Economic impact of the Hokonui Wind Farm

Report to support a referral application under FTAA

NZIER report to Hokonui Energy Limited

May 2026

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1 Introduction

1.1 Purpose

The purpose of this report is to provide an initial economic assessment of the Hokonui Wind Farm in support of the referral application that will be made for the Project under the Fast-track Approvals Act 2024 (FTAA). The criterion for accepting a referral application is that the project is an infrastructure or development project with significant regional or national benefits. This report provides evidence that the project meets that requirement.

The Hokonui Wind Farm is a large-scale infrastructure project that will increase renewable electricity in Southland Murihiku. The Hokonui Wind Farm will be located in the Hokonui Hills in Southland and will comprise of up to 83 wind turbines. The generation capacity of the project is intended to total 500 MW, with an annual expected output of 1,905 GWh. This output is sufficient to power approximately 238,000 households. The generation capacity will be constructed in three phases[1] from 2031 to 2035 and will make a material contribution to meeting the projected increase in electricity demand in Southland and New Zealand.

1.2 Scope

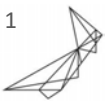
Because this report is intended to support a referral application, it is focused on providing relevant information about the Southland economy and its electricity sector. The report first describes the regional economy, including its demand for electricity. It then assesses the project against criteria related to the FTAA.

1.3 Summary finding

Southland has a vibrant economy that supports good incomes for its population. The economy is diversified – grounded in the primary sector, with a significant manufacturing sector and varied services sector (particularly in Invercargill). This economy requires energy. To support the growth and decarbonisation of the Southland economy, more renewable electricity generation is required. Current forecasts suggest there could be a generation shortfall in the future, which regional planning aims to avoid.

The Hokonui Wind Farm is an infrastructure project that will deliver significant regional benefits by supporting the continued growth and development of the Southland economy while supporting decarbonisation of leading industries, including manufacturing and transport.

[1] The planned phasing for the project is 188 MW (37.35 percent) by 2031, 156 MW (31.33 percent) by 2033 and 156 MW (31.33 percent) by 2035. The construction of the BESS is expected to follow similar phasing.



2 Economic landscape of Southland

2.1 GDP and major industries

Southland has a vibrant and diverse economy. The Southland region's GDP per capita has risen steadily since 2000. In 2024, it sits about 7 percent above the national average, with Invercargill (+11 percent) and Southland District (+5 percent) offsetting Gore (-4 percent). The economy is led by manufacturing, agriculture and owner-occupied property operations (38.9 percent of GDP).

Table 1 GDP per capita, Southland Murihiku

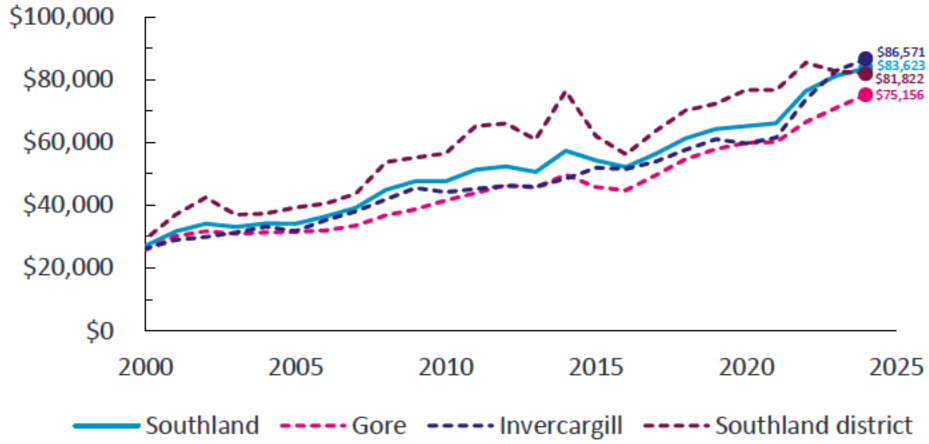
Figures for 2024

	Southland	Gore	Invercargill	Southland district
GDP per capita for the year to March 2024	$83,623	$75,156	$86,571	$81,822
Percentage change in the GDP per capita between 2023 and 2024, year to March	3.0%	6.0%	4.7%	-1.0%
The ratio of the GDP per capita to the national value, for the year to March 2024	1.07	0.96	1.11	1.05

Source: Ministry of Business, Innovation and Employment (MBIE)[2]

Figure 1 GDP per capita for Southland's districts

$NZD not adjusted for inflation, 2000–2024

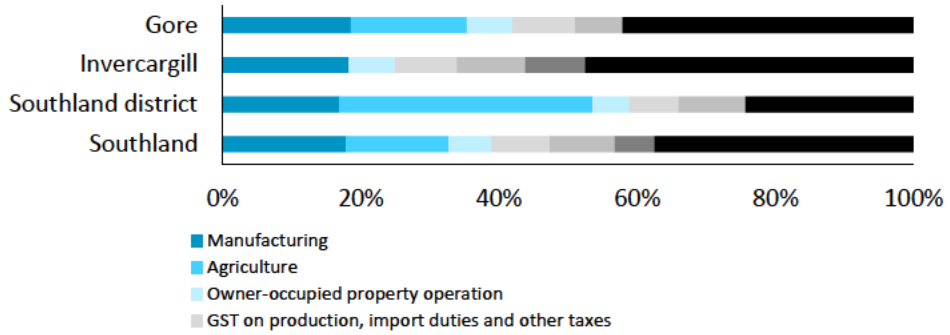


Source: MBIE

[2] https://webrear.mbie.govt.nz/summary/southland?accessedvia=southland

Figure 2 GDP contribution from Southland's top 5 industries

Figures for 2024



Source: Ministry of Business, Innovation and Employment

2.2 Role of electricity

Electricity plays a critical and growing role in Southland Murihiku's energy system in residential consumption, industrial activity, and the region's decarbonisation pathway. At a regional level the output from the Hokonui would help to meet Southland regional electricity demand. Over the past five years annual load in the Southland region has exceeded annual generation.

Current residential electricity use is substantial at 342,596 MWh (Electricity Authority 2025); overall demand is projected to increase significantly through to 2050 as transport and industry electrify and new users such as the Datagrid Data Centre Park[3] become established. To meet the country's targets for greenhouse gas emissions reduction while supporting economic activity, increasing the electricity available for transport and industry will be important (Climate Change Commission 2021).

For example, Mataura Valley Milk has converted its dairy processing plant from coal to electricity, installing a large electric boiler that eliminates around 22,000 tonnes of CO_2 emissions annually. Meridian has also supported similar process heat electrification projects with Open Country Dairy and Fonterra and has multiple further agreements underway in Southland, providing evidence of momentum toward electrification (Meridian 2024). Fonterra has since installed a 20 MW electrode boiler at its Edendale site and intends to install another two 30 MW boilers at the site (Energy Efficiency and Conservation Authority 2025).

The shift toward renewable energy is expected to create a widening supply gap unless new energy generation is developed. Electricity is central to achieving decarbonisation. An estimate of the generation capacity required simply to electrify the current industrial uses in Southland is 150 MW (Beca 2024), to say nothing of other uses of electricity or increased demand from new development. Datagrid has recently received resource consent to construct and operate datacentre near Invercargill which is expected to begin operation in 2028 (Datagrid 2026b; Russell 2026). The 280 MW datacentre will require 2,453 GWh of electricity per year. Datagrid has signed a power purchase agreement with Mercury Energy for 140 MW which secures half of the required supply (Datagrid 2026a; Lagonsin 2026).

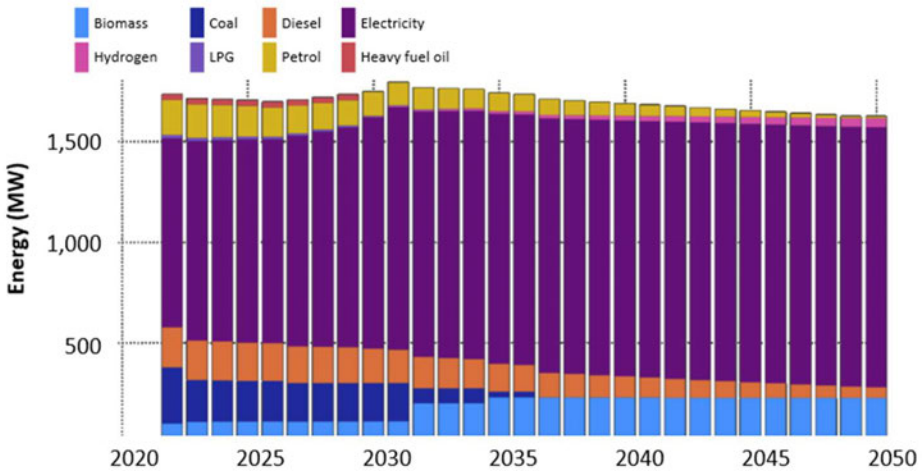
[3] The Datagrid Data Centre Park (Datagrid) is a planned artificial intelligence (AI) facility in Makarewa (https://www.datagrid.nz/).

Addressing the shortfall will require significant investment in new generation, as well as transmission and distribution upgrades.

The figures and table below show the growing demand for electricity in Southland and the potential for a supply shortfall. Experts have shown that, in either a baseline or a green growth scenario, demand for electricity will increase (Beca 2024). Forecast supply is not expected to meet that growing demand. The shortfall could reduce the electrification of process heat and transport, reducing future economic growth in important sectors such as manufacturing and agriculture and having wider implications for achieving New Zealand's decarbonisation targets.

Figure 3 Demand forecast by energy type – transition scenario

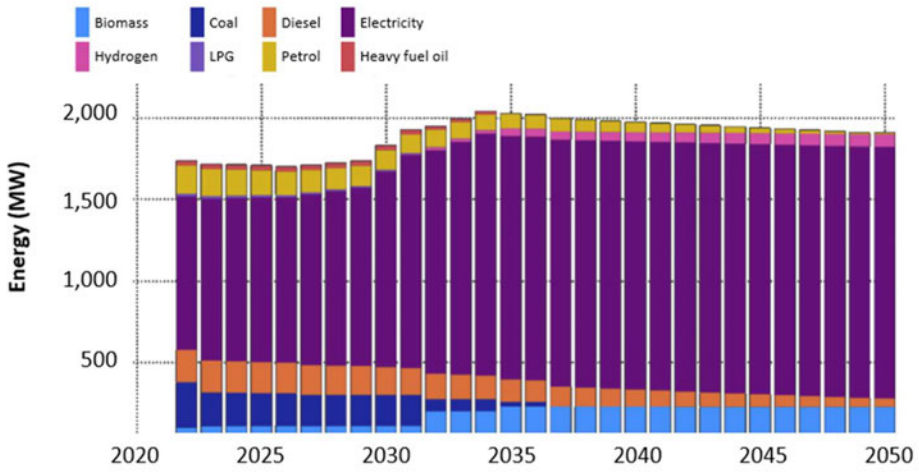
Yearly evolution of demand profile (MW)



Source: Beca (2024)

Figure 4 Demand forecast by energy type – green energy growth scenario

Yearly evolution of demand profile (MW)



Source: Beca (2024)

Table 2 Electricity supply and demand in Southland

Figures for 2025

	Transition scenario		Green energy growth scenario	
Year	**Demand (MW)**	**Supply (MW)**	**Demand (MW)**	**Supply (MW)**
2022	940	1173	940	1173
2030	1150	1194	**1200**	1194
2035	**1244**	1189	**1494**	1189
2050	**1294**	1190	**1544**	1190

Note: Red numbers **in bold** indicate demand that exceeds available supply. In this table, all demand over 1200 is greater than supply.
Source: Beca (2024)

Importantly, the shortfall in electricity production is not just a regional issue. The New Zealand Infrastructure Commission and MBIE have indicated that renewable electricity generation capacity for the country needs to increase by 170 percent by 2050 to satisfy demand (Ministry of Business, Innovation and Employment 2023; New Zealand Infrastructure Commission 2022). Given that level of increase, Southland would not be able to rely on importing electricity from elsewhere to meet its needs.

2.3 Development plans

Southland Murihiku's regional energy planning identifies wind generation as a central component of its future energy system. Since the strategy's publication, the continuation of the New Zealand Aluminium Smelter (NZAS) at Tiwai Point has been confirmed through new electricity supply agreements signed in 2024, enabling operation until at least 2044 (Transpower 2026). This aligns Southland with the strategy's **high electricity demand pathway**, under which existing generation is insufficient to meet forecast demand, requiring substantial new renewable generation, with the majority being onshore wind. The strategy notes to move forward under this scenario, social license for the energy transition is "*vitally important to achieve successful implementation*" (Beca 2024).

Transmission planning by Transpower and PowerNet (2023) further supports this direction, with recent upgrades enabling new generation connections, including wind projects such as Kaiwera Downs. *"There are also grid stability and capacity issues that will impact new load and generation connections. For example, we anticipate that increased load growth may eventually lead to system constraints when there is low hydro and wind generation in the Southland region to meet the existing and growing base and peak load."*

2.4 Population

Southland has a population of around 104,850 people across 40,185 households, with the largest share in Invercargill (58,000 people), followed by Southland District (33,900) and Gore (12,950). Unemployment is relatively low at 4.2 percent in December 2025, below the national rate of 5.3 percent, although Invercargill is higher at 5.8 percent.

Table 3 Population by people and households

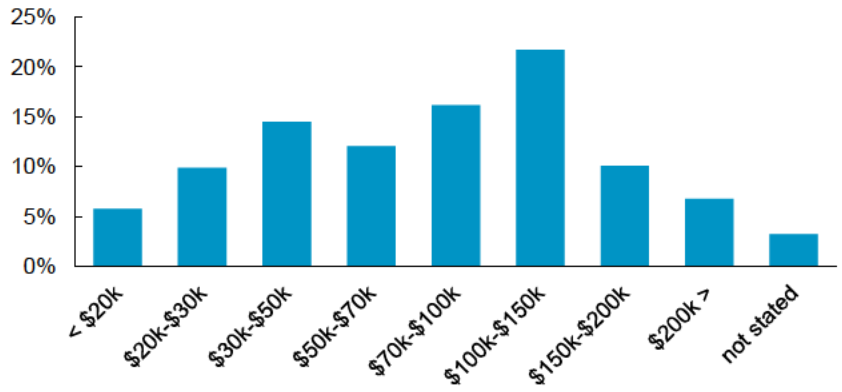
Number of people, households in occupied private dwellings

	Number of people (2025)	Number of households (2023)
Gore	12,950	5,301
Invercargill	58,000	22,125
Southland district	33,900	12,750
Southland	**104,850**	**40,185**

Source: Ministry of Business, Innovation and Employment, Stats NZ

Figure 5 Southland's income distribution

Percent, $NZD 2024



Source: Ministry of Business, Innovation and Employment

Table 4 Unemployment in Southland

2025

Area	Unemployment rate (Dec 2025)
New Zealand	5.3%
Southland	4.2%
Invercargill	5.8%
Gore	*No data*
Southland district	*No data*

Source: Ministry of Business, Innovation and Employment

2.5 Summary

Southland has a vibrant economy that supports good incomes for its population. The economy is diversified – grounded in the primary sector, with a significant manufacturing sector and varied services sector (particularly in Invercargill). This economy requires energy.

To support the growth and decarbonisation of the Southland economy, more renewable electricity generation is required. Current forecasts suggest there could be a generation shortfall in the future, which regional planning aims to avoid.

3 Alignment with the FTAA

In order to refer a project to the fast-track approvals process, the Minister for Infrastructure (the Minister) must be satisfied that the project will help achieve the purpose of the FTAA, which is to facilitate the delivery of infrastructure and development projects with significant regional or national benefits. For the purposes of determining if a project will have significant regional or national benefits, the Minister must consider a relevant Government policy statement and may consider the matters set out in section 22(2) of the FTAA. Of relevance to this assessment, this includes whether the project:

- Has been identified as a priority project in a central government, local government, or sector plan or strategy (for example, in a general policy statement or spatial strategy), or a central government infrastructure priority list;
- Will deliver new regionally or nationally significant infrastructure or enable the continued functioning of existing regionally or nationally significant infrastructure;
- Will deliver significant economic benefits; and
- Will support climate change mitigation, including the reduction or removal of greenhouse gas emissions.

We provide an assessment of the above relevant matters as they relate to the economic impacts of the Hokonui Wind Farm below.

3.1 Appropriateness for fast-track approvals process

FTAA section

Section 22(1)(a)
The criteria for accepting a referral application include that the project is an infrastructure or development project that would have significant regional or national benefits.

The project is an infrastructure project that will deliver significant national and regional benefits by helping to meet the projected increase in electricity demand nationally and regionally and supporting the decarbonisation of both electricity generation and the economy. The core increase in electricity demand is driven by the electrification of industrial process heat, followed by the electrification of private transport.[4]

The projected increase in electricity demand in New Zealand over the next thirty years is substantial:

- The Ministry of Business, Innovation and Employment (2024) '*Electricity Demand and Generation Scenarios*' (EDGS)[5] project that electricity demand will increase from EDGS projected 2026 levels by between: 3,800 and 7,400 GWh (8.9 to 16.4 percent) by 2030,

[4] The electrification of industrial process heat has become urgent since the production of the MBIE and Transpower forecasts quoted below with the faster-than-expected decline of domestic natural gas and the relatively high cost of imported alternatives.

[5] The lower bound demand increases are from the 'Reference' scenario and the upper bound demand increases are from the 'Innovation' scenario.

13,500 and 21,400 GWh (31.9 to 47.6 percent) by 2040 and 19,700 to 27,100 GWh (46.4 to 60.2 percent) by 2050.

- Transpower (2025) 'Te Kanapu' with a lower bound forecast similar to the EDGS 'Reference' scenario and upper bound scenarios 'Global green' and 'Made in Aotearoa'. The 'Global green' scenario projects that electricity demand will increase from EDGS projected 2026 levels by: 10,600 GWh (25.0 percent) by 2030, 40,600 GWh (95.8 percent) by 2040 and 62,600 GWh (147.7 percent) by 2050.[6]

The generation capacity of the project is intended to total 500 MW with an annual expected output of 1,905 GWh. This output is sufficient to power approximately 238,000 households. The generation capacity will be constructed in three phases[7] from 2031 to 2035 and will make a material contribution to meeting the projected increase in electricity demand forecast under the EDGS and Te Kanapu scenarios.

If new generation infrastructure, such as that provided by the Hokonui Wind Farm, cannot be constructed and commissioned in line with or ahead of demand growth:

- On average, the economy will face an energy supply gap, which will constrain economic activity and increase reliance on coal and imported natural gas to partially meet excess electricity demand.[8] This energy supply gap will increase energy prices and also constrain the decarbonisation of industrial process heat and private transport.
- During dry years, the frequency of very high prices, supply rationing and the risk of widespread electricity rationing or power outages will increase.

At a regional level, the output from the Hokonui would help to meet Southland regional electricity demand. Over the past five years annual load in the Southland region has exceeded annual generation (figures are provided in Appendix A). The outlook for the balance between local generation and supply over the next ten years is uncertain. Output will be increased by other wind farm projects under construction and by those awaiting consent, if granted. However, demand is also likely to increase due to the electrification of process heat for dairy processing and will increase dramatically if the Datagrid data processing centre that has recently been consented is constructed. As noted above the 280 MW datacentre will require 2,453 GWh of electricity per year, just under 40 percent of average electricity demand in Southland. It is expected to be the second largest user of electricity in the country (Russell 2026).

The construction and operation of the Hokonui Wind farm will also have significant economic benefits for local communities:

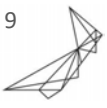
- Construction phase will inject $455 million into the local economy .[9]
- Operating the wind farm will inject up to $18 million per year into the local economy.

[6] The Te Kanapu 'Made in Aotearoa' scenario has slightly lower electricity demand forecasts for 2030 and 2040 than the 'Global green' scenario but a higher electricity demand forecast in 2050.

[7] The planned phasing for the project is 188 MW (37.35 percent) by 2031, 156 MW (31.33 percent) by 2033 and 156 MW (31.33 percent) by 2035.

[8] The capacity of existing thermal generation plant to meet the forecast supply gap beyond the early 2030's is questionable to the projected increase in demand relative to a static supply of thermal generation and the age of the existing plant.

[9] This value is gross spending. The contribution to GDP is about 30 percent of the gross spending.



3.2 Priority in central government, local government, or sector plan/strategy

FTAA section

Section 22(2)(a)(i)

Has the project been identified as a priority project in a central government, local government, or sector plan or strategy (for example, in a general policy statement or spatial strategy), or a central government infrastructure priority list?

The Hokonui Wind Farm would make an important contribution to central government objectives for:

- Meeting the greenhouse gas emission reduction target of net zero by 2050 for long-lived gases, which was established in the Climate Change Response (Zero Carbon) Act.
- Doubling renewable generation by 2050 as set out in the Electrify New Zealand policy (Ministry for the Environment 2026).[10]

Development of the Hokonui Wind Farm is fully supported by the National Policy Statement on Renewable Energy Generation (NPSREG, Amended 2025), which is fully supportive of new wind generation. The objectives of the NPSREG include:

> *(b) enable REG capacity and output to significantly increase; …*
>
> *(d) enable REG to provide greater security of electricity supply and resilience to supply disruptions to all people and communities;*
>
> *(e) enable REG to support achieving New Zealand's emission reduction target and implementation of the emissions reduction plan under the Climate Change Response Act 2002;*
>
> (Ministry for the Environment 2025, 6)

The Hokonui Wind Farm would also contribute to the increased electricity generation needs identified by the New Zealand Infrastructure Commission and its Strategy for 2022 to 2052. The Commission noted that capacity will need to increase by 170 percent (New Zealand Infrastructure Commission 2022). Similarly, the Electricity Authority reported that New Zealand needs 400 MW to 500 MW of new capacity each year until 2050 to meet the demand from electrification (Electricity Authority 2022). Other research on decarbonisation pathways similarly finds that significant investment in electricity generation is needed to meet target and support the economy (Boston Consulting Group 2022). The Hokonui Wind Farm would therefore provide a significant contribution to meeting New Zealand's future electricity generation needs.

3.3 Delivery of significant regional or national infrastructure

FTAA section

Section 22(2)(a)(ii)

Will the project deliver new regionally or nationally significant infrastructure or enable the continued functioning of existing regionally or nationally significant infrastructure?

[10] See 'Electrify NZ: A key policy of the second emissions reduction plan'.

As stated in section 1, the generation capacity of the project is intended to total 500 MW with an annual expected output of 1,905 GWh. The generation capacity will be constructed in three phases from 2029 to 2032 and will make a material contribution to meeting the projected increase in demand discussed above.

3.4 Economic significance

FTAA section
Section 22(2)(a)(iv)
Will the project deliver significant economic benefits, and if so, how?

The most enduring economic benefit from the Hokonui Wind Farm is harnessing a hitherto unused wind resource to produce a service of value: electricity. This output will contribute to the increase in renewable electricity capacity required to meet the expected rise in electricity demand driven by the electrification of the economy, including light vehicle transport and industrial process heat and new industries such as data centres.

Having additional generation should help with electricity prices, as well. Contact Energy in its FTAA application for the Southland Windfarm asserted that electricity costs would be lower if the windfarm was built than without it. The assertion was based on modelling by Concept Consulting which estimated benefits from reducing the time over which the country was short of generation capacity and avoiding the need for more expensive forms of renewable energy generation.

The construction and operation of the Hokonui Wind Farm will also have significant economic benefits for local communities. Based on data from the applicant, we estimate that the:

- Construction phase will inject $455 million into the local economy.[11]
- Operating the wind farm will inject up to $18 million per year into the local economy.

New electricity generation is also needed for other development projects to proceed and contribute to the economy. For example, the Datagrid data centre in Southland that has recently been granted multiple resource consents will require a large amount of electricity – second only to the Tiwai Point aluminium smelter (Russell 2026). The new electricity generation from the Hokonui Wind Farm is therefore required to unlock the value of other economic investments.

The project will also produce employment effects. Based on information from the applicant, the direct employment in construction will involve 185–250 full-time equivalents (FTE), and operation will involve 24–33 FTE. This employment will comprise many job and skill levels, providing a variety of employment opportunities. The project can also be expected to create flow-on impacts in the rest of the Southland economy.

[11] This value is gross spending. The contribution to GDP is about 30 percent of the gross spending.

3.5 Climate change mitigation support

FTAA section

Section 22(2)(a)(vii)

Will the project support climate change mitigation, including the reduction or removal of greenhouse gas emissions, and if so, how?

Wind farms assist in displacing baseload thermal generation at the margin, either directly if generating at the same time as thermal generation would be dispatched, or indirectly by enabling greater conservation of stored hydro, which has greater flexibility in responding to short-term demands. Displacing thermal generation will therefore result in a reduction of greenhouse gas emissions in New Zealand relative to the counterfactual of having less new wind generation.

We estimate that if the proposed Hokonui Wind Farm's annual output of 1,905 GWh were generated using gas, this would lead to an additional 971,000 tonnes of CO2e per year; it would produce 1,922,000 tonnes of CO2e per year if generated using coal. The Project will therefore provide a significant contribution to reducing greenhouse gas emissions in New Zealand.

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Appendix A Load and generation in Southland

Southland region electricity demand has exceeded load for 2017 onwards by an average of about 1,157 GWh (24.3 percent of average generation). Table 5 lists demand and generation by point of connection (POC) to the grid.

The names of the demand POC are: Brydone – BDE0111, Edendale – EDN0331, Gore – GOR0331, Invercargill – INV0331, North Makarewa – NMA0331 and Tiwai – TWI2201.

The names of the generation[12] POC are: Kaiwera Downs – GOR0331, Flat Hill – INV0331, Manapouri – MAN2201 and Monowai and White Hill – NMA0331.

Table 5 Electricity demand and generation

Total for calendar year in GWh

POC	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Demand										
BDE0111	57.6	57.6	59.5	59.7	56.5	58.2	56.3	56.0	60.1	53.5
EDN0331	139.4	143.0	145.6	137.5	149.6	152.5	158.2	160.2	184.3	258.3
GOR0331	152.5	162.6	175.2	160.2	172.1	173.2	173.9	179.6	226.6	236.3
INV0331	443.2	452.3	452.9	452.3	486.5	499.3	509.2	515.2	544.0	551.8
NMA0331	286.5	278.6	271.9	296.4	283.9	276.1	277.3	286.8	297.5	295.2
TWI2201	5,045.1	4,998.8	5,060.1	5,247.1	4,996.9	4,956.1	5,014.3	5,012.2	4,432.3	4,785.6
Total	**6,124.3**	**6,092.8**	**6,165.2**	**6,353.1**	**6,145.5**	**6,115.3**	**6,189.4**	**6,210.0**	**5,744.8**	**6,180.6**
Generation										
GOR0331	3.9	4.5	3.6	4.4	1.8	0.3	0.3	44.6	155.7	124.2
INV0331	23.9	23.9	24.9	27.6	26.3	25.3	22.3	20.0	23.6	25.7
MAN2201	5,860.6	4,157.0	5,178.4	5,323.7	5,017.6	5,141.1	4,108.1	4,374.1	4,824.0	4,556.7
NMA0331	227.2	187.2	179.8	208.9	184.4	159.8	114.3	152.1	193.6	165.3
Total	**6,115.6**	**4,372.6**	**5,386.7**	**5,564.6**	**5,230.1**	**5,326.5**	**4,244.9**	**4,590.8**	**5,196.9**	**4,871.9**
Excess demand										
Volume	8.7	1,720.2	778.5	788.5	915.4	788.8	1,944.4	1,619.1	547.8	1,308.8
Share of generation	0.1%	39.3%	14.5%	14.2%	17.5%	14.8%	45.8%	35.3%	10.5%	26.9%

Source: Electricity Authority EMI Dataset reports; 'Demand trends' and 'Generation trends' downloaded from www.emi.ea.govt.nz/Wholesale/Reports

[12] Manapouri and Monowai are hydroelectric power schemes. Kaiwera Downs, Flat Hill and White Hill are all wind farms.