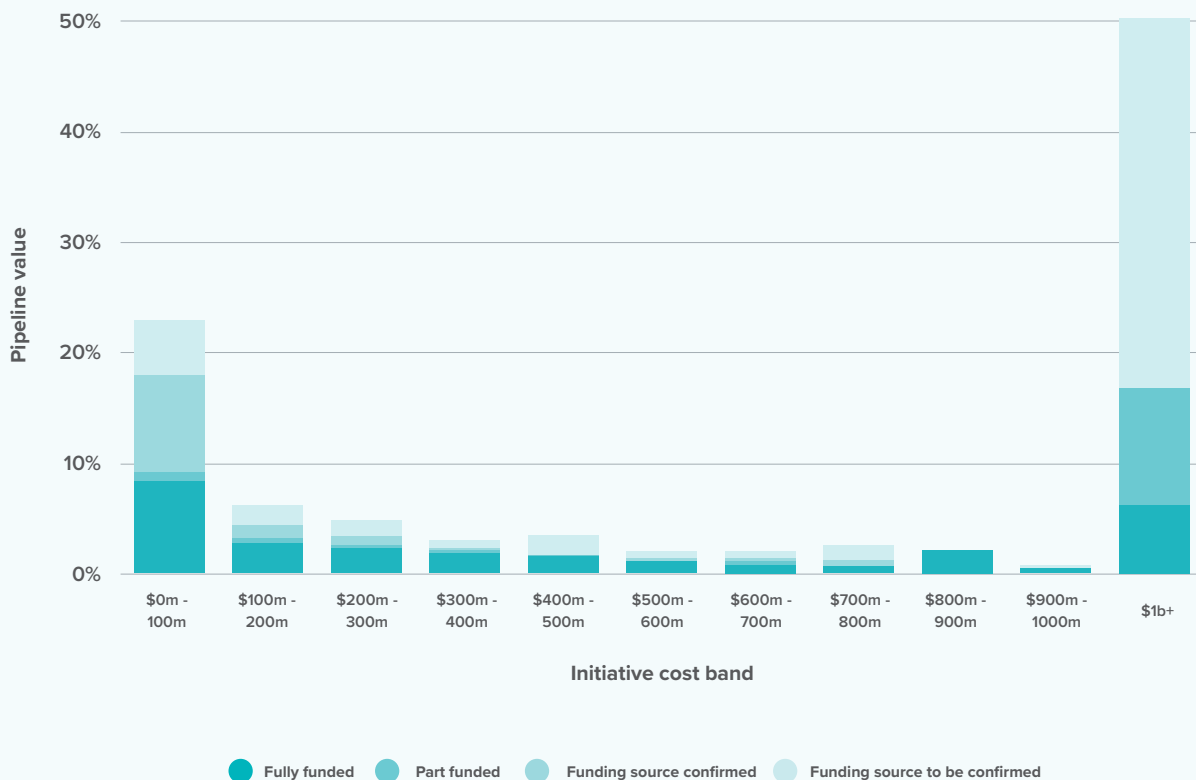
Smaller projects and programmes make an important contribution to achieving stability and confidence in the forward works programme,

with 85% of the 9,011 smaller initiatives reported as having a confirmed funding source (18% of total Pipeline value).

At the other end of the scale, the Pipeline currently includes 37 initiatives with expected costs of \$1 billion or more. While these initiatives account for 50% of total Pipeline value, only 14 (17% of total Pipeline value) are part or fully funded.

Larger initiatives account for significant proportion of infrastructure investment but are largely unfunded

Distribution of initiatives in the Pipeline by expected initiative cost, June 2025



Interactive tool



Infrastructure priorities programme
tewaihanga.govt.nz



Infrastructure priorities programme endorsements

Read the assessment reports for endorsed infrastructure proposals and learn about associated Pipeline initiatives.

Infrastructure priorities and the Pipeline

The Commission's **Infrastructure Priorities Programme** (IPP) undertakes independent standardised assessments of unfunded infrastructure proposals to evaluate their strategic alignment, value for money, and deliverability.

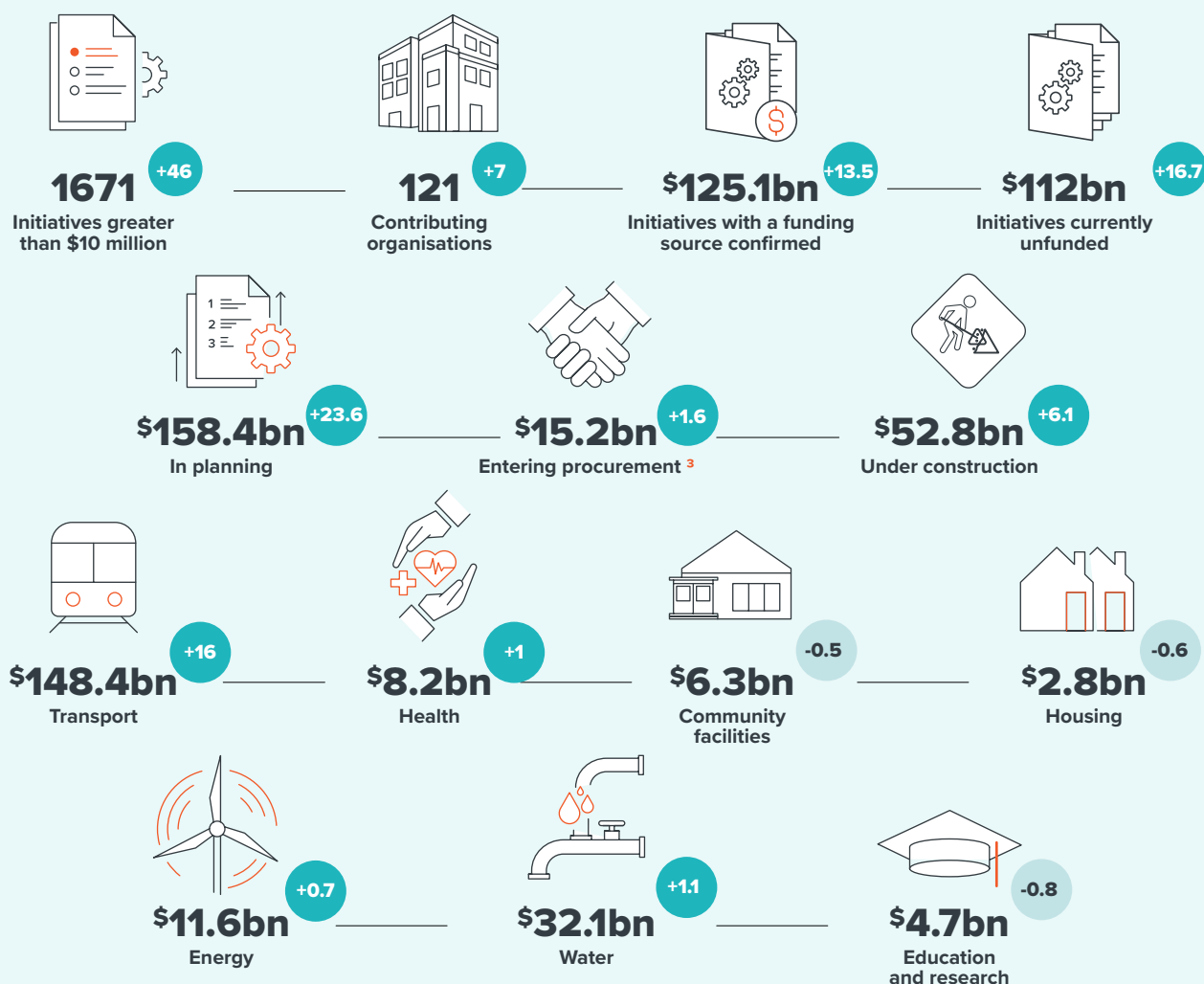
A proposal that is submitted to the Commission, and endorsed through the IPP does not automatically qualify for funding. Endorsed proposals give decision makers and the public more visibility of upcoming investment choices and confidence that a proposal is credible and an important infrastructure priority for New Zealand.

Proposals that are endorsed by the IPP, are included as an unfunded initiative in the Pipeline (or linked to associated initiatives already in the Pipeline), growing the forward view of potential demand for resources and future construction market opportunities.

In the first round of the IPP programme, 17 proposals were endorsed at one of three stages. Table 1 shows that these 17 proposals relate to 23 initiatives in the Pipeline. These IPP endorsed initiatives are highlighted with an icon in the Pipeline initiative search tool.

Table 1: Summary of Pipeline initiatives and those supported by an IPP endorsement

Initiative value	Total initiatives	Initiatives in planning	Initiatives in planning and not fully funded	Initiatives linked to IPP endorsement
<\$10m	7,578	4,381	3,431	7
\$10m-\$50m	1,202	590	501	6
\$50m-\$500m	423	189	159	7
\$500m+	69	45	43	3
All initiatives	9,272	5,205	4,134	23



³ Projects submitted with a project status of 'In procurement' and projects reported to enter procurement in 12 months from 1 July 2025.

New Pipeline contributors

A total of 121 organisations now contribute information about their infrastructure initiatives to the Pipeline. Interest in the Pipeline continues to grow, as more insights are derived from this evidence base, and recognition that contributing to the Pipeline informs and helps to ensure representation in the National Infrastructure Plan.

In June, 86% of our contributors provided project updates, adding new initiatives, making changes or confirming their information remained correct. In addition to these updates, we welcomed seven new contributors, with three of these organisations contributing to the Pipeline through their participation in the Infrastructure Priorities Programme:

Department of Conservation
Kordia Group Limited
New Zealand Underground
Asset Register

Reserve Bank of New Zealand
Waitaki District Council
West Coast Regional Council

Westland District Council

We thank our partners for their efforts and another step change to improving the national coverage of the Pipeline and supporting planning in the construction sector.

Using the Pipeline

The Pipeline forms an important evidence base to support a coordinated approach to infrastructure delivery across sectors, regions, and markets. Insights from the Pipeline enable understanding of investment options (and opportunity costs), competing demand for construction resources and workforce, and constraints or opportunities in the market. This understanding is fundamental to promoting efficient investment in infrastructure.

The Pipeline helps inform policy development and the Commission's advice on improvements to the wider infrastructure system, as well as Government demand-side decisions (e.g. increasing or curtailing demand through funding and other settings), and supply-side decisions (e.g. economic, education, and employment initiatives and settings).

Infrastructure providers use the forward view of infrastructure activity the Pipeline provides to inform prioritisation, coordination, planning, and investment decisions. Our stakeholders within the construction market use the Pipeline to understand upcoming business opportunities and the workforce capability and capacity that will be needed to deliver infrastructure projects. Regional economic and employment agencies use the Pipeline to understand when they need to draw skills to their region.

Initiatives under construction

In June there were 2,565 initiatives totalling \$52.8 billion in expected costs that were recorded as being under construction. These initiatives will be at various stages of completion with some having just started construction and others near completion, with little remaining spend to enter the market.

- 1,490 initiatives totalling \$13.1 billion were from local and regional councils,
- 870 initiatives totalling \$27.2 billion from central government entities, and
- 205 initiatives totalling \$12.5 billion from commercial providers including state owned entities, private organisations, and council-controlled organisations.

Initiatives entering procurement

The June update indicated 483 initiatives worth \$9 billion in total expected costs (including \$7.3 billion of initiatives that have a funding source confirmed) were in procurement at the time of the update. This procurement activity may be for parts of these projects and may not reflect the full value of the initiatives.

- 260 initiatives totalling \$1.9 billion were from local and regional councils,
- 127 initiatives totalling \$3.6 billion from central government entities, and
- 96 initiatives totalling \$3.5 billion from commercial providers including state owned entities, private organisations, and council-controlled organisations.

A further 338 initiatives with \$6.2 billion in total expected costs (including \$2.1 billion of initiatives that have a funding source confirmed) are expected to enter procurement during the 12 months from 1 July 2025.

- 251 initiatives totalling \$1.1 billion were from local and regional councils,
- 33 initiatives totalling \$2.3 billion from central government entities, and
- 54 initiatives totalling \$2.9 billion from council-controlled organisations. (State owned entities and other private sector infrastructure providers have not indicated any initiatives that are planned to enter procurement over the next 12 months.)

The initiatives in procurement and expected to enter procurement in the next 12 months are projected to contribute between \$340 to \$740 million spend per quarter through to mid-2029.

The Pipeline includes a further 4,843 initiatives totalling \$152.1 billion in expected costs (including \$49.8 billion of initiatives that have a funding source confirmed). These initiatives are either recorded as expected to enter procurement after 30 June 2026, or have been submitted to the Pipeline without a reliable indication of expected procurement timing. Many of these initiatives in early planning are expected to change – some will not receive funding.

- 3,534 initiatives totalling \$18.8 billion were from local and regional councils,
- 589 initiatives totalling \$96.7 billion from central government agencies, and
- 720 initiatives totalling \$36.6 billion from state owned entities, private organisations and council-controlled organisations.

Projections show these initiatives could add \$1.2 to \$3 billion spend per quarter through to 2033 and then a further \$2.5 to \$3.8 billion through to 2036.

Where to learn more



Login or register for access at
insights.tewaihang.govt.nz



Learn more on our Insights Platform where you can gain access to a range of Pipeline insights and tools.

- Search the Pipeline, view estimated timings, and filter by project size, sector, location, and more.
- Download Pipeline information for initiatives that have not been provided in confidence.
- Uncover the workforce and occupations that would be needed to deliver the initiatives Pipeline.

You may notice some changes in our visualisation tools this quarter as we have migrated our supporting technology. We will continue to improve the presentation of the Pipeline and our insights. If you experience any issues or ideas – please let us know using the Pipeline email address.

Drivers of change in value between quarters

Value of initiatives with confirmed funding sources increased by \$13.5 billion

Transparent reporting of funding status enables the Commission to build a clearer view of committed investment and provide a better signal to the construction market of what is being planned with insights into the relative certainty of initiatives proceeding.

The net effect of all changes from March was an increase of \$13.5 billion in Pipeline value for initiatives with confirmed funding sources, this is highlighted in Figure 3.

- \$8 billion (43%) of the increases in Pipeline value for initiatives with confirmed funding sources came from existing contributors providing additional initiatives (some will be new projects; others will be improved

reporting). Around two thirds of this value comes from NZTA state highway maintenance and low-cost low-risk programmes, and Department of Correction's Christchurch men's prison and Hawkes Bay prison redevelopment initiatives.

- \$7 billion net increase came from initiatives changing from having no funding source confirmed to having funding a source confirmed, and from projects having a confirmed funding source to having no confirmed funding source (i.e. the reverse). This change in value primarily came from NZTA adjusting the funding status of many of the RONS initiatives in the Pipeline.
- \$2.1 billion from completed initiatives being removed from the forward Pipeline.

Total value of all initiatives in the Pipeline increased by \$30.2 billion

The main drivers of the change in the total expected costs of initiatives in the Pipeline from March 2025 (\$206.9 billion) to June 2025 (\$237.1 billion) are outlined in the list below and highlighted visually in Figures 3 and 4.

Increases in total Pipeline value	Decreases in total Pipeline value
<ul style="list-style-type: none">• \$1.4 billion from new organisations providing information• \$24.9 billion from existing contributors providing additional initiatives• \$10.3 billion from adjustments in the reported value of existing initiatives	<ul style="list-style-type: none">• \$2.1 billion from initiatives completed during the quarter• \$600 million from initiatives cancelled during the quarter• \$2.8 billion from adjustments in the reported value of existing initiatives

We are committed to working with Pipeline contributors to improve information quality. Quality adjustments resulted in a net decrease of \$800 million in Pipeline value.

Together, contributors added \$26.3 billion of new initiatives to the Pipeline in June. A large portion of this increase came from funded and future initiatives relating to New Zealand-wide state highway maintenance activity spanning 2024-2034, and low-cost-low-risk transport programme activity spanning 2023-2030. This is the first time we have been able to include this information in the Pipeline and represents an important step towards improving transparency of maintenance work and the Pipeline’s ability to explain intended infrastructure investment over the next 10 years.

Adjustments to previously reported initiatives had a net result of adding a further \$7.5 billion in value. Over 60% of this increase was driven by a change in approach to reporting to better reflect the full potential costs and scope for initiatives, rather than by a change in initiative scope or cost.

Figure 4 illustrates the total change in Pipeline value in June inclusive of all initiatives, regardless of funding status, or their progress through the planning and delivery lifecycle.

The value of initiatives with a confirmed funding source increased due to new initiatives added to the Pipeline, increases in expected initiative cost, and initiatives' funding status progressing

Changes in Pipeline value for initiatives with confirmed funding sources, March 2025 – June 2025



Contributors drive an increase in total Pipeline value through adding new initiatives and recording increases in value of existing initiatives

Changes in total Pipeline value including unfunded initiatives, March 2025 – June 2025



Adjustments to expected costs of initiatives

Figures 3 and 4 highlight that changes to the expected cost of existing initiatives are a large driver of change in Pipeline value. Cost estimates for initiatives in early planning stages are typically lower-confidence. However, these early project stages are also the easiest time to accommodate change to these initiatives.

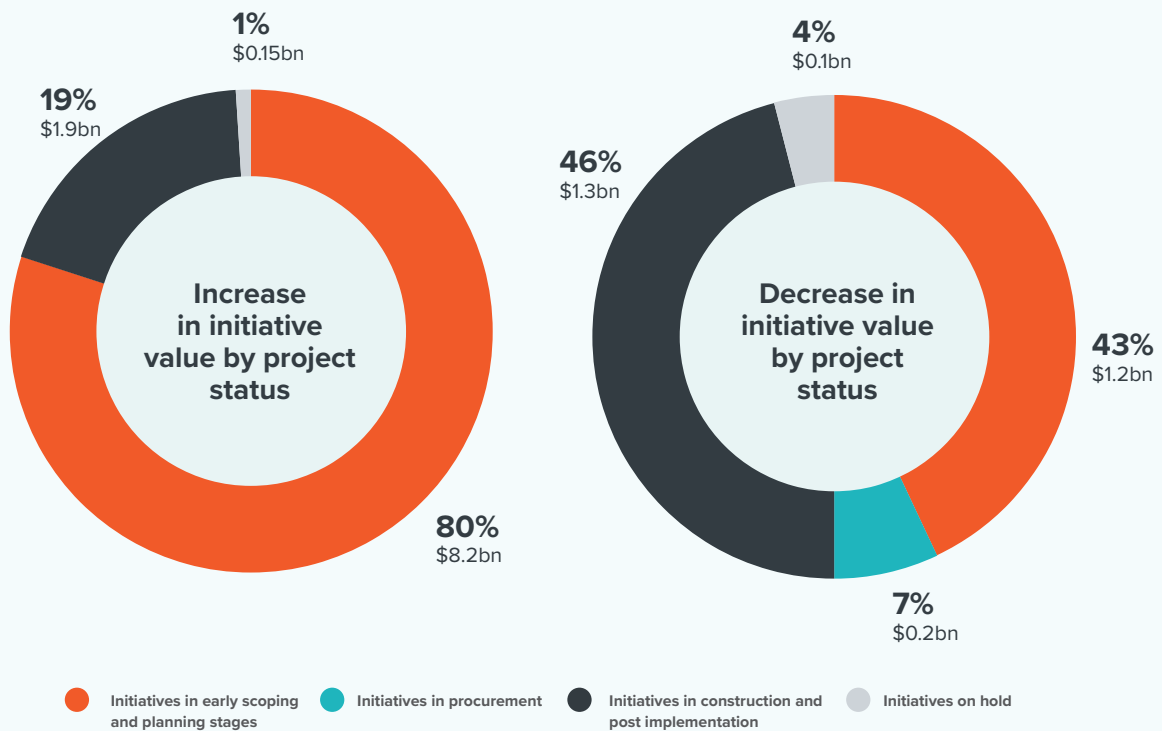
In the June update, changes to initiatives in early scoping and planning stages accounted for 80% of the \$10.3 billion increase in the expected costs for existing initiatives. A further 19% came from initiatives in construction and post-implementation.

Initiatives in early scoping and planning stages accounted for 43% of the \$2.8 billion decrease in the expected costs from existing initiatives, while 46% came from initiatives in construction or post implementation stages.

Changes in expected costs can be driven by a change in approach to reporting to better reflect potential costs for full initiatives, rather than by a change in initiative scope. We continue to work with contributors to standardise and align their reporting processes.

Most adjustments in initiative value occur in early planning stages

Project status for Pipeline initiatives that increased or decreased in reported value since March 2025.



Projected spend by sector

Each quarter we model the projected spend to deliver initiatives in the Pipeline. The projections include all Pipeline initiatives regardless of funding status except for initiatives reported as 'under review' and 'on hold' which have been excluded. The shape of the projections reflects that both initiative demand and certainty naturally decrease over the planning horizon. We can also see how the rate of the decrease varies across infrastructure sectors. Factors such as the relative size of an individual initiative to the size of the market, initiative scope, and initiative complexity influence how far ahead initiatives are typically planned within each sector.

The June 2025 update shows a total of \$17.5 billion in projected potential spend across the 2025 calendar year. This figure is a \$0.9 billion increase in projected spend for 2025 relative to our previous projections using March 2025 Pipeline information. The projected spend for 2026 is currently \$16.6 billion. These figures are expected to rise as near-term projects are planned and submitted to the Pipeline.

Commission research indicates over the last 20 years, New Zealand spent an average of 5.8% of gross domestic product (GDP) on infrastructure. The \$17.5 billion in projected spend for 2025 equates to around 4.1% of GDP and highlights the level of infrastructure activity included in and explained by the Pipeline in the near term. Our modelling for 2025 – 2035 indicates that for Pipeline initiatives with confirmed funding sources, three quarters of projected spend will occur within five years. This measure provides a benchmark of how far ahead we are making commitments in aggregate across the Pipeline.

Building the forward view

We continue working with our contributors to improve the visibility of lower-certainty initiatives that are earlier in the planning cycle and are currently unfunded. A more complete Pipeline with a transparent longer-term view of expected activity becomes a powerful tool to support scheduling and assessment of project deliverability in addition to funding and policy decisions.

The improved visibility of lower-certainty initiatives is shown more clearly in Figures 6 and 7, where in 2029 the balance of projected spend shifts from spend for initiatives that are largely in delivery and planning with confirmed funding sources, to spend for initiatives that are in early planning stages without confirmed funding sources.

Spend by sector

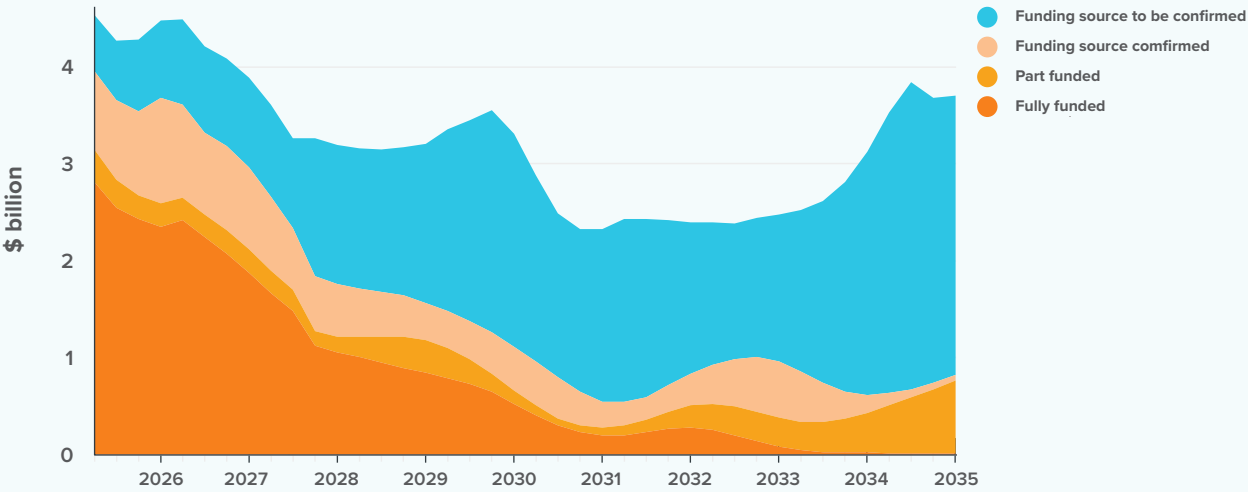
Figure 8 illustrates projected spend by infrastructure sector. Spend in the transport sector (including road, rail, ports, and airports) dominates the Pipeline over the next 10 years. In 2025 transport spend accounts for \$9.6 billion or 55% of total projected spend. Annual spend for all initiatives in this sector remains above \$5 billion across the 10-year spend period. Over the next 10 years the total projected transport spend is \$76.3 billion or 59% of spend across all sectors.

The water sector accounts for \$3.4 billion or 19% of projected spend in the 2025 calendar year. Projected annual spend in the water sector fluctuates between \$1.5 billion and \$3.7 billion between 2025 and 2032 and, based on current submitted information, drops to \$0.6 billion in 2033. Local councils will be well advanced in the development of their water services delivery plans, due 3 September 2025. As these new water entities form up and become operational, we expect to see improvement in the completeness of water delivery programmes submitted to the Pipeline.

The spend projections will continue to evolve as projects are adjusted, scheduled, and completed, new projects are planned and added, and as new contributors provide project information to the Pipeline.

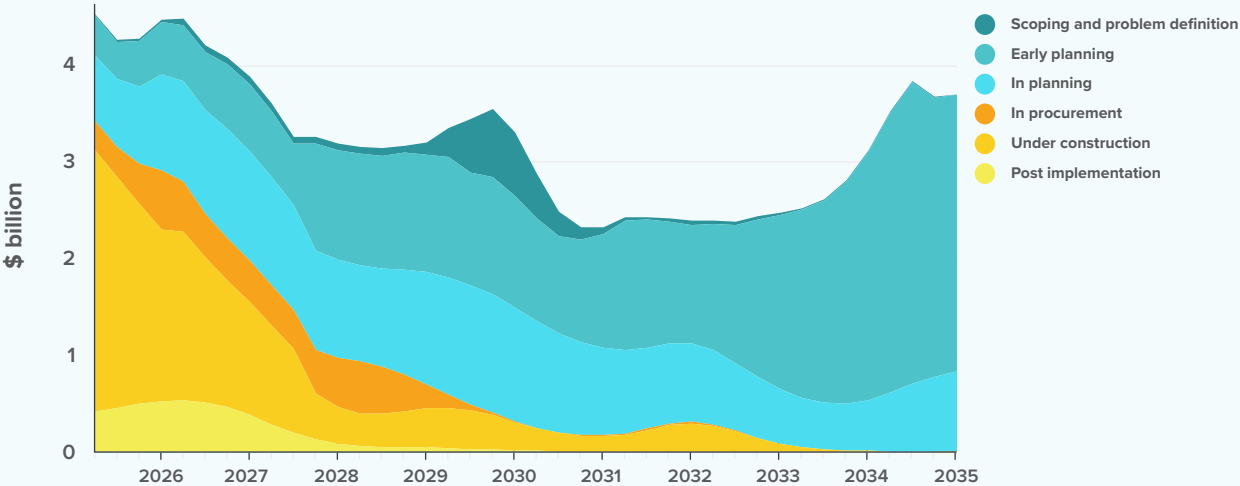
Approximately half of projected spend in the next ten years is funded or has a confirmed funding source

Projected quarterly spend by funding status, 2025 – 2035



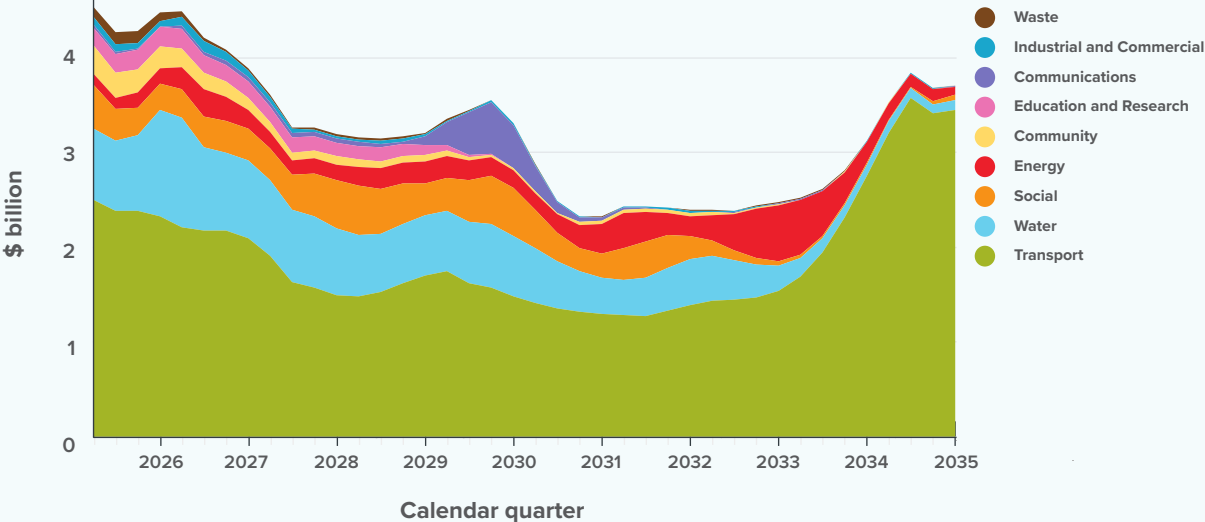
Most unfunded spend comes from projects in early planning stages

Projected quarterly spend by project status, 2025 – 2035



Transport sector spend is projected to dominate infrastructure investment over the next ten years

Projected quarterly spend by sector, 2025 – 2035



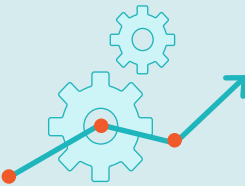
The workforce needed to deliver the Pipeline

The infrastructure workforce is part of the wider construction workforce, much of which is dominated by housing construction activity. Around one third of the construction workforce works in infrastructure. An early view of workforce demand (and measures of forward certainty) is important for planning, coordination, and scheduling of work. It also helps training institutions, the construction sector, and regions to make more informed and careful decisions on investments in developing the skills and workforce that will be needed.

Each quarter we model the workforce required to deliver the initiatives in the Pipeline. Figure 9 illustrates the national workforce demand by occupation group.⁴

The workforce numbers presented in the projections below include estimates of both full-time and part time workers needed for all Pipeline initiatives⁵ regardless of initiative funding status. These workforce projections will continue to change, as new initiatives are planned across the horizon and this information is submitted to the Pipeline.

Interactive tool



Pipeline workforce projections

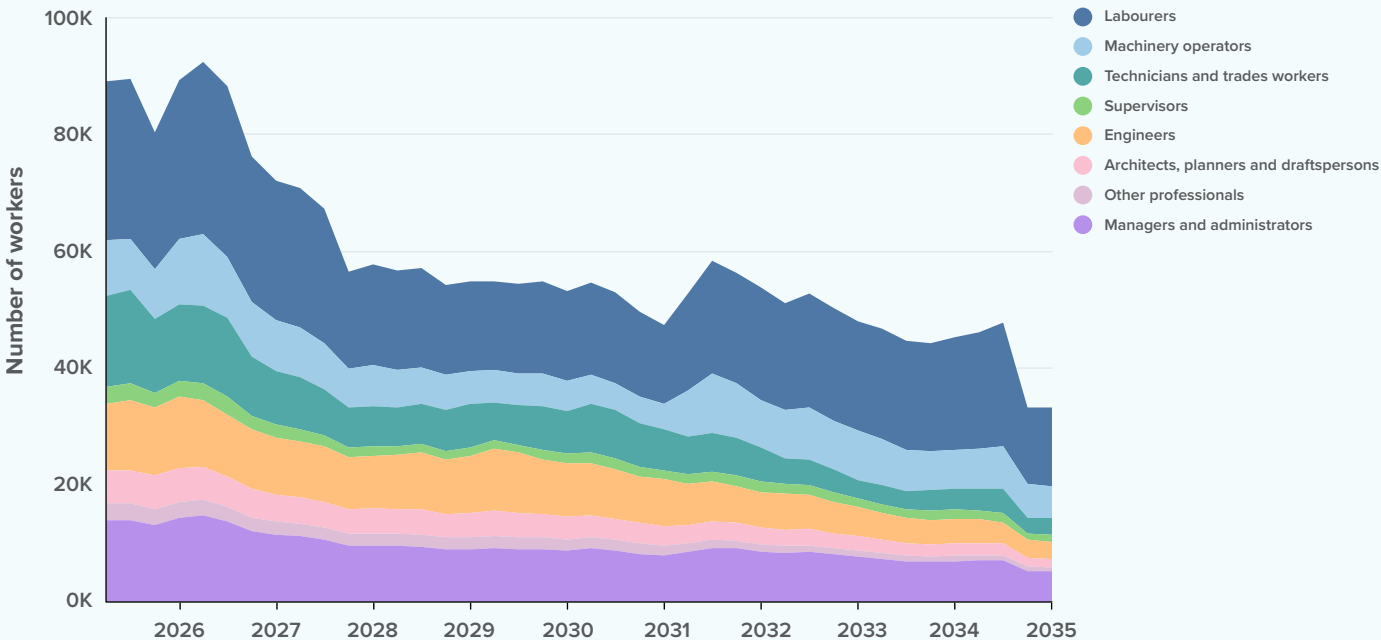
Learn about the projected workforce demand by occupation, for your region, sector, or industry on our insights platform.



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Projected workforce required to deliver Pipeline initiatives

Workers each quarter by occupation group, 2025 – 2035



⁴ Our workforce modelling currently uses a different model to the spend modelling and some differences may arise because of this. Over time we will integrate these two models.

⁵ Projections of the number of workers needed will generally be larger than the number of full-time equivalents needed due to the presence of workers that where their specialist skills only required for part of the time.

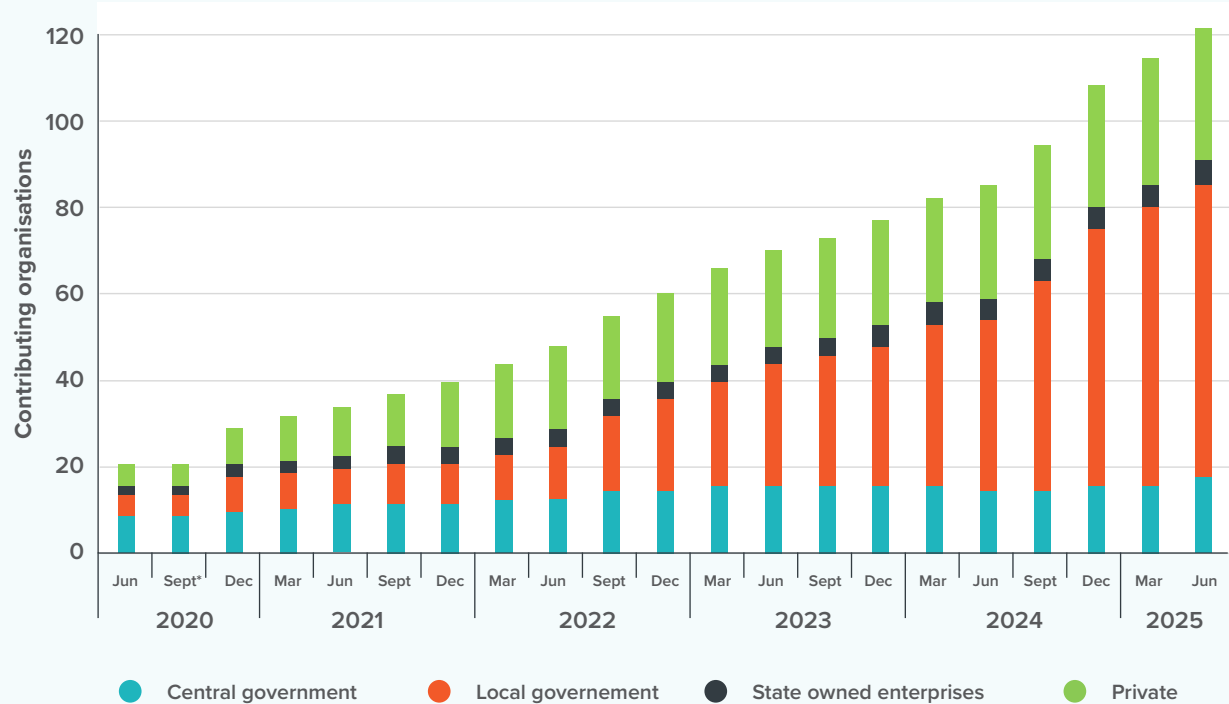
Towards a complete Pipeline

Te Waihanga first published the Pipeline in June of 2020 to support statutory functions required under the New Zealand Infrastructure Commission/Te Waihanga Act 2019.

The Pipeline continues to build towards a trusted and complete view of current and planned infrastructure investment activity in New Zealand.

Pipeline contributors grew by 42% in the last 12 months

Pipeline contributors, June 2020 – June 2025 ⁶



⁶The Pipeline update process was not run in the September quarter of 2020.

The June 2025 quarter lifted our contributors to 121 organisations, up 42% on 12 months ago. Pipeline contributors include 18 central government organisations, 6 State owned enterprises, 4 electrical lines companies covering 54% of the installation control points (ICPs) ⁷, and 67 councils (86% of councils across New Zealand).

Local government organisations are responsible for providing many important infrastructure services at a local and regional level. Our council contributors represent 95% of all rates revenue collected and are illustrated in Figure 11. We continue to work with these organisations to improve quality of the information in the Pipeline.

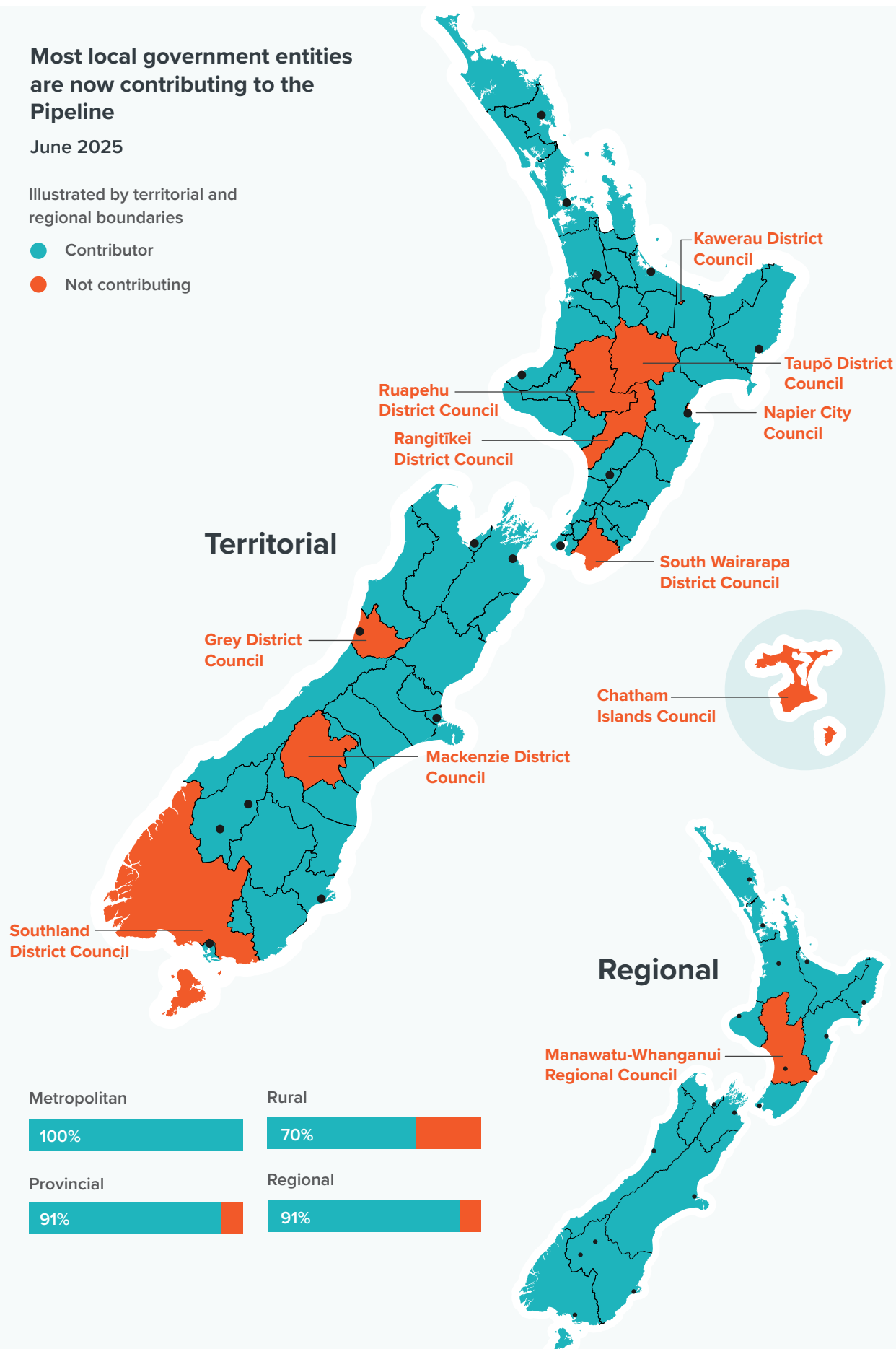
⁶ In Figure 6 Central government includes Crown entities; state-owned enterprises include mixed-ownership models; private organisations includes council-controlled organisations and universities.

⁷ An ICP is an installation control point or the point of connection to an electricity network where an electricity retailer is deemed to supply electricity to a consumer.

June 2025

Illustrated by territorial and regional boundaries

- Contributor
- Not contributing



Join the Pipeline

If your organisation is responsible for infrastructure, and your projects are not in the Pipeline, or you are new in your organisation and want to know more, please contact the Infrastructure Commission and get your projects added and kept up-to-date via pipeline@tewaihanga.govt.nz.

Watch our [Introduction to the Pipeline webinar](#) and find out more about the role of the Pipeline, value to your organisation, submission process, and data requirements.

We appreciate your support as we continue to build a complete picture of infrastructure investment and project intentions from across New Zealand.

Improving the Pipeline information collection

The Pipeline integrates with other functions and programmes across government, informing decisions, and providing stakeholders with transparency on the forward works programme for infrastructure.

Information in the Pipeline evolves as initiatives progress, data maturity grows, value provided from the information increases, and the quality of information submitted by infrastructure providers improves. This creates a need for ongoing changes in the information we request and how we describe it to ensure the evidence base remains fit for purpose.

In March and June, we indicated that we would soon make structural changes to the Pipeline information request. These changes will be implemented after the National Infrastructure Plan has been finalised.

The upcoming changes will:

- Improve the usability and structure of the submission template.
- Support greater nuance in reporting of funding status.
- Allow uncertainty in project dates and values to be indicated.
- Balance information requirements with template efficiency.

We aim to align the Pipeline information template and evidence base with existing standards or conventions or other departments reporting standards, where possible. The Commission is working with the Treasury, and Department of Internal Affairs, and other government stakeholders on information standardisation.