



Teletrac Navman x
Civil Contractors NZ

2025 Construction Industry Survey



Dan from Taylors Contracting at Hira Forest Nelson,
"best part of building infrastructure in forestry is
the early starts before the sun comes up."

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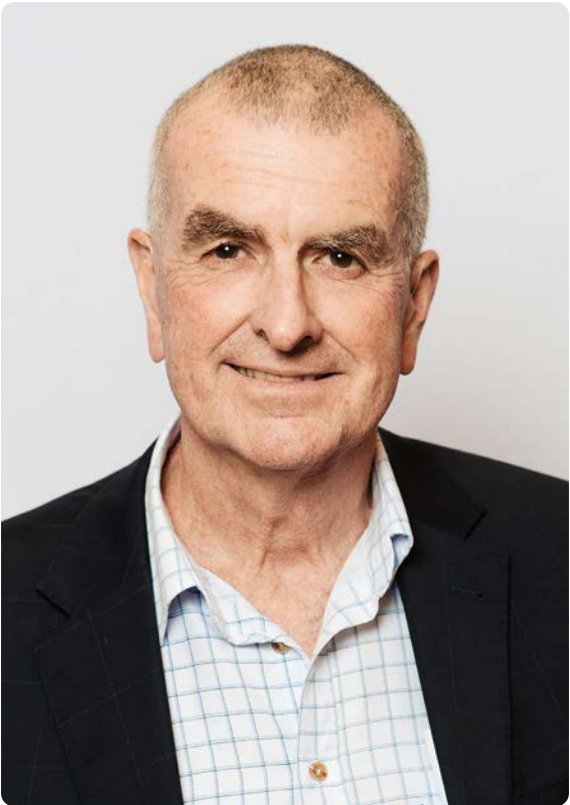
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Alan Pollard
Chief Executive,
Civil Contractors New Zealand



James French
Construction Industry Specialist,
Teletrac Navman

Foreword

This is the ninth Construction Industry Survey - a research partnership between Civil Contractors New Zealand (CCNZ) and Teletrac Navman.

Our research helps to build a picture of New Zealand’s civil construction industry and the experiences of those within the industry. The results shed light on the state of the civil construction industry and its outlook for the future, as well as stimulating discussion on industry views amongst private and public organisations, local and central government.

KEY INSIGHTS

The 2025 Construction Industry Survey reveals a landscape characterized by varied expectations and significant challenges. The good news? Opportunity for growth.

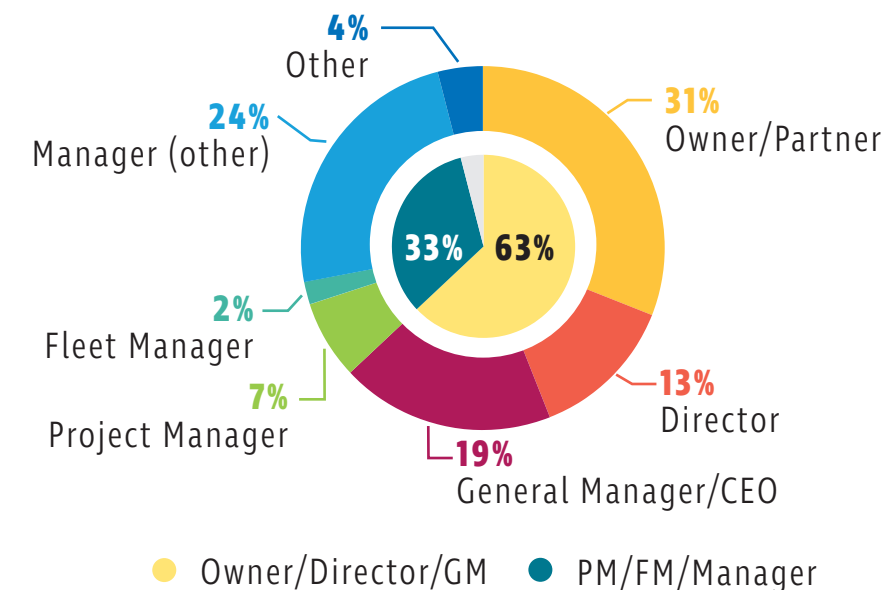
With insights from civil construction industry professionals across New Zealand, it helped identify:

- Confidence continues to decline across several key areas of the NZ civil construction industry since 2021 as the current positive outlook for the industry has dropped from 50% to 16%.
- The perceived positive impact of a clearer pipeline remains high, with 85% believing that a development of a clearer pipeline of central and local government work would have a positive impact.
- A steady decline in the confidence of new technologies to improve business efficiency to overcome stated challenges, however, 60% of respondents have cited the use of mandating technology onsite as a strength to win work.
- Small and Medium Businesses are scoring low in confidence with the civil construction industry, with less than half (46%) confident in the ability of their business to withstand change and overcome the challenges faced.
- The labour market has softened, with 42% of respondents decreasing staff numbers over the past year.
- 73% citing a lack of work for contractors (an increase from just 15% in 2021).

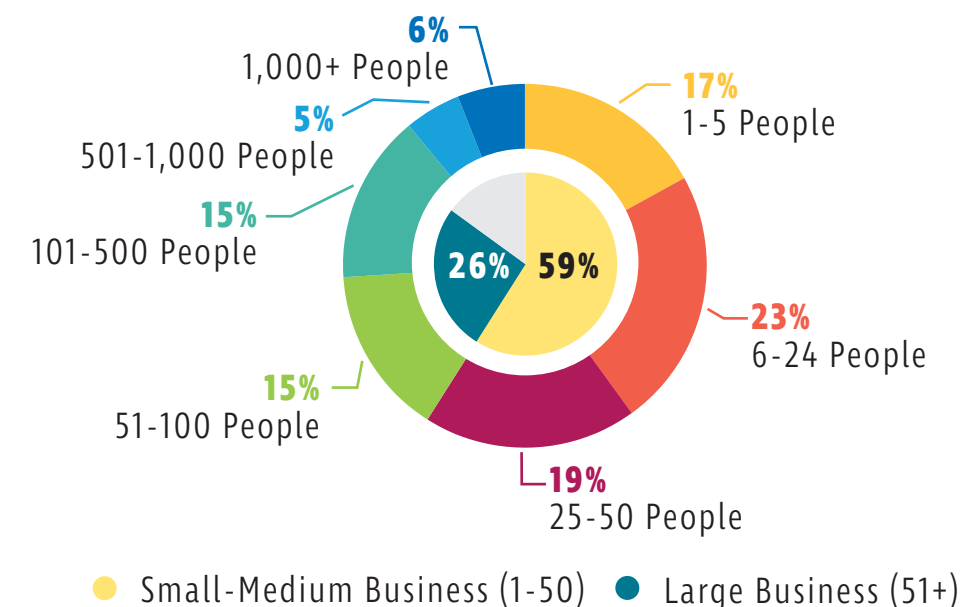
Demographics And Methodology

172 adults from the civil construction industry took the online survey from 25 May – 22 June 2025.

Position/Role



Number of People in Business



What is your position/role in your business? Base n=172
Approximately how many people work for your business? Base n=170



Bronson from Bosco, at Wellington - Team gathering for a special day remembering a fallen driver.

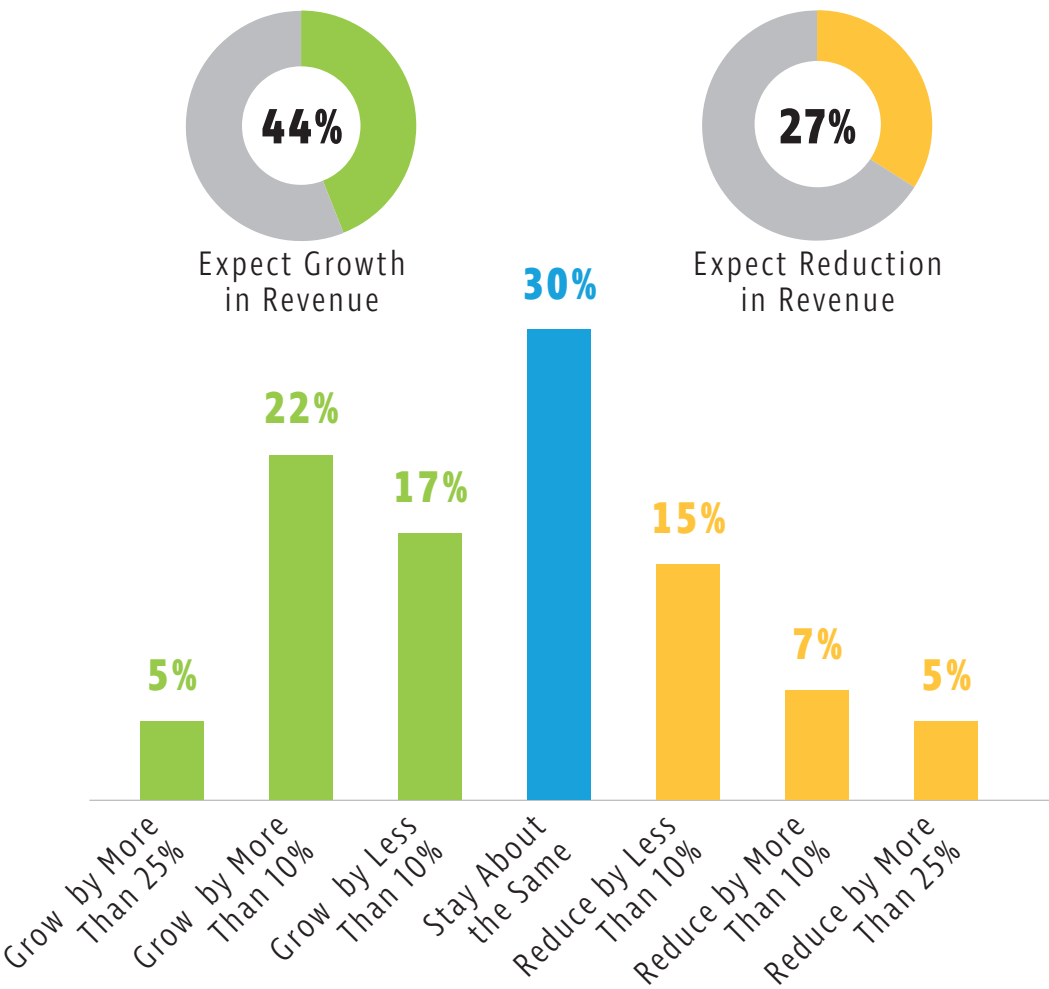
Industry Outlook and Confidence

Zara from CMT Group, at Blenheim - Staff member getting stuck in doing trenching work to improve Blenheim Infrastructure.

Revenue Expectations

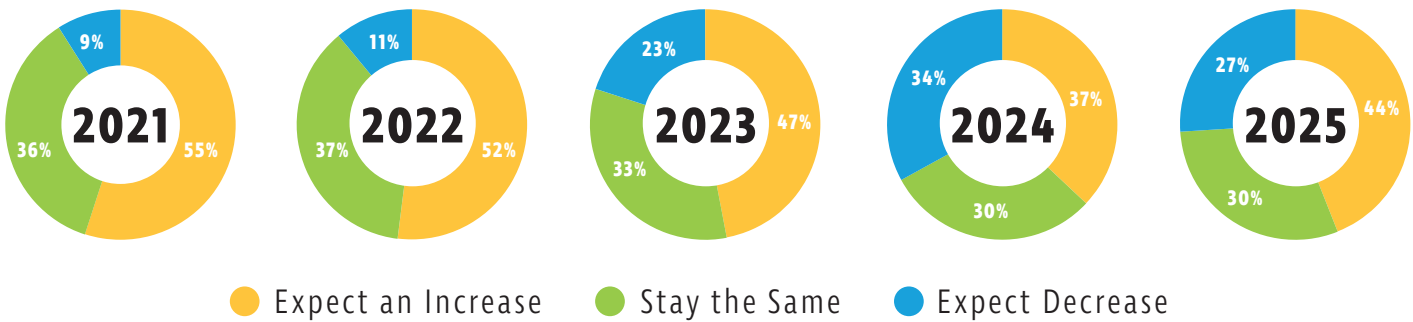
While there are signs market conditions are improving, expectations around revenue growth remain low.

Revenue Expectations (next 12 months)



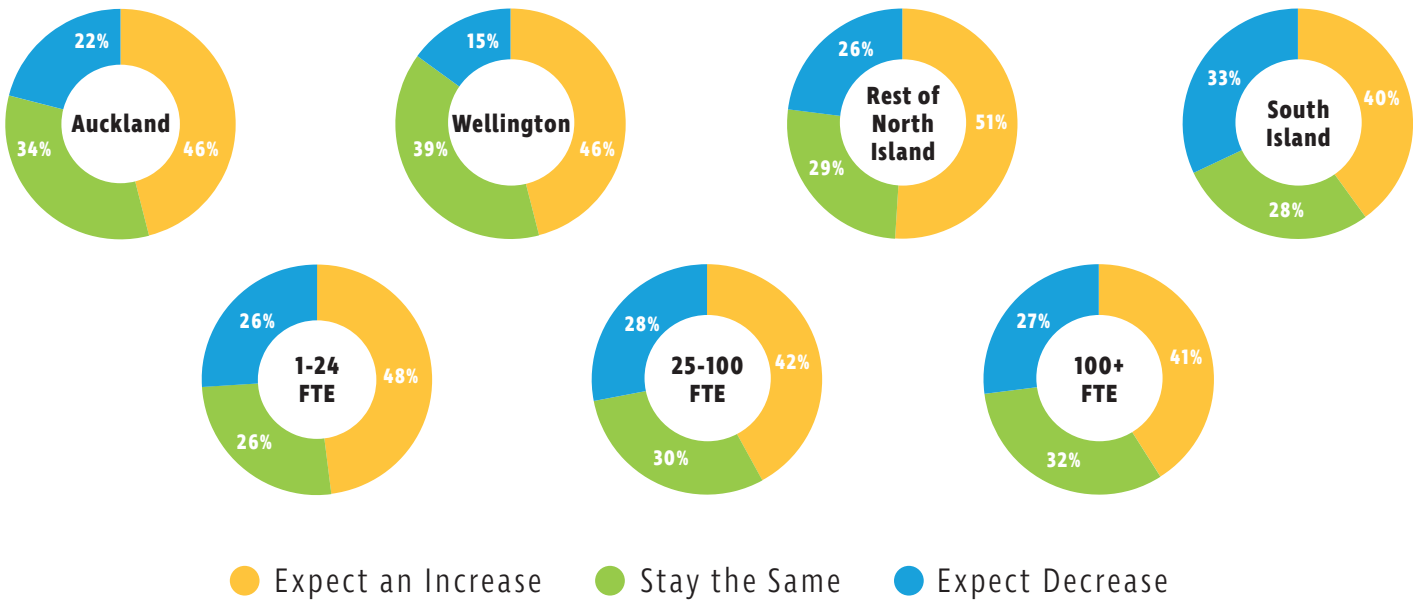
Revenue Expectation

Trended



Revenue Expectation by Region and Business Size

FTE Count



Do you expect that your business turnover (revenue) will grow, stay about the same, or reduce in the next 12 months? Base Total Sample n=172
Base 2024 n=226, 2023 n=198, 2022 n=226, 2021 n=161; Auckland n=49, Wellington n=13, Rest of North Island n=35, South Island n=73, 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44

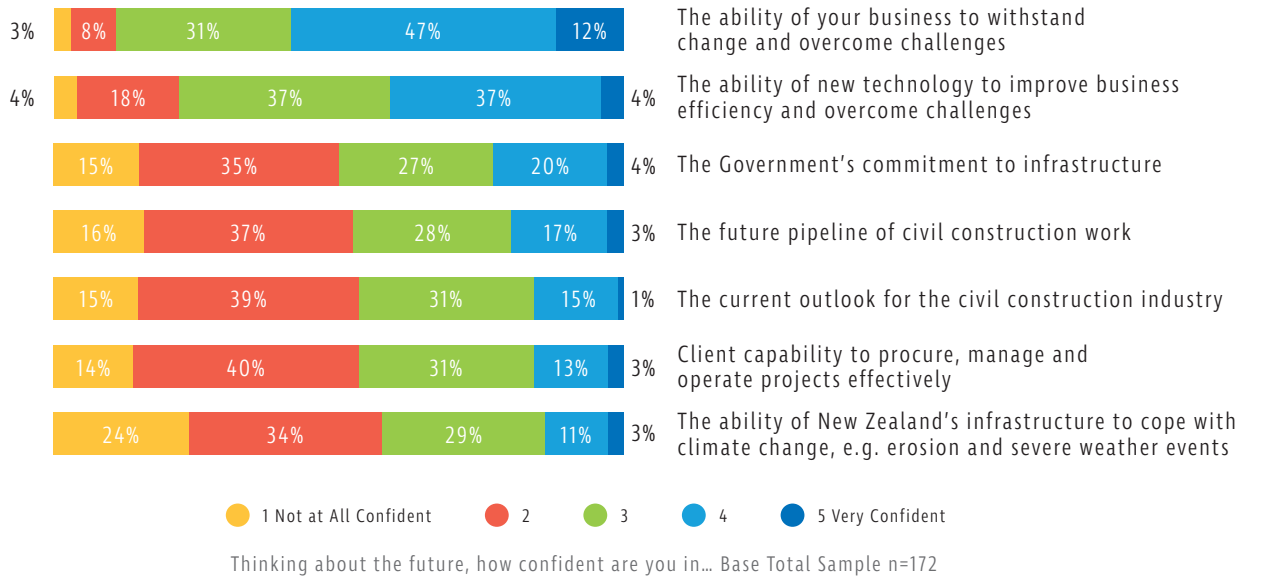


Dan from Taylors contracting, at Hira forest Nelson, Clearing a slip that blocked road, climbed to the top and benched the slip down and around 800 truckloads.

Industry Confidence

Surveyed business were most confident about their ability to withstand change and overcome challenges. However confidence in NZ's infrastructure to cope with climate change is low.

Confidence



Confidence - Trended

Confidence in the current outlook for the industry and the future pipeline of work has continued to fall significantly.



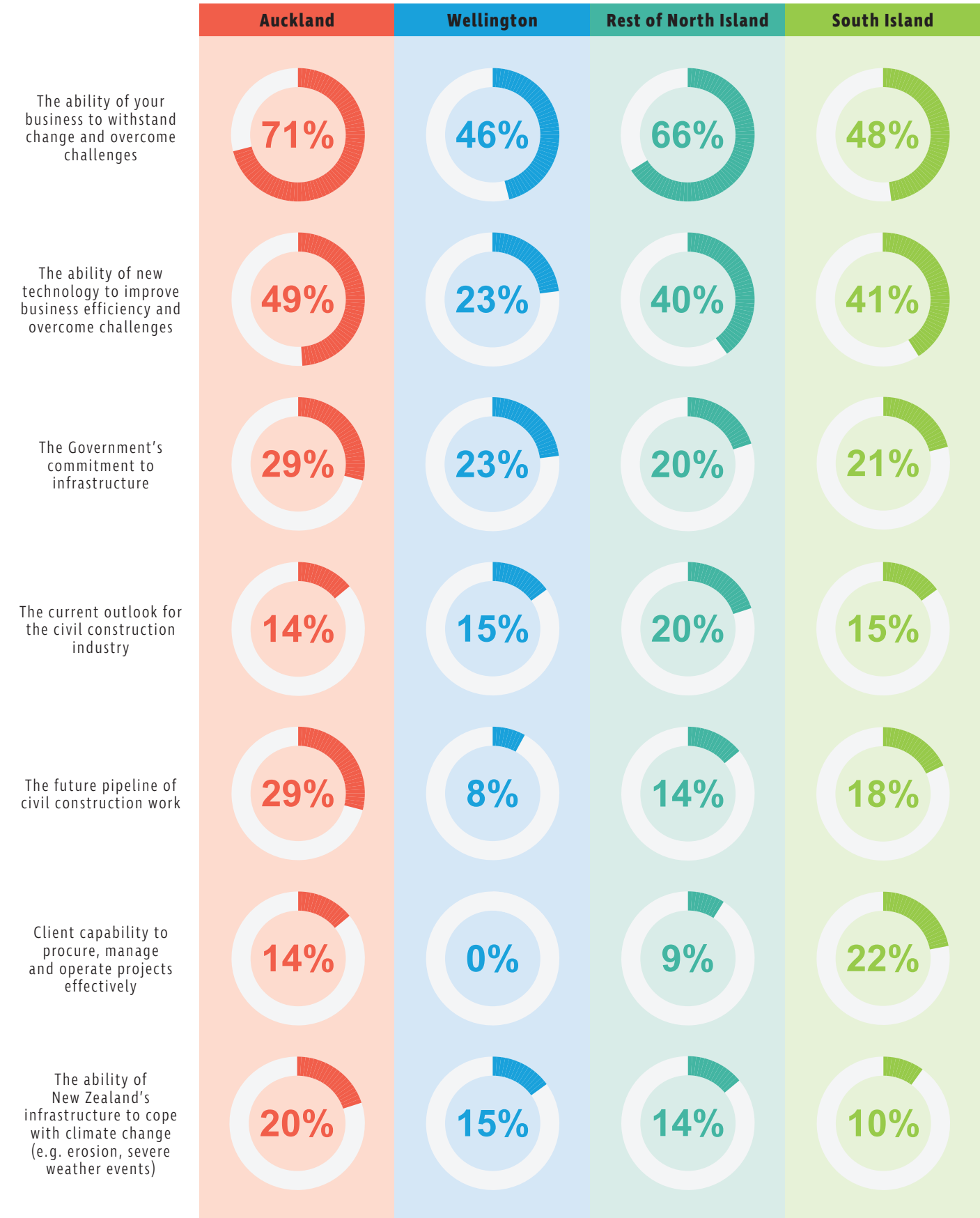
Thinking about the future, how confident are you in...
Base 2024 n=-172, 2024 n=226, 2023 n=198, 2022 n=226, 2021 n=161



Hamish from HGM Construction, at Christchurch Adventure Park - HGMs Maeda 10.5 ton crawler crane set up ready to stand an Attentis monitoring pole with the chairlift return station in the background.

Confidence - by Region

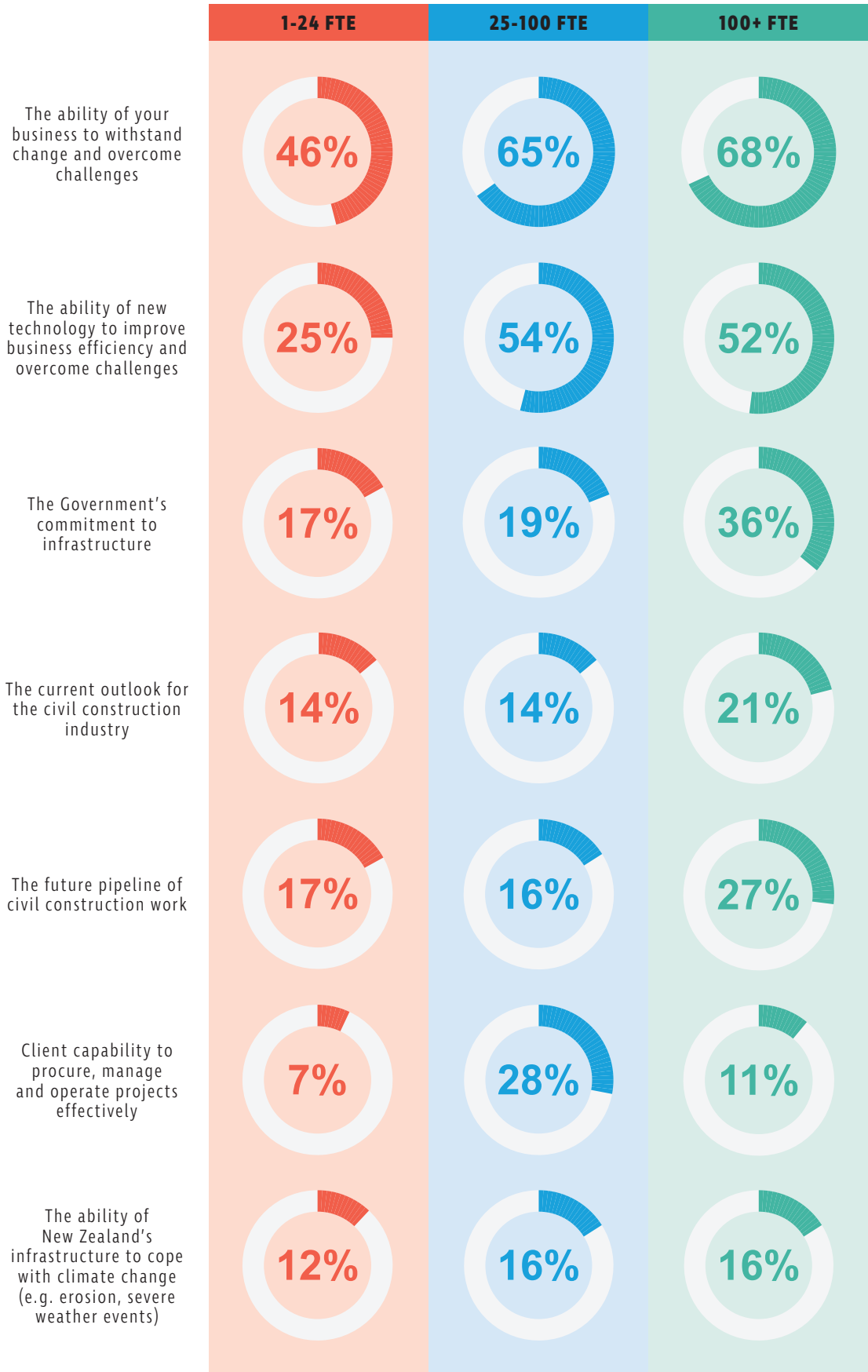
Larger businesses are more confident in their ability, and in the ability of new technology to withstand change.



Thinking about the future, how confident are you in...
Base Auckland n=49, Wellington n=13, Rest of North Island n=35, South Island n=73, 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44

Confidence - by Business Size

FTE Count

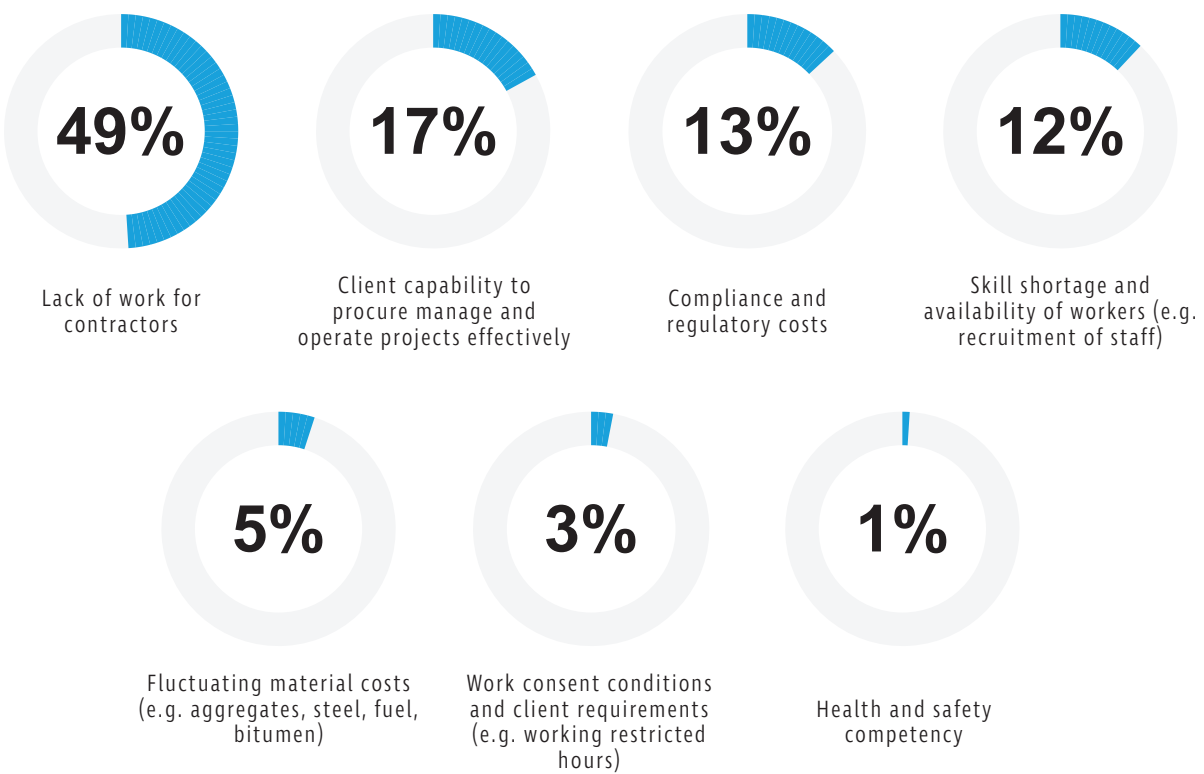


Thinking about the future, how confident are you in...
Base Auckland n=49, Wellington n=13, Rest of North Island n=35, South Island n=73, 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44

Challenges

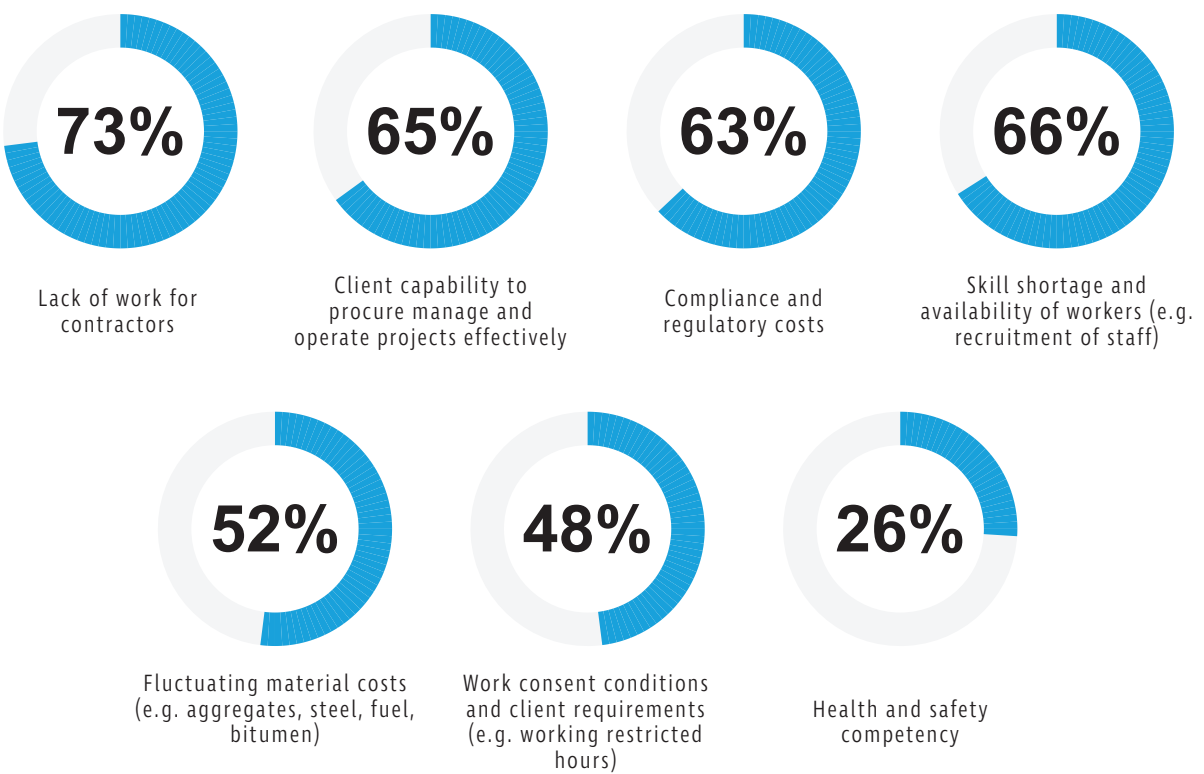
Main industry challenge is the lack of work for contractors.

Main Challenge

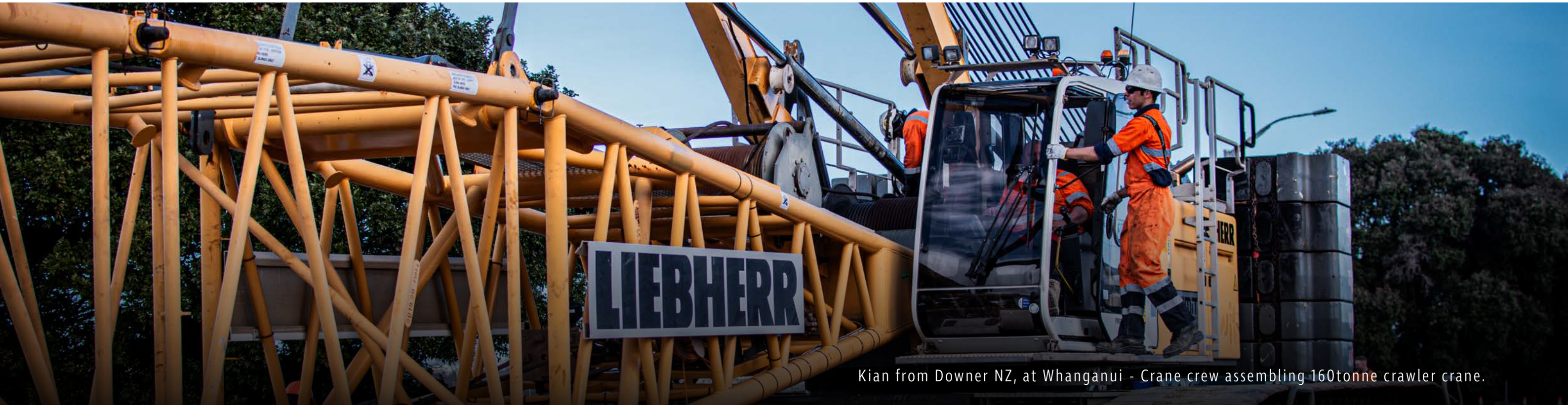


What is the main challenge in the construction industry? Base Total Sample n=172

Perceived Challenges to Industry Growth



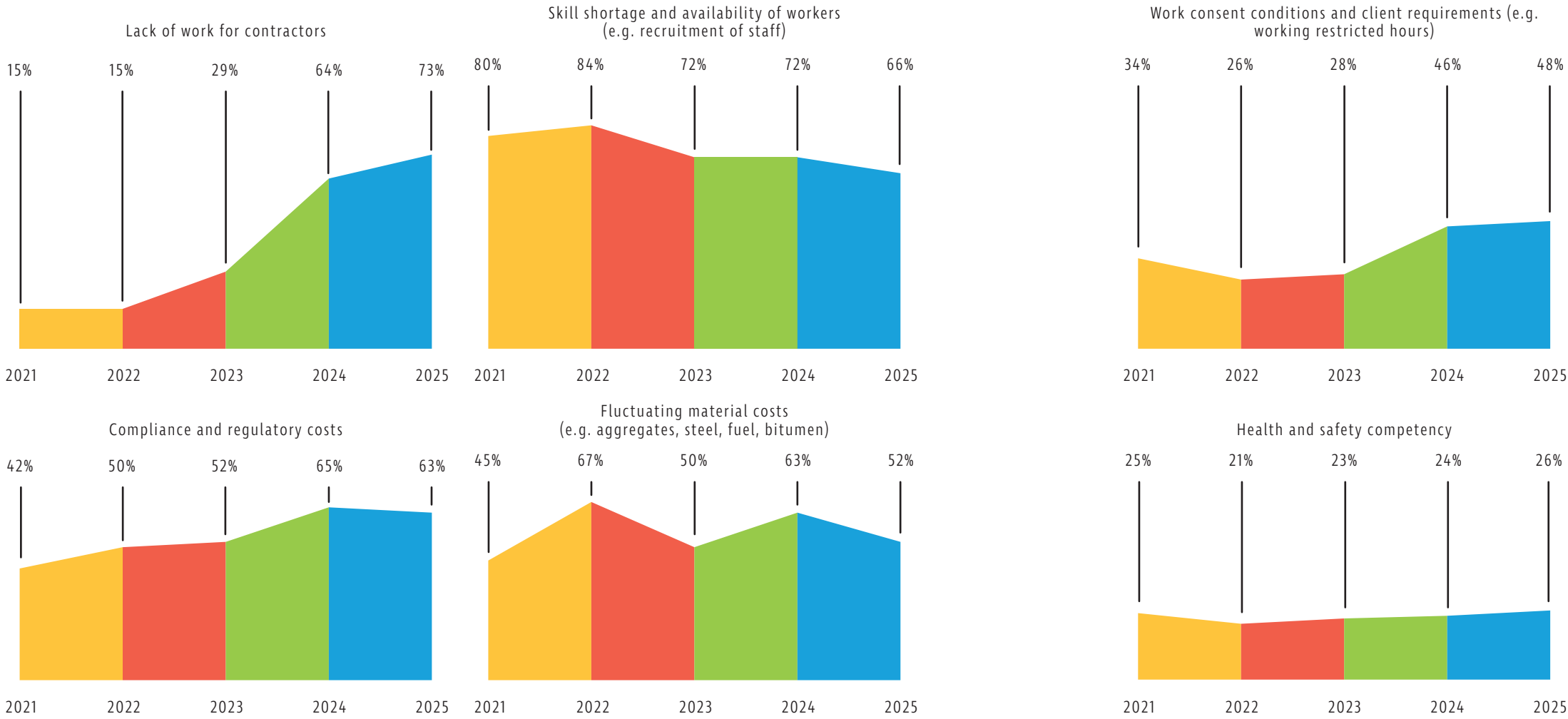
What challenges do you think the construction industry is facing for future growth? Base Total Sample n=172



Kian from Downer NZ, at Whanganui - Crane crew assembling 160tonne crawler crane.

Challenges - Trended

Lack of work for contractors has increased significantly as a challenge for the industry. Fluctuating material costs are less of a challenge compared to last year.



What challenges do you think the construction industry is facing for future growth? Base 2025 n= 172, 2024 n=226, 2023 n=198, 2022 n=226, 2021 n=161



Olivier from Pro Magma, at Wiri - Early morning picture of our yard.



Phillip from Pipeline and Civil Limited, at North Auckland - Our amazing welder in his element assisting one of our sites. Pipeline on the new Highgate Bridge, welding a CLS steeled pipe to help connect the water supply from Milldale to Silverdale.

What Can Be Done to Overcome MAIN Challenge

Selected verbatim responses from respondents regarding main challenges

Lack of Work for Contractors

"The government needs to be investing more into infrastructure and reducing the red tape, stop putting extra costs onto NZ businesses."

"Need to run the councils and government departments more efficiently to reduce waste so they can put it into capital projects that make a difference."

"Depoliticise infrastructure and create 30 year+ pipelines so businesses and local government can plan and be sustainable."

"Effective management of longer-term work pipelines without the frequent changes and stops and starts that occur. Planning to ensure that investment is spread evenly over time to minimize ups and downs."

"Pipeline of workflow needs to increase for public works. Local government and central government to speed up consenting processes so private development can happen at a faster rate."

"Continuity between successive governments. Accountability to deliver pipeline of projects."

"Hurry up with consents to start all the bigger jobs like motorway extension jobs. It will stop big players sniffing around the medium size jobs which will open work flow. As of April, May and June I see a lot of bigger companies buying work which is a quick race to the bottom."

What do you think could be done to overcome the issue of ["Main-Challenge"]?



Michelle from E.N Ramsbottom Ltd, at Te Manuao Road, Otaki
- Laying a 355dia PE watermain for a new reservoir.

Skills Shortage and Availability of Workers

"Emphasis on value of trades in schools and opportunity for youth to get experience and insight to working in trades."

"Immigration laws need to change to make it easier to get skilled labour."

"Encourage young people to head into our industry."

"Better structured pipeline of infrastructure projects with minimum subcontractor delivery %'s, will allow the industry to retain skilled labour across the board rather than lose them to Australia."

"Give incentives to Kiwis working hard to stay in the country and not continue with the brain drain."

"Offer a competitive pay scale to retain our workers who we have spent time training here."

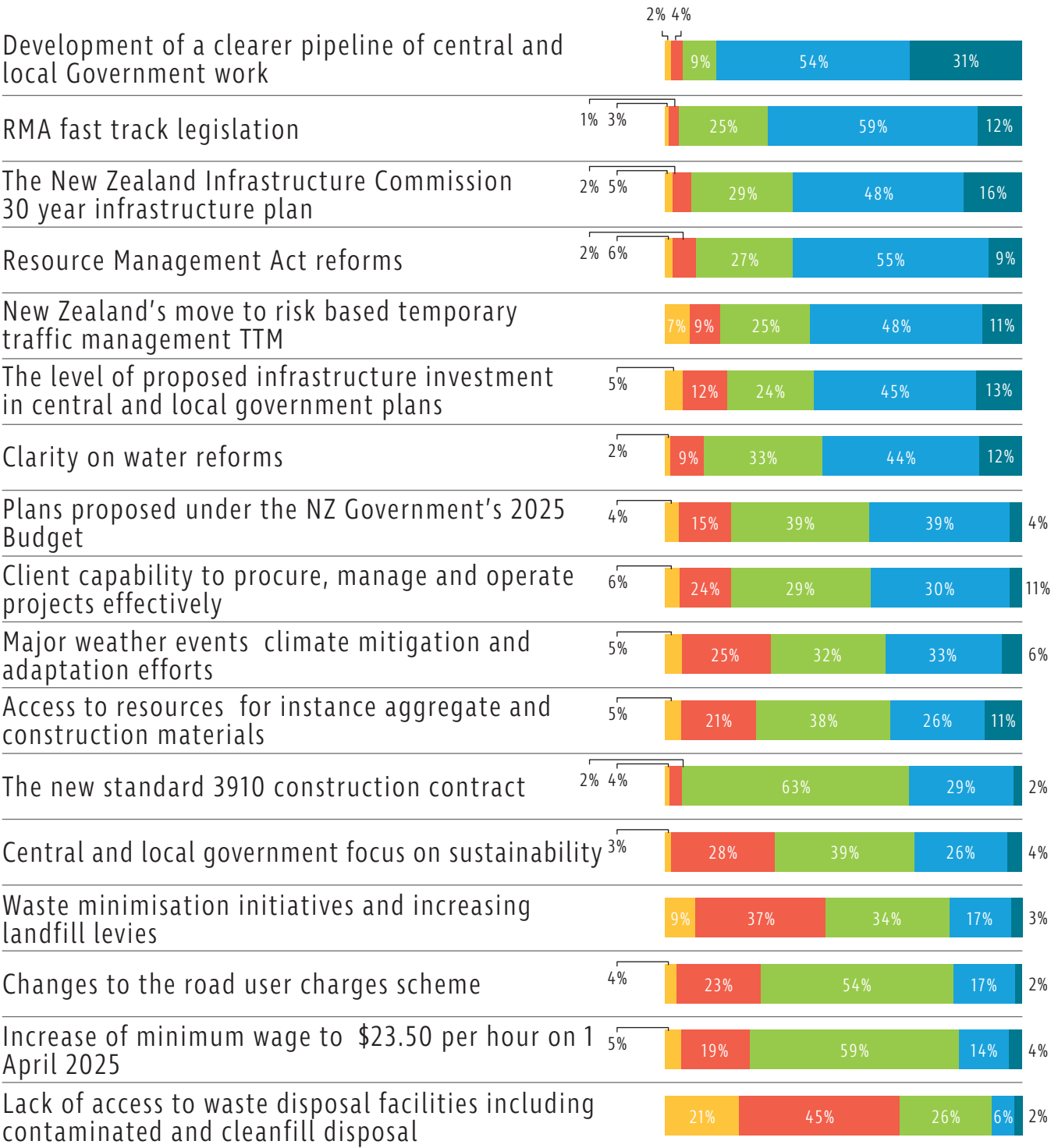
Industry Issues



Kian from Downer NZ, at Whanganui - Willy from Downer NZ is gas cutting steel to assemble a piling gate for a slip repair site along the Whanganui River.

Industry Issues

A clearer pipeline is seen as having the largest potential impact on business over the next 3 years.

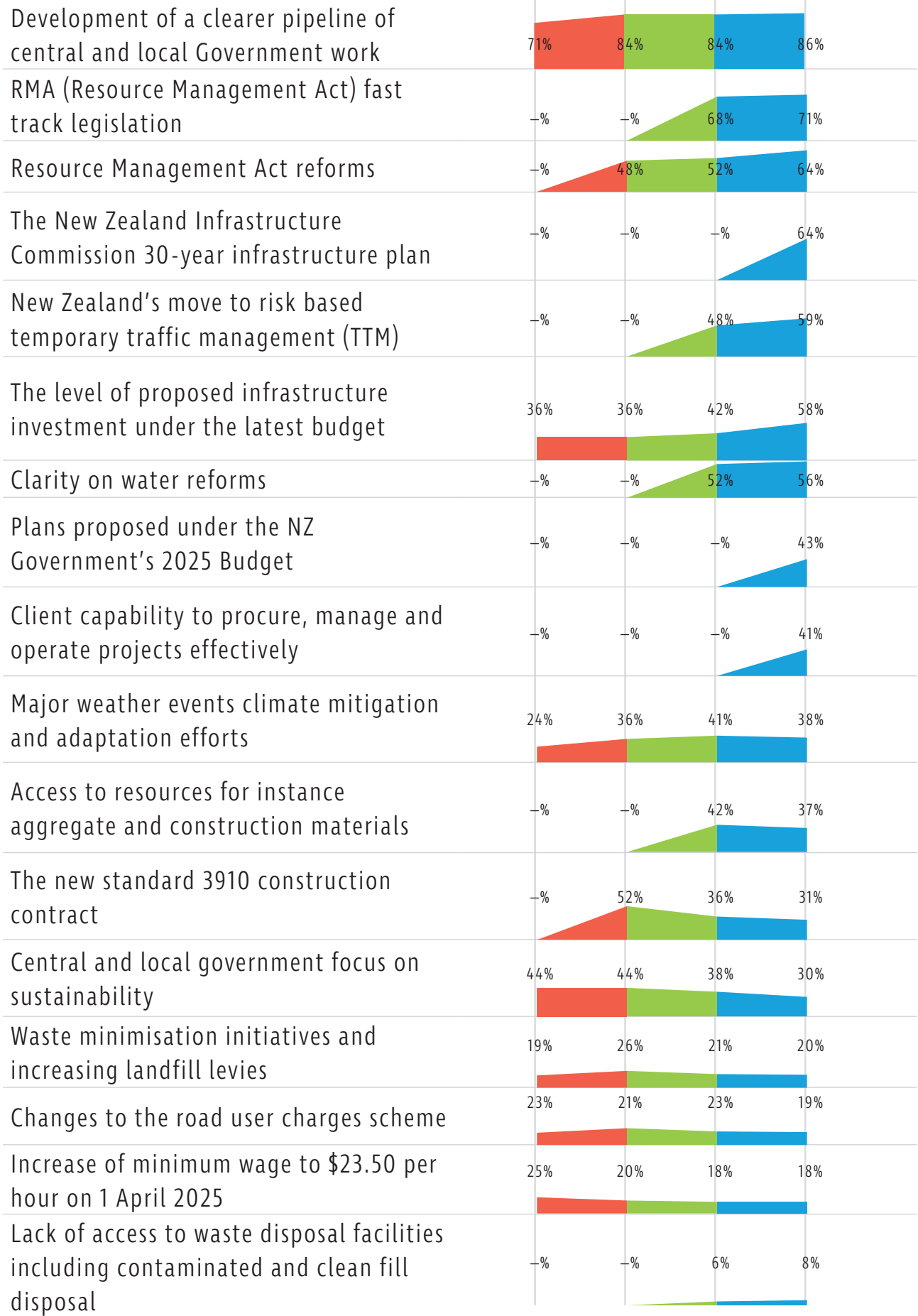


● A high negative impact ● A negative impact ● No significant impact
● A positive impact ● A high positive impact

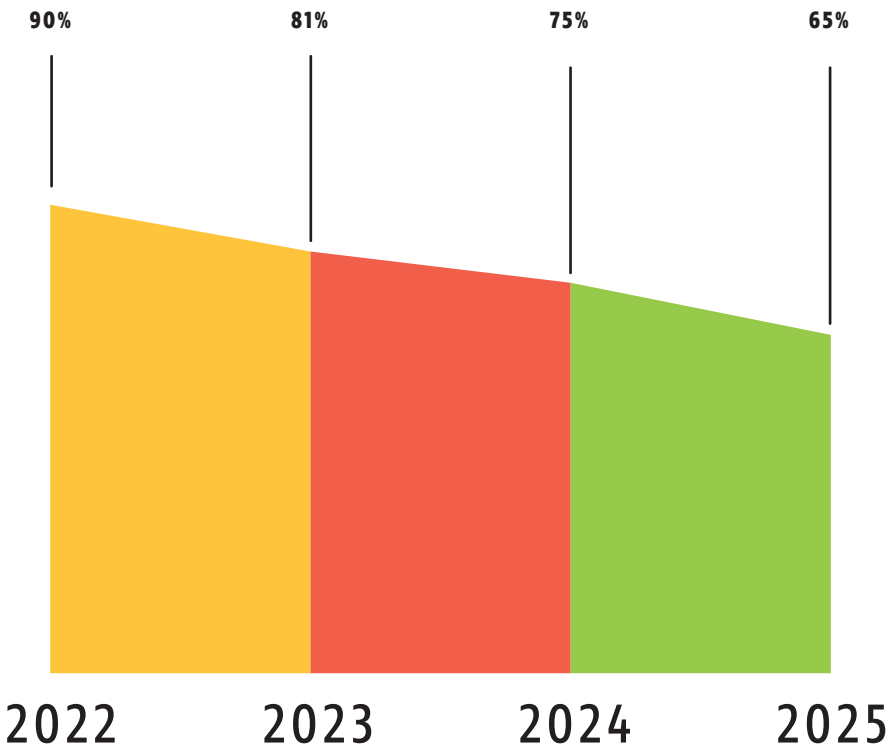
What impact do you think these actual or potential issues/events could have on your business in the next three years?
Base Total Sample n=172

NET POSITIVE IMPACT

Trended



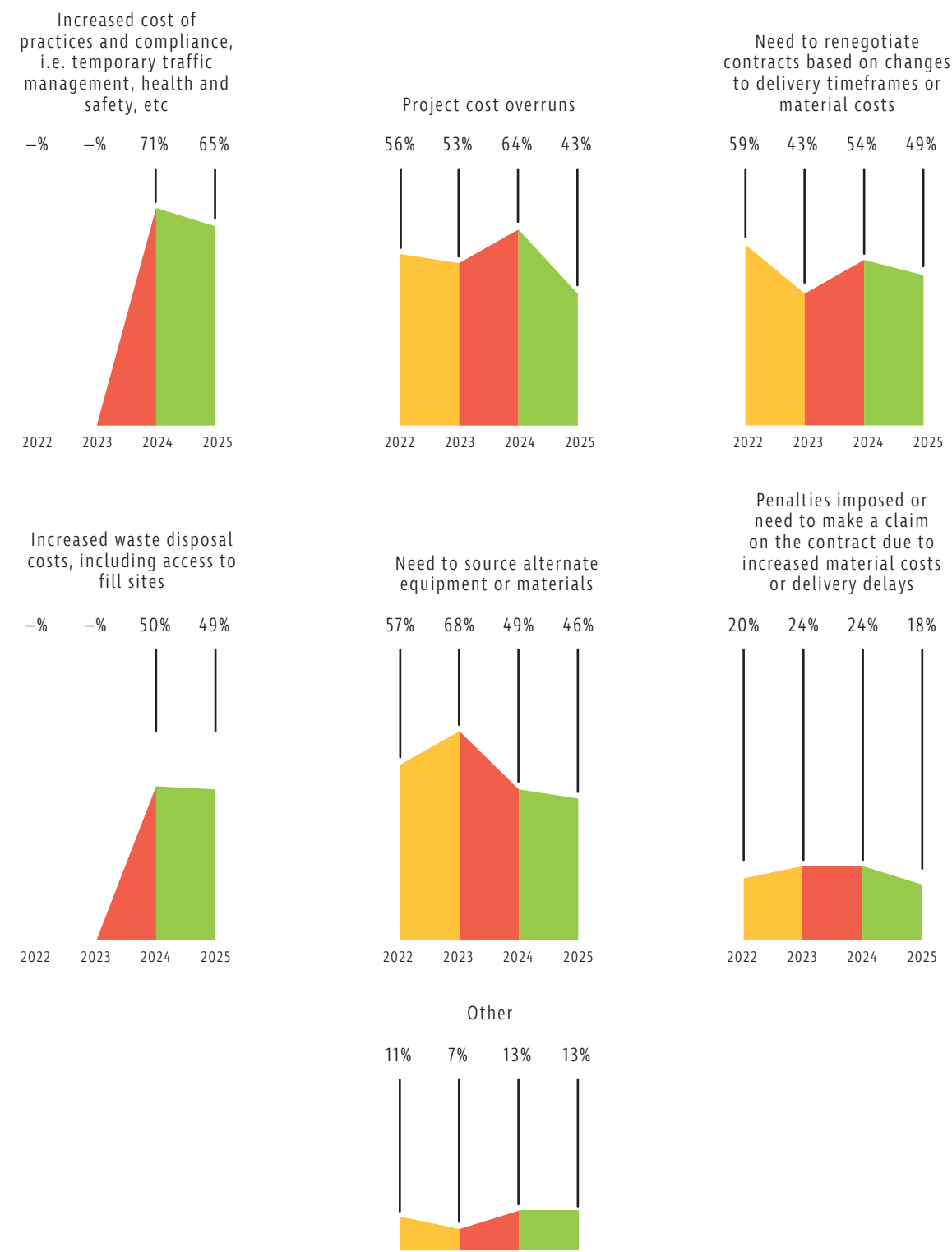
Has Been Significantly Impacted by Cost Escalation and Supply Chain Issues



Supply Chain Impacts

Many businesses have been significantly impacted by increased costs and project overruns particularly compliance costs

Types of Significant Impact Experienced



Tamarisk from Mills Albert Limited, at Manuwatu - Vestas Turitea North Range Road - Sunrise to begin the day of widening road for new turbine blades to travel on.

Has your business been significantly impacted by cost escalation and supply chain issues over the past 12 months?
Base 2025 n= 172, 2024 n=226, 2023 n=198, 2022 n=226, 2021 n=161
If so, what significant impacts has your business experienced? Base All who have been impacted 2025 n= 112, 2024 n=166, 2023 n=161, 2022 n=203

Workforce

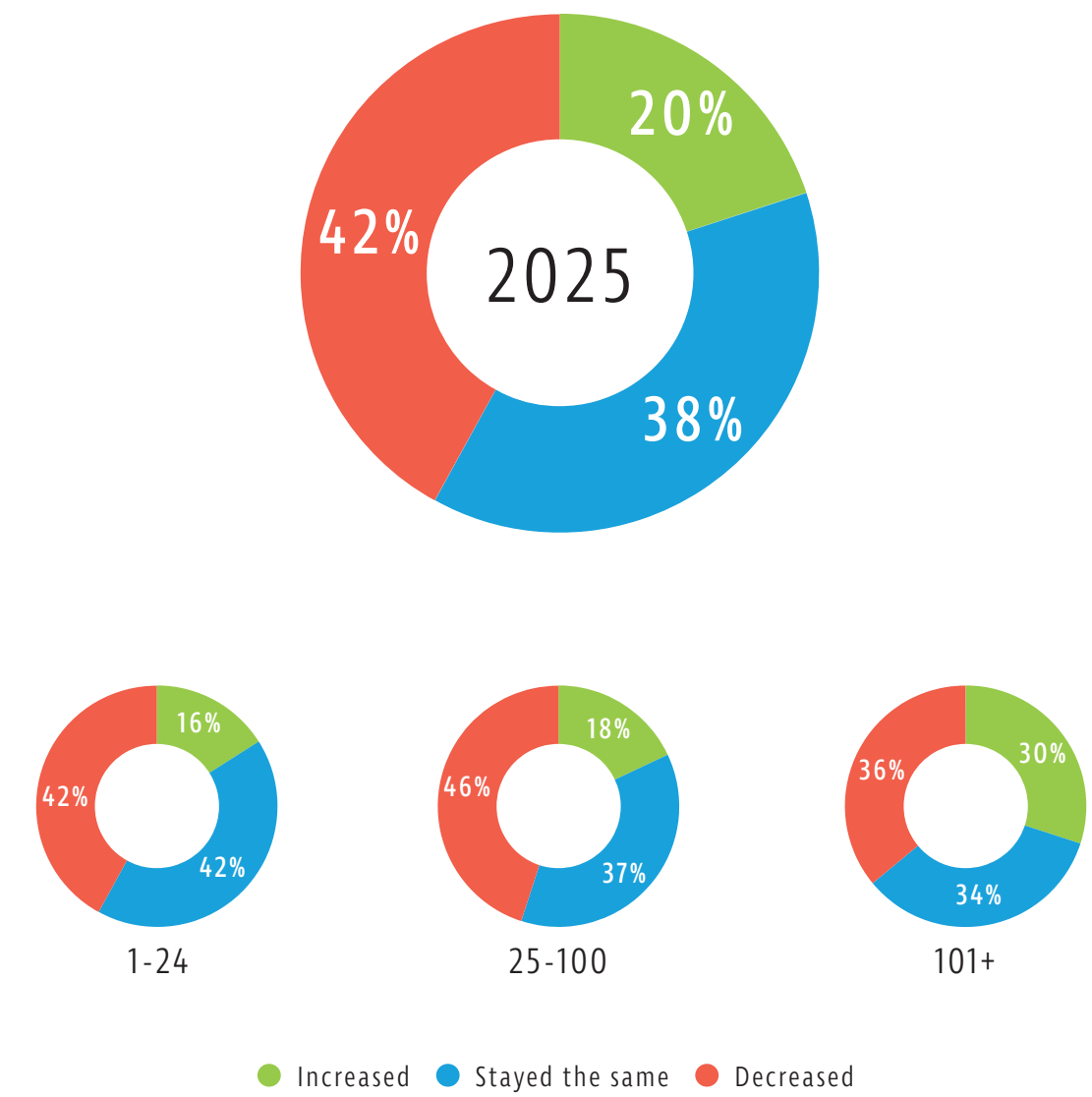


William from AA Contracting, at Stratford Plateau, Taranaki - Working with DOC to excavate the foundations for a new toilet block on the slopes of Mt Taranaki which will become part of the new great walk, The Taranaki Crossing.

Staffing change over past year

A fifth have increased their staff numbers over the past 12 months, however 42% have reduced their staff numbers.

Staff changes over past year

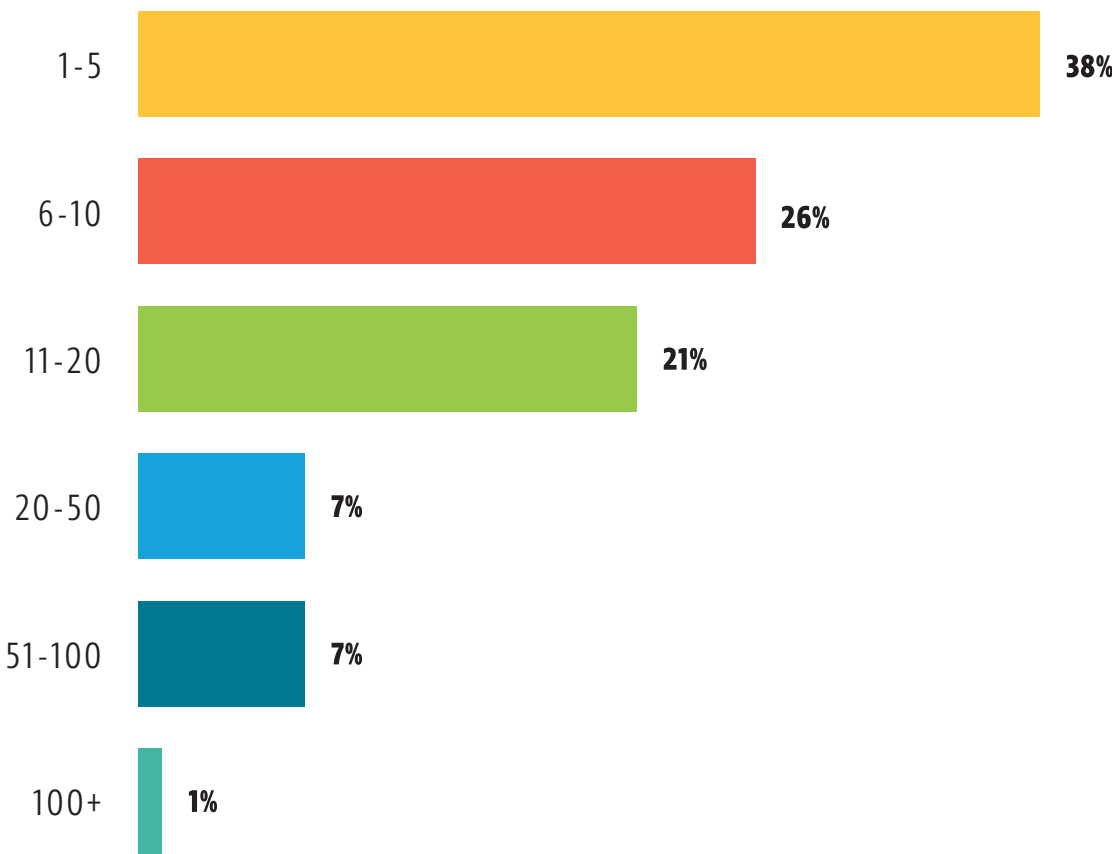


Over the past 12 months, have your staff numbers..... ? Base Total Sample n=172, 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44
By how many have your staff levels reduced? Base Total Sample n=172



Kian from Downer, at Whanganui - Iremis from Downer NZ piling team control the vibro, which is driving 18m length sheet piles into the ground to retain a drop out along the Whanganui River

How many staff levels have reduced by



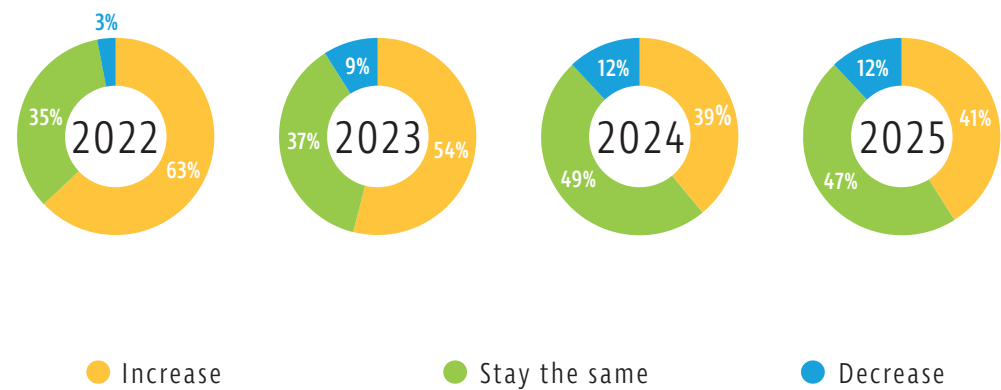
Over the past 12 months, have your staff numbers..... ? Base Total Sample n=172, 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44
By how many have your staff levels reduced? Base Total Sample n=172

Staffing change

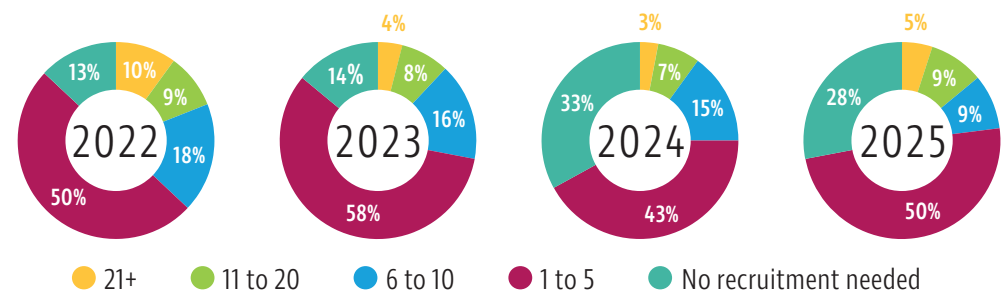
Trended

After a softening in labour demand over the last 4 years, we have seen little uplift since 2024. Half of businesses expect requirement for staff to stay the same. 28% of businesses state that no recruitment is needed.

Expected Change in Requirement for Staff



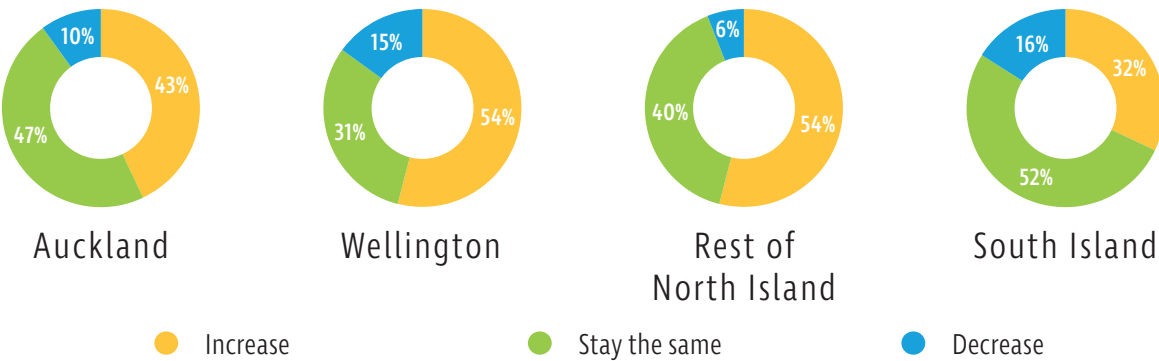
Ideal Recruitment Number



Over the next year, do you think your requirement for staff will... ? Base Total Sample n=172
How many staff would you recruit today if people with the right skills were available? Base Total Sample n=172

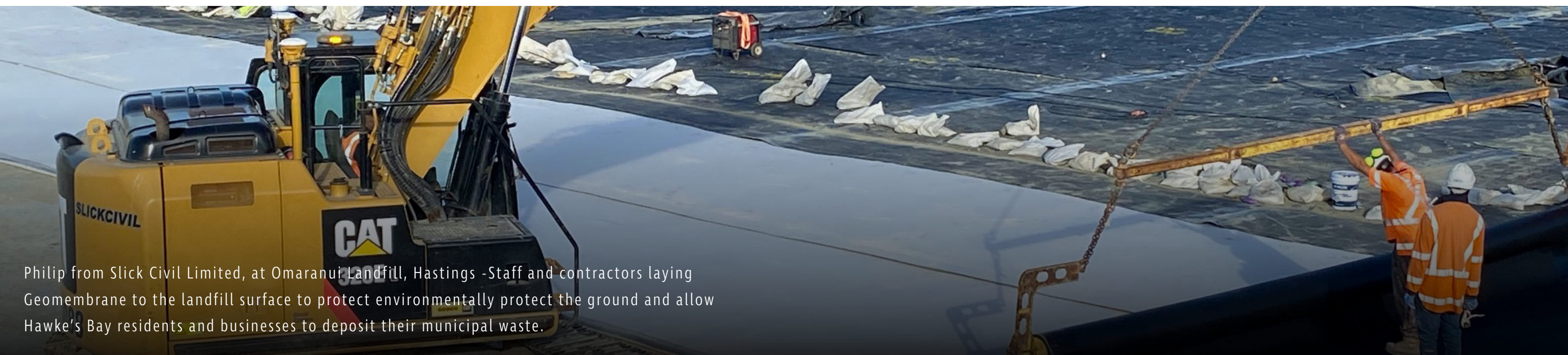
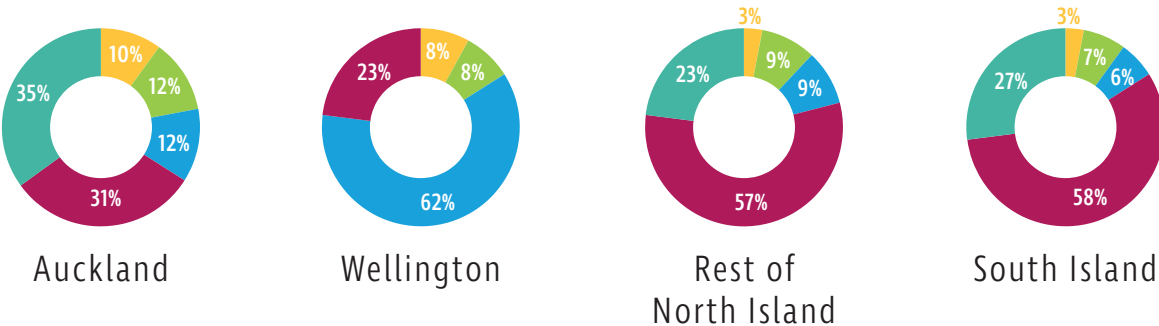
Expected Change in Requirement for Staff

by Region



Ideal Recruitment Number

by Region



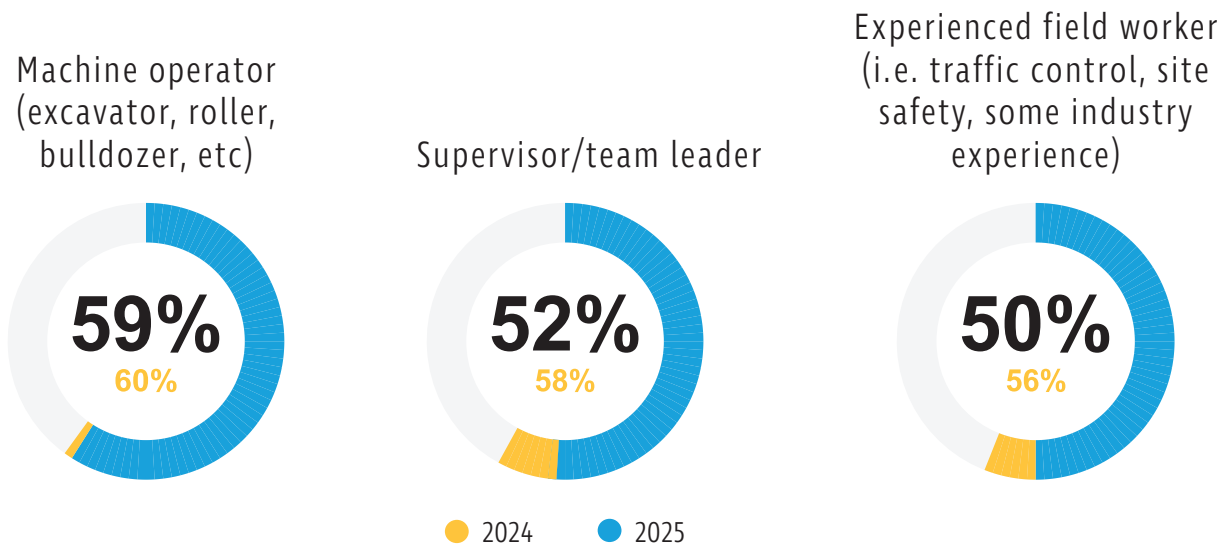
Philip from Slick Civil Limited, at Oamaru Landfill, Hastings -Staff and contractors laying Geomembrane to the landfill surface to protect environmentally protect the ground and allow Hawke's Bay residents and businesses to deposit their municipal waste.

Skillsets

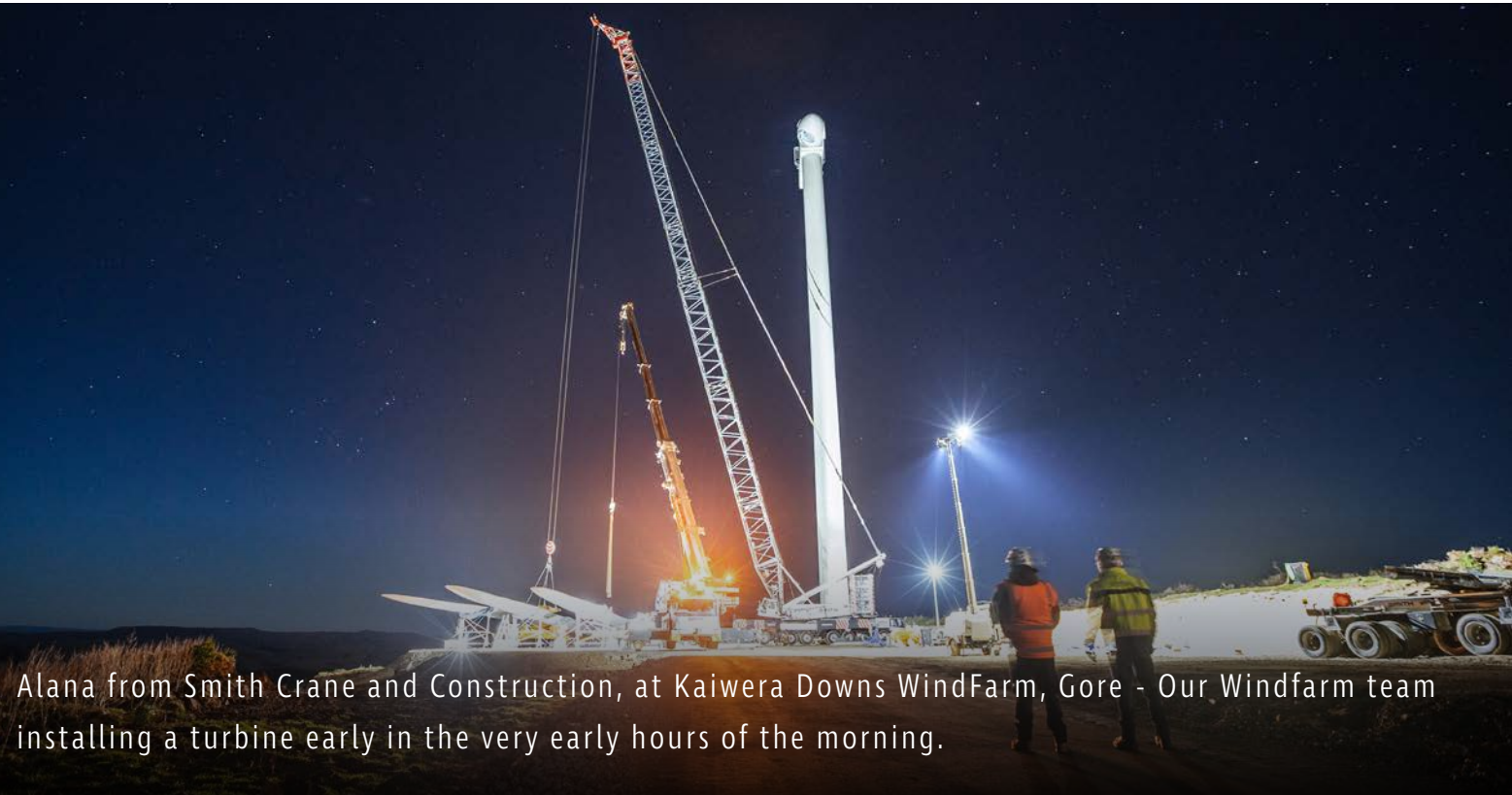
Machine operators, supervisors / team leaders and experienced field workers remain the most in-demand skillsets.

Skillsets most needed by business

Ranking



What skillsets do you most need in your business? Base Total Sample n=172
Please rank in order by clicking on the following you need the most (1) then the second (2) right through to the one you need the least

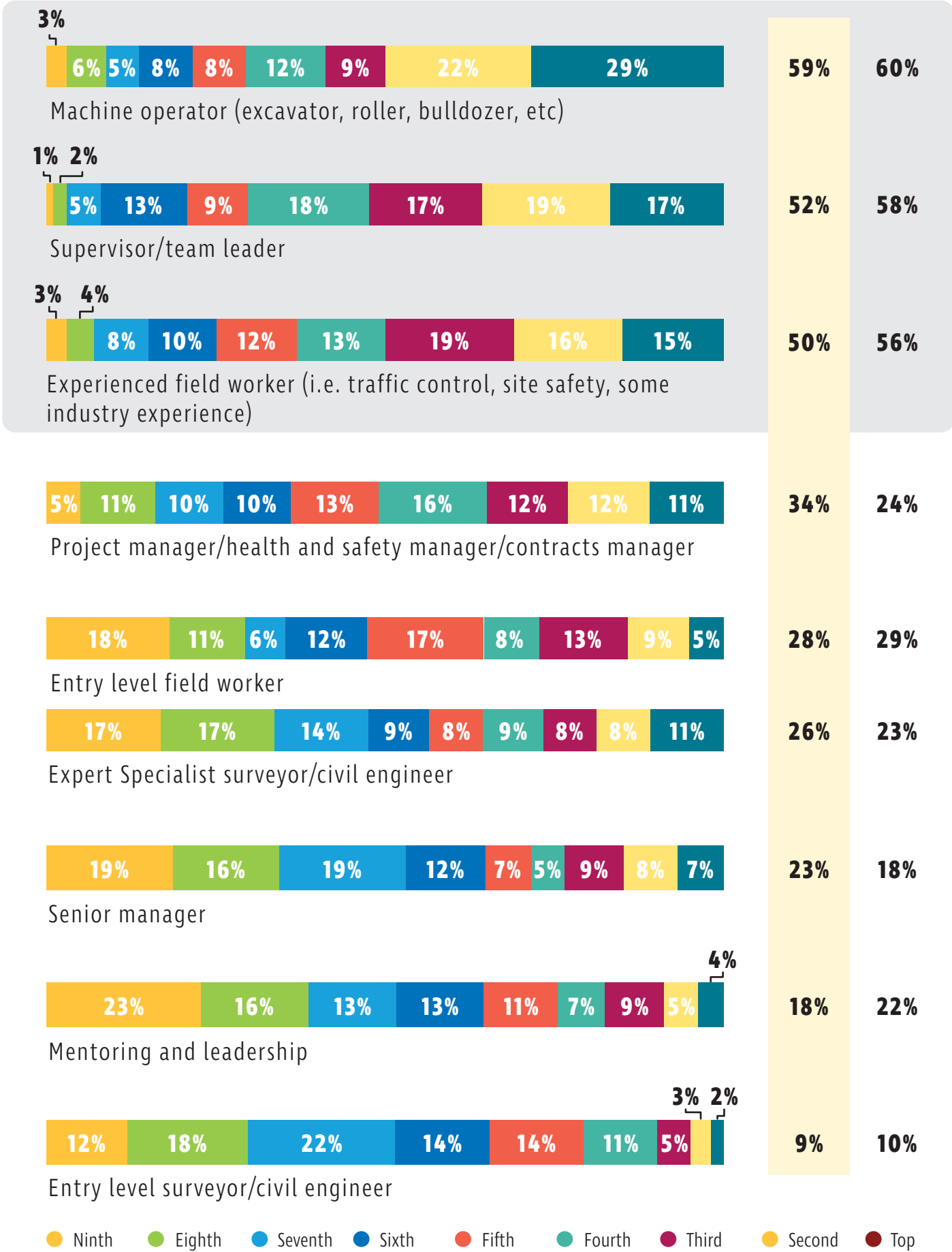


Alana from Smith Crane and Construction, at Kaiwera Downs WindFarm, Gore - Our Windfarm team installing a turbine early in the very early hours of the morning.

Skillsets Most Needed by Business

Ranking

Ranked in the
Top 3 Skillsets



What skillsets do you most need in your business? Base Total Sample n=172
Please rank in order by clicking on the following you need the most (1) then the second (2) right through to the one you need the least

Capability verbatims

Capability verbatims - what capability would you like to expand in your business?

"It's not about the available work but about having the right people who want to work and who are adaptable to a wide range of works. Businesses need to be adaptable with skills to work in different areas based on where demand lies."

"The Capability to run projects away from the home base, the lack of enthusiasm to work away from home is hard to manage and resource accordingly."

"Health and Safety Awareness and Self Determination among staff."

"We would like to improve our relationships within the industry. Someone who is knowledgeable about the industry and who has connections within it."

"Bulk earthworks, metal prep, asphalt sealing and slipform kerbing"

"I would like to expand all of our services plus introducing more specialised equipment to meet the needs. Would also like to diversify the business for future sustainability."

"Take on more skilled operators and truck drivers"

"Experience leader in all fields will make a huge difference, especially hands on people"

"Better understanding the business side of things like regulations, rules etc."

"Sheet piling, anchoring and soil nail installation. Piling work has dried up due to no commercial building being undertaken"

"With a better-defined pipeline that can be trusted to remain in place and actually be delivered (which we can't trust at the moment) We would invest more heavily in new technology and staff training."

"Civil construction work ie 3 waters and road construction work"

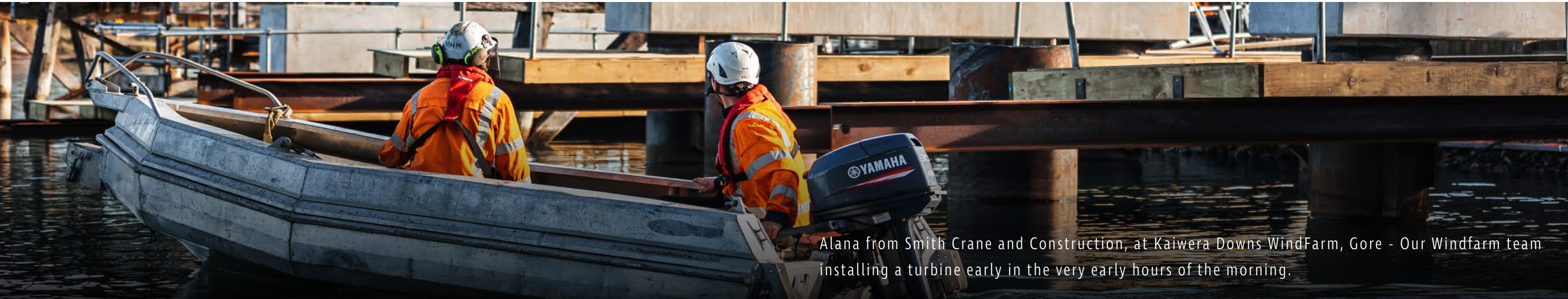
"Project manager to manage day to day contract supervision"

"Experienced in field workers and managers."

"More people capable of moving to foreman"

"Upskill all staff to run each part of the business to allow less high-level management input."

"Management Team i.e. contract managers, Engineers, Field Team - TTM Crews"

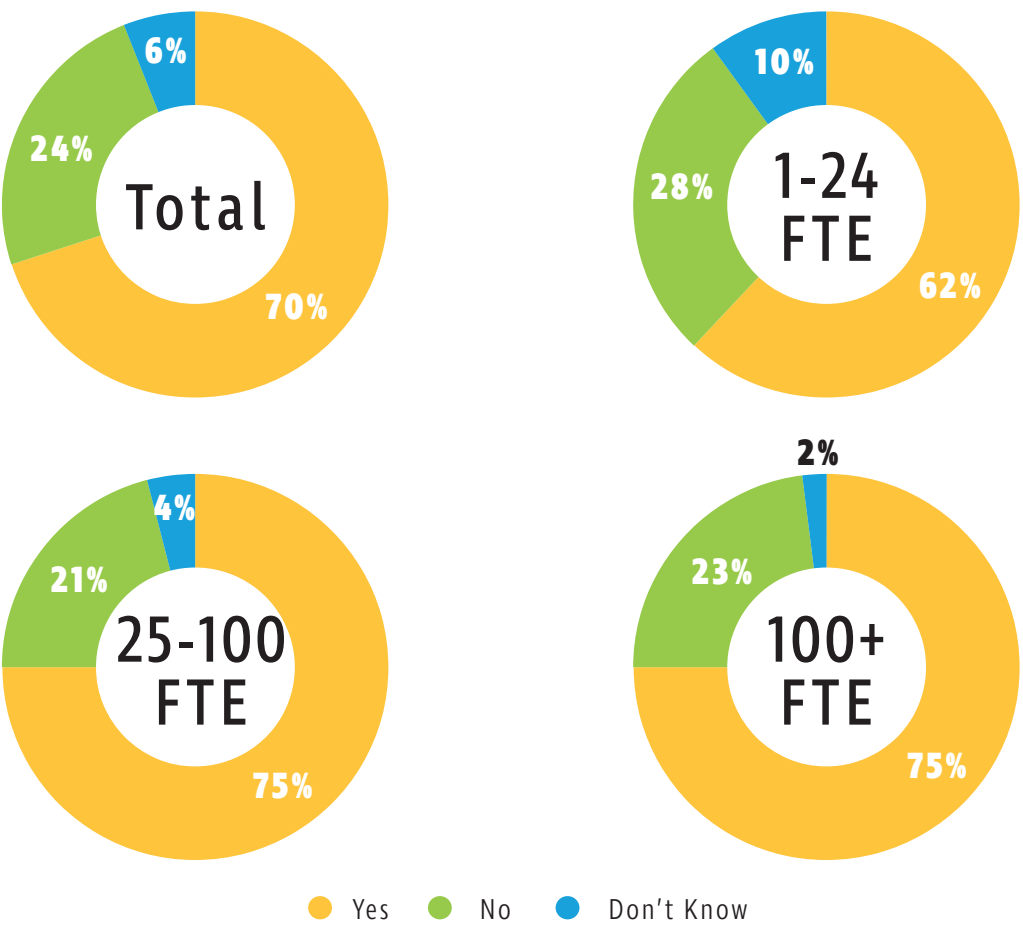


Alana from Smith Crane and Construction, at Kaiwera Downs WindFarm, Gore - Our Windfarm team installing a turbine early in the very early hours of the morning.

Staff Retention Support



Training resources



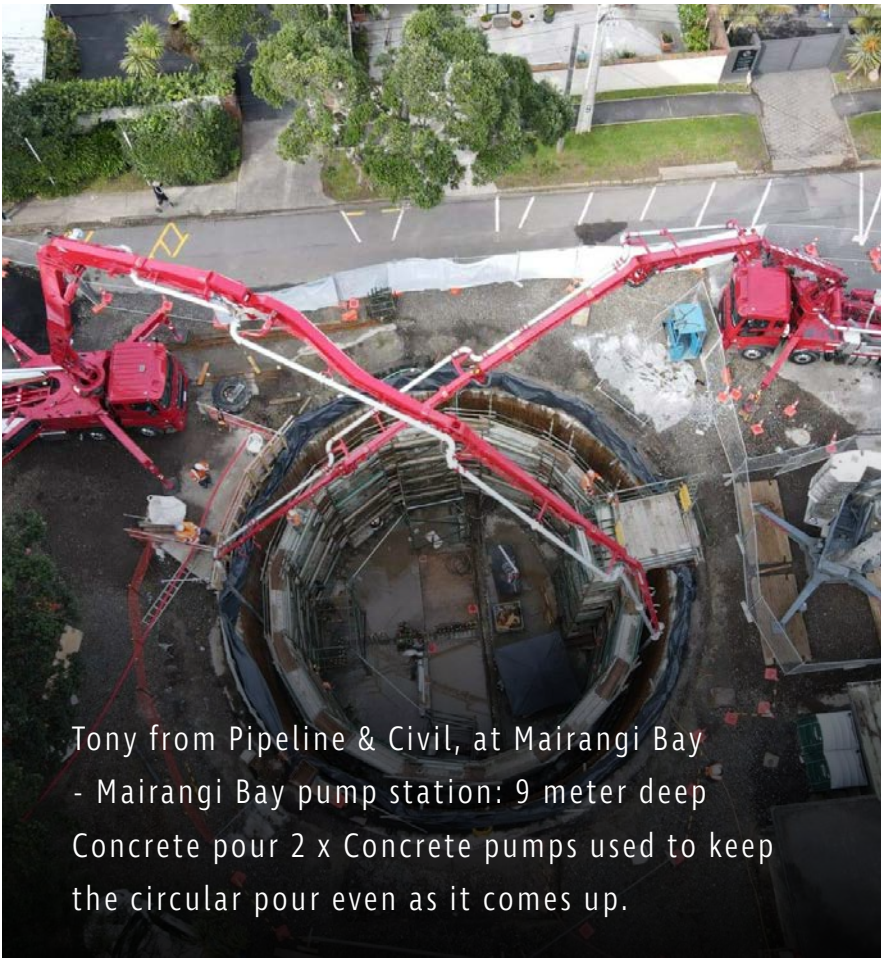
What would support your business in taking on and retaining staff? Base Total Sample n=172
Do you currently have the right resources and staff in your business to train and mentor your staff?
Base Total Sample n=172 , 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44

Staff Retention

More certainty is the key way businesses want support for staff acquisition and retention.

Training Resources

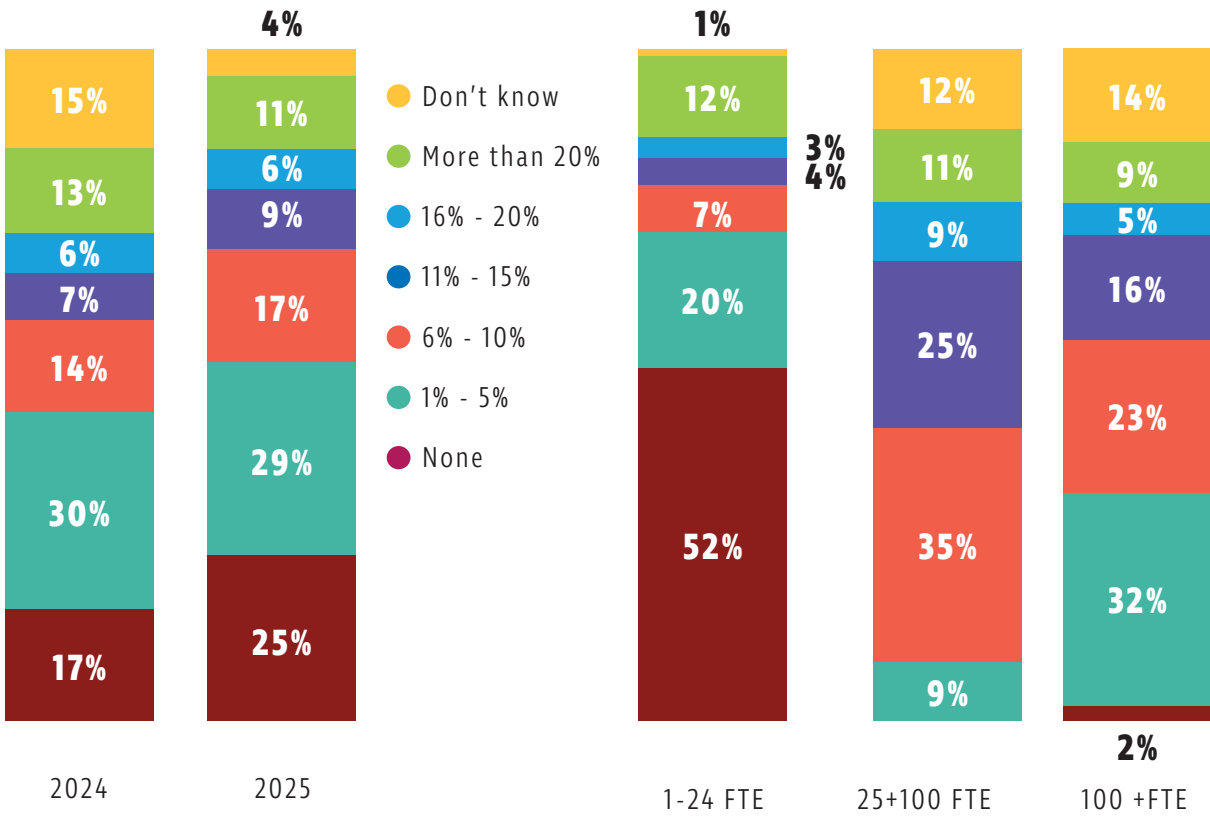
The majority of businesses (70%) currently have the right resources and staff in their business to train and mentor new staff. However a quarter (24%) do not.



Apprenticeship

Almost half (46%) of businesses have up to 10% of their workforce on apprenticeships. This is significantly lower among smaller businesses; half of small businesses (1-24 full time employees) have no workers on apprenticeships or training programmes.

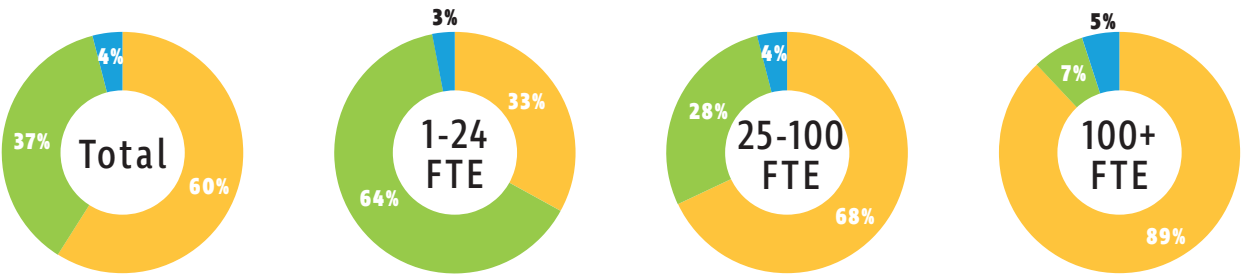
Percentage of workforce on apprenticeship or working on nationally recognised qualifications



What proportion of your staff are currently working on a nationally recognised qualification, or an apprenticeship?
Base Total Sample n=172 , 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44

Leadership Training

The majority of larger businesses (89%) are training for leadership or supervision skills.



Is your organisation training for leadership or supervision skills?
Base Total Sample n=172 , 1-24 FTE n=69, 25-100 FTE n=57, 100+ FTE n=44



Utilities Infrastructure New Zealand installing a new pipeline in Christchurch.

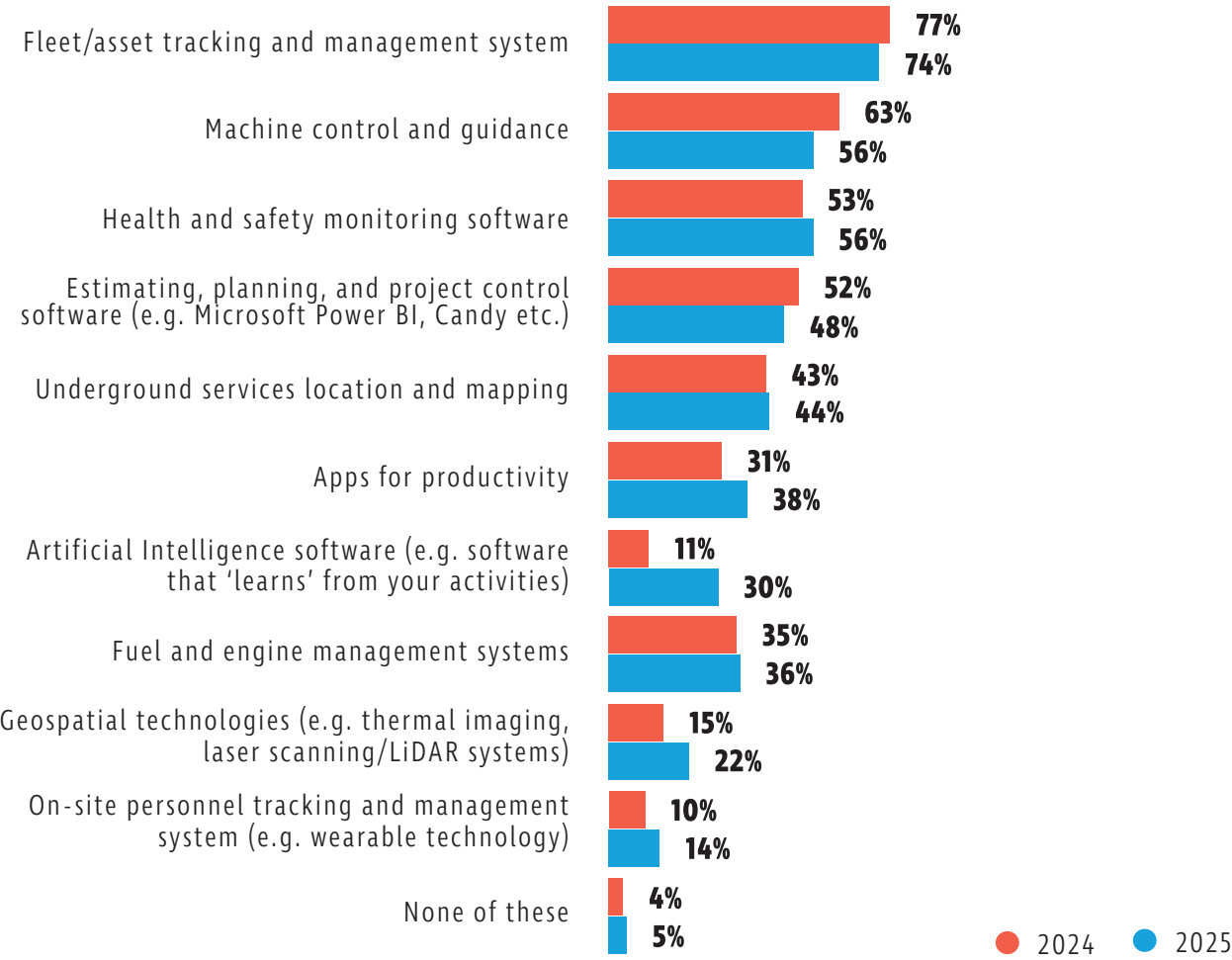
Technology

Mya from HEB Construction, at Te ahu a Turanga, Manawatu Gorge Project - Sunrise from the top of one of the major cuts on the project looking over Woodville.

On-site Technology

Fleet management, followed by machine control and H&S Monitoring are the most common onsite tech solutions.

On-site Technology Solutions Currently Used



What types of on-site technology solutions do you currently use in your business? Base Total Sample n=172

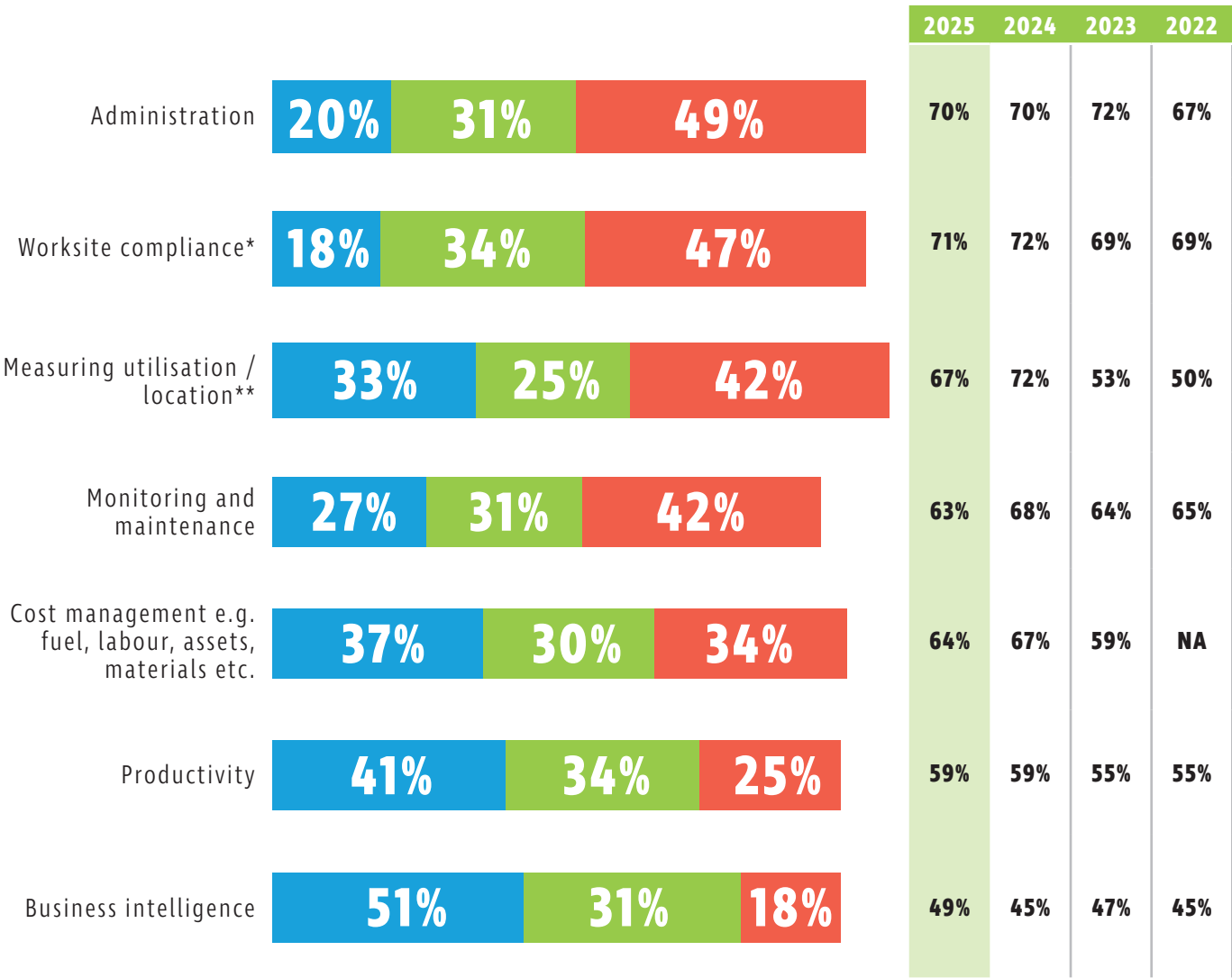


Kate from Fulton Hogan, at Edendale, Southland - Steam rises from the freshly laid asphalt at the Edendale Realignment Project during a thunderstorm.

Specialised Technology

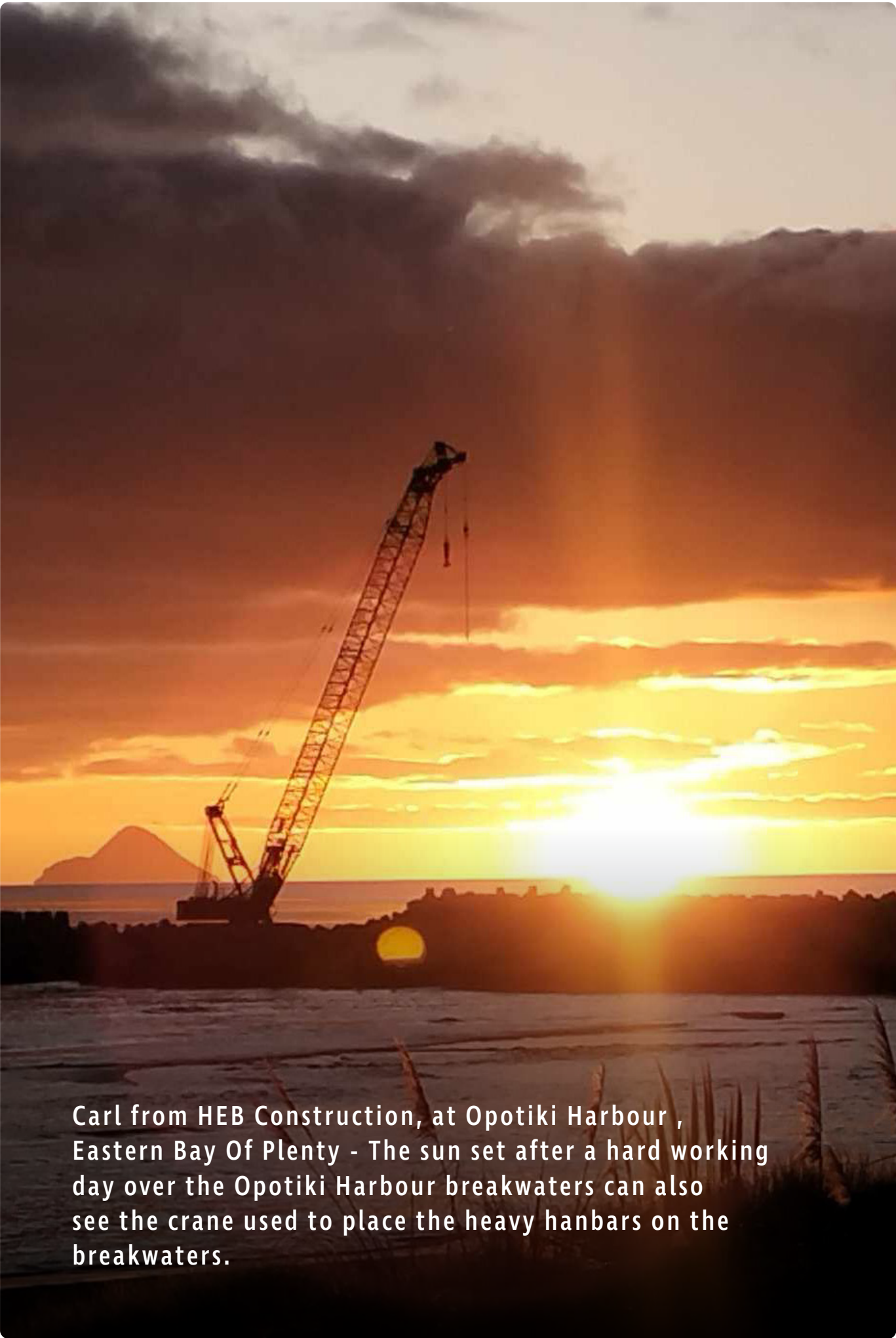
Areas that are currently used by majority of businesses include Administration and Compliance.

Areas that may be under-utilised include Business Intelligence, Productivity, and Cost Management.



Do not use construction technology for this on-site Sometimes use construction technology for this on-site Frequently use construction technology for this on-site

Thinking about each of the following purposes, do you use any specialised construction technology or software on the job site? Base Total Sample n=172
Please note, this excludes standard office technology such as computers or Microsoft office
*Note Worded as Compliance prior to 2025
**Note: Worded as "Measuring utilisation" in 2023 and 2022

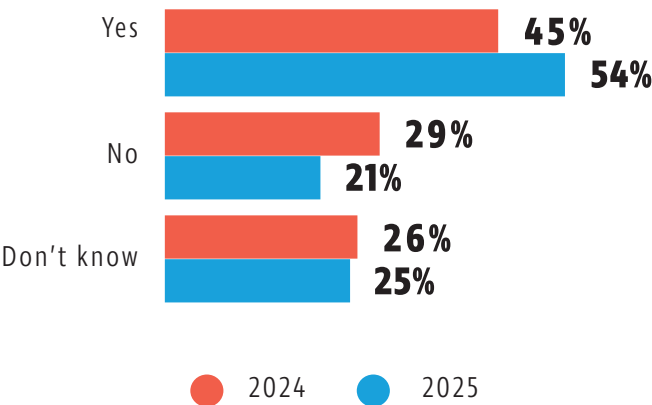


Carl from HEB Construction, at Opotiki Harbour , Eastern Bay Of Plenty - The sun set after a hard working day over the Opotiki Harbour breakwaters can also see the crane used to place the heavy hanbars on the breakwaters.

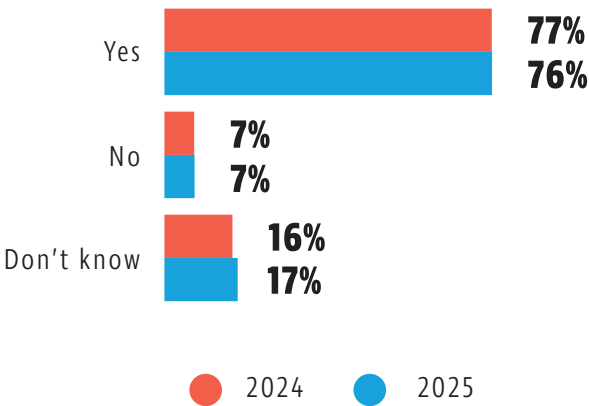
Business Intelligence

Of those businesses who are currently using Business Intelligence technology, 54% state it is impacting engagement, and 76% envision increasing demands for overall integration.

Is use of Business Intelligence impacting engagement with suppliers, contractors, clients?



Envision increasing demands for overall integration of tech to improved data insights



Is the use of Business Intelligence technology or software impacting how you engage with suppliers, contractors, clients etc.? Base: All who use Business Intelligence n=84
Do you envision increasing demands for overall integration of technology for improved data insights to provide Business intelligence? Base: All who use Business Intelligence n=84

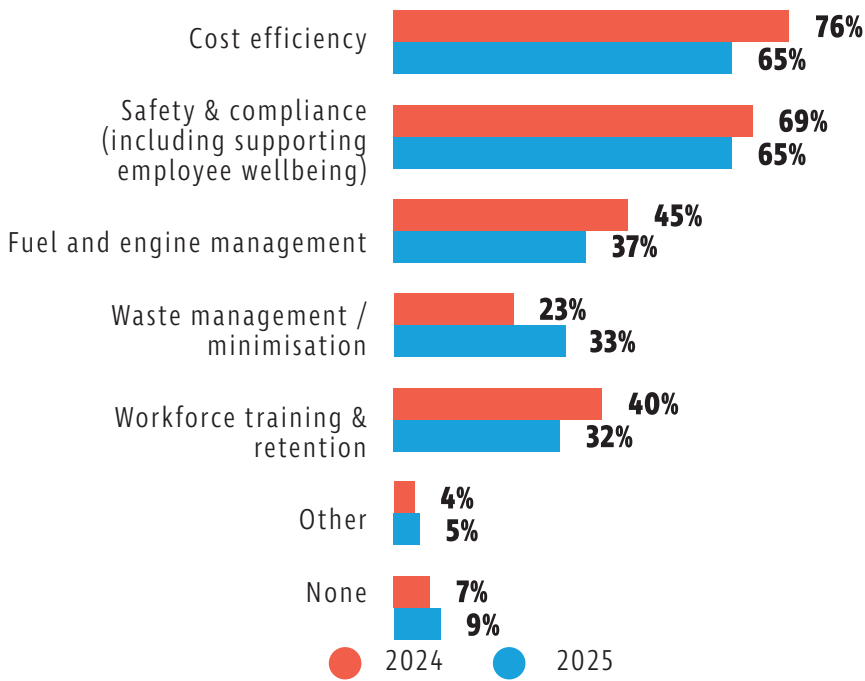


Jamie from BT mining, at Stockton Mine - Volvo ec380 still sleeping on a beautiful west coast morning. Rehabilitation work getting things back to nature.

On-site Technology

Cost efficiency, followed by safety and productivity, are the key drivers of technology implementation.

Benefits of implementing technology



What benefits have you seen from implementing technology? Base Total Sample n=172

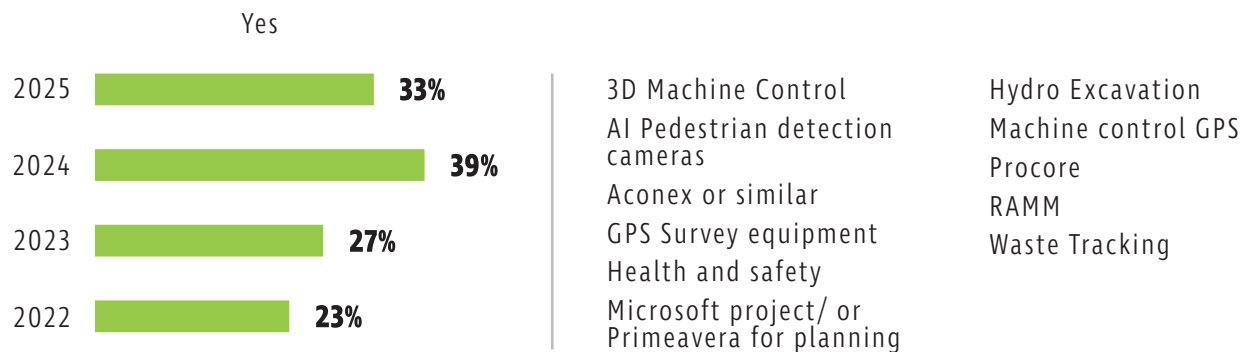


Ollie from Mr Dig, at Wairarapa - Taking a moment from farm maintenance work to admire the beauty of this rainbow and the inclusivity & diversity that Matariki brings to everyday life for us.

Mandated Technology

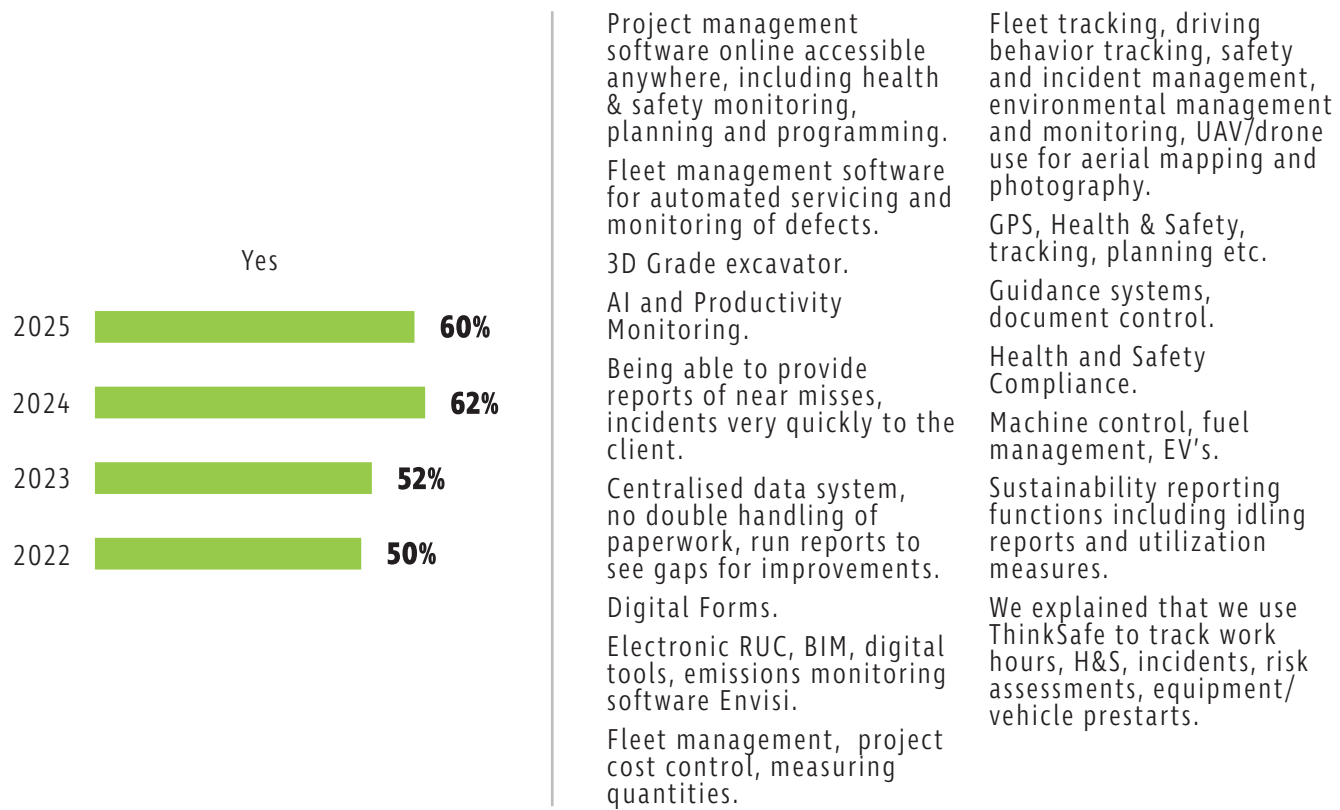
A third of businesses have been mandated certain tech to bid for work. This has softened slightly since 2024.

Have your customers mandated a certain tech in order to bid for work?

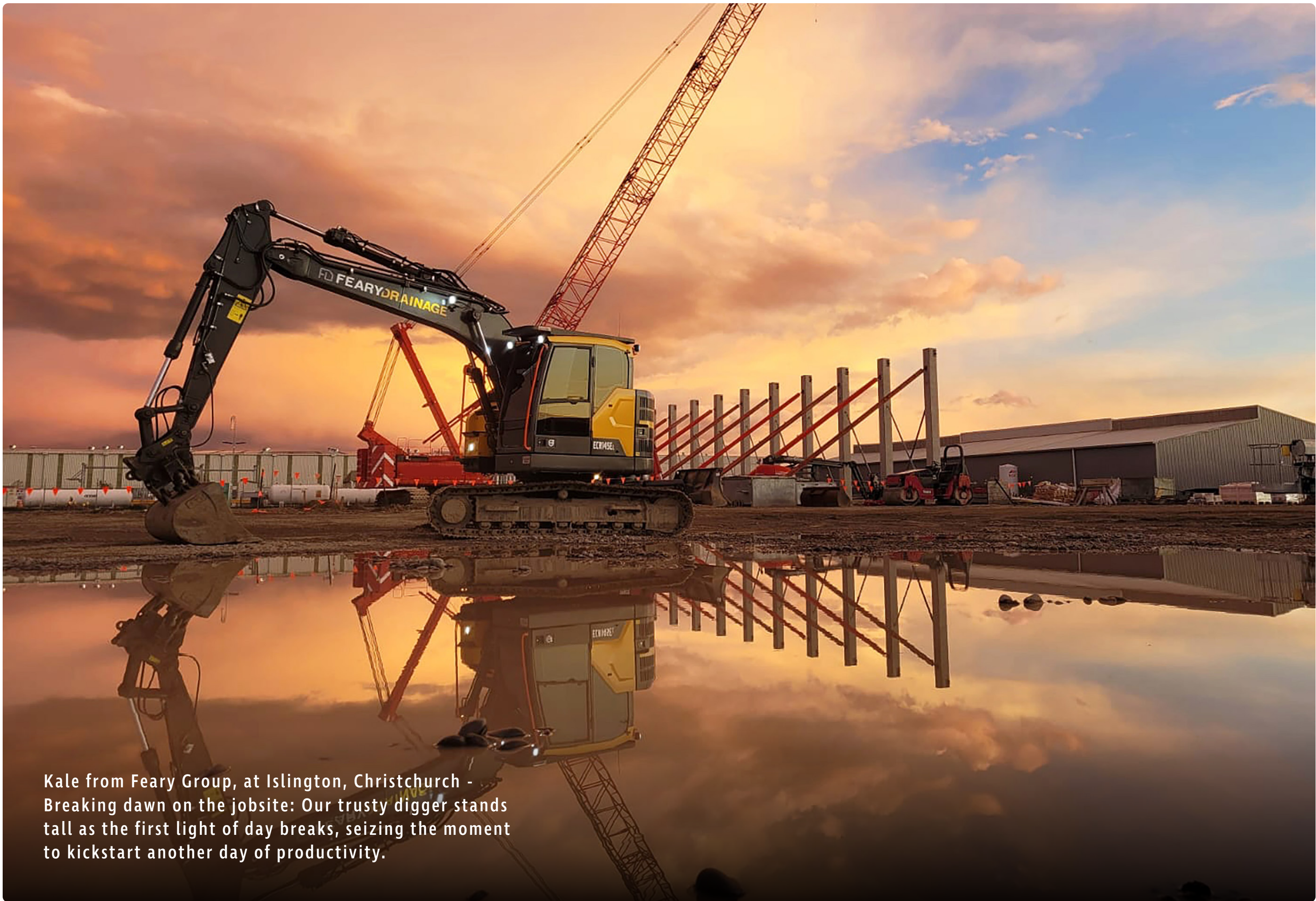


60% have highlighted on-site tech to win work.

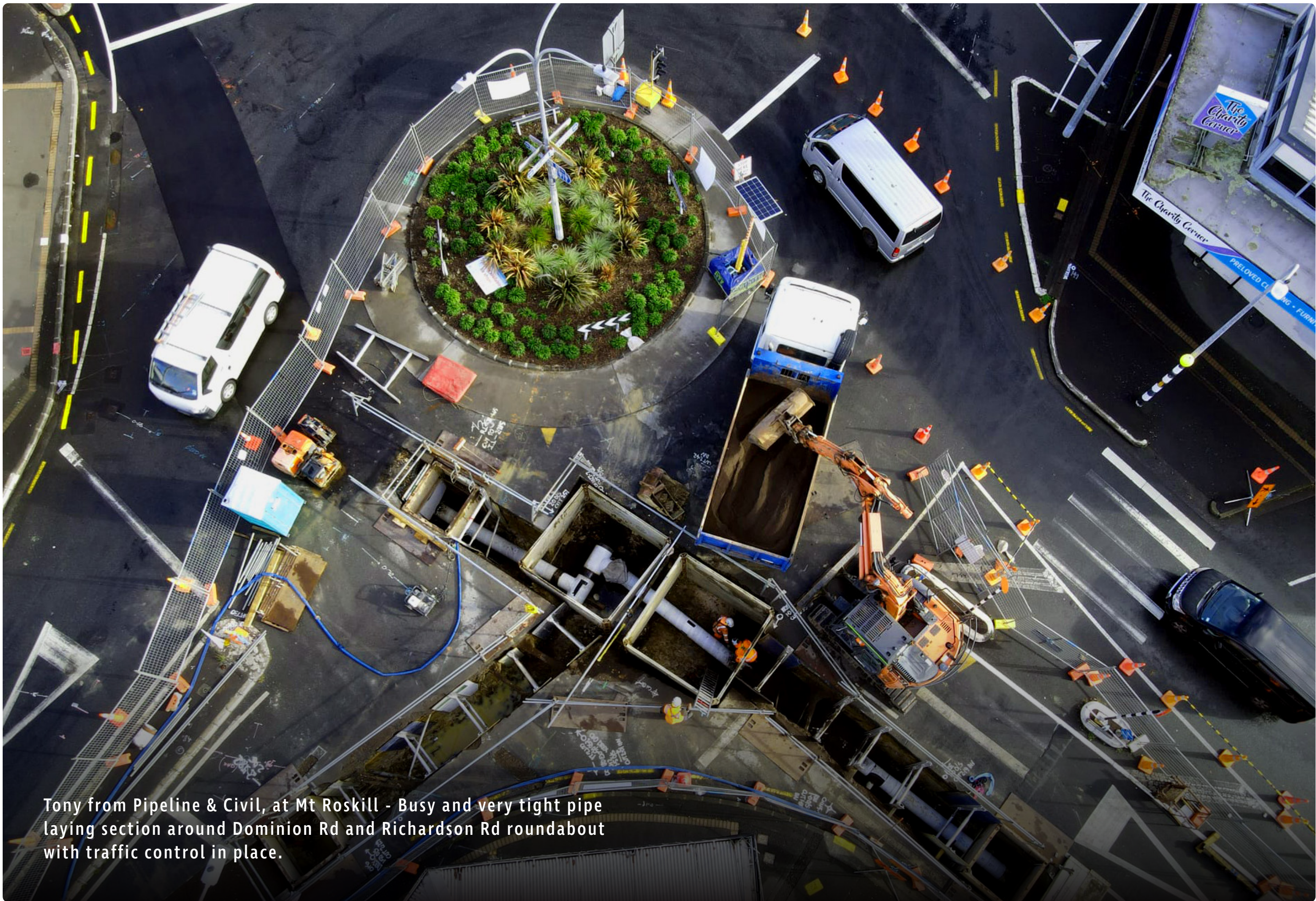
Have you highlighted onsite tech to win work?



Have you highlighted your use of on-site technology (e.g. fleet tracking, asset tracking, health and safety apps) to win projects or work? Base Total Sample n=172
IF YES - What aspect of using technology did you promote?



Kale from Feary Group, at Islington, Christchurch -
Breaking dawn on the jobsite: Our trusty digger stands tall as the first light of day breaks, seizing the moment to kickstart another day of productivity.



Tony from Pipeline & Civil, at Mt Roskill - Busy and very tight pipe laying section around Dominion Rd and Richardson Rd roundabout with traffic control in place.



About Teletrac Navman

Teletrac Navman aims to be the driving force behind the industries that transform and sustain our futures by offering simple and intelligent solutions that enhance efficiency, safety, and sustainability. As a connected mobility platform for industries that manage vehicle and equipment assets, Teletrac Navman simplifies the complex so that its customers can transform the way they work through cloud-based solutions that leverage AI to unlock the power of operational insight. Teletrac Navman manages more than 700,000 vehicles and assets around the world. The company operates globally, with offices worldwide and headquarters in Northbrook, IL.

Teletrac Navman is part of Vontier, a global industrial technology company uniting critical mobility and multi-energy technologies and solutions to meet the needs of a rapidly evolving, more connected mobility ecosystem. For more information visit **[TeletracNavman.com](https://www.TeletracNavman.com)**

About Civil Contractors New Zealand

Founded in 1944, Civil Contractors New Zealand represents the interests and aspirations of more than 780 member organisations and businesses. These members are responsible for the physical construction of NZ's transport, water, energy and other civil infrastructure networks. Members include large, medium-sized, and small businesses in civil engineering, construction and general contracting, and associate members who provide valuable products, support and services to contractor members. For more information, visit

[CivilContractors.co.nz](https://www.CivilContractors.co.nz)

New developments in the works in the Bay of Plenty