



Waitaha Canterbury **World-stage ready**

Key pillars for Canterbury's regional deal proposal

AUGUST 2025

CANTERBURY
Mayoral Forum



Foreword

The Canterbury Mayoral Forum is excited about what's to come for our region.

Waitaha Canterbury is on the move – we're becoming globally innovative, increasing trade and investment as well as attracting top talent. All of this comes from the recognition that our strong businesses and cohesive communities are innately linked to our environment, our lifestyle, and our capacity for innovation.

To ensure we continue our upward trajectory, we must optimise the five key pillars that will supercharge our economy: Transport, Housing, Energy, Infrastructure and Innovation. Doing so sets the foundation for future growth and positions the region to capitalise on a central government Regional Deal or other funding opportunities. Focusing on these five pillars, and getting them right, requires continued partnership between local government and the private sector, who will ultimately enable the ambition, and further, meaningful engagement with central government and mana whenua.

This document, World-stage ready, is both a stake in the ground and a view to our prosperous future. We can unlock our region's vision through true regional cooperation along with government regulation and funding.

We all have a role, both regionally and nationally, in accelerating the economic growth of Waitaha Canterbury while safeguarding our social, cultural, and environmental wellbeing.

Waitaha Canterbury is ready. Our region has forecast population increase from 687,100 people to about 900,000 (high growth projections) by 2048, we're increasingly competitive, investment-attractive, and future-focused. Our region has the ingredients to offer a high quality of life and attract even more top talent to support sustained growth and investment.

This doesn't just benefit Waitaha Canterbury but the rest of New Zealand, too.

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Growth meets opportunity

Waitaha, the Canterbury region, is not just a strong regional player, it's a launchpad for global innovation, trade, and talent. With strengths in agritech, aerospace, education, manufacturing, medtech, and clean energy, the region is competing and collaborating internationally.

The region offers stable governance, a skilled workforce, and a collaborative ecosystem. Canterbury is not preparing to be relevant – it already is. We're exporting ideas, talent, and technology to the world.

This document sets out the opportunity to invest in a region that's already delivering results and scaling fast, which means Canterbury is not only a beneficiary of national policy, but a driver of it.

Over the past year, the Canterbury Mayoral Forum, Business Canterbury, and the private sector have come together to form a shared ambition for Waitaha Canterbury. The progress we have made toward the goal of a shared ambition – bringing the public and private sectors together from across the region – has created the conversations and conditions for alignment and clarity.

This ambition outlines what sets Canterbury apart and the key ingredients for Canterbury's long-term success. It has stemmed from the recognition that strong businesses and strong communities are innately linked to our environment, our lifestyle, and our capacity for innovation.

It provides a clear and credible foundation for future growth, whether through a Regional Deal or other opportunities. More importantly, it gives us a common starting point and a platform for continued partnership between local government and the private sector, who will ultimately enable the ambition, and for further engagement with government and mana whenua.

Canterbury is a place where public-private partnerships thrive and where infrastructure is being built for the next generation. Our region's connections to mana whenua, natural landscapes, and strong community values make it a unique and authentic place to live, work, and grow.

As Canterbury evolves, so too will the ambition for our region. But what won't change is our commitment to making Canterbury one of the best places in the world to test ideas, grow businesses, and build a great life.



Purpose of this document

This document intends to ensure Canterbury is ready for a Regional Deal proposal, or other opportunities to strengthen the partnership between central and local government, mana whenua, and the private sector, for the continued economic advancement of Waitaha Canterbury, Te Waipounamu South Island, and Aotearoa New Zealand.

The Canterbury Mayoral Forum is strongly aligned on this ambition.

We are committed to doing our part and working with government, mana whenua, and the private sector on the priorities for Canterbury's long-term success. Together we can super-charge our region's growth and productivity, deliver much needed infrastructure, and increase the supply of quality and affordable housing; while safeguarding our social, cultural, and environmental wellbeing, and increasing our region's economic contribution to Aotearoa New Zealand.

To achieve this, there are some fundamental pillars we must get right:

1. Transport
2. Housing
3. Energy
4. Infrastructure
5. Innovation.

This *Waitaha Canterbury: World-stage ready* document focuses in on these pillars. It builds on work we have already done as a region and recognises the role government can play in backing our ambitions. They are areas we have advanced our shared understanding of the opportunities and challenges we face, and our priorities for action. We are well placed now to accelerate in these areas.

The intention of this document is not to cover every element for our region's success – we know there are other areas we need to collectively address as a region. Water availability and use, food and fibre, tourism, a skilled workforce and employment, and technology, are just some examples. This work will continue to happen alongside our work on the five key pillars.

Canterbury Mayoral Forum

– collaborating to get things done

The Canterbury Mayoral Forum includes the Mayors of the 10 territorial authorities in Canterbury and the Chair of the Canterbury Regional Council (Environment Canterbury).

The Forum provides a mechanism for Canterbury’s local authorities to:

- Stand together and speak with ‘one strong voice’ for Canterbury and its communities
- Identify and prioritise issues of mutual concern and foster co-operation, co-ordination, and collaboration to address them
- Advance regional economic and social development through leadership, facilitation, and advocacy
- Work together, and with central government and other key sector leaders in Canterbury, to meet the needs and expectations of our communities at the lowest possible cost to ratepayers.

Plan for Canterbury

The Plan for Canterbury 2023-25 sets out the Mayoral Forum’s interests and priorities across three priority areas:

1. Sustainable environmental management of our habitats
2. Shared prosperity for all our communities
3. Climate change mitigation and adaptation

The Forum’s work to progress the ‘Shared prosperity for all our communities’ priority area has focused on building on the region’s economic strengths and developing its emerging sectors; growing, attracting, and retaining a skilled workforce; improving the transport network; and coordinating strategies for housing our communities.

This ***Waitaha Canterbury: World-stage ready*** document builds on the momentum generated by this work.

Our objectives

The Mayoral Forum’s strategic objectives for Canterbury include the following:

- Accelerate sustainable and inclusive economic growth
- Build climate-resilient, future-ready infrastructure
- Enable diverse, affordable, quality housing and choices for a growing population
- Transition to a low-emissions, renewable energy future
- Strengthen the tourism sector through supporting infrastructure and regulatory and funding tools
- Partner with mana whenua and the private sector on growth opportunities
- Safeguard social, cultural, and environmental wellbeing.

Our shared ambition

Powerful partnerships and decisive leadership are super-charging Canterbury's growth, innovation, and productivity, while also defending the high-quality lifestyles we value across the region. We are a big region of diverse sub-regions – targeted collaboration and action can further unlock the unique strengths of each of our communities.

Canterbury is the home of opportunity – where the environment, innovation, and quality of life thrive together.

Canterbury's unique advantage

What sets Canterbury apart is that success here doesn't come with the familiar trade-offs. You can succeed in business and raise a family, all while enjoying one of the most affordable, high-amenity lifestyles in the Southern Hemisphere.

Few growing regions in the world can claim that and even fewer can sustain it. But that's Canterbury's challenge, and opportunity.

Well-connected and doing business

Canterbury boasts one of New Zealand's most diverse and connected business communities in the country. With a global city at our doorstep, an international airport, two deep-water ports, and two leading universities driving research and innovation, we're connected and aligned in a way that few regions can match.

Because we are so well connected and aligned across business, mana whenua, the education sector, and civic leadership, we can move independently, confidently, and at pace.

A diversified regional economy

Our deep roots in agriculture and engineering have laid the foundation for a thriving innovation ecosystem. Today, Canterbury is home to some of New Zealand's most exciting growth sectors, including advanced manufacturing, aerospace, smart tourism, and other hi-tech industries.

These industries are drawing in global investment, attracting top talent, and contributing to prosperity across the region and up and down New Zealand.

We're ready to launch

To accelerate this momentum, we must act now. This means investing ahead of demand in infrastructure, particularly around energy and connectivity. We must protect and evolve our competitive advantage in housing affordability and lifestyle. We must also modernise and align the regulatory settings that enable us to innovate, attract investment and grow, as we continue to enhance our reputation for solving the world's big problems here.

Canterbury is growing and ready now. We're already leading and shaping the next chapter of New Zealand's story – a chapter where innovation and growth is underpinned by liveability and the environment.

Priority 1



Investing ahead of demand in energy and connectivity infrastructure.

Priority 2



Protecting and advancing our competitive advantage in affordable housing and lifestyle.

Priority 3



Enabling innovation by ensuring regulation is fit for the future and aligned across the region.

Our context

Our region

Canterbury extends from Kēkerengū, north of the Waiau Toa Clarence River, to the Waitaki River catchment in the south; and from the snowcapped peaks of Kā Tiritiri o Te Moana, the Southern Alps, to Kā Pahi Whakatekateka o Waitaha, the Canterbury Plains. It is the largest region in New Zealand by land area, making up almost a third of the South Island.

Canterbury boasts incredible natural history and cultural heritage. It is renowned for its stunning landscapes; diverse ecosystems; large swathes of flat, arable land; and abundant water. Its unique geography and environments provide numerous opportunities, such as for primary industries, renewable energy and tourism, but also pose risks. The impacts of major earthquakes and flooding events in our region are well documented.

Water is at the heart of Canterbury's story. It is a taonga central to all life in the region, having an important relationship with our food production, energy security, resilience, and economic development; and playing a unique role in the traditional economy and culture of Ngāi Tahu.

Canterbury is home to a diversity of people and places – from high growth urban areas to provincial and rural districts, all with their own special value.

Close to 700,000 people call the region home – 13 per cent of the national population. It is the most populous region in the South Island and second most populous in New Zealand, and one of the fastest growing regions in the country. Canterbury's strong growth is projected to continue, with high growth projections suggesting around 900,000 people could be living in the region by 2048 – 280,000 more than was recorded in 2018.

Most of Canterbury's residents live near the coast. 82 per cent of the population live in Greater Christchurch – the second largest urban centre in New Zealand – which encompasses the major urban areas of Christchurch City and the Selwyn and Waimakariri Districts (e.g. Christchurch, Rolleston, Rangiora, Kaiapoi and Lincoln). Greater Christchurch represents one of six Urban Growth Partnerships across New Zealand, in recognition of its share of the national population (more than 10 per cent) and its focus for urban growth and economic productivity.

Timaru and Ashburton are also key urban areas in Canterbury; while a number of other smaller townships, such as Amberley, Waimate, Kaikōura, and Fairlie, play an important role as service centres for their surrounding rural communities.

Our vast region is linked by expansive transport networks, including the largest road network in New Zealand. These networks provide important connectivity within the region and beyond.

Canterbury is the main gateway to the South Island, possessing a major international airport (Christchurch), a regional airport (Timaru), two seaports (Lyttelton and Timaru), an inland port at Rolleston, and a rail hub at Fairton. Being well connected to the rest of New Zealand and the world makes the region a significant hub for freight and tourism. Christchurch is also one of just five Antarctic gateway cities in the world, serving as a key access point for Antarctic expeditions.

Significant visitor numbers come to Canterbury to experience all that the region and the wider South Island have to offer. Canterbury has some of New Zealand's key epicentres for tourism, from Aoraki Mount Cook in the Mackenzie, to Hanmer Springs in Hurunui, to the world-renowned tourism offerings of Kaikōura – and all the charming bits in-between.

Canterbury also has a history of being at the forefront of education, research and innovation, which it continues to foster today. The region is home to three leading universities, a regional polytechnic, and the largest public library in the South Island. It also has the largest tertiary, research and teaching hospital in the South Island, and is a key contributor to the work of our national public research organisations.

Together, these institutions play a central role in supporting Canterbury's thriving innovation ecosystems and the unique opportunities we have in exciting growth sectors.

Ngāi Tahu

Ngāi Tahu holds rangatiratanga over more than 80% of Te Wai Pounamu, including Canterbury. Ngāi Tahu is made up of whānau and hapū that hold traditional authority over specific areas and comprises descendants from five primary hapū: Kāti Kuri, Ngāti Irakehu, Kāti Huirapa, Ngāi Tūāhuriri, and Ngāi Te Ruahikihiki, as well as those of Ngāti Māmoē and Waitaha.

Te Rūnanga o Ngāi Tahu, established under the Te Rūnanga o Ngāi Tahu Act 1996, is statutorily recognised as the representative tribal body of Ngāi Tahu Whānui. Its membership comprises 18 Papatipu Rūnanga, each holding mana whenua and mana moana within their takiwā. Te Rūnanga manages, advocates for, and protects the collective rights and interests of Ngāi Tahu as mana whenua.

The modern relationship between Ngāi Tahu and the Crown is underpinned by three core documents: Te Tiriti o Waitangi, the Ngāi Tahu Deed of Settlement 1997, and the Ngāi Tahu Claims Settlement Act 1998 (NTCSA). These documents establish a legal framework for the relationship between Ngāi Tahu and the Crown.

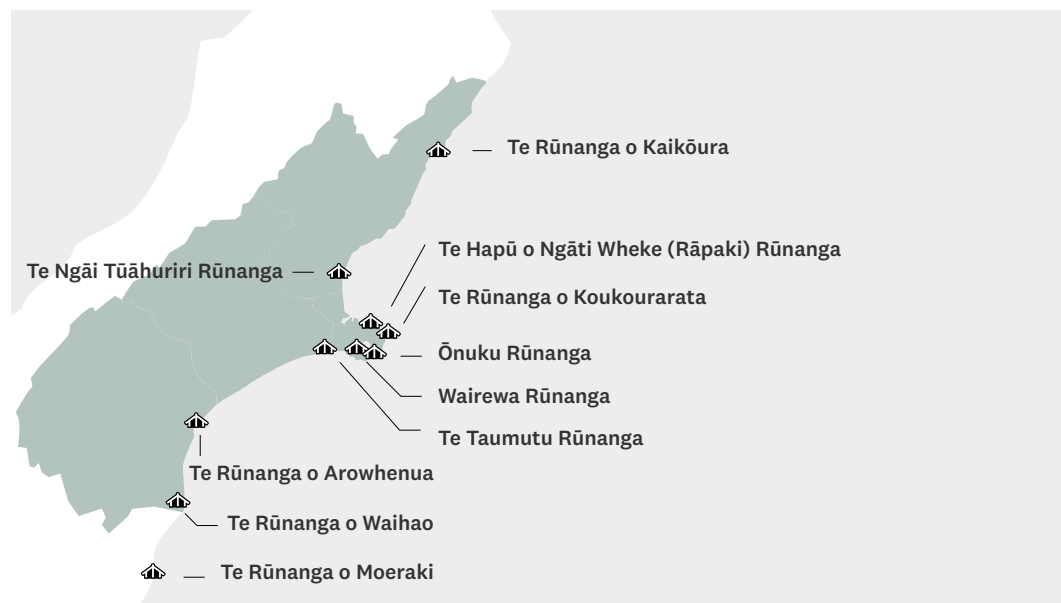
As outlined in the Deed of Settlement and NTCSA (section 6 (7)), the Crown formally apologised for its failure to acknowledge Ngāi Tahu rangatiratanga and mana over South Island lands. This apology recognises Ngāi Tahu as tāngata whenua and affirms their rangatiratanga within the Ngāi Tahu takiwā.

Rangatiratanga reflects Ngāi Tahu's ability to autonomously manage its affairs for the benefit of its whānau and communities. While often exercised alongside the Crown's kāwanatanga, Ngāi Tahu's rangatiratanga stands as a cornerstone of their governance and decision-making within their takiwā.

The Ngāi Tahu Settlement marked a turning point, initiating a "new age of cooperation" between the Crown and Ngāi Tahu. This commits the Crown to developing policies and plans affecting the Ngāi Tahu takiwā, interests, or rangatiratanga in collaboration with Ngāi Tahu.

Te Rūnanga o Ngāi Tahu (Declaration of Membership) Order 2001 lists the Papatipu Rūnanga that make up Te Rūnanga o Ngāi Tahu and their takiwā. It is acknowledged practice that consultation on local matters occurs through Papatipu Rūnanga.

The 10 Papatipu Rūnanga in Waitaha Canterbury are:



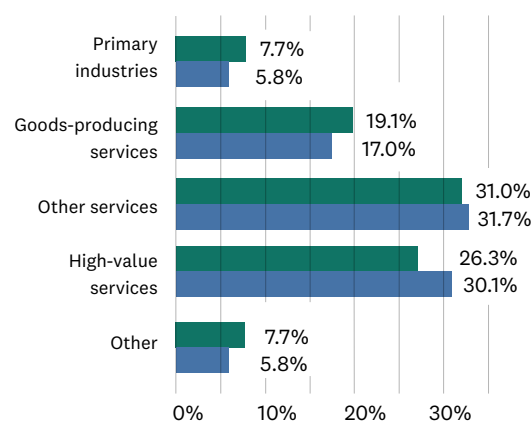
Our economy

Canterbury's economy is marked by its diverse and resilient structure – and business makeup – and it is making it one of New Zealand's most dynamic regions. Agriculture remains a foundational pillar, especially in rural sub-regions, new and emerging aerospace, food and fibre, complemented by strong performance in manufacturing, construction, health care, retail, and a growing tech sector. This mix of primary industries and advanced services in manufacturing and application of technology has helped Canterbury maintain steady growth – even as the national economy faced headwinds.

The region contributes over 12 per cent of New Zealand's Gross Domestic Product (GDP) and accounts for 13 per cent of national employment, with nearly 349,000 filled jobs across sectors. Notably, Canterbury's exports are dominated by food manufacturing – dairy, meat, and cereals – while its top employers include health care, education, and technical services. This economic diversity not only buffers the region against downturns but also positions it to lead in innovation and sustainable development.

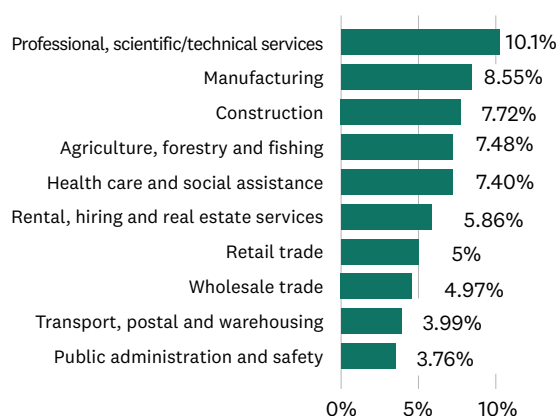
Economic structure by broad sector, 2024

% of total, year to March 2024



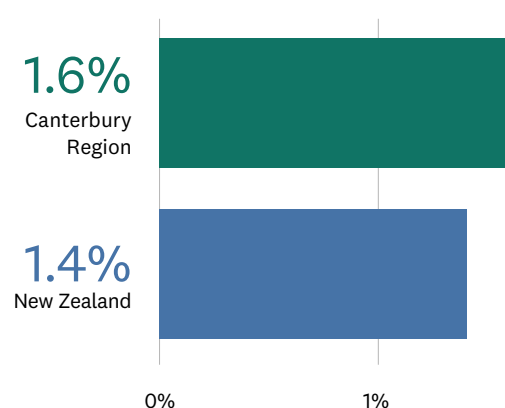
Ten largest ANZIC Level 1 industries, 2024

% of total, year to March 2024



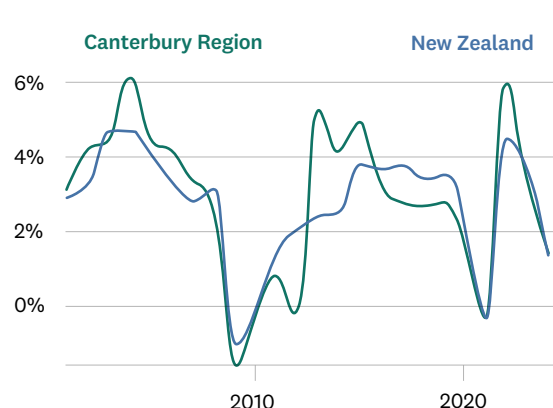
Gross domestic product

Annual average % change, year to March 2024



Gross domestic product

Annual % change, March years



Source: Infometrics, Regional Economy

GDP is a key economic indicator that measures the value of goods and services produced in a region. Canterbury is currently growing faster than the national economy; this is a trend that is consistent in the post Covid economy.

Canterbury as a region has substantial opportunities to grow future industries that solve global problems. These industries are future-focused and will drive an increase in productivity, should the region be able to build credible strategies and develop the core enabling infrastructure.

Gross domestic product

March years, 2024 prices

Year	Canterbury Region			New Zealand		
	Level (\$m)	% Change (annual average)	Absolute change (annual average) (\$m)	Level (\$m)	% Change (annual average)	Absolute change (annual average) (\$m)
2000	\$26,069.40			\$218,896.90		
2005	\$32,483.90	4.5	\$1,389.70	\$265,804.00	4.1	\$10,439.30
2010	\$35,385.50	-0.1	-\$17.90	\$287,915.20	0	-\$108.00
2015	\$41,022.00	4.9	\$1,901.90	\$325,176.90	3.8	\$11,984.00
2020	\$46,888.00	1.8	\$837.90	\$382,971.00	2.3	\$8,674.20
2021	\$46,780.70	-0.2	-\$107.30	\$381,794.30	-0.3	-\$1,176.70
2022	\$49,582.30	6	\$2,801.60	\$399,110.20	4.5	\$17,315.90
2023	\$51,231.10	3.3	\$1,648.80	\$413,064.70	3.5	\$13,954.50
2024	\$52,043.10	1.6	\$812.00	\$418,823.80	1.4	\$5,759.10

Future-proofing global agriculture with bold innovation in food, fibre, and agritech

Canterbury is emerging as a globally relevant nexus for solving agricultural challenges through innovation. The region's strategic blend of primary production, advanced manufacturing, and cutting-edge agritech is redefining how food and fibre systems can be both productive and sustainable. At the heart of this transformation is a powerful support ecosystem – anchored by government investment in the new Public Research Organisation in Lincoln (Selwyn District) – which fosters collaboration between researchers, entrepreneurs, and industry. This confluence of science, technology, and policy positions Canterbury not just as a regional leader, but as a catalyst for global change in how we grow, process, and sustain the planet's agricultural future.

Elevating our offering to become a premium tourism destination

Canterbury has a compelling opportunity to elevate its tourism sector by developing a premium visitor offering that aligns with the region's broader economic development strategy. With its dramatic landscapes, rich cultural heritage, and world-class food and wine experiences, Canterbury is well-positioned to attract high-value travellers seeking immersive and sustainable experiences. The region is shifting from being a gateway to elsewhere, toward becoming a destination in its own right. By investing in infrastructure, storytelling, and regional connectivity, alongside more user pays regulatory tools, Canterbury can unlock greater seasonal spread, longer stays, and increased visitor spend – driving economic growth while preserving the region's unique identity.

Becoming a globally significant aerospace region, for research test and evaluation

Canterbury is set to become a global hub for aerospace research and testing by 2035, as outlined in the Waitaha Canterbury Aerospace Strategy. With ideal skies, low air traffic, and strong industry-academic partnerships, the region aims to generate over \$1 billion annually, support 1,500+ jobs, and achieve net-zero operations for half of its aerospace companies. Anchored by Tāwhaki and the University of Canterbury, it's positioning itself as a future-focused centre for aerospace innovation and sustainable flight.

Building an innovation ecosystem, for sustainable transport that solves global problems

Canterbury aspires to be an innovation engine for sustainable fuels and logistics, with the University of Canterbury leading research in hydrogen, smart supply chains, and low-emission transport. Fabrum's advanced liquid and gaseous hydrogen technologies are unlocking zero-emission solutions for aviation and freight – once seen as hard to decarbonise. With nearly 100 per cent renewable energy, test sites at Christchurch Airport, and hydrogen stations in Invercargill and Christchurch, the region is building future-ready infrastructure that could redefine flight, freight, and fuel across the South Island, New Zealand and beyond.

Waitaha Canterbury: By the numbers

Water and land

- **44,500km²** – largest region in New Zealand by land area (17% of NZ total)
- **78,000km** of rivers and streams and 4,700 lakes and tarns
- **70%** of New Zealand's groundwater
- **800km** of coastline and 11,600km² of coastal marine area
- **21%** of New Zealand's highest quality soils
- **63%** of New Zealand's irrigated land area
- **19%** of the total area farmed in New Zealand

People

- **687,100** – 55% of South Island's population and 13% of New Zealand's population
- **82%** of the region's population lives in Greater Christchurch
- **1.9%** – annual average growth between 2018 and 2023 (1.4% for NZ overall)
- **901,500** people – projected population by 2048 (high growth scenario)
- **12%** of people are affiliated to an iwi (24,500 affiliated with Ngāi Tahu)
- **25%** of people were born overseas (e.g. Asia, UK and Ireland, and Australia)

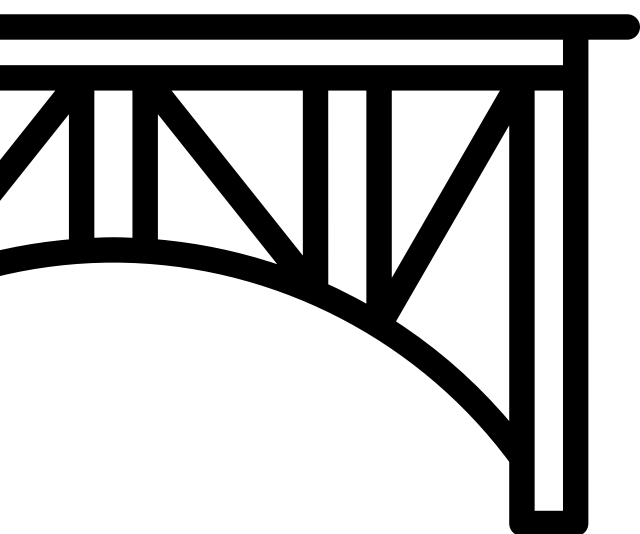
Housing

- **\$717,800** – average house value (81% of NZ's average house value)
- **6.1** – house value to income (6.5 for NZ overall)
- **37%** – mortgage payment proportion of income (39% for NZ overall)
- **70%** of households own or partly own their home
- **\$513** – average weekly residential rent (\$575 for NZ overall)

Economy

- **\$52 billion** of GDP – second largest economy in New Zealand (12% of NZ total)
 - **10.1%** – Professional, scientific and technical services
 - **8.6%** – Manufacturing
 - **7.7%** – Construction
 - **7.5%** – Agriculture, forestry and fishing
 - **7.4%** – Health care and social assistance
- **81,000** businesses and **368,500** filled jobs
- **\$141,200** – GDP per filled job (\$149,200 for NZ overall)
- **\$14.5 billion** of exports (15% of NZ total)
- **\$5.5 billion** of dairy product exports – highest exporter for the region
- **441,000** overseas visitor arrivals into Christchurch Airport
- **147,200** cruise ship passengers visit Canterbury ports
- **\$4.2 billion** of tourism expenditure
- **7.2%** of filled jobs are in the tourism sector (6.5% for NZ overall)





Canterbury's connectivity and resilience are critical to its economic success and wellbeing, and its role as the gateway to the South Island. Investing ahead of demand in transport infrastructure and services is essential to supporting growth, building resilience, strengthening supply chains, and ensuring efficient links across the region and beyond to national and global markets.

Pillar 1:

Transport

Canterbury's transport context

- Expansive road and rail networks, including the largest road network in the country (1,330km of state highways, 14,630km of local roads, and 650km of rail network).
- Deteriorating network conditions due to historic underinvestment and increased traffic volumes associated with population and economic growth.
- Significant investment in maintenance and renewals is needed, especially given the impacts from more frequent and intense weather events.
- Significant resilience issues from a range of natural hazards – highest number of 'extreme' or 'major' risks of any region in New Zealand.
- Heavy reliance on bridges for river crossings on critical freight and visitor routes (1,900 bridges on the transport network).
- Congestion is becoming an increasing issue, particularly in Greater Christchurch.
- Extensive public transport network in Greater Christchurch (buses and ferries), an on-demand service in Timaru, and Community Vehicle Trusts across the region.
- Gateway to the South Island for people and freight, benefiting from an international airport, regional airport, two seaports, an inland port, and a rail hub.
- Accounts for almost half of all the total freight movements in the South Island, reflecting its role as a strategic freight and logistics hub, and major market.

Increased maintenance and resilience of the network

Significant increases in the level of investment in road maintenance, operations and renewals are proposed in Canterbury, representing at least 40 per cent of the planned transport investment by central and local government in the next decade. This investment aims to both maintain existing levels of service and address deferred maintenance on parts of the network.

Greater resilience of Canterbury's transport infrastructure is extremely important to securing regional and national supply chains. The impacts of Canterbury's transport network being disrupted were well illustrated by the flooding of the Rangitata River in 2019, which effectively cut the South Island in two; and the Kaikōura earthquake in 2016, which closed SH1 and the Main North Line for an extended period and forced significant detours to be taken.

Canterbury's bridges are a significant transport network resilience risk and one that is reaching a critical point. There are over 1,900 bridges in the region, many of which are ageing and at increasing risk from intensifying natural hazard events. The pipeline of bridge infrastructure projects will be fundamental to securing the resilience, connectivity, growth and productivity of Canterbury and the wider South Island. This infrastructure pipeline is of national significance.

Examples of key bridge projects either underway or planned in Canterbury include the Second Ashburton Bridge in Ashburton (a Road of Regional Significance), Pages Road Bridge in Christchurch, Conway Bridge in Hurunui, Skew Bridge in Waimakariri, and the Elephant Hill Stream Bridge SH82 and North Waihao SH82 in Waimate.

Enhanced public transport that unlocks growth and development

Greater Christchurch is rapidly growing and congestion is becoming an issue. Without significant investment to support transport choices, there will be more congestion, longer journey times, increases in vehicle emissions, and impacts on the region's growth and productivity. Public transport must play a role in moving more people, more efficiently, and unlocking the full development potential of our urban areas.

Greater Christchurch's public transport investment programme, referred to as PT Futures, will achieve higher frequency services, and realigned and improved routes. It will improve journey times and reliability, increase access to key growth areas and destinations, and remove barriers for people using public transport. Some of the programme is already being delivered, while some parts will take more time and be subject to funding.

These public transport improvements will pave the way for Mass Rapid Transit (MRT). MRT is a city shaping project that will transform Greater Christchurch's public transport network and urban form. MRT will run on dedicated corridors where public transport will be prioritised, enabling a higher speed service. The routes will connect Christchurch's central city with key centres in the north and south-west, and will support significant growth and development.

The MRT project has been included in the draft National Infrastructure Plan, recognising its national importance, good value for money, and capable of being successfully delivered.

Efficient freight networks supported by strategic freight infrastructure

Protecting and enhancing strategic freight routes and infrastructure so that freight can move freely and reliably is essential to the region's productivity and competitiveness. The future of Canterbury's freight network will need to have an optimal mix of modes (i.e. freight moved by road, rail, air, and sea) to ensure goods are transported in an efficient, timely, and climate conscious manner. This will help achieve maximum value from our network.

An extensive study is underway to better understand the movement of freight in the South Island and support informed infrastructure planning and investment. The outputs of the study will support central and local government to make decisions that maximise the value of supply chains and ensure the transport system serves our communities as best as possible. The study is being overseen by the South Island Regional Transport Committee Chairs Group.

Key opportunities

What we are doing	What we need from government
- Implementing the Canterbury Regional Land Transport Plan 2024-34, which prioritises around \$10 billion of transport activities proposed for the region over the next 10 years. - Commencing work on the Canterbury Regional Land Transport Plan 2027-37. - Delivering Roads of National Significance and Regional Significance: - Belfast to Pegasus Motorway and Woodend Bypass - Second Ashburton Bridge - Canterbury Package – Rolleston Upgrade, Halswell Upgrade, Brougham Street Upgrade, and rural intersections - Reviewing the Canterbury Regional Public Transport Plan to ensure it reflects recent changes and sets a compelling vision for public transport. - Implementing the key moves and directions set out in the Greater Christchurch Spatial Plan and Greater Christchurch Transport Plan. - Delivering key improvements to Greater Christchurch's bus routes and services through the PT Futures programme. - Progressing the planning and design of a MRT system for Greater Christchurch, with a current focus on route protection and moving toward a detailed business case. - Undertaking an extensive study to better understand the movement of freight in the South Island, in order to inform infrastructure planning and investment. - Exploring options for an integrated bridge renewal programme for the region.	- To recognise the transport priorities for Canterbury in the Government Policy Statement on land transport, including public transport in Greater Christchurch. - To enable greater certainty, flexibility and support for local transport decision making, particularly regarding baseline levels of investment that can be delivered without bespoke arrangements. - To establish regional transport funding allocations that reflect the use of the network, using vehicle kilometres travelled (VKT) as the proxy for revenue collected from road users in the region. - To empower local authorities to develop and implement a wider range of funding tools and solutions. - To ensure a more integrated approach to funding allocation, making better use of the collaboratively developed priorities in Regional Land Transport Plans. - To better align the timing of transport planning and funding processes.

Key funding and investment tools
- Regional allocations for transport funding - Road tolling and congestion charging - Land and development value capture mechanisms - Public-private partnerships and other co-investment models - Proportion of international visitor levy for regional infrastructure - User-pays models (e.g. accommodation levies) to fund infrastructure - Other legislative tools

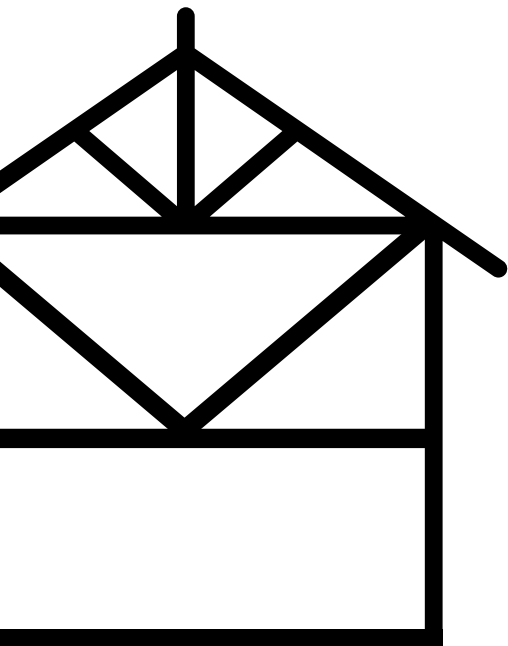
Regional allocations for transport funding

There is an opportunity to enable greater certainty, flexibility and support for local transport decision making in New Zealand, particularly for baseline levels of investment that can be delivered without bespoke arrangements. High trust, long-term funding agreements, rather than contestable funding, would reduce the cost of funding allocation services and achieve greater value for money in the sector.

Regional funding allocations that reflect the use of the transport network, using VKT as a proxy, would provide a more transparent basis for high-level funding allocations. It would ensure road users receive the benefit for what they pay.

The table below shows that most regions are already receiving a level of investment that broadly aligns with their share of national VKT – Canterbury being the clear exception.

Region	2013 Population	2018 Population	2023 Population	2023 GDP	2023 VKT	2024-27 NLTP
Northland	4%	4%	4%	3%	4%	4%
Auckland	33%	33%	33%	39%	31%	31%
Waikato	10%	10%	10%	9%	Unknown	7%
Bay of Plenty	6%	7%	7%	6%	Unknown	8%
Gisborne	1%	1%	1%	1%	1%	2%
Hawke's Bay	4%	4%	4%	3%	4%	4%
Taranaki	3%	3%	3%	3%	3%	2%
Manawatū / Whanganui	5%	5%	5%	4%	5%	6%
Wellington	11%	11%	10%	12%	9%	13%
Marlborough / Nelson / Tasman	3%	3%	3%	1%	3%	2%
West Coast	1%	1%	1%	1%	Unknown	1%
Canterbury	13%	13%	13%	13%	14%	5%
Otago	5%	5%	5%	4%	Unknown	3%
Southland	2%	2%	2%	2%	3%	1%



Protecting and enhancing Canterbury's housing affordability and high amenity lifestyle is vital to it maintaining its competitive edge, particularly in the face of rising growth pressures. These strengths offer a high quality of life, attract top talent, and support economic growth, helping to retain and boost the region's population, workforce, and investment appeal.

Pillar 2: Housing

Canterbury's housing context

- One of the fastest growing regions in the country and projected to grow to a population of around 900,000 by 2048 (based on a high growth scenario).
- Accounts for approximately 20% of new dwellings consented in New Zealand, with the region's share consistently increasing over the last five years.
- Decreasing household sizes due to an ageing population, family formation happening later, and a diverse workforce often looking for smaller accommodation.
- Housing stock does not match the population diversity – multi-unit consents have increased but standalone houses still make up about 85% of housing stock.
- Housing is more affordable than others part of the country – average house value to household income ratio in Canterbury is 6.1, compared with 6.5 nationally.
- Home ownership rates are increasing and sit at close to 70% of households.
- Housing stress is also increasing, with those spending more than 30% of their income on housing increasing.
- Short-term rental accommodation is affecting housing supply – 5,000+ homes estimated to be available on accommodation sites.
- Public housing supply has increased but is not keeping pace with the need, and the housing register of people who need this public housing is increasing.

Increased housing diversity and more choice

Canterbury needs a wide range of housing types and tenures that suit the unique needs of the region's population. This includes having more affordable and accessible homes to meet the needs of smaller households, youth, and students, and a broader range of housing choices for older people to age in their existing communities. This requires having different sizes, densities, and tenures of homes.



The region would also benefit from more resilient urban form in our urban settings, and suitable development patterns that are responsive to a range of natural hazard risks and supported by a functional infrastructure network.

Increased long-term rental availability and affordability

Canterbury needs a wider range of suitable long-term rental options, and the cost of renting needs to be more affordable for more people.

This requires minimising the impacts of short-term rentals for tourism on the rental market and meeting the growing and changing needs of our communities with long-term rental availability. Suitable temporary housing for seasonal workers also needs to be available, in collaboration with businesses that provide

seasonal work, so that the housing provided across the region supports our economic growth and diverse industries. Public housing supply in the region will also need to increase to better align to the need, with suitable provision of emergency and transitional housing.

Fit-for-purpose policy and regulation

Policy and regulation need to support the right type of houses to be delivered in the right places and is enabling of wider infrastructure benefits across the region.

This requires data gaps to be addressed to ensure a suitable evidence base for making housing policy and regulation decisions is available. These decisions will support suitable housing in both urban and rural environments and will ensure consistency around how policy is applied and interpreted by all those involved in the delivery of housing across the region.

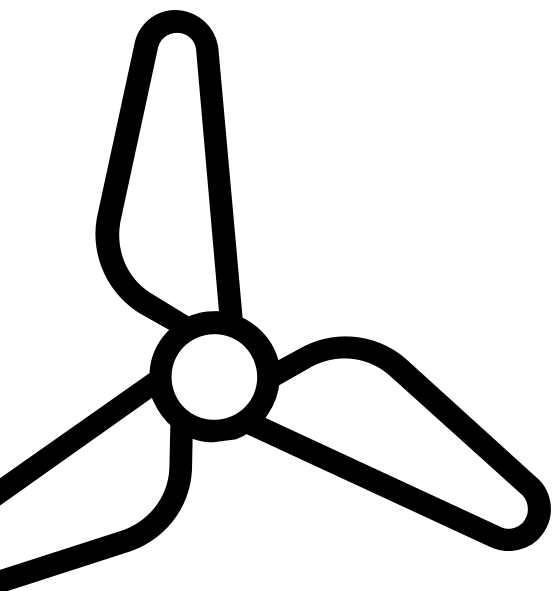
Key opportunities

What we are doing	What we need from government
- We have finalised the Waitaha Canterbury Regional Housing Strategic Plan, which identifies the priorities for Canterbury's local authorities to focus its efforts. - Sharing information between Canterbury's local authorities about ways to incentivise affordable and diverse housing options through partnerships with developers and funders. - Implementing the Joint Housing Action Plan for Greater Christchurch in collaboration with partners to address four key gaps in the private market – emergency, social and affordable housing, and lack of 1-2 bedroom homes. - Exploring ways to better coordinate between housing and related service providers and community groups, to better understand the range of housing needs and issues facing different communities. - Investigating ways to support older person's housing diversity, especially in areas outside of urban centres. - Exploring a coordinated approach to engaging with the build-to-rent sector. - Undertaking further work to identify what support is needed to assist employers to take an active role in housing their workers locally. - Investigating ways to support mixed income multi-generational housing solutions. - Undertaking early work to support regional spatial planning. - Implementing the key moves and directions set out in the Greater Christchurch Spatial Plan. - Collaborating with partners to unlock the potential of Greater Christchurch's Priority Areas.	- To enable the delivery of mixed-tenure housing over the next five years, 100 Income Related Rent Subsidy (IRRS)/Operating Supplement (OS) places are provided through a flexible fund, which will be supported by funding tools such as subsidies and infrastructure cost assistance to unlock social and affordable housing. - The specific settings suggested for change include: - Review and amend settings related to leasing, zoning, and covenants. - Review and amend the National Policy Statement on Urban Development (NPS-UD), specifically identifying and revising policies that hinder local housing objectives. - To return the Goods and Services Tax (GST) to councils, and also return the GST on public and affordable housing projects when delivered by Mana Whenua or Community Housing Providers, in order to accelerate growth and alleviate debt ratio pressures. - To enable controls and current and additional visitor levies (both central and local) that help address the strain on housing and infrastructure, recognising the impact of short-term accommodation on housing, and regulatory and funding assistance. - To enable land and development value capture mechanisms that generate a funding stream for partners to assist in responding to housing affordability challenges associated with growth. - For government to fund its role in providing social and affordable housing in response to the challenges of growth. This includes directly providing housing or supporting the Community Housing Provider sector through subsidies and supplements to deliver a mix of social and affordable housing products.

Key funding and investment tools

- Return of GST on new builds to local councils
- Land and development value capture mechanisms
- Public-private partnerships and other co-investment models
- Proportion of international visitor levy for regional infrastructure
- User-pays models (e.g. accommodation levies) to fund infrastructure
- Housing policies, community housing trusts
- Other legislative tools





Canterbury's abundant renewable energy resources position it to lead New Zealand's energy transition. By investing in innovation and infrastructure, the region can support national decarbonisation goals, drive economic growth, and unlock new energy markets, while ensuring confidence in energy supply, security, and long-term affordability for households and businesses.

Pillar 3: Energy

Canterbury's energy context

- Large region with an abundance of water, sun and wind, meaning it is well placed to play a leading role in New Zealand's successful renewable energy transition.
- Significant contributor to New Zealand's renewable electricity generation – all large-scale electricity generation in the region is renewables based.
- Key role in meeting the country's increasing energy demand – New Zealand's electricity demand is projected to increase by up to 82% by 2050.
- 11 major hydro power stations with generation capacity of 1,795MW – Benmore hydro-station is the second largest in New Zealand.
- Three large-scale solar arrays, the most installed rooftop solar of any region in the country, and numerous solar proposals in the pipeline.
- 19 active Transpower projects (as at May 2025), proposing to add over 4,500MW of new generation capacity in Canterbury and South Canterbury.
- Reducing fossil fuel use is a key challenge in the energy transition, as the region is still heavily reliant on fossil fuels for transport and industry.
- Other key challenges include managing investment, accessing capital, managing peak capacity issues in a changing climate, and supporting community and consumer understanding.

Economic development and energy are intrinsically linked

The demand for renewable energy will increase in the context of decarbonisation and industry growth. To support industry, there must be confidence in energy supply, security, and affordability. Canterbury has the potential to be at the forefront of the energy transition away from fossil fuels to more renewable sources, as evidenced by the queue of renewable projects in the pipeline. This would generate significant economic opportunities for the region.

The opportunity to invest in renewable infrastructure, innovation in clean technologies, and the development of new energy markets would positively impact Canterbury through job creation, technological advancement, and supporting industry growth and diversification. Transitioning the region’s energy system to prioritise renewable sources would also foster economic development through localised energy production, which is currently focused on grid-scale solar but with opportunities in wind, hydrogen, biomass and biofuels.

A regional approach to energy

There is significant support from stakeholders for a more joined-up regional approach to energy in Canterbury that aligns and coordinates with the goals and priorities of central and local government, industry, and communities. Shaping the energy future in Canterbury will help unlock the benefits of economic growth, environmental sustainability, and social development.

Energy cannot be looked at in isolation, as it intersects with transport, housing and urban development, infrastructure, regional skills and

immigration, water, climate change, industry, food production, community wellbeing, and more. A regional approach to the energy system would enable the many co-benefits of the energy transition to be realised. Aligning around a compelling vision will help attract partners and provide certainty for the necessary investment.

A multitude of pathways are being explored as part of the energy transition. Clear progress has been made in some areas, for example the electrification of vehicles; heat pump technology; proposed large waste-to-energy projects; grid-scale solar farms; and local solutions, such as using wastewater to heat public buildings. Other possibilities are emerging but still have an infrastructure cost barrier or a degree of uncertainty as to whether they will succeed.

A shared approach will help the region navigate the energy transition collectively. Given that Canterbury plays a significant role in New Zealand’s energy system, future planning will also consider the impacts on the South Island and the rest of the country.

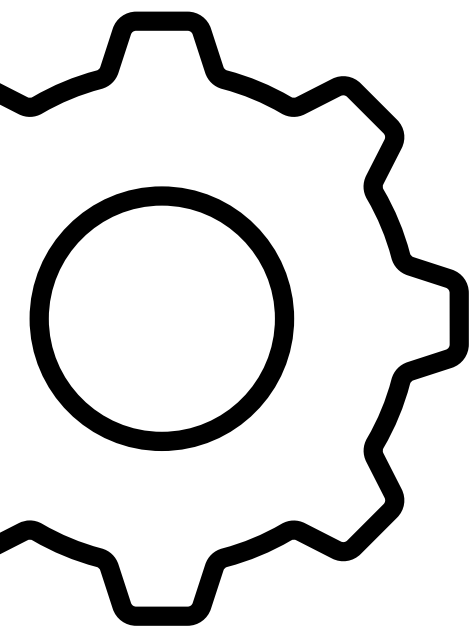
Key opportunities

What we are doing	What we need from government
- Completed the Canterbury Energy Inventory – the first comprehensive overview of the region’s energy landscape. - Developing a regional approach to energy that will support industry, drive decarbonisation, enhance energy resilience, and unlock new growth opportunities. - Undertaking early work to support regional spatial planning.	To partner with local government, mana whenua and the energy sector on the development of a regional approach to energy for Canterbury.

Key funding and investment tools
- Public-private partnerships and other co-investment models - Proportion of international visitor levy for regional infrastructure - User-pays models (e.g. accommodation levies) to fund infrastructure - Other legislative tools







Canterbury is ready to lead the next chapter of New Zealand's story. The region has proven delivery capability and wants to partner on strategic investments – across transport, energy, social, digital, and flood resilience infrastructure – to boost productivity, strengthen communities, and deliver long-term value for the country. Our collective ambitions rely upon resilient and connected infrastructure.

Pillar 4: Infrastructure

Canterbury's future will be built on the strength of its infrastructure

Infrastructure is the cornerstone of Canterbury's prosperity, liveability, and resilience. As a fast-growing region and the South Island's economic engine, Canterbury plays a vital national role. Its long-term success relies on resilient, reliable and connected infrastructure that links people, goods and ideas across the region, the South Island, New Zealand, and the world.

We must invest ahead of demand peaks – maintaining and upgrading what we already have, while planning for new infrastructure that will underpin further economic growth and productivity, and support regional equity. Long-term, strategic planning backed by sustainable funding and smart regulation is essential to delivering a future-focused infrastructure pipeline.

Social infrastructure

Infrastructure must support the systems that sustain daily life – housing, education, and health – as well as enable the industries that power our economy.

Canterbury's infrastructure is critical to building liveable and prosperous communities across the region, in both urban and rural settings. Investment in hospitals, schools, three waters, public facilities, and shared spaces strengthens health and wellbeing outcomes, improves education access, and fosters social cohesion. They are basic building blocks for a growing and thriving region that we simply must get right.

Tertiary education institutions serve as regional anchors. They attract students, research, and investment; fuel innovation; and provide the skilled workforce needed to deliver large-scale infrastructure. Canterbury has high performing universities and polytechnic, including the University of Canterbury, Lincoln University, the University of Otago Medical School, and Ara Institute of Canterbury. We must continue to leverage and build on their success.

Digital infrastructure

Digital connectivity is also essential. Reliable broadband and mobile networks are critical for education, employment, health services, and commerce – particularly in our rural areas. Digital infrastructure must be prioritised alongside other infrastructure to ensure no community is left behind. New Zealand’s geographic isolation in the world only serves to emphasise the strategic importance of staying at the forefront of digital technologies and innovations.

Flood resilience infrastructure

Flood resilience infrastructure is also critical to Canterbury’s safety, resilience, and long-term economic productivity. With multiple significant braided rivers, including the Waimakariri, Rakaia, and Rangitāta, the region faces major flood risk across urban and rural areas. Well-maintained stopbanks, floodways, and drainage systems protect lives, homes, farmland, and nationally important infrastructure from increasingly frequent and severe weather events.

Climate change is raising the stakes. Extreme rainfall, sea-level rise, and catchment volatility demand modern, adaptive flood protection systems.

Co-investment between local and central government now will prevent disruption and loss in the future.

A long-term, strategic approach to infrastructure

Long-term, strategic infrastructure planning is essential to Canterbury’s ambition. It will support the region to deliver the right infrastructure and services in the right places at the right times. Our aim is to build an integrated, future-ready infrastructure pipeline that enhances our economy, protects and strengthens our communities, and contributes to national prosperity.

To achieve this, there are three key enablers that we can focus on:

- **Regional spatial planning**
Spatial planning coordinates land use planning and infrastructure investment. It helps to coordinate infrastructure development between sectors and ensures that infrastructure is well used, and its negative effects are managed. Spatial planning involves central and local government, mana whenua, infrastructure providers, and the private sector.

Canterbury is progressing early work to support regional spatial planning, ahead of any requirements for spatial planning under the new resource management system.
- **Streamlined regulation and consenting**
Consenting for infrastructure can be a major hurdle to effective infrastructure provision, both in time and in cost (as much as 16 per cent of project costs can be for consenting). We must modernise and align our regulatory settings to remove unnecessary blocks on infrastructure delivery and unlock investment, while continuing to manage interactions with surrounding land uses and any negative impacts on our natural environment.
- **Sustainable funding and financing**
Total infrastructure investment will continue to increase with population and economic growth. Canterbury’s local authorities are ready to partner with central government, mana whenua, and the private sector to co-fund infrastructure. We must ensure that the right tools and mechanisms are in place so that our critical infrastructure can be funded in a sustainable way.

With a strong vision, proven delivery record, and collaborative leadership, Canterbury stands ready to deliver a bold infrastructure pipeline that aligns with regional and national priorities.

Canterbury's major infrastructure projects

The following provides examples of major infrastructure projects either proposed, in progress or recently completed in Canterbury.

Transport

- Roads of National and Regional Significance, including:
 - Belfast to Pegasus Motorway and Woodend Bypass (Waimakariri)
 - Second Ashburton Bridge (Ashburton)
 - Canterbury Package – Rolleston Upgrade (Selwyn), Halswell Upgrade (Christchurch), Brougham Street Upgrade (Christchurch), and rural intersections
- Major bridge renewal projects, such as Pages Road Bridge (Christchurch), Conway Bridge (Hurunui), Skew Bridge (Waimakariri), and the Elephant Hill Stream Bridge SH82 (Waimate) and North Waihao SH82 (Waimate)
- Greater Christchurch Public Transport (PT) Futures programme
- Greater Christchurch Mass Rapid Transit (MRT) system
- Tāwhaki National Aerospace Centre.

Energy

- Kōwhai Park (Christchurch) – 230ha, 150MW solar farm
- Lauriston Solar Farm (Ashburton) – 93ha, 47MW solar farm
- Mt Cass Wind Farm (Hurunui) – 95MW wind farm.

Health

- Christchurch hospital upgrades

Education

- New primary schools in Prebbleton (Selwyn), Lincoln (Selwyn) and Halswell (Christchurch), and additional classrooms across various Christchurch schools.

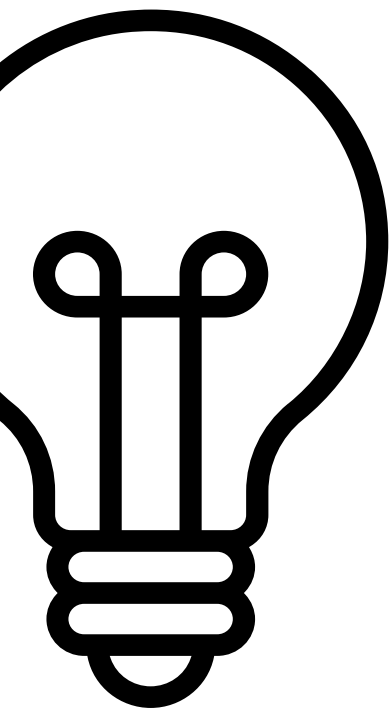
Flood protection

- Flood resilience and recovery work, covering the Waiau, Ashley/Rakahuri, Waimakariri and Rangitata rivers, as well as a region-wide planting and berm management project.

Other

- Te Pae (Christchurch Convention Centre)
- Parakiore Recreation and Sport Centre (metro sports facility)
- Christchurch multi-use arena, One NZ Stadium Te Kaha
- Court Theatre in Christchurch
- Upgrades and new builds at the three Christchurch prisons.





Canterbury is a powerhouse of innovation, with businesses and people who combine ingenuity, resilience, and a solutions-focused mindset to meet both local, national and global challenges. From advanced manufacturing and agritech to aerospace, renewable energy, digital technologies, and food innovation, the region is home to enterprises that consistently punch above their weight in creating products and services that compete internationally.

Pillar 5: Innovation

Canterbury's innovation context

- A highly skilled workforce that has capacity and ambition to be at the forefront of New Zealand's next wave of innovation-led growth.
- Anchored by a diverse economy and a strong base of research and development expertise, Canterbury's innovation ecosystem is underpinned by leading tertiary institutions, cutting-edge research hubs, and collaborative industry clusters.
- Businesses here are renowned for their collaborative spirit, leveraging cross-sector partnerships to solve complex problems and unlock new opportunities.
- Emerging sectors include space and aerospace technologies. Anchored by the Waitaha Canterbury Aerospace Strategy, the region aims to generate \$1 billion in economic impact by 2035 and create 1,500 high-value jobs.
- A leader in sustainable agrifood production where technology-driven efficiencies are reshaping global supply chains.
- Home to nationally and internationally recognised biotech leaders producing top quality products for use in therapeutic, cell culture, microbiology, and immunology applications around the world.
- Rapidly emerging as a national hub for clean tech manufacturing, powered by near-100% renewable electricity and a surge in solar generation. Lauriston Solar Farm generates 100 GWh annually, powering ~13,000 homes. Kōwhai Park Solar Farm: A 170 MW solar farm beside Christchurch Airport, expected to generate 290 GWh annually—enough to power 36,000 homes.

Our people drive innovation

Innovation in Canterbury is people-powered. Our communities have a proven ability to adapt, diversify, and lead in the face of change — qualities that were forged in response to both natural and economic challenges.

Canterbury has become a launchpad for global innovation, with strengths in agritech, aerospace, education, and clean energy – the region is competing and collaborating internationally. What's also fuelling Canterbury's can-do approach are our private-public partnerships, a strong relationship with mana whenua as well as our unique natural landscapes and diverse communities.

Spotlight on Canterbury innovation

Aerospace

The region's low air traffic, advanced manufacturing capabilities, and supportive regulatory environment make it ideal for testing and developing cutting-edge aerospace technologies.

Key features:

- **Strategic Vision and Investment**
 - Waitaha Canterbury Aerospace Strategy
 - Focus on sustainability, innovation, and global competitiveness
 - Globally competitive companies in operation
- **Tāwhaki National Aerospace Centre**
 - Located at Kaitorete Spit beside Lake Ellesmere (Te Waihora)
 - Joint venture between hapū and the Crown
 - Offers permanent test flight airspace and R&D facilities
- **Academic and talent pipeline**
 - University of Canterbury produces top-tier engineering graduates
 - Strong links between academia and industry for R&D and workforce development
- **Events and Collaboration**
 - Annual New Zealand Aerospace Summit connects innovators, investors, and global partners
 - Joint events with Canterbury Tech to foster cross-sector innovation
- **Regulatory advantage**
 - Low air traffic and streamlined regulations support rapid testing and deployment
 - Emphasis on contributing to solutions for global challenges like climate change and sustainable propulsion.

Biotech and precision medicine sectors

Christchurch's Te Papa Hauora Health Precinct is a strategic partnership between Canterbury's major tertiary education and health institutions, working together with representation from Ngāi Tūāhuriri. These institutional anchors recognise that collectivising their interests in the Canterbury health system creates a range of opportunities for collaboration and innovation.

Movement of key businesses to Te Papa Hauora brings cutting-edge therapies closer to New Zealand patients, but also catalyses the emergence of an immunotherapy innovation cluster, drawing together research, clinical expertise, and commercial biotech under one collaborative ecosystem.

Key features:

- **Strategic Partnerships**
 - Strong ties with the Malaghan Institute of Medical Research
 - Collaboration with local hospitals and universities for translational research
- **Te Papa Hauora Health Precinct**
 - Multi-institutional hub combining healthcare, academia, and innovation
 - Facilitates clinical trials, workforce development, and biotech commercialisation
- **Talent and Research Pipeline**
 - University of Otago (Christchurch) and University of Canterbury provide biomedical and engineering talent
 - Opportunities for PhD and postdoc research in immunology, oncology, and cell therapy
- **National impact**
 - Reduces reliance on overseas CAR-T treatments, improving access and affordability
 - Positions Christchurch as a leader in personalised medicine and biotech manufacturing
- **Cluster potential**
 - Opportunity to attract startups, investors, and global biotech firms
 - Shared infrastructure and regulatory support for scaling immunotherapy innovations
- **Health equity focus**
 - Potential to improve cancer outcomes for Māori and underserved populations.





Clean tech manufacturing

Canterbury is rapidly emerging as a national hub for clean tech manufacturing, powered by near-100% renewable electricity and a surge in solar generation. The region's strengths in advanced engineering, composite materials, and precision manufacturing are being harnessed to develop technologies that reduce emissions across aviation, transport, and industrial sectors.

With world-class research from the University of Canterbury and strategic coordination across industry and government, Canterbury is building a future where clean fuels and climate-positive technologies are designed, tested, and exported from Christchurch.

Key features:

- **Renewable Energy Backbone**
 - Canterbury's electricity grid is nearly 100% renewable, with hydro and rapidly expanding solar
 - Lauriston Solar Farm generates 100 GWh annually, powering ~13,000 homes
 - Kōwhai Park Solar Farm: A 170 MW solar farm beside Christchurch Airport, expected to generate 290 GWh annually—enough to power 36,000 homes
- **Fabrum and Hydrogen Coalition Leadership**
 - Fabrum develops cryogenic hydrogen systems, composite tanks, and refuelling infrastructure for aviation and transport
 - Hydrogen Coalition aligns industry, academia, and government to coordinate infrastructure, policy, and investment
 - Together, they enable real-world hydrogen trials, including Christchurch Airport's hydrogen-powered ground operations
- **Decarbonising aviation**
 - Clean tech manufacturing supports hydrogen-powered aircraft and airport vehicles
 - Fabrum's technologies enable onboard storage, rapid refuelling, and cryogenic management
 - Coalition strategy includes scaling hydrogen aviation hubs and integrating with global networks
- **University of Canterbury innovation**
 - Leads the HINT Project with German Aerospace Centre to model hydrogen energy systems
 - Research informs manufacturing strategies for aviation fuels, industrial decarbonisation, and energy resilience
- **Advanced manufacturing capabilities**
 - Regional expertise in precision engineering, automation, and composite materials
 - Facilities produce fuel systems, refuelling infrastructure, and zero-emission propulsion components
- **Strategic Advantages**
 - Renewable-powered manufacturing reduces lifecycle emissions and attracts global investment
 - Synergies between energy, aerospace, and biotech sectors foster cross-industry innovation
 - Canterbury positioned as a climate-tech export hub with scalable infrastructure and talent.



Agri value chain

Canterbury is redefining its agricultural value chain through a powerful blend of science, sustainability, and strategic collaboration. Anchored by the newly established New Zealand Institute for Bioeconomy Science Public Research Organisation and the research excellence of Lincoln University, the region is shifting from volume to value—focusing on climate-smart production, regenerative systems, and high-value exports.

Innovative companies in Canterbury are leading the charge, integrating environmental stewardship with market-driven innovation. Together, they're building a future where Canterbury's food and fibre sector is globally competitive, locally grounded, and environmentally resilient.

Key features:

- **Primary Sector PRO**
 - A new regional body coordinating strategy across agriculture, food, and fibre
 - Focuses on innovation, sustainability, and Māori enterprise leadership
 - Acts as a catalyst for collaboration between industry, iwi, and research institutions
- **Lincoln University leadership**
 - National centre for agribusiness education and research
 - Offers specialised programmes in agribusiness value chains, land management, and food systems
 - Home to the Agribusiness and Economics Research Unit (AERU), which informs policy and market strategy
- **Value chain transformation**
 - Shift from commodity exports to branded, traceable, and environmentally certified products
 - Emphasis on storytelling, provenance, and consumer trust in global markets
 - Integration of digital tools, emissions tracking, and supply chain transparency
- **Māori enterprise and land stewardship**
 - Ngāi Tahu Farming exemplifies indigenous leadership in sustainable land use
 - Māori agribusinesses play a key role in shaping ethical and regenerative value chains
- **Environmental innovation**
 - Focus on reducing agricultural emissions, improving soil health, and enhancing biodiversity
 - Research into alternative proteins, low-emissions livestock systems, and circular nutrient flows
- **Strategic Advantages**
 - Canterbury's scale, climate, and infrastructure support diverse agricultural systems
 - Strong links between research, industry, and iwi enable rapid innovation and adoption
 - Positioned to lead New Zealand's transition to a climate-smart, high-value food economy.

Funding and investment tools

There are a wide range of funding and investment tools that central and local government can pull from the toolbox to achieve the priorities outlined in this document. While far from being an exhaustive list, some of the key tools that Canterbury wishes to further explore are summarised in the table below.

	Transport	Housing	Energy	Infrastructure
Return of GST on new builds to local councils		✓		✓
Road tolling and congestion charging	✓			✓
Land and development value capture mechanisms	✓	✓		✓
Public-private partnerships and other co-investment models	✓	✓	✓	✓
Proportion of international visitor levy for regional infrastructure	✓	✓	✓	✓
Regional allocations for transport funding	✓			✓
User-pays models (e.g. accommodation levies) to fund infrastructure	✓	✓	✓	✓
Housing policies, community housing trusts		✓		
Co-investment in flood and river resilience infrastructure				✓
Other legislative tools	✓	✓	✓	✓

Next steps

A Regional Deal proposal that's uniquely Canterbury

This *Waitaha Canterbury: World-stage ready* document has outlined the Canterbury Mayoral Forum and Business Canterbury's shared ambition for Waitaha Canterbury, and some of the fundamental elements for its long-term success.

Its intention has been to show why Canterbury is primed for creating a Regional Deal proposal, or to leverage other opportunities to strengthen the partnership between central and local government, mana whenua, and the private sector. It intends to be a catalyst for productive discussion and collaboration between partners.

To get the Regional Deal proposal done for Canterbury, we welcome input from a range of partners, sectors, and stakeholders.

Not least this includes each Canterbury local authority, Papatipu Rūnanga, Te Rūnanga o Ngāi Tahu, health and tertiary education sectors, the private sector, infrastructure providers, and communities.

This region-wide input and cooperation will be essential to developing our collective story and unique value proposition for Canterbury. This exciting work will be undertaken during the next local government triennium, starting after the local elections in October 2025.

Continuing to progress a joined-up approach for Canterbury

Alongside our work to develop a Regional Deal proposal, there is a wide range of work already underway or planned that will continue to progress our regional priorities.

- We are advancing discussions about **regional spatial planning** and how we might best approach this work in Canterbury.
- We are undertaking a full review of the **Canterbury Regional Land Transport Plan**, identifying our transport priorities for the 2027-37 period (being progressed by the Canterbury Regional Transport Committee).
- We are progressing work on a **regional approach to energy**, building on the recently completed regional energy inventory for Canterbury.
- We have finalised the **Waitaha Canterbury Regional Housing Strategic Plan**, which identifies the priorities for Canterbury's local authorities to focus its efforts.
- We are implementing the **Canterbury Climate Partnership Plan**, including identifying pathways to transition to a low-emissions region.
- We are implementing the key moves and directions from the **Greater Christchurch Spatial Plan**, including progressing the planning and design of the **Greater Christchurch MRT system**, and delivery of the **Greater Christchurch Joint Housing Action** (being progressed by the Greater Christchurch Partnership).
- We are extending our **understanding of the South Island freight system** to support more informed infrastructure planning and investment (being progressed by the South Island Regional Transport Committee Chairs Group).
- We are supporting the vision set out in the **Waitaha Canterbury Aerospace Strategy**, which outlines a clear pathway to transform our aerospace sector into a global leader and a \$1 billion contributor to the economy by 2035.
- Canterbury Ambition, working with **Business Canterbury** to ensure collective vision and ambition led by private sector and enabled by local and central government.

