

COVID-19 Alert Level 4
in the Waikato:

**LOOKING BACK TO
SHAPE THE WAY
FORWARD**

MAY 2020

EXECUTIVE SUMMARY



THE WAIKATO IS WELL PLACED TO SUPPORT A NATIONAL ECONOMIC RECOVERY:

Four sectors feature strongly in our 2019 GDP contribution and 2016-2019 growth and have proven to respond well post the Global Financial Crisis and Christchurch Earthquakes.

THREE BROAD SECTORS TAKE A PREDOMINANT FOCUS AS WE LOOK TOWARDS OUR RECOVERY:

1. Primary Industries
2. Manufacturing
3. Construction

IN SUPPORTING BUSINESS RECOVERY A NUMBER OF CROSS-CUTTING THEMES WILL REQUIRE BUSINESS TO ADJUST. EFFORT AND FOCUS MUST LOOK TO:

EDUCATION AND TRAINING

Infometrics are forecasting 25,000 job losses in the Waikato region. A large number of these losses are expected to be from the Accommodation and food services, retail and wholesale trade sectors. If Primary Industries, Manufacturing and Construction are to cushion the blow a concerted effort will be needed to encourage short-form learning, on the job learning and recognition of transferrable skills in re-deployment. A re-focused 2019 Labour Market Strategy connecting industry, agency and community must emphasise redeployment and the establishment of new skills. The two most pressing steps that must be completed.

- Provide easily accessible employment opportunities for those who have lost roles, both short and long term employment, answering the 'how do I find a new role?'. Focus should include business to business transfer of workforce and redeployment opportunities beyond the normal job search methodologies.

- Address the perceived skills gaps, both practical and personal that will present barriers to individuals and communities for redeployment. Deliver short form education programmes and on the job training for the four key sectors that will support recovery. Deliver opportunities to support those affected, building confidence, skills and capability to showcase transferrable skills.

TECHNOLOGY AND INNOVATION

New Zealand's productivity and conversion of information patents to commercially viable products has long lagged behind many other countries. Technology will offer solutions to enhance business capability. In order to accelerate our use and development of technological advances for business we must:

- Simplify our terminology. Providing support direct to business to explore, understand and problem solve simple ways to enhance business. Provide independent thought leadership to solutions for our region versus products to business.
- Create innovation communities. Connecting businesses with common challenges versus competing products/services. Finding solutions that can then be adopted by others.

INFRASTRUCTURE

Te Waka's view is that the positive impact will come from many of the large shovel ready projects that were pitched to the Crown Infrastructure Partners request. These however will not accelerate our recovery in isolation. Local Government, Iwi and business must partner and take matters into their own hands to unlock a myriad of smaller projects that can be started quickly.

NOTE: In preparing this document we wish to thank the many partners who have contributed information and insight. We specifically thank Waikato Regional Council, PwC, Deloitte and KPMG for their partnership.

For more information:

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CEO Te Waka

THE WAIKATO ECONOMY



THE WAIKATO IS WELL PLACED TO SUPPORT A NATIONAL ECONOMIC RECOVERY

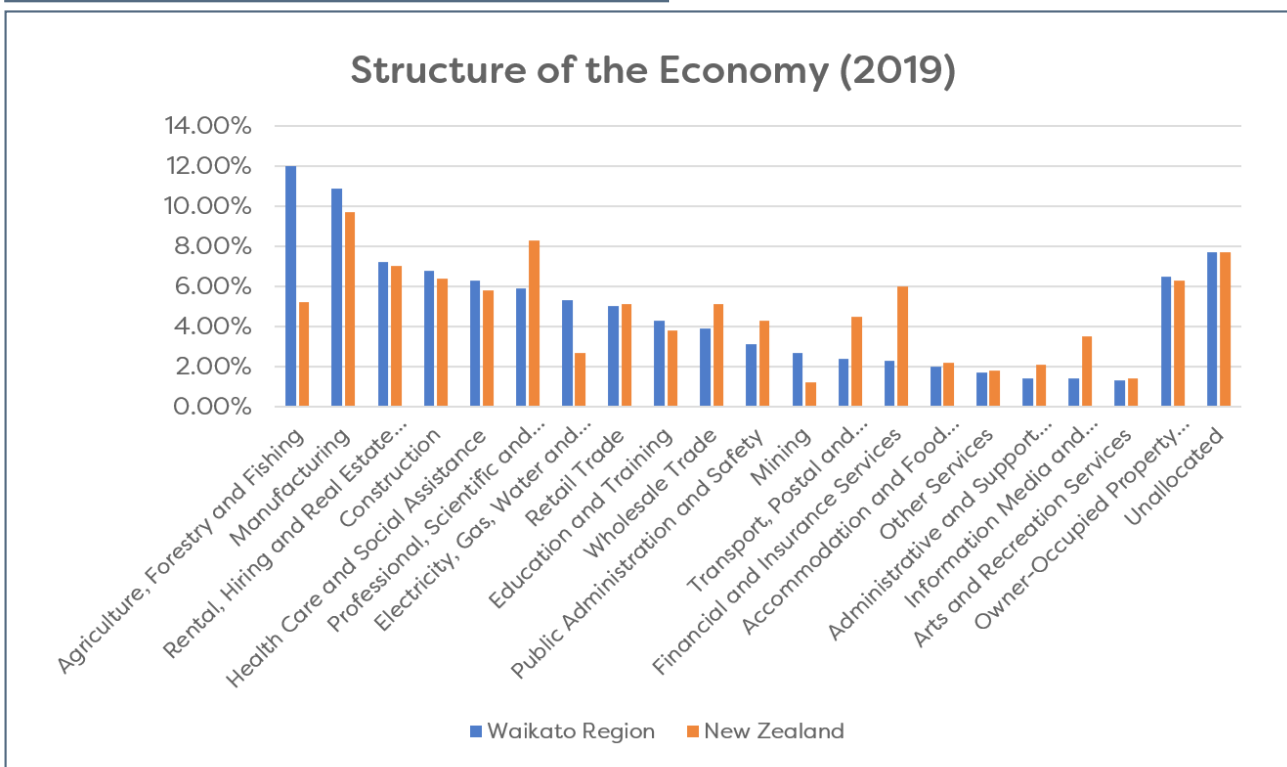
Many consider us:

- the foundation of the country’s agriculture, manufacturing, mineral and food technology industries
- an industry leader in education, aviation and technology, health services and construction
- a high growth area – located in the central golden triangle

Strategically aligned and positioned – we have the Waikato Plan, the Waikato Mayoral Forum and significant regional strategies with the Waikato Wellbeing Project, Future Proof, the Regional Housing Initiative, Vital Signs and more.

These regional strengths have not changed as a result of a coronavirus outbreak and should underpin a coordinated approach to economic stimulus and recovery – the fundamentals of the Waikato regions economic strategy still hold true.

Graph 1: HISTORIC GDP CONTRIBUTION



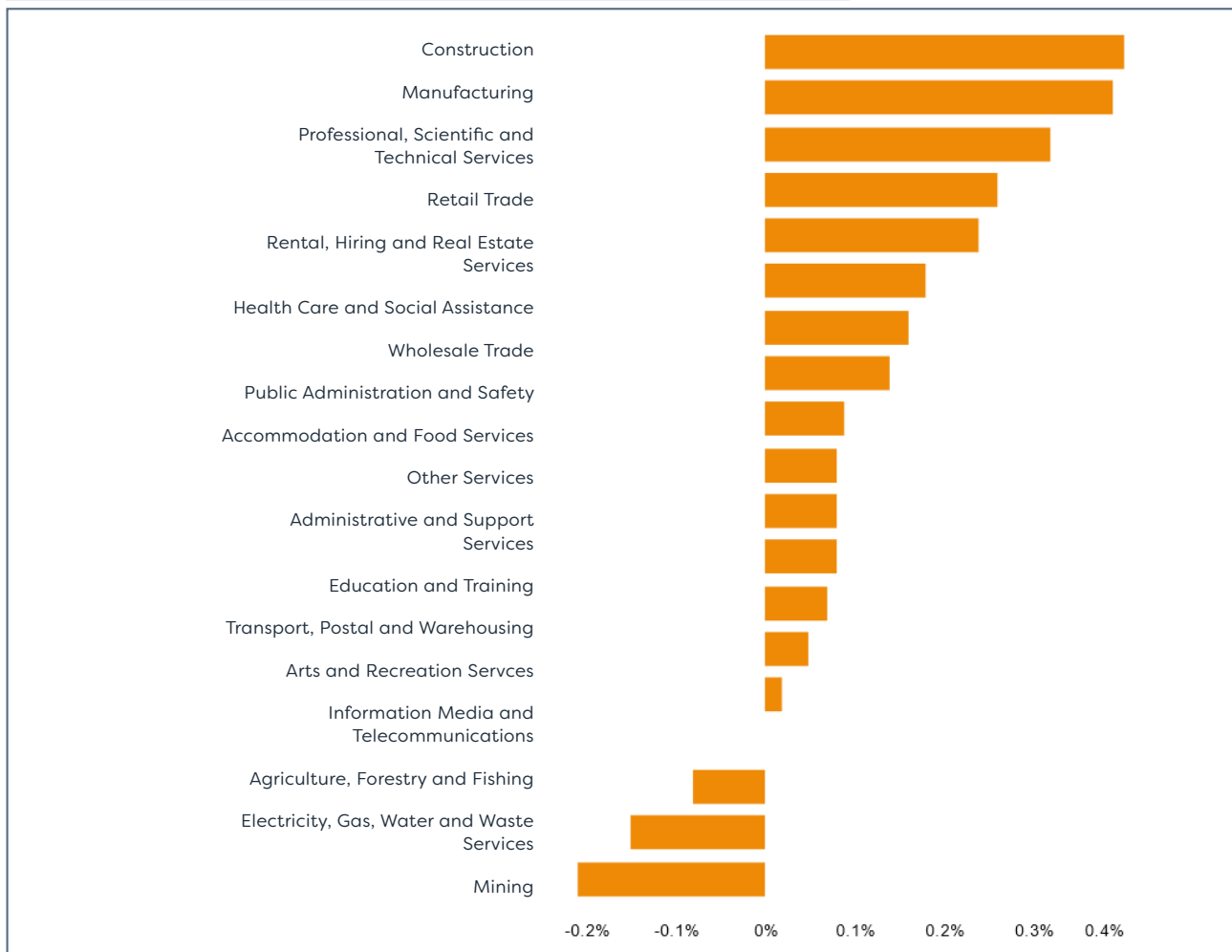
Source: Infometrics



- The Waikato region is relatively heavily weighted towards the primary sector, which makes up 15 percent of the regional economy, compared with 6 percent for New Zealand. Around two-thirds of this Waikato figure is farming and horticulture.
- Manufacturing and utilities are also relatively important in the Waikato, reflecting processing of dairy, meat and forestry products, and the electricity generation that takes place in the region.

- In contrast, the Waikato region has a smaller reliance on service sectors such as financial services, public administration, logistics and professional, scientific and technical services. To some extent, this reflects the concentration of those sectors in Wellington and Auckland especially.
- The construction sector has been the fastest growing in the region in recent years. This has been driven by a swelling population, with around two-thirds of building consents being for residential construction.
- Manufacturing and consulting services have also been growing relatively quickly.
- Other fast-growing sectors also have been driven largely by population growth. These include retail trade, real estate services, health care and social assistance services.

Graph 2: HISTORIC WAIKATO GDP GROWTH 2016-2019



Source: Infometrics

IMPACTED SECTORS



APRIL 2019

New Zealand has near full employment with strong wage growth, surging tourism numbers and GDP north of 3 percent.

APRIL 2020

New Zealand's borders are closed, businesses are shut, and many SME's are struggling to survive. Infometrics is projecting 250,000 jobs to be lost nationally over the next year. Our tourism, hospitality and retail related sectors are set to be the worst hit.

Note: Tourism is indicated as Accommodation and Food Services in Graph 3 below.

No industry or sector is expected to escape the economic impact of COVID-19 – even our health sector will not go unscathed with demand for private health services impacted by discretionary spend and physical distance requirements.

It is clear we are in for a rough ride as the national economy, our region and our businesses adjust.

Redeployment, repositioning, pivoting, adaptation, new technologies and innovation will all feature in our recovery.

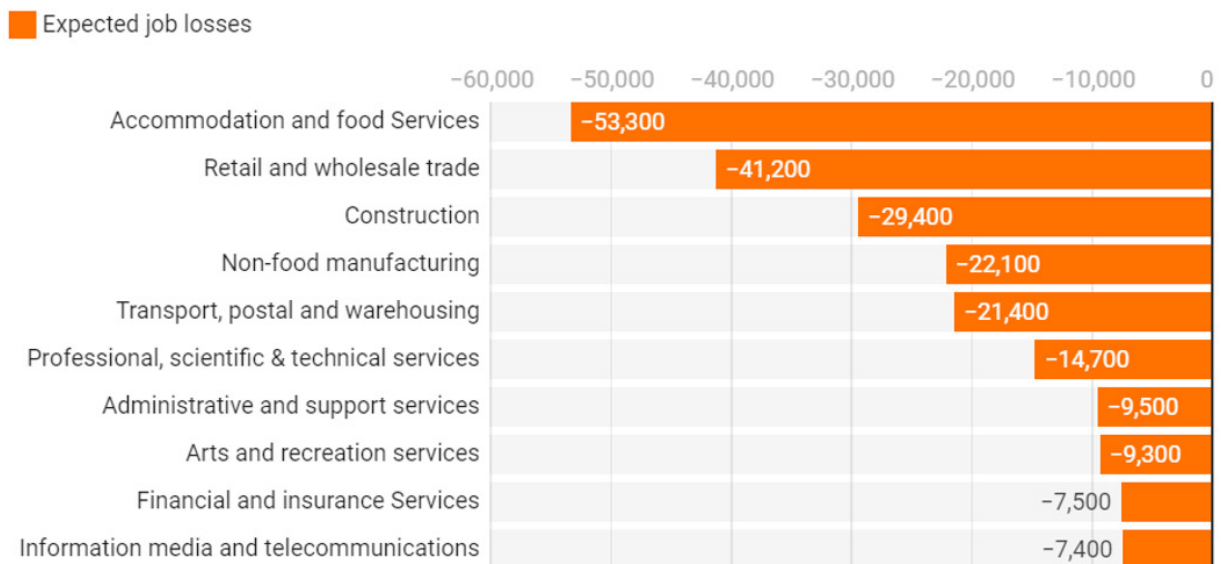
Looking back, we understand the best performing sectors during the global financial crisis were:

- Fishing, Forestry and Mining
- Government Administration and Defence
- Personal and Community Services including health and aged care

Essentially businesses that thrived were those involved in the production, manufacture and provision of products and services related to necessities and not discretionary items.

Graph 3: COVID-19 TO CAUSE HUGE JOB LOSSES ACROSS NZ

Industries with largest job losses between March 2020 and March 2021, preliminary estimates



Source: Infometrics

Businesses with strong online presences and lower cost bases could gain greater market share than competitors with traditional business models and high cost bases during the recovery from COVID-19. The current disruption will favour technology companies that can distribute products and services online and those firms that assist the digitisation of businesses in traditional sectors.

Distribution and logistics businesses are expected to also do well as consumers switch to purchasing online.

Furthermore, the infrastructure sector will be positively impacted with government stimulus supporting developments in regions. Infrastructure will support the development of new housing to address the national shortage although short term there will likely be a reduction in housing demand and productivity impacts as we adjust to new health and safety and physical distancing requirements.

Whilst some believe it will be back to business as usual after the lockdown, this is far from reality. It will be a different economy. Some sectors will recover quickly. Others are thriving through the lockdown. Some sectors will struggle.



Businesses that export or import are likely to have additional cost and complexity introduced to supply chains that will take time to adjust to the new normal. For businesses that don't innovate, there will be additional costs and lowered productivity due to the need for physical distancing and other COVID-19 Health and Safety practises.

The Board of Innovation have created an Industry Impact assessment tool, weighting industry characteristics across industry sectors. Applicable and adaptable for Economic Practitioners across the Waikato to assess local sectors of importance.

Graph 4: COVID-19 INDUSTRY IMPACT ACROSS NZ

Note: Detailed impact analysis per industry in dedicated reports.	Industry characteristics					Impact analysis
	Large gatherings are essential	Close human interaction is essential	Hygiene, or perception thereof, is critical	Dependant on travel (business and leisure)	Service or product is postponable or expendable	
Tourism and hospitality	Very high	Very high	High	Very high	High	Very high
Sports	Very high	Very high	Medium	Low	Medium	High
Music	High	High	Low	Medium	Medium	High
Automotive	Low	Low	Medium	Low	Very high	High
Beverages (Alcohol)	High	High	Medium	Medium	Low	Medium
Retail (non-food)	High	Medium	Medium	Medium	Medium	Medium
Pharmaceuticals	Low	Low	High	Low	Low	Low

Source: Board of Innovation

A broad look at Waikato's sectors



DAIRY

Short-term it is business as usual on farm. GDT prices have declined steadily, likely off-set by a falling NZD. Global recession could impact demand and prices in global markets. Longer term New Zealand will continue to be a producer of high-quality protein for the global market.

DRY STOCK

Our dry stock sector will provide an important back bone to the Waikato's recession, although will face challenges with processing with enhanced health and safety requirements including physical distancing restrictions.

FORESTRY

Hit early with the glut of logs in China and then its shutdown. There have been significant job losses in the sector although is starting to see a rebound with China factories reopening. It faces further issues if the domestic residential building market using predominately locally grown and milled timber declines for a period.

HORTICULTURE

There has been a short-term impact on availability of picking and packing staff. The sector has seen significant investment in recent years meaning increasing production expected in next few years. This may cause some consolidation. Eyes will be watching how demand holds in key export markets.

MANUFACTURING

Short-term the need for social distancing will impact production and capacity. It is a very broad category. Those manufacturing for the building and construction sectors may see a decline in the short-term while food processors are less likely to be impacted. For exporters, it will depend on product and markets to assess the extent of impact. Inability to visit overseas markets will require businesses to change the way they sell overseas and install if they usually have people travel to complete the process. Supply chains may be impacted with delays on raw materials having flow on effects on production. This may increase costs and reduce competitiveness.

CONSTRUCTION

There has been short-term pain with large workforces being less productive and delays on contracts. The outlook will be impacted with decreased business and consumer confidence which will have the flow on effect of willingness to invest in new developments in the short-term. This is evidenced by Hamilton City Council whose consents took over five years to return to pre GFC numbers. Potential opportunity for businesses to hire skilled staff as some businesses downsize and people return from overseas. Government stimulus should see this sector improve but it will need associated support for labour market and a partnership approach to manage the pipeline of projects.

REAL ESTATE AND PROPERTY

In the short-term there has been a challenge to get listings and hold viewings. Once government mortgage holiday provisions expire there could be an increase in distressed sales, including mortgagee sales caused by increased unemployment and business failures. Interest rates continue to be low which will support investment. Job confidence will be key to support the residential property market.

HOSPITALITY AND EVENTS, TOURISM

Short-term it has been very painful. Waikato has been less impacted relatively, compared to other regions. Transitioning to a domestic focused economy will mean cost structures for some businesses need to be reduced. Domestic business travel will likely reduce for an extended period of time as people become more comfortable with video meetings, which will further impact hotels and hospitality. Internationally focused tourism businesses may mothball as not viable with small domestic numbers, for example, Hobbiton and cultural experience operations.

RETAIL

In the short-term essentials have been able to trade with the balance shut down. Looking forward, consumer demand will remain suppressed with a shift towards online sales.

TRANSPORT AND LOGISTICS

In the short-term essentials can work with restrictions, some businesses shut down. Logistics and distribution businesses have seen a massive increase. Demand will be suppressed moving forward but distribution and logistics will remain strong due to online sales.



ECONOMIC SCENARIOS

BALANCING THE HEALTH AND ECONOMIC IMPACTS: COVID-19 v. WORLD ECONOMIC SCENARIOS



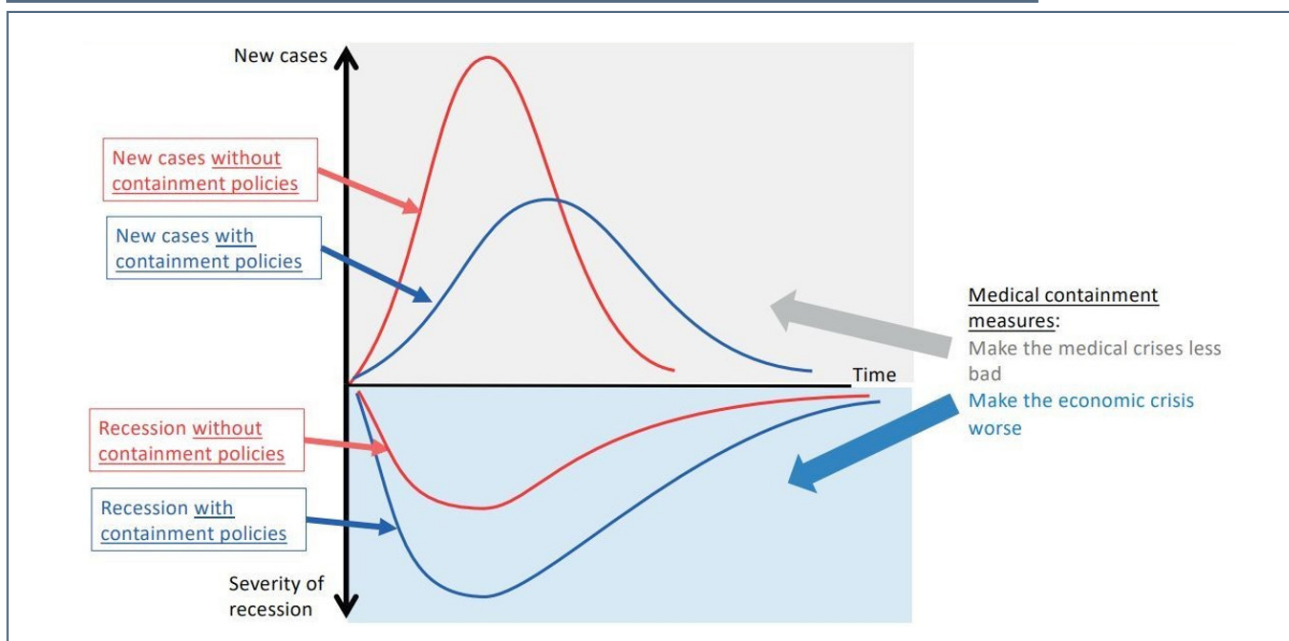
While managing the health crisis is the priority, economic impacts will be widespread. Scenario planning for mid and long-term effects at local, regional, national and international levels will be necessary to help plan recovery.

TE WAKA IS URGING A COORDINATED AND COLLABORATIVE EFFORT. NOW IS THE TIME TO WORK TOGETHER, BRING OUT THE BIG ARTILLERY, INVEST FOR IMPACT THAT ENABLES EMPLOYMENT AND BUSINESS SURVIVAL FOLLOWED BY BUSINESS GROWTH.

In doing so it is important to understand the challenge of assessing and managing two curves – Health and Economic. The science of which is imperfect and has the potential to be oversimplified. We note the risk of doing so, but in the interests of keeping a clean and concise commentary provide the below review.

Alert Level 4 and to a large extent Alert Level 3 have brought business to a screeching halt. Return to Alert Level 2, and any oscillation that may occur, will see a continuation of quarantine systems, physical distancing, reductions to business productivity, reduced retail spend and a continuation for many of working from home.

Graph 5: CONTAINMENT POLICIES FLATTEN THE MEDICAL CURVE, BUT STEEPEN THE RECESSION CURVE



Source: Centre for Economic Policy Research (CEPR)

ECONOMIC SCENARIO'S

A great many scenarios have been presented for post COVID-19. They range in complexity, definition and all have a huge range of assumptions embedded.

Four scenarios commonly present themselves:

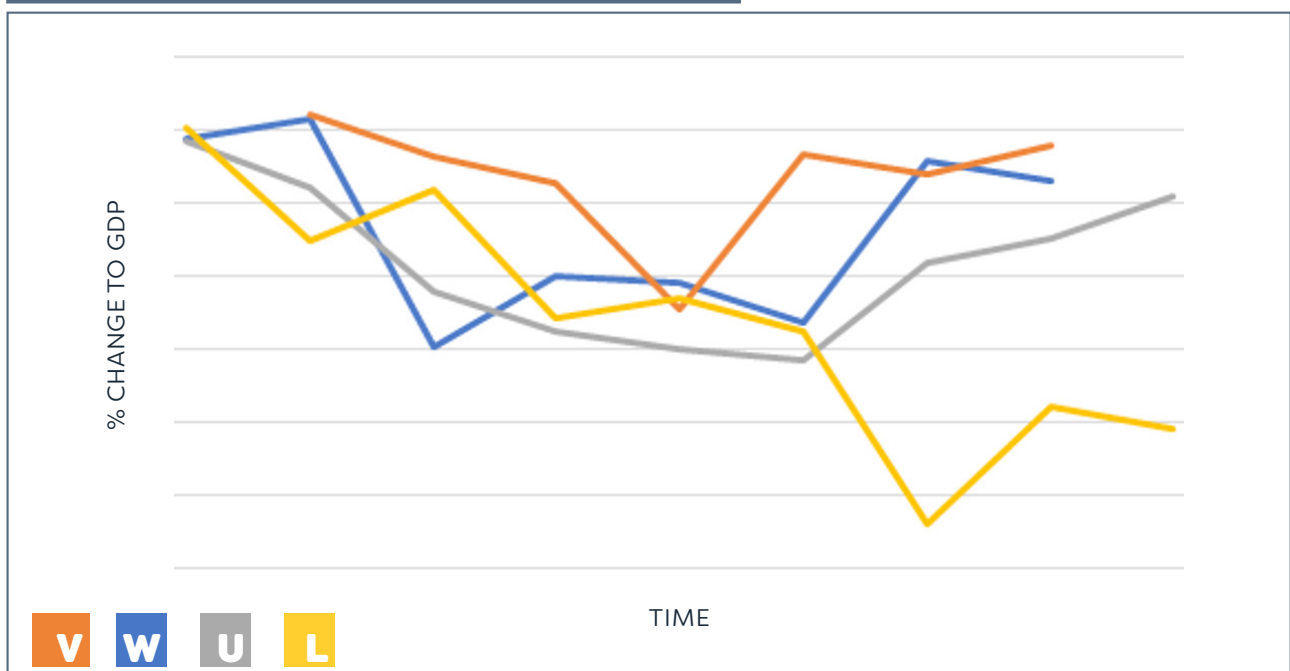
1. **THE FUTURE WE HOPE FOR – V CURVE RECESSION** – successful economic and health responses enable sustained returned to business. Exceptional government financial support and favorable global economic conditions enable rapid recovery. Community compliance and technology advancement enable successful virus management.
2. **THE FUTURE WE SHOULD PREPARE FOR – U CURVE RECESSION** – a health response that sees us oscillate over time across our alert levels and associated restrictions, nationally and internationally. This oscillation serves to slow economic recovery.
3. **THE FUTURE THAT MAY OCCUR – W CURVE RECESSION** – limitations to the sustainability of our health and economic responses see us have a short term V curve recession followed by a second recessionary impact as the economy falls into recession, recovers with a short period of growth, then falls back into recession before finally recovering, giving a 'down up down up' pattern.



4. **THE FUTURE WE SHOULD AVOID – L CURVE RECESSION** – our health and economic response are inadequate and result in an over-burdened health system and an elongated return to business. Waves of reinfection cause loss of life and a deeper, longer economic impact.

Scenario planning is important as it sets out options to how scenarios unfold. No-one knows the answers, so an assessment of individual business scenarios and options is critical. For the Waikato economy to thrive – small, medium and large business must survive and prosper.

Graph 6: W, V, U AND L SHAPED RECESSIONS



WAIKATO'S BUSINESS ALERT LEVEL 4 RESPONSE

Alert Level 4 has undoubtedly been a very challenge time for business across the Waikato. A range of support interventions have been in place via a collaborative approach from Te Waka, Chambers of Commerce, Regional Tourism Agencies, Central Government Agencies, Iwi, Business Associations and Local Authorities.

Te Waka's dedicated partnership with Local Authorities has seen the establishment of the Waikato Business Support Service www.waikatobusinesssupport.nz.

The Business Support Network and our dedicated Regional Business Partner Team have supported in excess of 500 Waikato Businesses during Alert Level 4.

Our collaborative approach has focused to:

- Connect local business communities – providing a network of support to provide legacy relationships and opportunities
- Leveraging networks and partnerships – Iwi, business associations, chambers, central government agency (MSD, MBIE, IRD and more) and Local Authority partners
- Provide a single source of truth for access to resources and information
- Share information and reduce duplication

WAIKATO BUSINESS SUPPORT

1. The outbound approach and proactive connect to business whilst challenging during Alert Level 4 with many businesses in hibernation, enabled a potential connect to businesses who may not ordinarily reach out for support and in addition a single point of reliable information to business support opportunities.
 - 14% still expect to make redundancies
 - 72% have received no bank assistance to date
 - 73% have not sought rent relief to date
 - Top five professional services accessed to date:
 1. 43% Accounting
 2. 30% None
 3. 8% Business Strategy and Planning
 4. 8% People Management and HR
 5. 8% Legal advice
 - Top five professional services needed looking ahead:
 1. 55% None
 2. 22% Accounting
 3. 10% Marketing
 4. 9% People Management and HR
 5. 6% Business Strategy and Planning
 - Preferred delivery model of support and advice - Direct by Professional Service Advisors
 - Desire to have mentors is increasing
2. The wage subsidy investment has potentially protected businesses from early redundancies during Alert Level 4.
3. Cashflow forecasting support, financial advice and HR/personnel planning were strong themes for Business Support in Alert Level 4.
4. The 'unknown' looms large for businesses, what's changed, how to plan and how to adapt. Digital enablement is coming through as a strong theme for business as they return to open their doors and sales.
 - Early stage Alert Level 3 – significant increase in requests for digital support – contactless delivery, health and safety implementation, service delivery
5. For many the true impact of Alert level 4 closures and restrictions and modified services under Alert Levels 3, 2 and 1 remains unknown.

Respondents include 107 businesses from the Waikato:

- 51% businesses closed with no operation, 21% working from home office
- 40% expect 'Business slow return and well below normal levels'
- 89% have received the Wage Subsidy and 93% made no redundancies to date

Our next steps will see our supported adjusted for Alert Level 3 and an ongoing alignment/adjustment to national call centres and central government initiatives and funding.

TE WAKA REGIONAL BUSINESS PARTNER SERVICES

\$370,000 has been provided in Business Support direct to businesses across the Waikato as part of the COVID-19 fund. Figures show COVID-19 funding direct to each district during Alert Level 4.

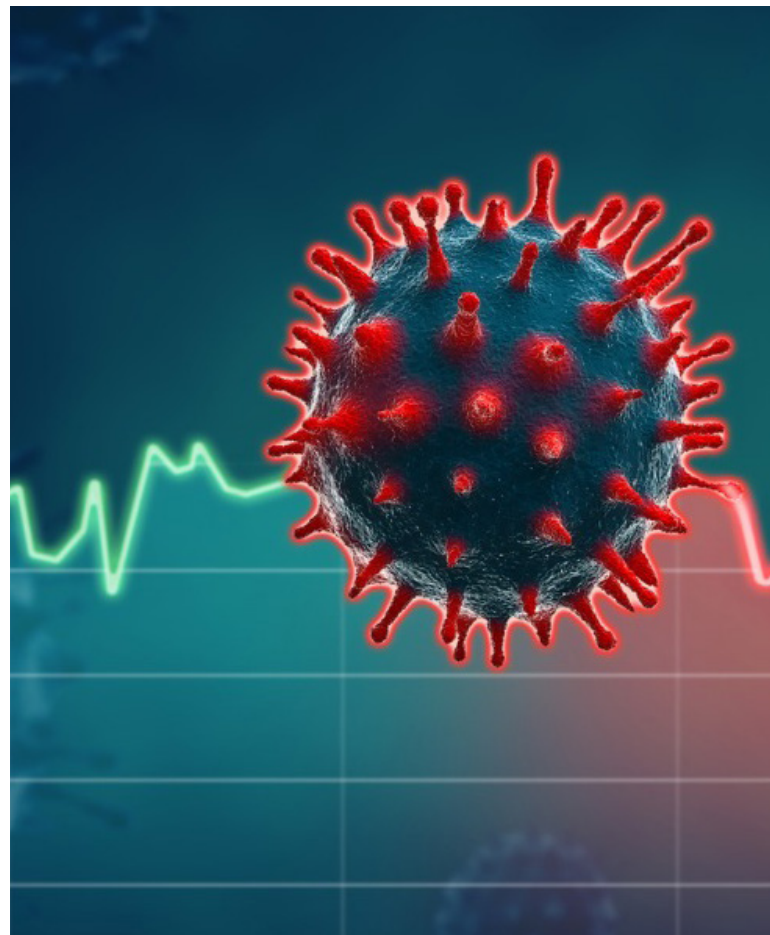
The COVID-19 fund is designed to assist with funding for businesses to access 1-1 support with professionals in the following areas:

- HR
- Health and Wellness
- Business Continuity Planning
- Finance and Cashflow Management

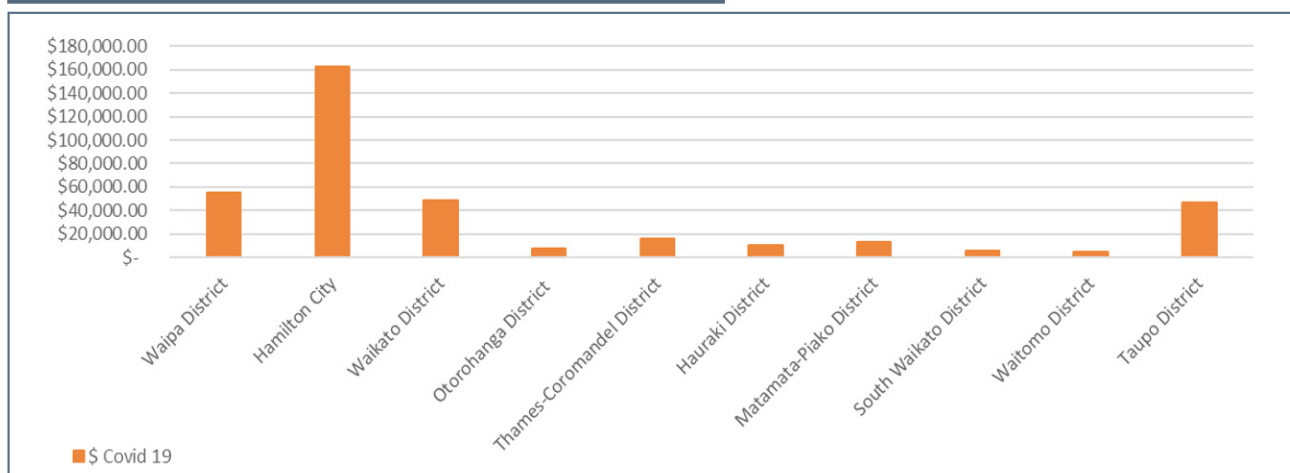
Eligible businesses are able to access 100% funding to allow businesses to seek advice in the areas above. Funding allocation is managed by Growth Advisors and is at their discretion.

FUTURE FOCUS

- Experience from the Christchurch earthquakes suggests that businesses will 'reach' out and connect more as we progress back down the levels. The Business Growth team connects with management in Christchurch to share ideas and concepts as well as having regular contact with our neighbouring colleagues in Bay of Plenty and Taupō.
- Support with cashflow and financial forecasting will remain critically important for many business owners with delayed responses and reactions expected for smaller SME's.
- Demand will increase for funding assistance.
- The Waikato region must work together to promote and support solutions that enable impactful investments to sustainably accelerate economic recovery. We must advocate to Central Government, connect to collaborate and leverage our own resources to accelerate results.
- This will be a long recovery journey, phased recovery concepts and support will be needed.



Graph 7: BY DISTRICT \$ OF COVID-19 FUND



ADAPTATION

WHAT IS CLEAR IS THAT WE CAN EXPECT TO SEE BROAD SCALE MACRO-ECONOMIC ADAPTATION AS WELL AS MICRO-LEVEL CONSUMER BEHAVIOUR CHANGES.



Industry and Community adaptation will see:

- 1. A domestic focus** while the government focuses on an elimination approach that will keep borders largely closed to people for a year or more.
- 2. Reduced Immigration** that once fuelled GDP growth, will mean gaps our normal workforce and reduced consumer spend. There will be more people unemployed but for some industries this will not translate to a greater skill base.
- 3. Reduced air travel** and therefore less hotel nights and hospitality spend. Business travel may be deferred with an increased focus on health and safety of our workforce and enhanced comfort with video meetings.
- 4. Physical distancing** will bring an increased focus on contactless delivery and challenge our manufacturing, construction and production productivity.
- 5. Logistics and distribution** will see a structural shift in demand. Waikato's natural advantage as a logistics and distribution hub is positive. Petrol volumes may take some-time to recover, although more domestic tourism could assist this.
- 6. Tourism** will have a domestic focus for the foreseeable future. Many operators will not open or will have to greatly reduce price or change their offering to attract domestic tourists.
- 7. Education** will see international education decline and take time to recover as students enrol in their own countries. Economic downturns transpire in an increased number of people in education as displaced workers retrain. Online learning and micro-credential learning will increase as a displaced workforce seeks to find new opportunities. On-job training will become an increasingly important focus.
- 8. The construction sector** will be an important part of New Zealand's recovery with central government preparing to significantly increase spending. The need for an increased labour market will need to be facilitated by training organisations and the sector with support from government and local agency alignment to deliver programmes. Public private partnerships will be required to fast-track projects to start and to streamline the pipeline of work.
- 9. The primary sector** will remain strong as the world needs to eat. This will help regional areas like Waikato with strong agricultural sectors. The sector will need to continue to innovate to overcome supply chain complexities and realise more value in product. The COVID-19 crisis could well increase New Zealand's niche as a safe and green producer.
- 10. Impacted communities** Māori communities as well as lower socio-economic communities have traditionally fared less well in recession. The Waikato has a higher than national average proportion of Māori population and recognised areas of deprivation. These will require a collective and collaborative effort across agency, organisation and community to ensure both practical and personal barriers are addressed in enabling positive outcomes.



ADAPTATION

CHANGING BEHAVIOUR: LIGHT TOUCH ECONOMY



Gradual shifts were happening in the way we purchase products and services – these will now be accelerated.

- 1. Reduced discretionary spending** – arts, creative and sport will all take a hit. Event goers may be reluctant to attend events and gatherings, retail spend will decline. Job losses will see short, medium and long-term reductions in spending.
- 2. Increased loneliness and depression** – isolation, loss of jobs, illness and relationship challenges will see an increased need for therapy and coaching, demand for pets and increased demand for online social games and communications.
- 3. Damaged trust in hygiene of people and products** – people and organisations will expect proof of hygiene and current health status. Packaging redesign, personal health assessment and records, increased cleanliness standards, electronic service, contact free delivery and drop-offs can all be expected.
- 4. Travel restrictions** – will see a rise in risk adverse communities of travel. Local tourism will flourish, the impact of longer (quarantine extended) holidays will reduce the attractiveness of international travel and see a rise in attractiveness of rural and remote luxury escapes.
- 5. Work from home** – will see an increase in acceptance and the potential to become part of the new norm. Additional emphasis will be placed on flexible working and work/life balance. Reduced commercial office space and infrastructure can be expected as a result with an advanced design of home offices. Policies and new health and safety and insurance processes will be needed to support home office provision.
- 6. Take out/home delivery ‘everything’** – delivery and/or remote-first retailing, there will be a need to think beyond retail to consider things such as a continued rise of eSports, virtual entertainment, consumer television packages and streaming.
- 7. Limited contact with older generations and immuno compromised** – will require enhanced support for +65 and vulnerable communities. Requiring a longer term rethink of social gatherings, accelerated digital adoption, tweaked ceremonies and celebrations and the rise of communities with special needs/certain age support groups.
- 8. Certified immunity** – business models that rely on tight spaces may see a rise in opportunities for those with official health records, employment and consumer certification.

LOOKING AHEAD: WORKING TOGETHER



In times like this, thinking is often done in silos where the general approach is to focus only on economic, social, environmental or a community of interest.

The reality is that all are interdependent. COVID-19 has shown just how intertwined our geographic community, health and the economy are. This pandemic will help to jolt our thinking and help us to reimagine the type of Waikato we'd like. It would be a shame to waste such an opportunity to consider how we do things differently, and it would be a shame to forget that we, the Waikato have a great number of key strategies and plans that remain relevant. For Te Waka, a number of cross-cutting themes will support our recovery.

- 1. Insights and Intelligence** - sharing data and knowledge to enhance our decision making and assess impact. Te Waka will take a lead role in guiding regional and district level economic data and knowledge sharing. We welcome partnerships to source and strengthen the breadth of information available including a focus on social, environmental and wellbeing information.
- 2. Labour Market Planning** - The Waikato Regional Labour Market Strategy (2019) remains relevant. Pre COVID-19 we were in a low unemployment environment with skills shortages across a number of industries. The new normal will alter the structure of our labour market and change the rules of our employment structures. Some who were in secure employment or confident in the prospects of their businesses now face uncertain times. Understanding the shape of our industries, opportunities and challenges and the structure of our community available for employment, matching skills to business and industry and providing transitional training will assist us in reimagining the new world of our workforce. Te Waka, in partnership with MSD and MBIE, will continue to lead the delivery of the Waikato Labour Market Strategy. Establishing an Interim Regional Skills Leadership Group (iRSLG) over the upcoming month.

- 3. Supporting the Māori Economy and Community** - Te Waka continues to partner with iwi and Te Puni Kokiri to implement Te Whare Ohaoha, Waikato's Māori economic development strategy. With the real threat of Māori being disproportionately affected by COVID-19 there has been increasing intensity of effort reduce this affect. Increased resourcing by Te Waka with Te Puni Kokiri support will assist this work.
- 4. Digitisation** - Te Waka funded Cultivate IT to develop and implement the regional digital strategy. Implementation of this strategy will become more important to support businesses adapt to the new normal and to ensure that adequate digital infrastructure is available to all communities in the region.
- 5. Logistics** - the Waikato has the enviable position South of Auckland and central to the Golden Triangle. Our position in supporting the Logistics framework of New Zealand and accelerating key infrastructure projects that enable our success will continue to be important to our strategic success

As a region we must reflect on our strategies and plan, modify them to ensure they are relevant for our altered reality, assign responsibility and accountability for delivery and to react in a coordinated, planned and impact focused manner.

CENTRAL AND LOCAL GOVERNMENT, IWI, REGIONAL ORGANISATION AND AGENCY, BUSINESS AND COMMUNITY ORGANISATIONS.

**TOGETHER WE CAN REPRESENT THE
WAIKATO AND ACCELERATE OUR
RESPONSE.**



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