

SmartGrowth Development Trends

Technical Report 2020





SmartGrowth: Development Trends Technical Report 2020

**Including Housing and Business Land Indicators
to meet the monitoring requirements of the
National Policy Statement on Urban Development**

**Western Bay of Plenty District
Tauranga City**

2019 – 2020

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Executive Summary

Executive Summary – July 2019 to June 2020

Comparison with previous year

Indicator	Tauranga City	Western Bay of Plenty District
 Dwelling consents issued	 -5%	 -8%
 New lots created	 -32.4%	 -68.5%
 Dwelling sales prices	 10%	 9.3%
 Dwelling rents	 6.6%	 -0.6%
 Dwellings sold	 -35.6%	 -4.6%
 Mean floor size	 -9m ²	 -4m ²
 2-Bedroom dwellings	 -8%	 -1%
 3-Bedroom dwellings	 14%	 -3.5%
 Non-residential buildings	 -2%	

Legend:  Up  Same as previous  Down

Residential Building Activity

Sub-region

- Building consents issued for new dwellings declined by 6% (100 consents) in 2019/2020, in the Western Bay of Plenty sub-region compared to the previous year (refer Figure 1).

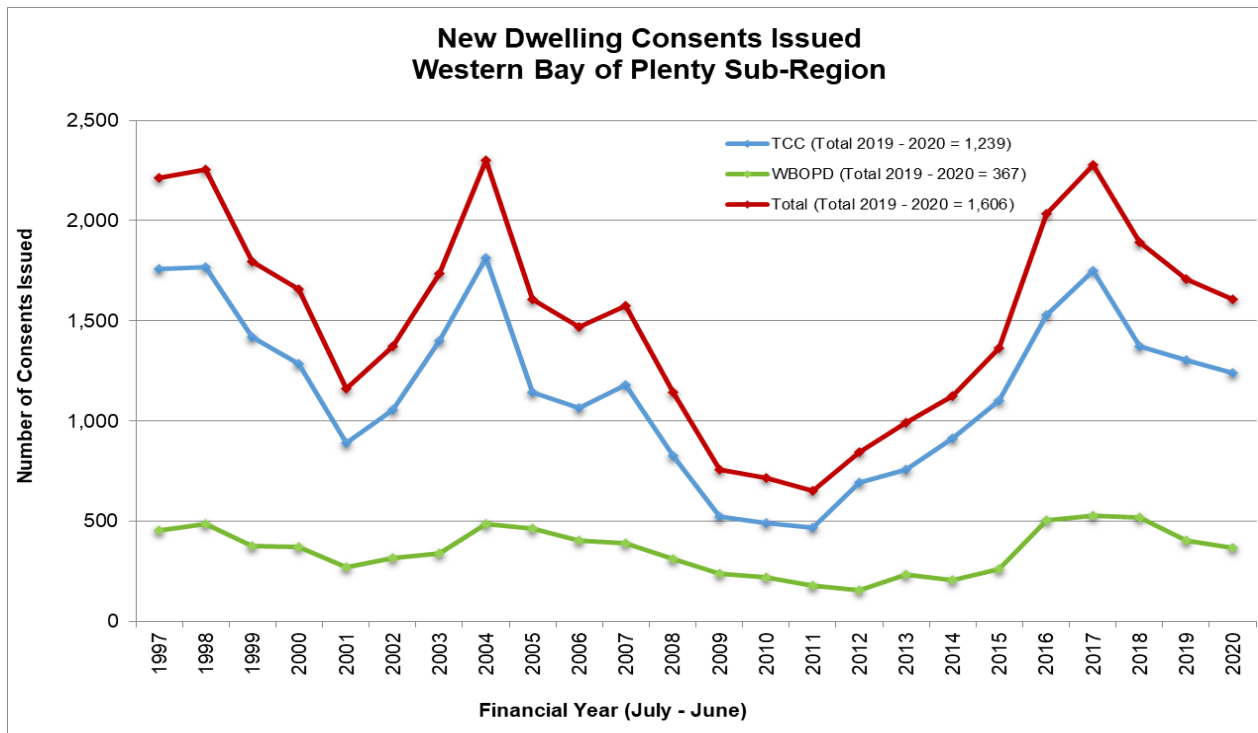
Tauranga City

- Dwelling consents issued for the 2019/2020 year increased in Ohauti, Welcome Bay and Wairakei Greenfield Urban Growth Areas from the 2018/2019 results, while it declined in other UGAs (refer Table 1).
- The Greenfield UGAs accommodated 85% of the new dwellings consented in Tauranga City in 2019/2020, with the number of dwellings declining by 10% from 2018/2019. The infill areas accommodated 15% of development in 2019/2020, declining from 26% in 2018/2019, with the number of dwelling consents declining by 50% from 336 to 169.

Western Bay of Plenty District - WBOPD

- Dwelling consents issued increased in both Te Puke (20%) and Katikati (12%) in 2019/2020 compared to the previous year, while all the other urban areas decreased. Most of the consents were issued in Omokoroa with 120 consents for 2019/2020.
- Dwelling consents issued decreased overall by 34 consents (or 9%) for Western Bay of Plenty District (refer to Figure 1).

Figure 1 New dwelling consents issued, Western Bay of Plenty sub-region, 1997 to 2020



In the last ten years, the sub-region recorded its highest number of dwelling consents issued in 2017. From that point, dwelling consents issued declined for three consecutive years. From 2018/19 to 2019/20, there was a decline of 6% (from 1,706 to 1,606 dwelling consents). In Tauranga City, the decline was 5% (66 consents), while Western Bay of Plenty District had a decline of 9% (34 consents).

Residential Subdivision Activity

Sub-region

- Subdivision development in the sub-region declined by 45% from 2018/2019 results.

Tauranga City

- The number of additional lots created declined by 32% in 2019/2020 compared to 2018/2019 and was 40% below the last 5 year average.
- In Tauranga City 76% of additional lots were created in Greenfield UGA's in 2019/2020.

Western Bay of Plenty District

- The number of new lots created at 224 stage decreased in all the urban growth areas (UGA's) and in all the rural areas, from 2018/2019 to 2019/2020 (refer to table 2).
- Omokoroa still have the highest number of subdivision consents granted of all the UGA's and due to the staging of subdivision by the developers, more subdivision consents were granted for Omokoroa in 2018/2019 (391 consents) compared to 2019/2020 (111 consents).

Table 1 Trends Summary – Tauranga City – 2018/2019 Compared to 2019/2020

Area		Dwellings consented	New Lots Created
	Bethlehem	↓	↑
	Pyes Pa	↓	↓
	Pyes Pa West	↓	↓
	Ohauti	↑	↓
	Welcome Bay	↑	↓
	Papamoa	↓	↑
	Wairakei	↑	↓
Existing Urban Areas (Infill/Intensification)		↑	↑
Rural Areas		↑	↑

Table 2 Trends Summary - WBOPD (Total) – 2018/2019 Compared to 2019/2020

Area		Dwellings Consented	New Lots Created
<i>Urban Growth Area</i>	Waihi Beach	↓	↓
	Katikati	↑	↓
	Omokoroa	↓	↓
	Te Puke	↑	↓
	(Other than above)	↓	↓
Rural Areas	Waihi Beach & Katikati	↓	↓
	Te Puna / Minden	↓	↓
	Kaimai / Ohauti-Ngapeke	↑	↓
	Maketu & Te Puke wards	↓	↓

Residential Development Capacity

Sub-region

- Compared to the SmartGrowth projections the actual growth at the sub-region level indicated 52 less dwelling consents were issued than projected as at 30 June 2020.
- Of the total estimated yield for the Greenfield UGA's in the sub-region, 21% capacity remained as at 30 June 2020.

Tauranga City

- Dwelling consents issued in Tauranga City was 99 or 9% above the SmartGrowth dwelling projection for the year ending 30 June 2020. The dwelling consents issued from July 2018 to end of June 2020 were also above the SmartGrowth dwelling projections by 4% (or 96) consents.
- Remaining Greenfield UGA capacity was 22% as at 30 June 2020.
- Wairakei (Papamoa East) Greenfield UGA has the highest percentage of capacity remaining (56%), while Pyes Pa UGA has the least (10%).

- Tauranga City has a short term (0-3 years) projected dwelling supply shortfall under two scenarios (85% greenfield and 15% infill intensification and 75% greenfield and 25% infill intensification) with and without the NPS-UD required 20% “competitiveness margin” applied. A medium term (4-10 years) shortfall is also projected under both scenarios except for the 75%/25% scenario without “competitiveness margin” applied. The medium term yield assumes release of Te Tumu and Tauriko West future Greenfield UGAs within this period.

Western Bay of Plenty District

- In Western Bay of Plenty District 149 less dwelling consents were issued than projected compared to the SmartGrowth dwelling projection as at 30 June 2020.
- Remaining Greenfield UGA capacity was 19% as at 30 June 2020 (refer to Table 7).
- Omokoroa UGA has the largest remaining capacity available with 32% or 872 dwellings, Katikati UGA has the lowest capacity remaining in Western Bay of Plenty District with 10% or 255 dwellings.

Residential Sales and Rents

Tauranga City

- Average selling price (12 month rolling average) increased by 10% to \$696,750 in last 12 months to 30 June 2020.
- Average dwelling rent (12 month rolling average) increased by 6.6% to \$434 in last 12 months to 30 June 2020.

Western Bay of Plenty District

- Average selling price (12 month rolling average) increased by 9.3% from \$617,625 in June 2019 to \$675,116 in June 2020.
- Average dwelling rent (12 month rolling average) declined by 0.6% to \$362 in last 12 months to 30 June 2020.

Dwelling Typology

Tauranga City

- The most prevalent lot size range for additional lots created was 326m² to 500m², at 46%.
- Standalone dwellings accounted for 76% of the dwellings consented in Tauranga City. In Wairakei, 80% of the dwellings consented were standalone dwellings.
- 87% of the dwellings consented in Tauranga City were single level dwellings.
- 58% of the dwellings consented in Tauranga City had 3 bedrooms and 20% had 2-bedrooms. The proportion of 4-bedroom dwellings declined from last year's 23% to 18% this year.
- 49% of all the dwellings consented were 3 bedroom standalone dwellings.
- 65% of the dwellings consented in Tauranga City had floor areas ranging from 101m² to 175m².
- Mean floor size of residential buildings consented decreased from 161m² in 2018/2019 to 152m² in 2019/2020.
- A higher proportion of dwelling consents were issued in 2019/2020 for “townhouses, flats, units and other dwellings” and less for “retirement village units”, “apartments” and standalone “houses” than the last 5 year average¹.

Western Bay of Plenty District

- In 2019/2020 all of the dwellings consented in WBOPD were standalone dwellings, minor dwellings or units and 88% of them are single storey dwellings (refer to table 16 & 18).

¹ Dwelling typologies are Statistics New Zealand Infoshare classifications.

- Most of the 2-storey dwellings were built in the rural areas (37% or 15 dwellings), followed by Omokoroa and Waihi Beach with 29% (12 dwellings) and 27% (11 dwellings) respectively.
- More than half (53%) of the dwellings consented in Western Bay had 3 bedrooms and 12% had 2 bedrooms
- 53% of the dwellings consented have a floor area of between 126m² to 200m² (table 23).
- Mean floor size of residential building consents has decreased by 4m² from 181m² in 2018/19 to 177m² in 2019/2020.
- More dwelling consents were issued in 2019/2020 for stand alone “houses” and retirement village units, and less “townhouses, flats, units and other dwellings”, and standalone “houses” than the last 5 year average.

Business Land and Activity

Sub-region

- Vacant industrial zoned land is currently available at Oropi, Te Maunga, Owens Place, Mount Maunganui, Tauriko, Sulphur Point, Greerton, Wairakei (Papamoa East), Katikati, Omokoroa, Te Puke, Rangiuru and Paengaroa.
- Vacant commercial land in Greenfield UGA's is available at Pyes Pa West/Tauriko, Bethlehem, Papamoa and Wairakei in Tauranga City and Omokoroa in Western Bay of Plenty.

Tauranga City

- 26 consents were issued for new industrial buildings in 2019/2020 (same as 2018/2019) while 5 less commercial buildings were consented in 2019/2020 compared to previous year.

Western Bay of Plenty District

- Industrial building consents were still slow in 2019/2020 with only one consent issued, while 3 commercial consents were issued for the same period.

1 Introduction

Monitoring development trends in the Western Bay of Plenty District and Tauranga City assists both Councils in understanding the changing patterns of development in the sub-region. Councils collect development statistics as part of obligation to Section 35 of the Resource Management Act 1991, “to gather information, monitor and keep records”.

This year marks the nineteenth year that development trends have been jointly monitored and reported by Tauranga City Council and Western Bay of Plenty District Council for the Western Bay of Plenty sub-region. From 2007, the annual Development Trends Report has incorporated development measures that relate to the Bay of Plenty Regional Policy Statement (RPS) and SmartGrowth Strategy requirements.

The RPS requires annual reviews to be undertaken to monitor, assess and report on population distribution, dwelling yields, zoned business land, and the proportion of potential residential allotments approved. SmartGrowth requires monitoring of uptake rates and land availability for both residential and business land, permanent versus holiday residences, and rural subdivision as well as a comparison of actual growth against SmartGrowth projected dwelling growth.

The National Policy Statement on Urban Development Capacity (NPS-UDC), came into effect on 1 December 2016. It classified Tauranga Urban Area (which relates to both Tauranga City and Western Bay of Plenty District²) as a high growth urban area. The National Policy Statement on Urban Development (NPS-UD) superseded NPS-UDC effective 20 August 2020.

The NPS-UDC Policy PB6 and PB7 required that high growth Councils monitor a range of indicators on a quarterly basis including:

- a) prices and rents for housing, residential land and business land, by location and type; and the changes in these prices and rents over time;
- b) the number of resource consents and building consents granted for urban development relative to the growth in population;
- c) indicators of housing affordability, and
- d) price efficiency

The NPS-UD requires under Section 3.9 “Monitoring Requirements” that every tier 1, 2, and 3 local authority must monitor, quarterly, the following³:

- a) the supply of dwellings
- b) prices of, and rents for, dwellings
- c) housing affordability
- d) the proportion of housing development capacity that has been realised:
 - (i) in previously urbanised areas (such as through infill housing or redevelopment); and
 - (ii) in previously undeveloped (ie, greenfield) areas
- e) available data on business land.

In relation to tier 1 urban environments, tier 1 local authorities must monitor the proportion of development capacity that has been realised in each zone with development outcomes that are monitored.

Every tier 1, 2, and 3 local authority is required to publish the results of its monitoring at least annually.

For the last two years, the SmartGrowth Development Trends Report incorporated a number of relevant indicators that meet NPS-UDC monitoring requirements (refer table 3), while continuing the development trends time series data. The report is produced annually for the period 1 July to 30 June.

² Western Bay of Plenty District (WBOPD) indicators are displayed for total WBOPD (urban and rural) or only the urban growth areas which include Waihi Beach, Katikati, Omokoroa and Te Puke.

³ Tauranga City and Western BOP District are Tier 1 local authorities under the NPS-UD

The SmartGrowth Technical Implementation Group (TIG) completed a housing and business land assessment in 2018⁴. The assessment includes information about the range of business uses and dwelling types, and provides evidence-based estimates of demand and feasible capacity.

SmartGrowth also developed a 30-year Future Development Strategy (FDS) that will drive the discussion and decision-making needed to manage the expected growth in the sub-region. Public consultation on the draft Future Development Strategy for Western Bay of Plenty sub-region was completed in 2018. The information gathered during the consultation was carried through to the Urban Form and Transport Initiative (UFTI). The UFTI work provides a coordinated approach to future urban development and transport, and takes precedence over the FDS until the UFTI staged work has been completed.

National Policy Statement on Urban Development Monitoring

To respond to the requirements of the NPS-UDC/UD, staff from the three Councils (Tauranga City Council, Western Bay of Plenty District Council, Bay of Plenty Regional Council) prepare the report under SmartGrowth.

The NPS-UDC⁵ requires the following deliverables (in sequence):

- establishing a monitoring regime (Policies PB6 and PB7);
- undertaking housing and business land assessments;
- setting development capacity targets for housing in statutory (Resource Management Act) planning documents – i.e. the Bay of Plenty Regional Policy Statement, Tauranga City Plan and Western Bay of Plenty District Plan; and
- developing (and consulting on) a Future Development Strategy to show how the identified targets will be met into the long term.

Monitoring and reporting on the NPS-UDC/UD PB6 started in December 2017, while PB7 indicators of price efficiency were incorporated in the monitoring reports from March 2018⁶. The Ministry of Housing and Urban Development (HUD) provided guides to support the implementation of the NPS-UDC/UD and an online dashboard that published charts, maps and underlying data on local housing markets. These were used as reference in the preparation of the monitoring reports, particularly on housing market indicators.

Table 3 outlines the indicators that are relevant to the NPS-UDC/NPS-UD monitoring requirements. The majority of indicators have a residential focus due to the availability of residential data through the HUD dashboard, and Council records.

Table 3 NPS-UD Indicators Monitored

NPS-UD category	Type	Topic	Indicator	Ref
a) Prices of, and rents for, dwellings	Residential	Prices	Dwelling Sales Price (Tauranga City and WBOPD's Urban Areas)	p.18
		Prices	Dwellings Sold (Tauranga City and WBOPD's Urban Areas)	p.20
		Rents	Nominal Rents Dwelling (Tauranga City and WBOPD's Urban Areas)	p.19
		Prices/ Rents	Ratio of Dwelling Sales Prices to Rent (Tauranga City and WBOPD's Urban Areas)	p.21
		Floor size	Average Floor Size per Residential Building (Tauranga City and total WBOPD)	p.38
		Prices	Average Value per Residential Dwelling Consent (Tauranga City and total WBOPD)	p.39
		Type	Building Consents by Type (Tauranga City and total WBOPD)	p.40
		Rents	Detailed Geographic Data on Dwelling Rents (Tauranga City and total WBOPD)	p.20

⁴ SmartGrowth Housing and Business Development Capacity Assessment for Tauranga City and WBOPD-Urban. Plans are underway to develop the 2021 HBA

⁵ The National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment (MBIE), June 2017 is still being used per advice from HUD.

⁶ The quarterly monitoring results for the NPS-UD starting from September 2020 will be included in the annual report for 2020/2021.

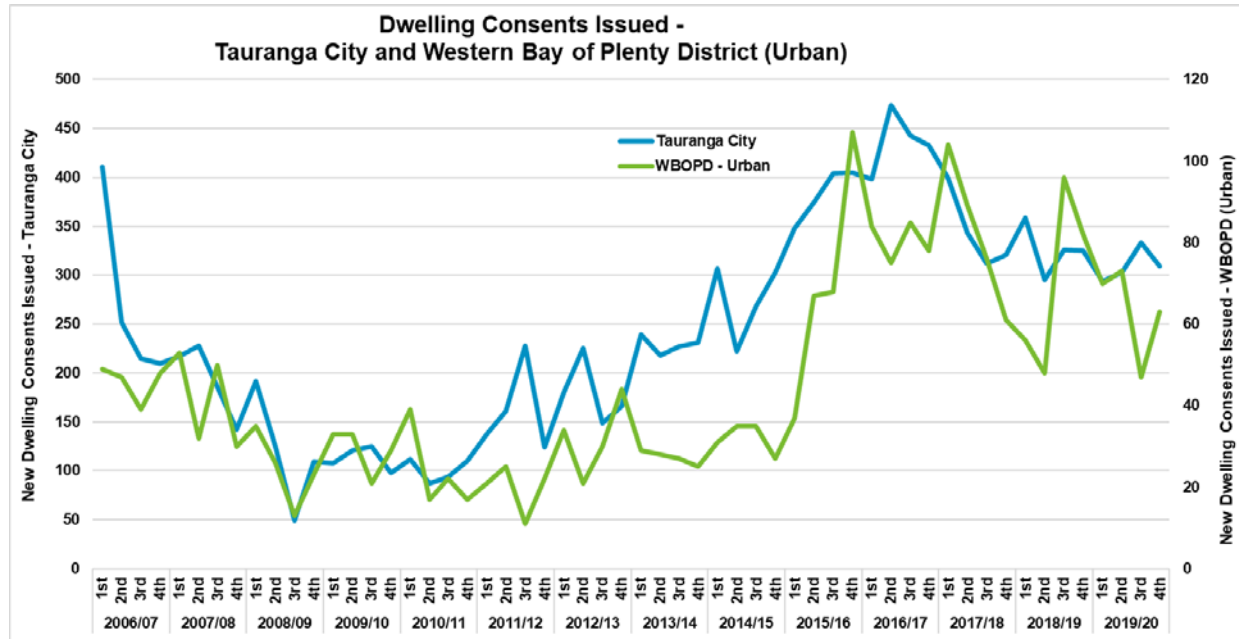
NPS-UD category	Type	Topic	Indicator	Ref
		Prices	Detailed Geographic Data on Dwelling Sale Prices (Tauranga City and total WBOPD)	p.19
	Business	Type	Building Consents by Type – Non-Residential (Tauranga City and total WBOPD)	p.49
b) Supply of dwellings	Residential	New Lots	New Lots Created (Tauranga City and WBOPD's Urban Areas)	p.11
		Dwelling Consents	New Dwelling Consents Issued (Tauranga City and WBOPD's Urban Areas)	p.8
		Dwelling Consents	New Dwelling Consents Compared to Dwelling Projections (Tauranga City and WBOPD's Urban Areas)	p.13
c) Housing affordability	Residential	Prices	Housing Affordability Measure (HAM) – Buy (Tauranga City and total WBOPD)	p.22
		Rents	Housing Affordability Measure (HAM) – Rents (Tauranga City and total WBOPD)	p.23

An explanation of indicators provided via the HUD/MfE guidance or dashboard is provided in Appendix 1, and referenced under the relevant indicator through the report.

2 Supply and Demand

New Dwelling Consents Issued

Figure 2 Dwelling consents issued, Tauranga City and WBOPD (urban), July 2006 to June 2020



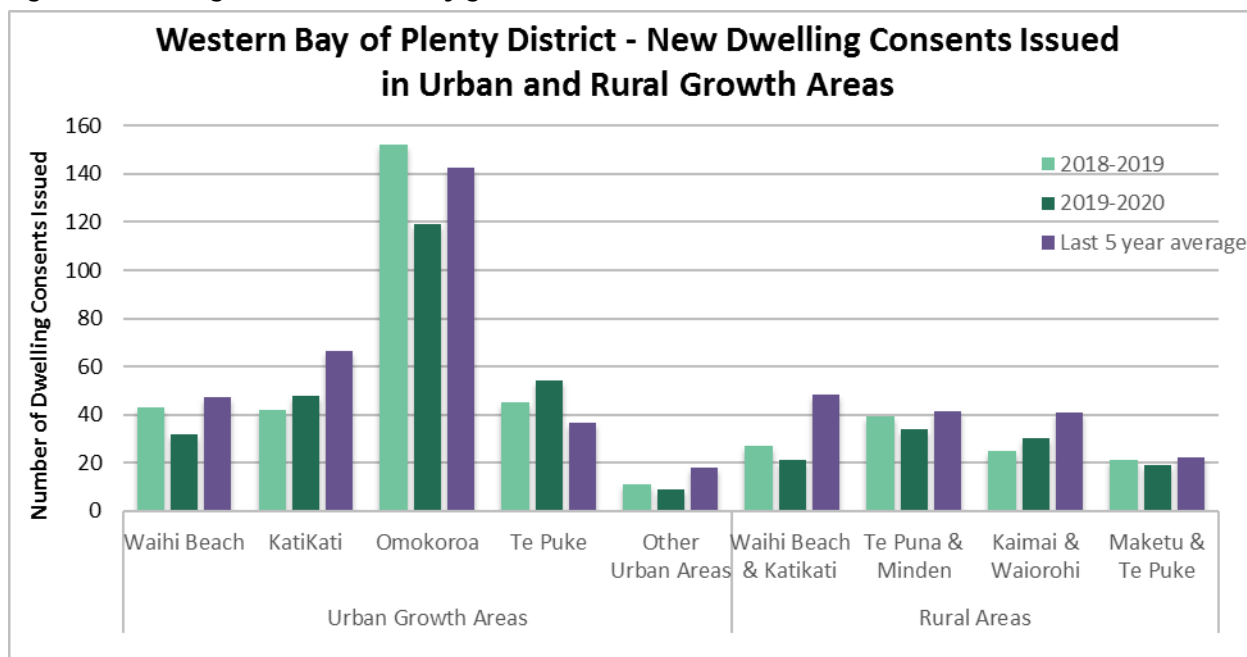
Dwelling consents issued in the urban areas of WBOPD decreased by 8.6% (or 24 consents) from 2018/2019 to 2019/2020 while dwelling consents for total WBOPD decreased by 8.5% (or 34 consents) in the same period. The decrease is likely to be due to the 5 week lockdown period where dwellings consents were issued but no construction work was done.

From 2018/19 to 2019/20, building consents issued for new dwellings in Tauranga City declined by 5% (or 66 consents). Compared to the last five year average this year's new dwelling consents were 14% lower. In the last ten years, the lowest annual record for new dwelling consents was in 2010/11 at 470, with a monthly average of 39. The annual average new dwelling consents in the last ten years was higher by 11% than this year's record.

Table 4 Dwelling consents issued in Tauranga City and Western BOPD-total

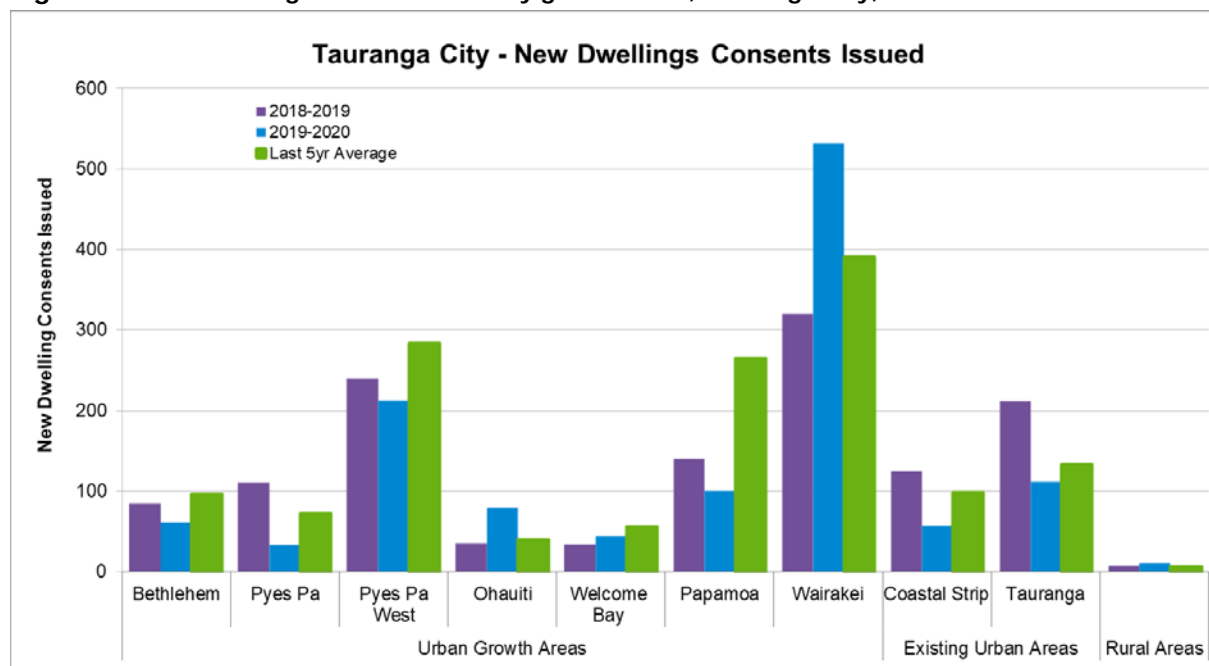
Dwelling consents		Trend	Change	% Change
<i>Tauranga City</i>				
This year	1,239			
Last year	1,305	↓	-66	-5.1
Last 5 years (average)	1,440	↓	-201	-13.9
Last 10 years (average)	1,113	↑	126	11.3
<i>Western BOPD – total</i>				
This year	367			
Last year	401	↓	-34	-8.5
Last 5 years (average)	464	↓	-97	-20.9
Last 10 years (average)	336	↑	31	9.2
<i>Western BOPD – urban</i>				
This year	254			
Last year	278	↓	-24	-8.6
Last 5 years (average)	293	↓	-39	-13.3
Last 10 years (average)	202	↑	52	25.7

Figure 3 Dwelling consents issued by growth area, WBOPD, 2018 to 2020



Dwelling consents issued in 2019/2020 decreased by 9% in the Greenfield UGA's and in the rural areas it decreased by 7%, compared to 2018/2019. Over 70% of the dwelling consents were issued in the urban areas. Dwelling consents issued in the UGA's increased in Te Puke (20%) and in Katikati (12%) while all the rural areas decreased compared to the previous year except in Kaimai/ Waiorohi where it increased by 5 consents.

Figure 4 New dwelling consents issued by growth area, Tauranga City, 2018 to 2020

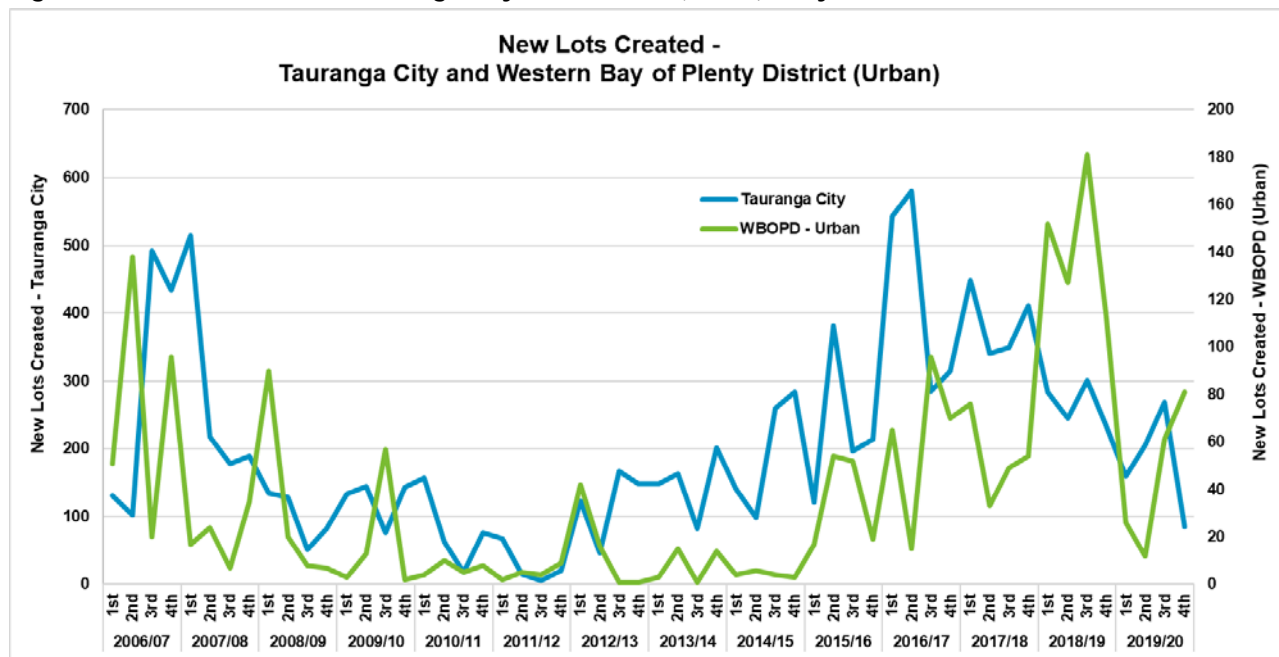


In 2019/20, around 85% of the new dwelling consents were issued in the greenfield urban growth areas, with the remaining 15% issued in the existing urban areas. Dwelling consents issued in greenfield UGAs declined by 10% (or 98 consents) compared to the previous year. The declines were noted in all growth areas except Ohaiti and Welcome Bay which recorded respective increases of 44 (126%) and 10 (29%) dwellings. The existing urban areas recorded a decline of 50% of new dwellings from 336 in 2018/19 to 169 dwellings in 2019/20. The dwelling figures (23 townhouses and 97 apartments) for the Farmers redevelopment currently under construction will be counted in future reports when fit out of the dwellings are consented.

Among the greenfield UGAs, Ohaiti was the only area that had an increase in number of dwellings consented during the year compared to the last 5-year average, while the existing urban areas recorded a decline of 27% (61 dwelling consents) during the same period.

New Lots Created

Figure 5. New lots created, Tauranga City and WBOPD (urban), July 2006 to June 2020



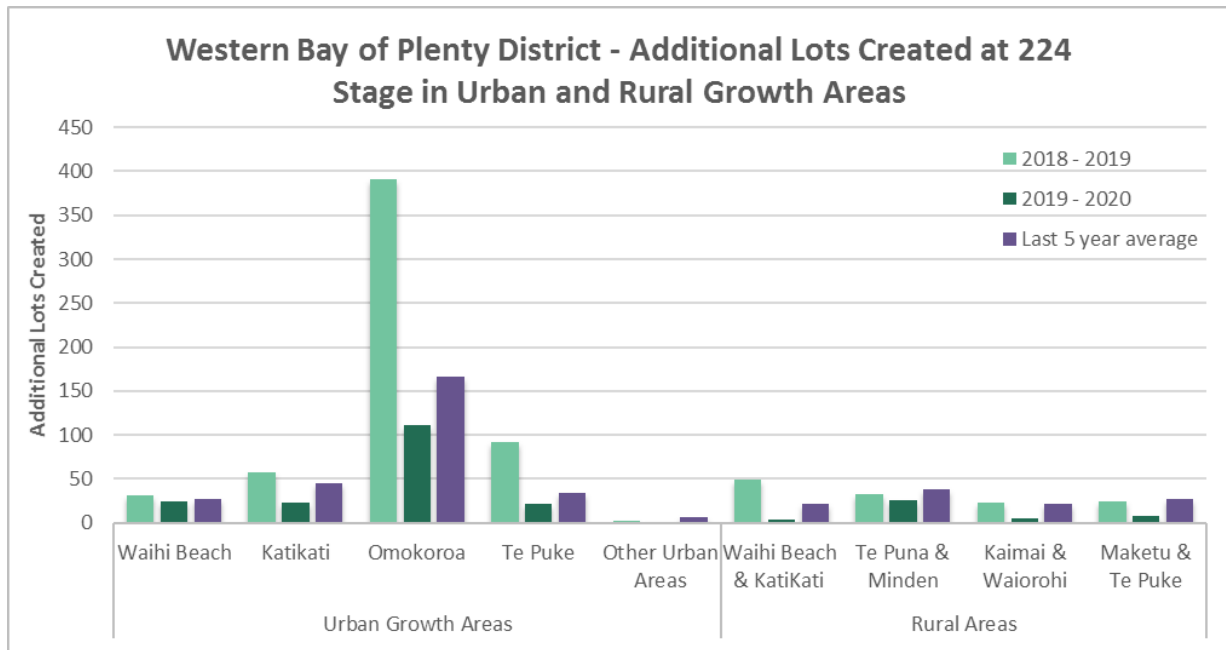
From its peak in 2018/2019, subdivision activity in WBOPD-urban had a significant decline with 69% or 392 less lots created in UGAs in 2019/20. New lots created in the UGA's were the lowest in 2014/2015 with an average of 4 new lots created per quarter, compared to the average of 45 new lots created in 2019/2020. In 2018/2019 most of the subdivision happened in Omokoroa (Special Housing Area and Kahawai Place) with 391 consents granted, followed by another 111 consents granted in 2019/2020.

In the last ten years, the number of new lots created in Tauranga City was lowest in 2011/12 at 109 and highest in 2016/17 at 1,723. The new lots created in 2019/20 was lower than the previous year's by 32% or 344 lots. It was also lower than the new lots created in other time periods by 40% (last 5 years) and 13% (last 10 years).

Table 5 New lots created, Tauranga City and Western BOPD-Urban

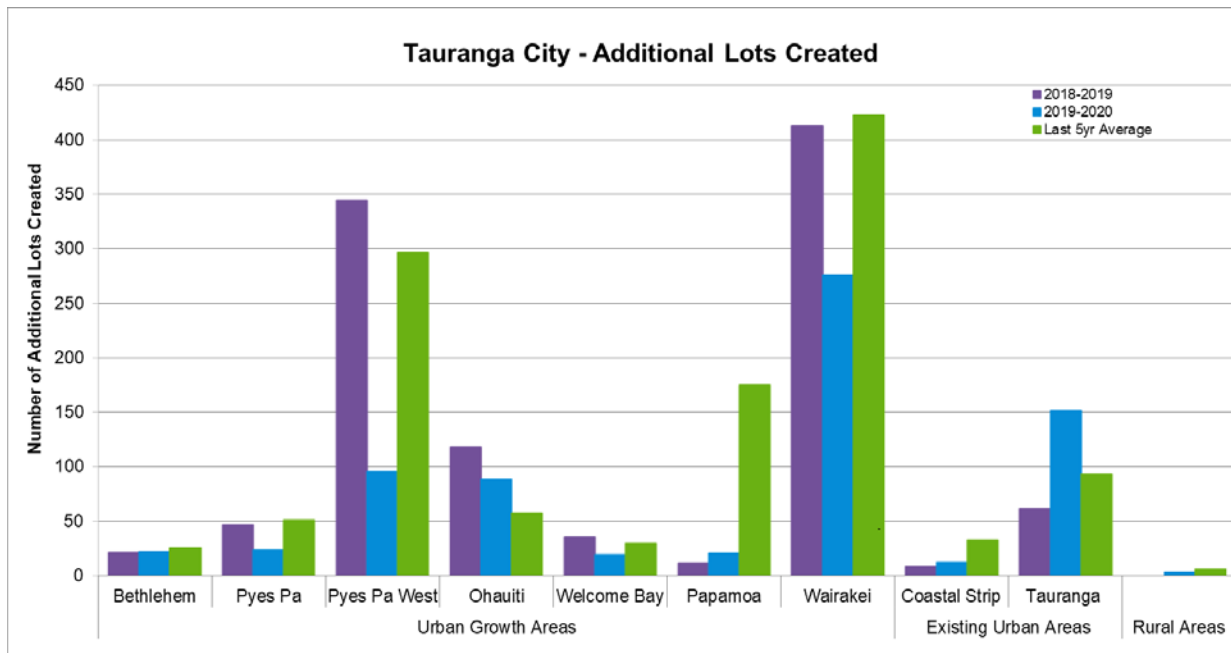
New lots	Trend	Change	% Change
<i>Tauranga City</i>			
This year		718	
Last year	↓	1,062	-32.4
Last 5 years (average)	↓	1,193	-39.8
Last 10 years (average)	↓	825	-13.0
<i>Western BOPD – Urban</i>			
This year		180	
Last year	↓	572	68.5
Last 5 years (average)	↓	270	33.4
Last 10 years (average)	↑	151	19.3

Figure 6 Additional lots created by growth area, WBOPD, 2018 to 2020



New lots created declined in all the urban growth and rural areas from the previous year. New lots created in the UGA's are still the highest for Omokoroa with 111 lots, followed by Waihi Beach-Bowentown with 24 new lots. In the rural areas the highest number of new lots created was in the Te Puna/ Minden area with 26 consents. Omokoroa fluctuates due to the timing of the stages by the 3 larger developers.

Figure 7 Additional lots created growth area, Tauranga City, 2018 to 2020



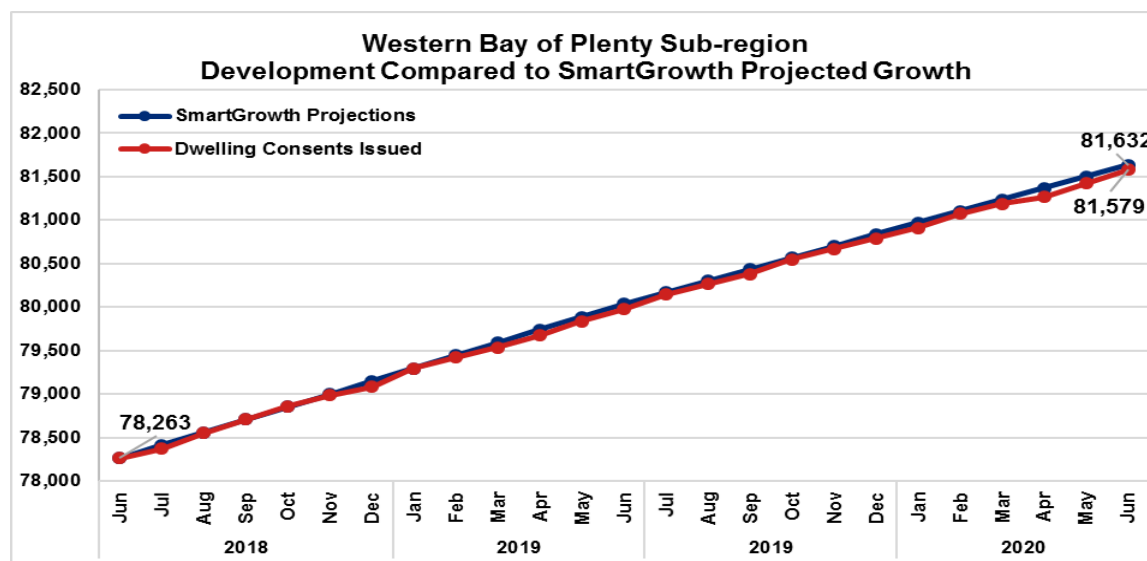
More than three quarters (76% or 549) of the additional lots during the 2019/2020 year were created in Greenfield UGAs, while 165 lots or 23% were created in existing urban areas. Subdivision development in the Greenfield UGAs declined by 45% or 442 lots in comparison to 2018/2019, while it increased by 132% or 94 lots in the existing UGAs in the same period.

Comparison with SmartGrowth Projections

Detailed population and household projections have been produced for the SmartGrowth region by the National Institute of Demographic and Economic Analysis (NIDEA), University of Waikato⁷ in 2014. Since then the 2018 Census results were released and the NIDEA projections was re-aligned to accommodate the higher population increase as per Census.

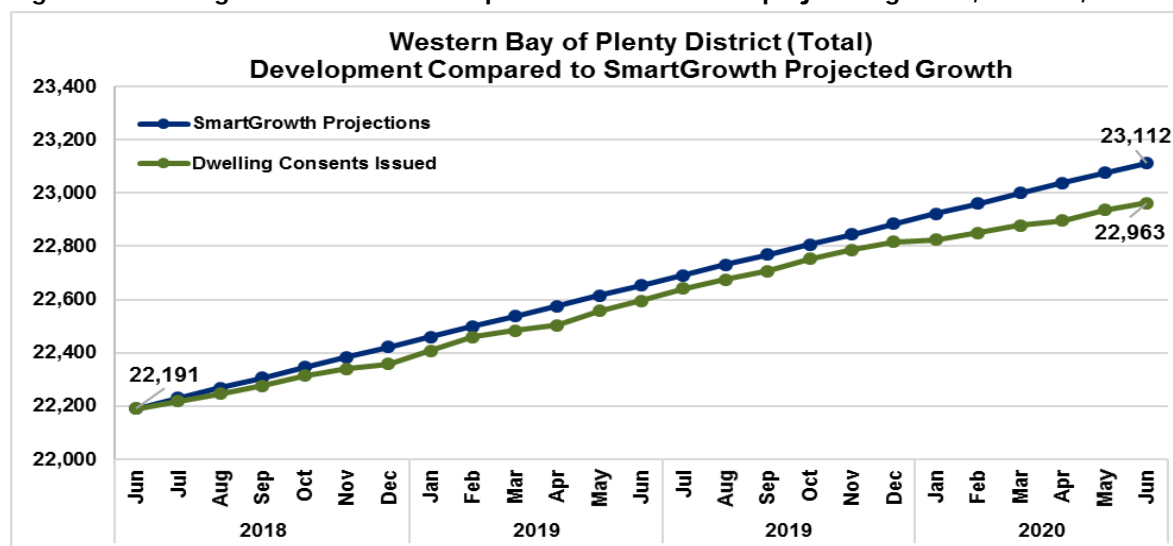
At June 2018, the population for the Western Bay of Plenty sub-region was 195,400⁸. The population of the sub-region is projected to increase to 276,300 people (+80,900 people) by 2048, while the number of dwellings is projected to increase from 78,663 to 113,661 over that period.

Figure 8 Dwelling consents issued compared to SmartGrowth projected growth, WBOP sub-region, 2018 to 2020



Dwelling consents issued in the Sub-region are very close to the dwellings projected. Between 1 July 2018 and 30 June 2020, 53 less new dwelling consents were issued, than projected.

Figure 9 Dwelling consents issued compared to SmartGrowth projected growth, WBOPD, 2018 to 2020

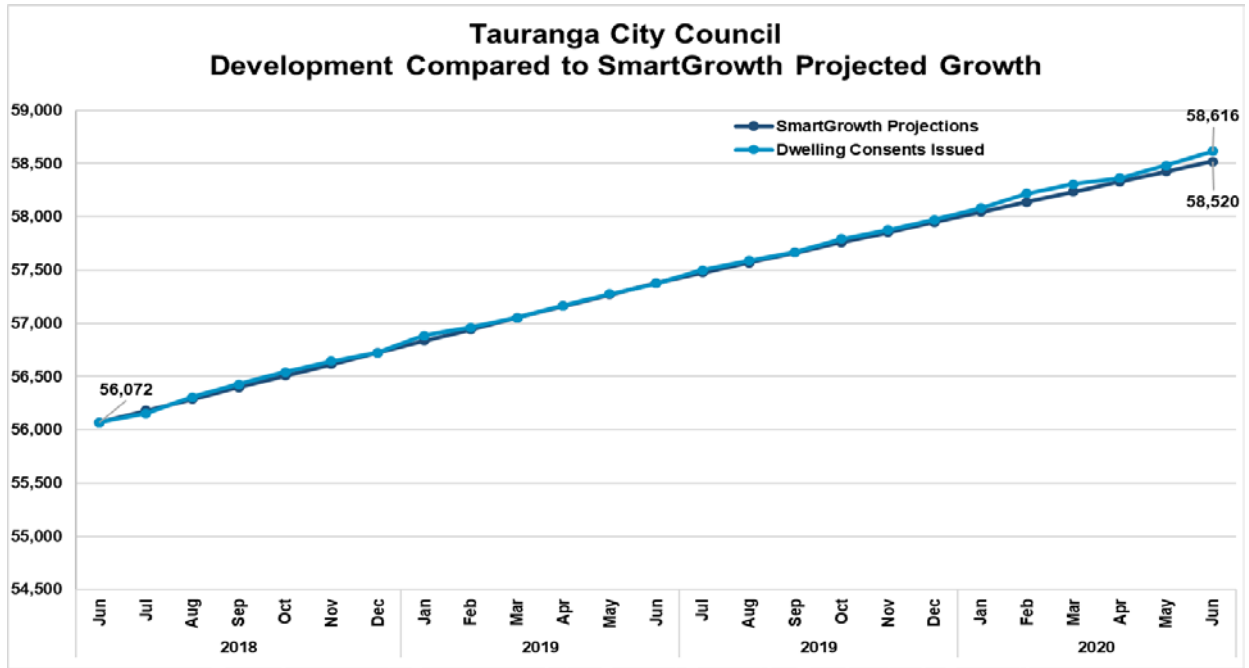


WBOP had 149 less dwelling consents issued than the SmartGrowth projections between 1 July 2018 and 30 June 2020.

⁷ The revised projections were adopted by the SmartGrowth Committee on 28 May 2014 and updated by both Councils in October 2019.

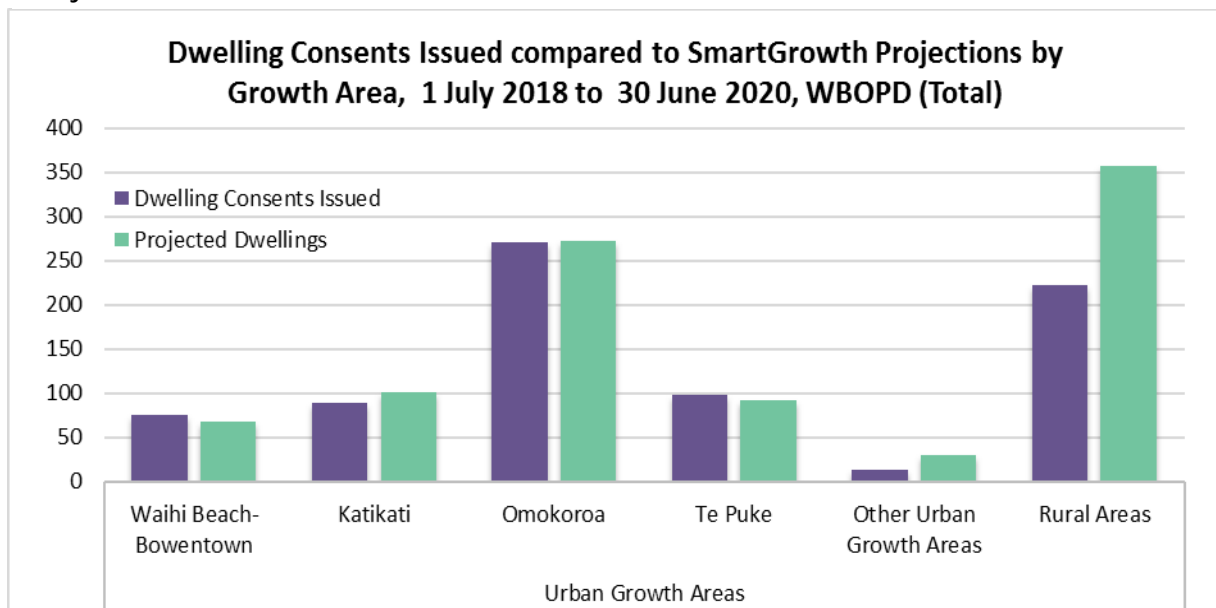
⁸ SmartGrowth population projections have been rebased to revised Statistics New Zealand Estimated Resident Population (ERPs) released 22 October 2020

Figure 10 Dwelling consents issued compared to SmartGrowth projected growth, Tauranga City, 2018-2020



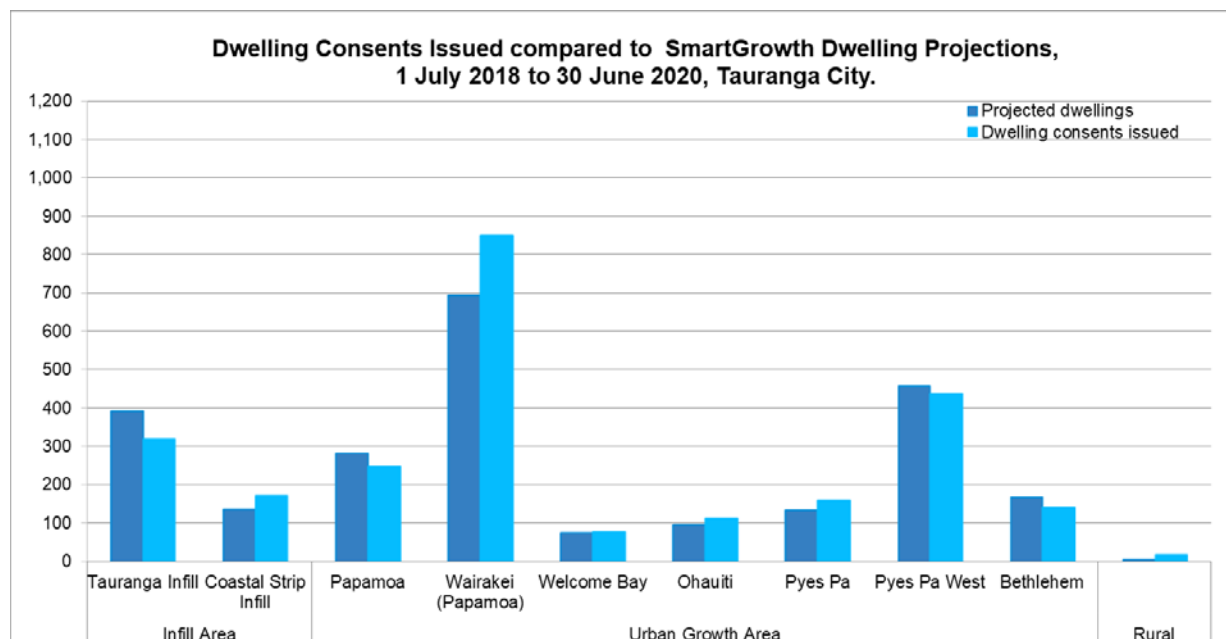
In Tauranga City, the number of dwelling consented between 1 July 2018 and 30 June 2020 were higher than the SmartGrowth projections by 4% (or 96 dwellings consents).

Figure 11 Dwelling consents issued compared to SmartGrowth projections by growth area, WBOPD, 1 July 2018 to 30 June 2020



In the UGA's of WBOPD, the actual dwelling consents issued are close to the projections, while the projections (357 dwellings) for the rural areas are much higher than the actual dwelling consents issued of 223 dwellings (-134 dwellings).

Figure 12 Dwelling consents issued compared to SmartGrowth projections by growth area, Tauranga City, 1 July 2018 to 30 June 2020



Between July 2018 and June 2020, 96 more dwellings (4%), were consented in Tauranga City compared to current SmartGrowth Projected allocation. Among the UGAs, Wairakei recorded the biggest increase of 23% or 157 dwellings consented. Overall, a decline of 21 dwellings or 1% was observed in the UGAs.

In the same period, 36 less dwellings were consented in the infill areas compared to the SmartGrowth projections, although an increase of 35 dwellings were recorded in the coastal strip.

Growth Rates – Land Availability

SmartGrowth requires that uptake rates and land availability for residential development be monitored. This is based on zoned residential land across the sub-region.

Tauranga City

Of the operative Greenfield UGA's, Pyes Pa UGA has the lowest proportion of remaining dwelling capacity (10%), while Welcome Bay has the lowest remaining dwelling capacity (217 dwellings), refer to Table 6.

Papamoa UGA which has the largest expected yield, has estimated potential for a further 1,458 dwellings. The majority of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block, and at the eastern end of Doncaster Drive in the Parton Road area.

Wairakei UGA in Papamoa East was made operative in May 2011, providing further capacity for an estimated 5,150 dwellings. At 30 June 2020 it had the largest remaining dwelling capacity (2,903 dwellings) and highest percentage of capacity remaining (56%).

Other Greenfield areas have been identified for future urban development and their suitability is currently being considered. Te Tumu in Papamoa East and Tauriko West future Greenfield UGA areas are currently being progressed through structure planning.

By June 2023 it is estimated that capacity for a further 4,444 dwellings will remain in the current operative Greenfield UGA's, which is 14% of the total estimated yield of these UGA's, falling to 1,515 dwellings (or 5% of total yield) by 2030. For the future Greenfield UGA's it is anticipated that a further 11,000 dwellings will be added to the yield by 2030, with capacity for a further 8,600 dwellings (or 78%) of this additional

yield estimated to remain by 2030. It is anticipated that remaining dwelling capacity at Wairakei in 2030 will be mainly for residential activity in and around the Wairakei Town Centre.

An assessment of remaining residential capacity in Tauranga City is provided below (Table 6) for the short term (next 3 years) and medium term (4 to 10 years). As required by the NPS-UD a 20% “competitiveness margin” is added on top of projected growth. Two scenarios are assessed, the first where 85% projected dwelling growth is assumed to be accommodated in Greenfield UGA areas (the current trend) with the balance (15%) accommodated in the established Infill Intensification parts of the City, and the second where the split is 75% Greenfield UGA and 25% Infill Intensification. A short term shortfall is projected under both scenarios with and without the additional 20% “competitiveness margin” applied. A medium term shortfall is also projected under both scenarios except for the 75% scenario without “competitiveness margin” applied⁹. The medium term yield assumes release of Te Tumu and Tauriko West future Greenfield UGA’s within this period.

Table 6 Dwelling growth rate and projected uptake by urban growth areas in Tauranga City

Greenfield Urban Growth Area (UGA)	Estimated Yield - Total Dwellings	June 2020 total dwellings (existing and consented)	Remaining capacity as at June 2020	Short term (3 years)		Medium Term (10 years)	
				Estimated uptake June 2020 – June 2023	Estimated remaining capacity at June 2023	Estimated uptake June 2023-June 2030	Estimated remaining capacity at June 2030
Bethlehem	4,700	3,658	1,042 (22%)	200	842	600	242
Pyes Pa	2,750	2,592	158 (6%)	70	88	80	8
Pyes Pa West	2,500	1,999	501 (20%)	400	101	80	21
Ohauti	1,800	1,465	335 (19%)	200	135	85	50
Welcome Bay	2,150	1,933	217 (10%)	100	117	100	17
Papamoa	11,900	10,442	1,458 (12%)	500	958	900	58
Wairakei ¹	5,500	2,247	3,253 (59%)	1,000	2,253	1,400	853
UGA (current) Sub-Total	31,300	24,336	6,964 (22%)	2,470	4,494	3,245	1,249
Te Tumu ²	6,000					1,500	4,500
Tauriko West ²	3,000					1,500	1,500
Keenan Road ³	2,000						2,000
UGA (future) Sub-Total	11,000					3,000	8,000
Greenfields Total	42,300	24,336	6,964	2,470	4,494	6,245	9,249

	85% Greenfield/ 15% Infill Intensification		75% Greenfield/ 25% Infill Intensification	
	Short term	Medium Term	Short term	Medium Term
Projected Dwellings (Citywide)	3,589	7,882	3,589	7,882
Greenfield UGA Projection	3,051	6,700	2,692	5,912
Greenfield UGA plus 20% NPS-UD Competitiveness Margin	3,661	8,040	3,230	7,094
Estimated Greenfield Dwelling Uptake	2,470	6,245	2,470	6,245
City Shortfall	581	455	222	-334
City Shortfall Including NPS-UD Competitiveness	1,298	2,031	940	1,243

¹ Timing of housing uptake in parts of the Wairakei Town Centre and periphery is dependent on delivery of future infrastructure and/ or the release of Te Tumu UGA to provide the necessary population scale to support it.

² Structure planning has commenced. If the release of either of these areas is delayed the medium term shortfall will increase.

³ Currently anticipated to be released in 2028-2033 planning period.

⁹ Under the NPS-UD a revised Housing and Business and Capacity Assessment (HBA) is to be completed by 31 July 2021. Population and dwelling projections will be reviewed through this process, including reassessing housing demand and development capacity that is plan-enabled, infrastructure-ready, and feasible and reasonably expected to be realised to determine whether there is sufficient development capacity to meet demand for housing in the short, medium and longer term. This information will be updated in 2021 SG Development Trends report to align with the 2021 HBA.

Faster or slower dwelling uptake than anticipated in Table 6, and in the established infill intensification parts of the City, will reduce or increase estimated shortfalls.

This assessment is for new dwellings. As sections are created before dwellings are constructed the shortfall for new sections would be more acute than the shortfall for new dwellings.

An independent assessment of residential development capacity in Tauranga City identified that the short and medium term housing shortfall could be significantly higher than the “City shortfall” calculated in Table 6¹⁰. It cited factors that constrained uptake of residentially zoned land including the slow release of some large development blocks or land-banking, topographic or access issues, a lack of infrastructure in some areas, and complications around land tenure (such as multiply owned Maori land). While these matters are generally accounted for in the Table 6 allocation, uptake of remaining capacity will continue to be closely monitored and the dwelling yield estimates and/ or timing adjusted where necessary.

Western Bay of Plenty District

In WBOPD both Te Puke and Waihi Beach UGA's have the largest design capacity in the District of over 3,500 dwellings. Although Waihi Beach has a large design capacity, it has the lowest remaining capacity available due to coastal inundation areas.

Omokoroa Stage 1&2 UGA has the largest dwelling capacity remaining in the District (1,025 dwellings), followed by Waihi Beach-Bowentown UGA with 573 dwellings. Katikati UGA does not include the Park Road dairy farm and Tetley Road orchard, and that leaves Katikati with only 255 dwelling capacity remaining (refer to Table 7).

Omokoroa capacity will be increased with the Stage 3 Structure Plan which provides for an additional 2,200 dwellings.

There is still enough availability of land under the NPS-UD 20% “competitiveness margin” for the short and medium term projected uptake.

Table 7 Dwelling growth rate and projected uptake by urban growth areas in Western Bay of Plenty District

Urban Growth Area	Total Capacity (Dwellings)	June 2020 Total dwellings (existing and consented)	Remaining capacity at June 2020	Short Term - 3 years		Medium Term - 10 years	
				Protected uptake June 2021 – June 2023	Estimated remaining capacity at June 2023	Protected uptake June 2024 – June 2030	Estimated remaining capacity at June 2030
WB-Bowentown/ Athenree	3,553	2,980	573	108	465	66	399
Katikati	2,543	2,288	255	153	102	262	0
Omokoroa – Stages 1 & 2	2,945	1,920	1,025	450	575	1,145	0
Te Puke	3,631	3,071	560	138	422	256	166
Greenfields (current) Sub-Total	12,672	10,259	2,413	849	1,564	1,729	565
Omokoroa - Stage 3	2,200	84	2,116	0	2,116	570	1,546
Greenfields (Future) Sub-Total	2,200	84	2,116	0	2,116	570	1,546

Occupied/Unoccupied Dwelling Ratio

SmartGrowth requires that “permanent” vs. “holiday residences” be monitored. A comparison of Census night occupied dwelling with unoccupied dwelling counts provides one indication of this. A table outlining occupied and unoccupied dwelling ratios based on 2018 Census is provided in Appendix 4 and a Statistical Area 2 (SA2) map is provided in Appendix 5¹¹.

Western Bay of Plenty District

In the Western Bay of Plenty District the coastal settlements of Waihi Beach-Bowentown and Pukehina Beach show the highest ratios of unoccupied dwellings with 57% and 49% respectively, signifying a high number of holiday homes in these areas, refer to Appendix 4.

¹⁰ Western Bay Sub-Region Residential Development Capacity Review, Veros Property Services, May 2019

¹¹ Note: Statistics NZ replaced “Census Area Units” (CAU’s) with “Statistical Area 2” (SA2’s) at 2018 Census. Although the SA2s are generally the same as CAU’s, the boundaries and names have changed to reflect changes in land use and population patterns

Other Statistical Areas (Athenree, Waiau, Maketu and Matakana Island) also indicate a relatively high proportion of non-permanent residences, each between 21% and 28% of homes unoccupied at Census time. Katikati and Te Puke have the least unoccupied dwellings available with 7% and 5% respectively.

Tauranga City

For Tauranga City the coastal strip SA2's of Mount Maunganui North, Omanu, Te Maunga, Papamoa Beach East, Palm Beach, and Palm Springs all registered an unoccupied dwellings proportion of 9% or greater on Census night suggesting a higher rate of holiday residence in these areas, refer to Appendix 4. These results correspond with the traditional holiday nature of the coastal strip. Outside the coastal strip only Tauranga Central, and Sulphur Point SA2's exceeded 9% unoccupied dwellings.

3 Dwelling Sales Price and Rent Trends

Dwelling Sales Price

In the sub-region, dwelling sales prices increased in the last twelve months to June 2020. In June 2020, the average dwelling sales prices (12-month rolling average) increased slightly by 1 per cent compared to the previous quarter. Compared to the same month the previous year, dwelling sales prices were 10% and 6% higher in Tauranga City and WBOPD, respectively. House prices in the last ten years were almost double in Tauranga City, while it's more than 70% higher in WBOPD.

Figure 13 Dwelling sales prices, Tauranga City and WBOPD, 2001/2020

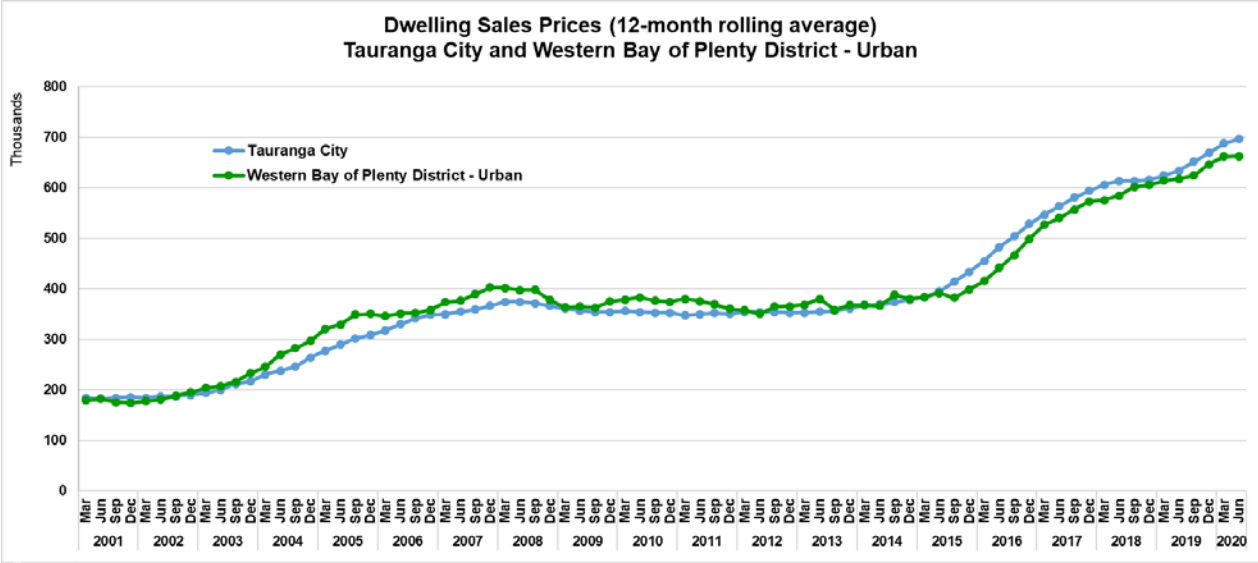


Table 8 Dwelling Sales Prices (12-month rolling average)

Dwelling Sales Price		Trend	Change	% Change
<i>Tauranga City</i>				
June 2020	\$696,750			
March 2020	\$688,250	↑	\$8,500	1.2
June 2019	\$633,500	↑	\$63,250	10.0
June 2016	\$483,000	↑	\$213,750	44.3
June 2010	\$353,663	↑	\$343,088	97.0
<i>Western BOPD – Urban</i>				
June 2020	\$675,116			
March 2020	\$661,866	↑	\$13,250	2.0
June 2019	\$617,625	↑	\$57,491	9.3
June 2016	\$441,482	↑	\$233,634	52.9
June 2010	\$382,631	↑	\$292,485	76.4

In WBOPD-urban, Te Puke had the highest increase in median house price in June 2020 compared to the same month last year at 6.4%, while Omokoroa increased by 36% compared to June 2018 to June 2020.

In Tauranga City, Pacific View had the highest increase in median house price at 33%, while Tauranga South had the biggest decline of 12% in the same period.

Figure 14 Dwelling sales prices, June 2020

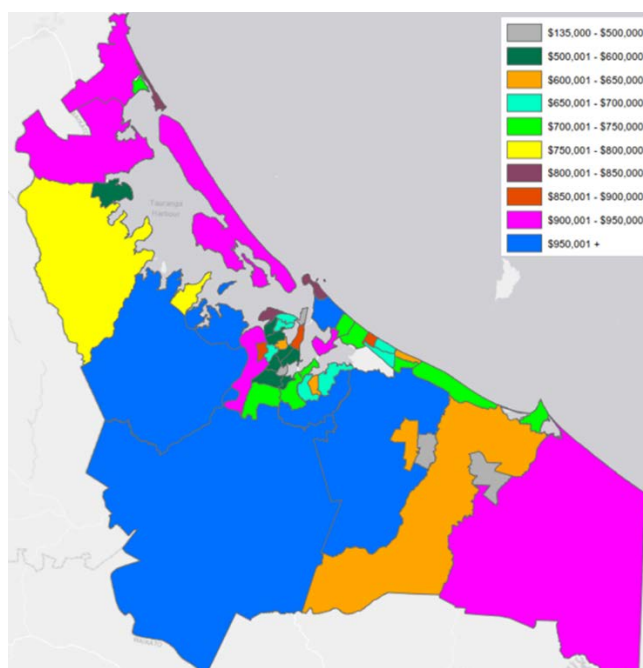
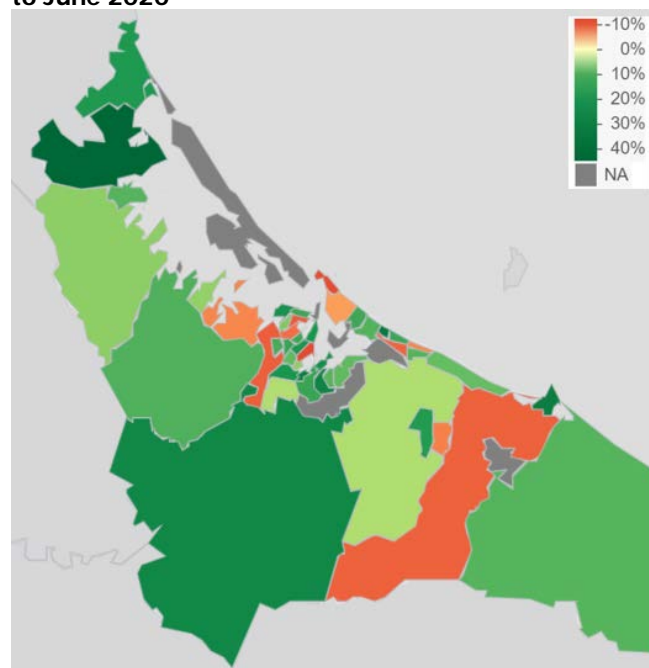


Figure 15 Change in dwelling sales prices, June 2019 to June 2020



Source: Corelogic – HUD Urban Development Capacity Dashboard

Dwelling Rents

The figure below shows that dwelling rents were relatively stable in Tauranga City in the second half of 2018, but gradually increased in early 2019 to June 2020. In WBOPD, however, dwelling rents declined from December 2019 to June 2020, with the June 2020 dwelling rent being lower than it was in same month during the previous year¹². It must be noted that these results may not be a true indication of the rental market as they only reflect properties where bonds have been lodged in the previous 6 months of

¹² The market rent information comes from bond data lodged at Tenancy Services.

the reference quarter. Due to COVID-19 the number of bonds lodged at Tenancy Services was impacted from March to June 2020. Refer Appendix 1 for an explanation of this indicator.

Figure 16 Dwelling rents, Tauranga City and WBOPD (urban), 2001/2020

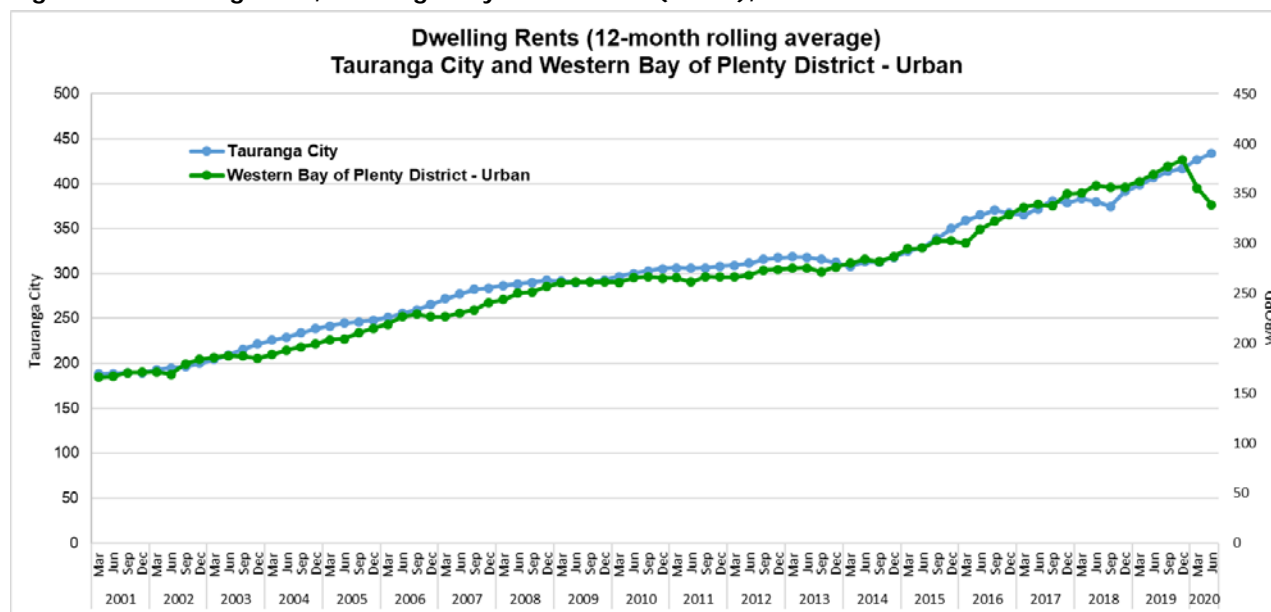
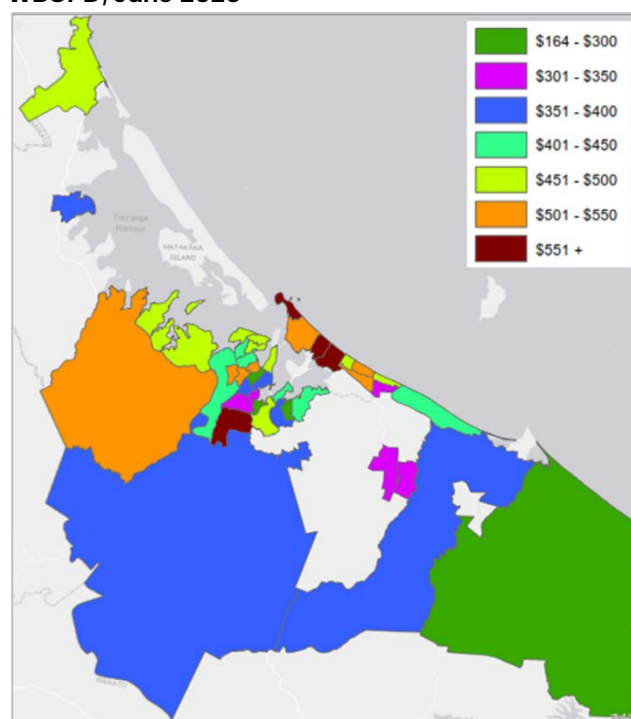


Table 9 Dwelling rents

Dwelling Rents	Trend	Change	% Change	
<i>Tauranga City</i>				
June 2020				
June 2020	\$434			
March 2020	\$427	↑	\$7	1.6
June 2019	\$407	↑	\$27	6.6
June 2016	\$365	↑	\$69	18.7
June 2010	\$300	↑	\$134	44.5
<i>Western BOPD – Urban</i>				
June 2020	\$362			
March 2020	\$369	↓	-\$7	2.0
June 2019	\$364	↓	-\$2	-0.6
June 2016	\$311	↑	\$51	16.5
June 2010	\$266	↑	\$96	36.2

Source: HUD NPS- Urban Development Capacity Dashboard

Figure 17 Weekly dwellings rents, Tauranga and WBOPD, June 2020



Dwellings Sold

The housing market was very quiet as expected during the last quarter of the financial year due to restricted movement because of COVID-19. This was evident in the lower number of houses sold (actual) in the last twelve months to June 2020, where WBOPD had 881 houses sold while Tauranga City had 2,540 houses sold. These sales were lower than the previous year, by a respective 33% and 13% for Tauranga City and WBOPD. These were also 60% and 63% below the highest annual sales volume recorded in 2015/16 for WBOPD and Tauranga City, respectively.

In WBOPD urban areas, 62 less houses (10%) were sold during the year to June 2020 compared to the previous period. Refer Appendix 1 for an explanation of this indicator.

Figure 18 Dwellings sold, Tauranga City and WBOPD, 2001 to 2020

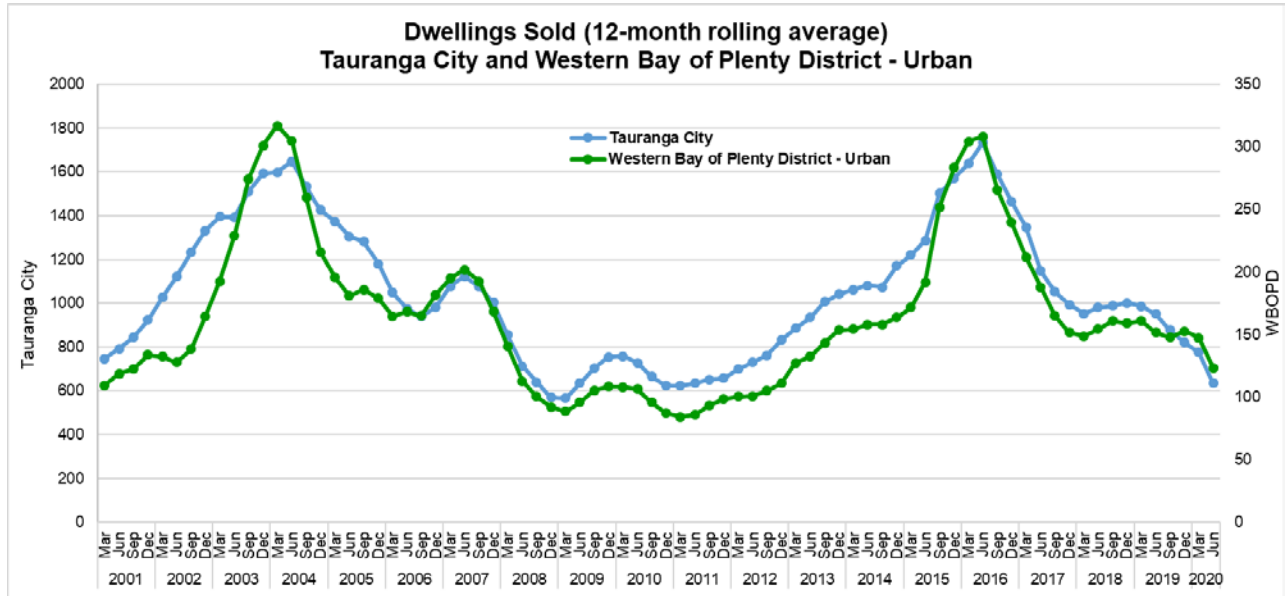


Figure 19 Dwellings sold, July 2019 to June 2020

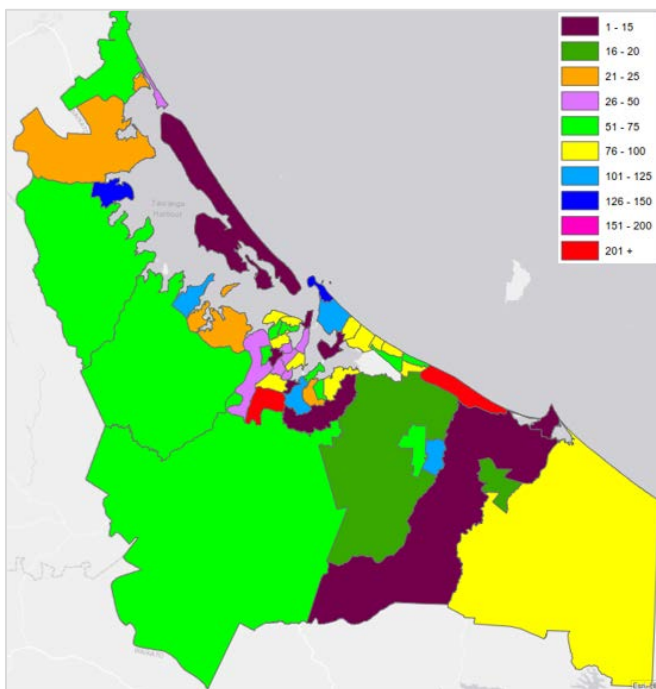
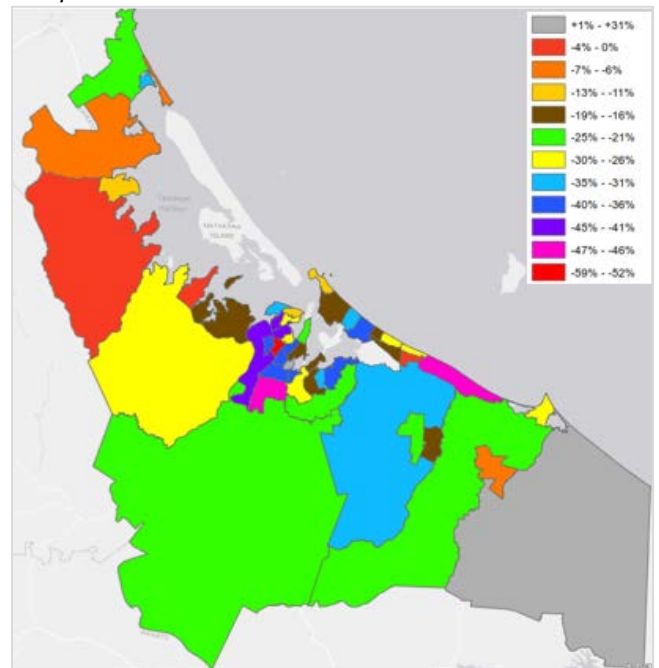


Figure 20 Percentage change in annual dwellings sold, 2018/19 to 2019/20

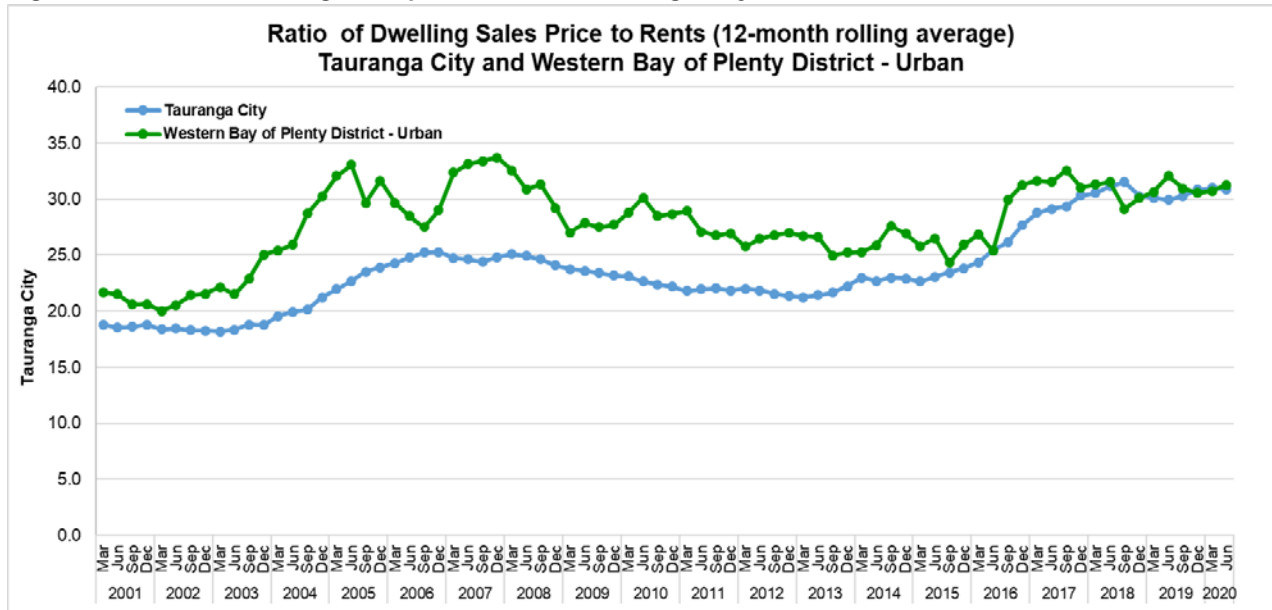


Source: Corelogic – HUD Urban Development Capacity Dashboard

Ratio of Dwelling Sales Prices to Rent

The figure below shows the ratio between house prices to mean annual rent. House prices to rent ratio in the sub-region had increased in the last 20 years. From mid-2016, house prices were 25 times higher than the mean annual rent. As it was increasing, it's becoming more affordable to rent than to purchase a house during these times. Refer to Appendix 1 for an explanation of this indicator.

Figure 21 Ratio of dwelling sales price to rents, Tauranga City and WBOPD (urban), 2001 to 2020



HAM – Housing Affordability Measure

HAM-Buy

In the last twelve months to December 2018 housing affordability has improved in the sub-region. The graph and table below shows a declining quarterly proportion of first home buyer households that were below the benchmark. However, because of the age of this data the measure may not be an accurate representation of current affordability levels. Refer Appendix 1 for an explanation of this indicator.

Figure 22 HAM-Buy: share of first time home buyer households below the benchmark, 2003 to 2018

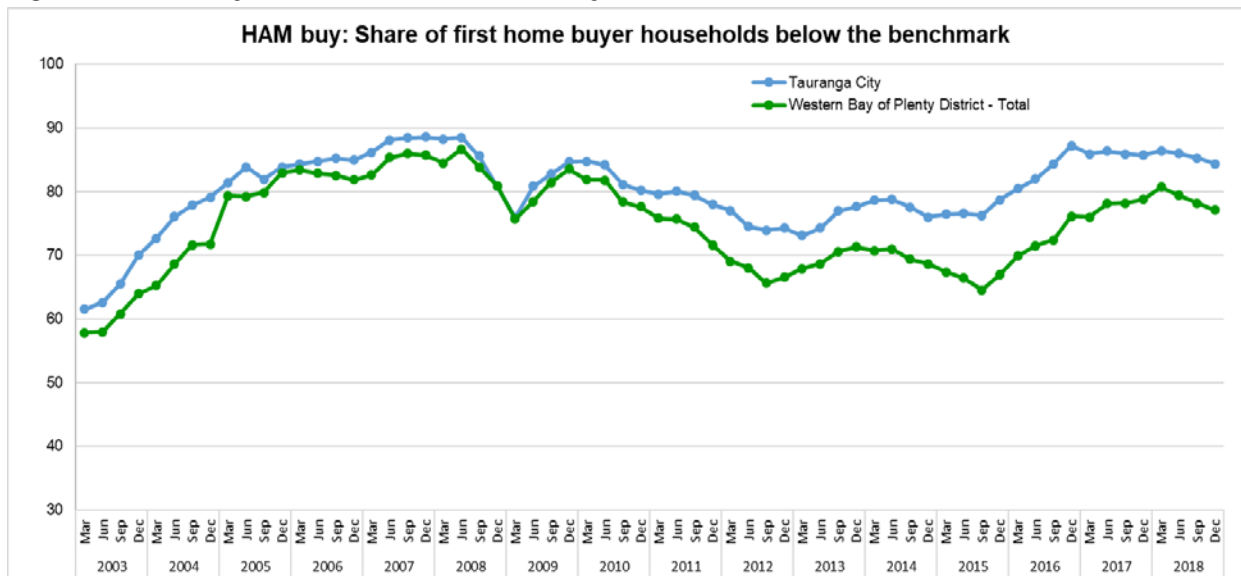


Table 10 HAM Buy

HAM-Buy		Trend	% Change
<i>Tauranga City</i>			
December 2018	84.4%		
September 2018	85.3%	●	-0.9
December 2017	85.7%	●	-1.3
December 2014	76.0%	●	8.4
December 2009	84.7%	●	-0.3
<i>Western BOPD</i>			
December 2018	77.1%		
September 2018	78.2%	●	-1.1
December 2017	78.7%	●	-1.6
December 2014	68.6%	●	8.5
December 2009	83.5%	●	-6.4

● More affordable ● Less affordable

Source: Corelogic – HUD Urban Development Capacity Dashboard

HAM Rent

The graph and table below shows an improved HAM-Rent in the sub-region in the last two years to December 2018. However, the HAM-Rent was lower than HAM Buy at 31 March 2018 in both Tauranga City and WBOP District, suggesting that it was more affordable to rent than to buy a home. Refer Appendix 1 for an explanation of this indicator.

Figure 23 HAM-Rent: share of renting households below the benchmark, 2003 to 2018

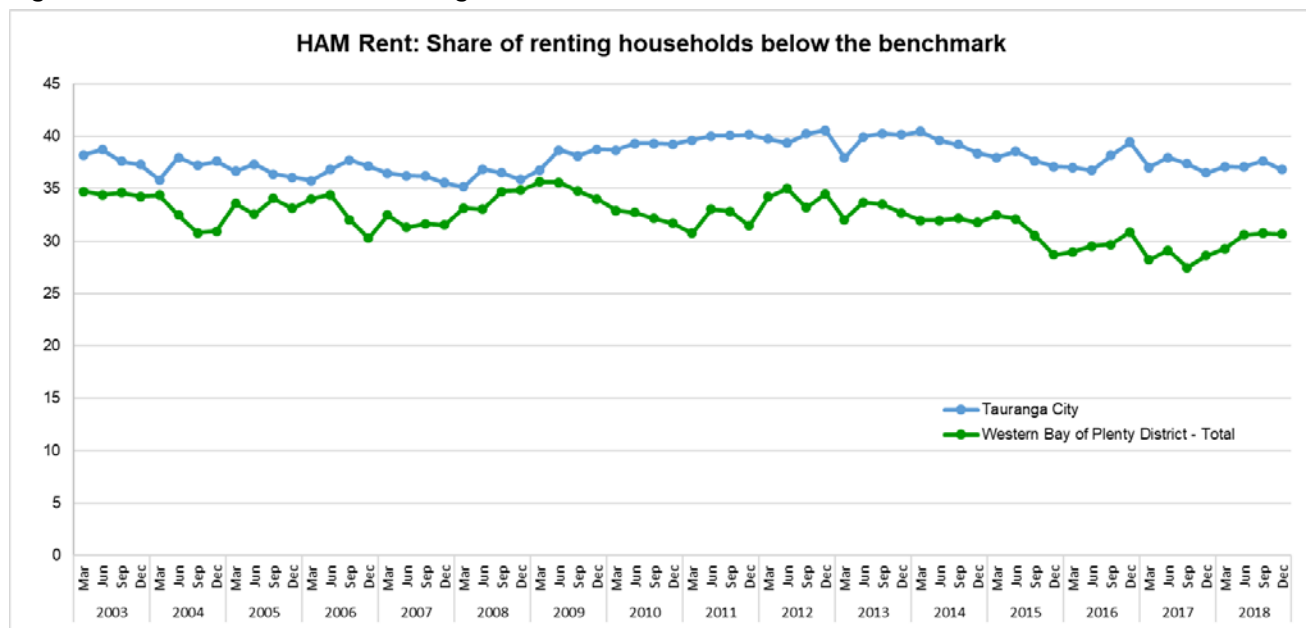


Table 11 HAM Rent

HAM-Rent		Trend	% Change
<i>Tauranga City</i>			
December 2018	36.8%		
September 2018	37.7%	●	-0.9
December 2017	36.5%	●	0.3
December 2014	38.4%	●	-1.6
December 2009	38.8%	●	-2.0
<i>Western BOPD</i>			
December 2018	30.7%		
September 2018	30.8%	●	-0.1
December 2017	28.6%	●	2.1
December 2014	31.8%	●	-1.1
December 2009	34.0%	●	-3.4

● More affordable ● Less affordable

Source: Corelogic – HUD Urban Development Capacity Dashboard.

4 Residential section size

Tauranga City

From July 2019 to June 2020, 80% of the new lots created in Tauranga City had areas of 500m² and below. This was an increase from the previous year's proportion of 64%. The remaining 20% of the new lots created had areas greater than 500m². The lot size range of 326m² to 500m² had the highest proportion of 46%. This was also higher than the previous year's proportion of 30% for this lot size.

Table 12 Residential lot/section size for additional lots created in Tauranga City, July 2019 to June 2020

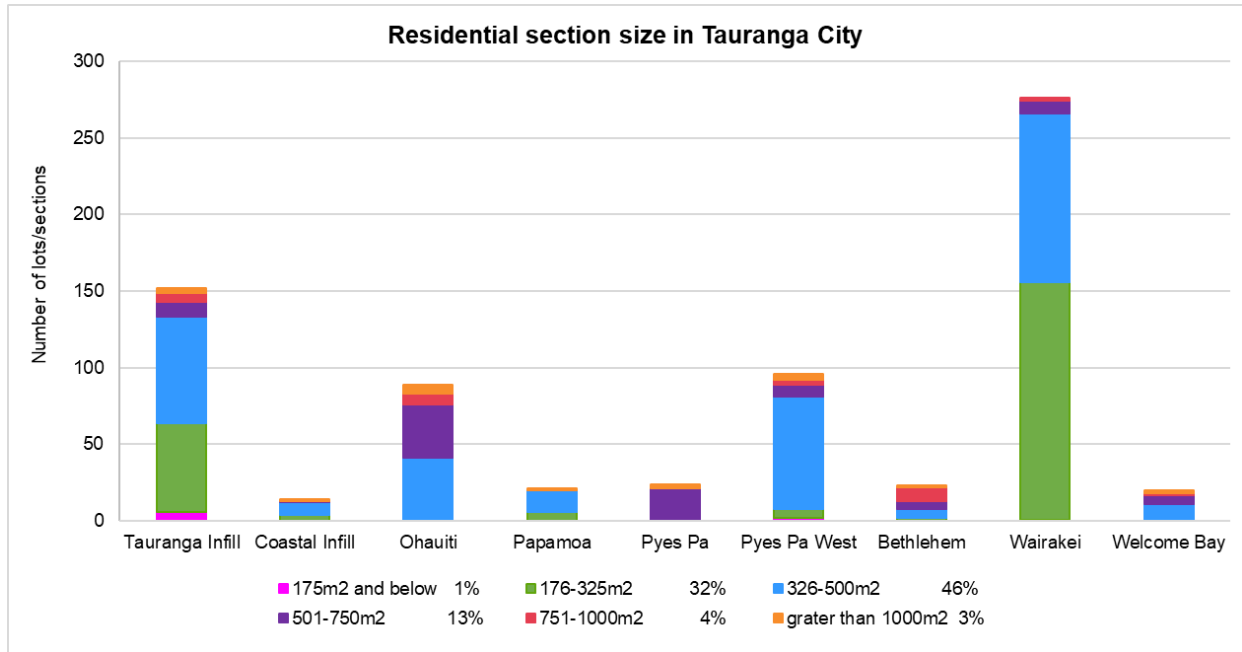
Residential lot/section size (m ²)	Dwelling yield per ha	Number of lots/sections	Per cent to total
175 and below	40 & above	10	2
176-325	21-39	232	32
326-500	14-21	331	46
501-750	9-14	94	13
751-1000	7-9	29	4
Above 1000	Below 7	22	3
Total		718	100

Dwelling yield per hectare based on the assumption that 30% of the land is lost to roads and reserves during subdivision

Tauranga City urban growth area

More than three fourths of the new lots created from July 2019 to June 2020 were in the urban growth areas, and more than three fourths of these lots had areas of 176m² to 500m². The prevalent size of lot in the UGAs was 326m² to 500m², except in Bethlehem and Wairakei. Among the UGAs, Bethlehem had the biggest prevalent lot size of 751m² to 1000m² while Wairakei had the smallest prevalent lot size of 176m² to 325m².

Figure 24 Residential lot/section size for additional lots created in Tauranga City, July 2019 to June 2020



Historical residential section size

For all lot sizes, the lower number of lots created this year compared to previous year can be attributed to reduced availability of zoned land for residential development and the impact of COVID-19 to residential development activities. It is noted further, that even before the scarcity of residential zoned land and COVID-19, residential section size in Tauranga City has been getting smaller.

The graphs below show that since July 2014, the number of sections with sizes between 325m² to 500m² had been higher than the next larger lot size of 501m² to 750m². Similarly, the number of smaller lot size of 176m² to 325m² steadily increased since 2011 reaching its highest point last year. The number of smaller lot size can be expected to further increase as larger lots are subdivided.

Figure 25 Residential section size in Tauranga City, 2005/06 to 2019/20

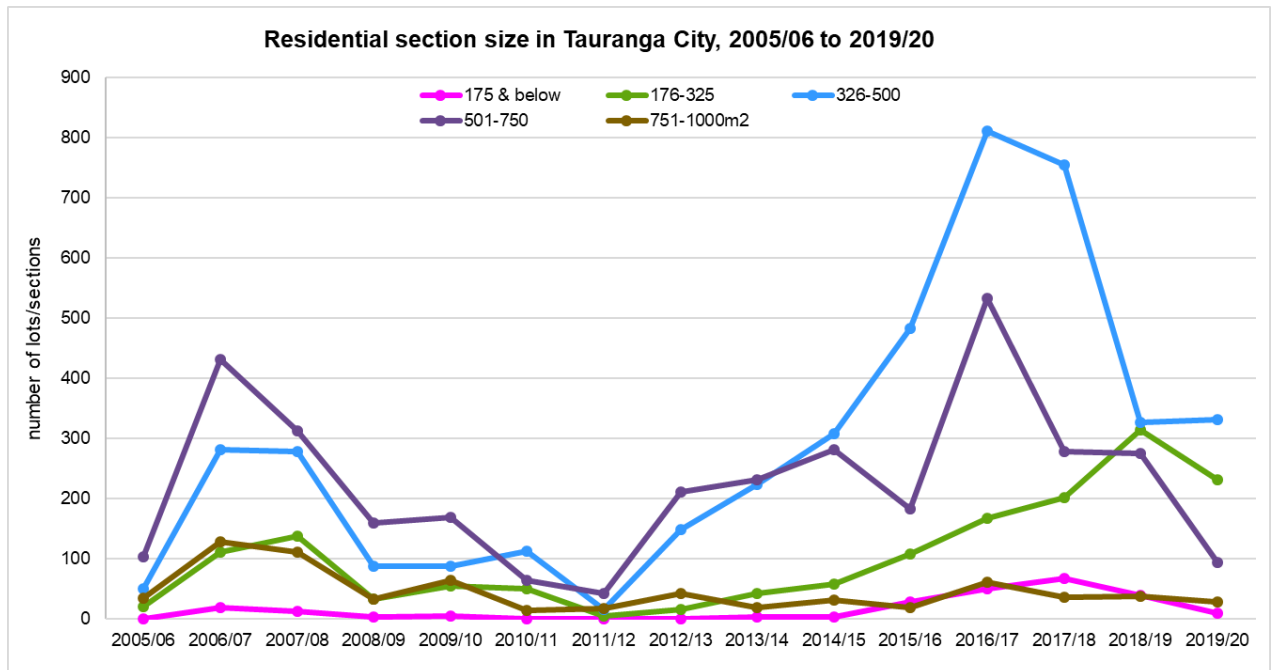


Figure 26 Residential section size in Tauranga City, 2005/06 to 2019/20

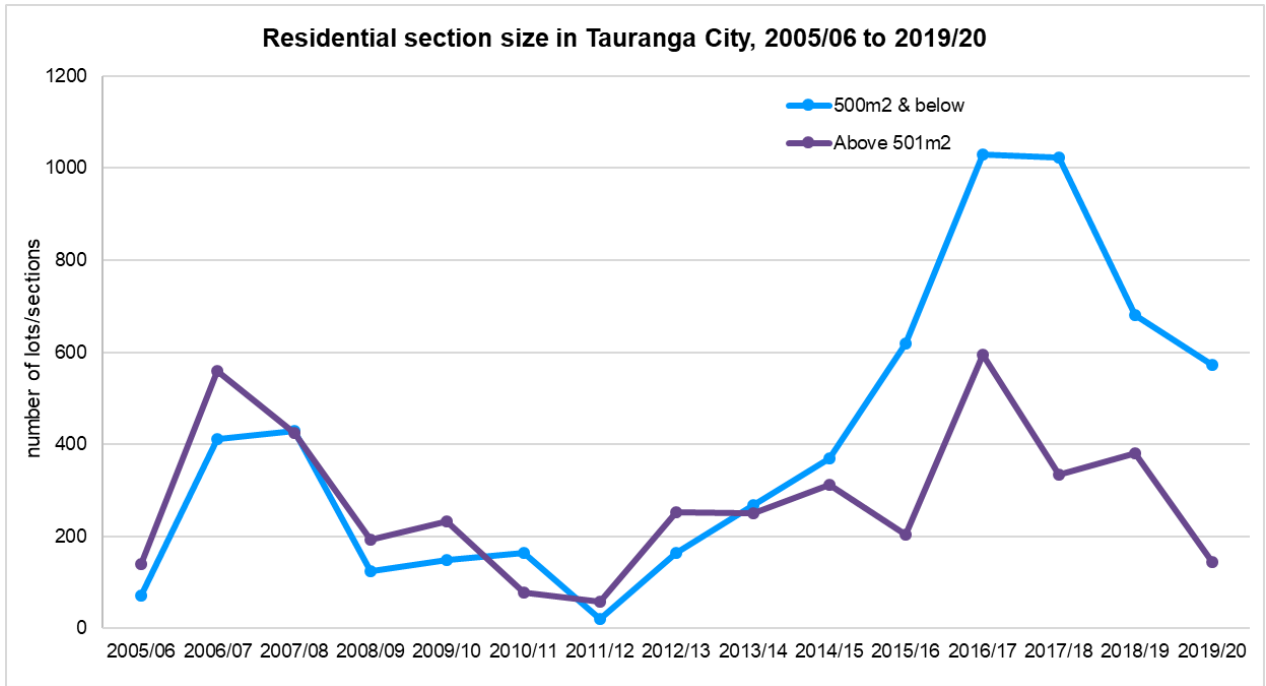
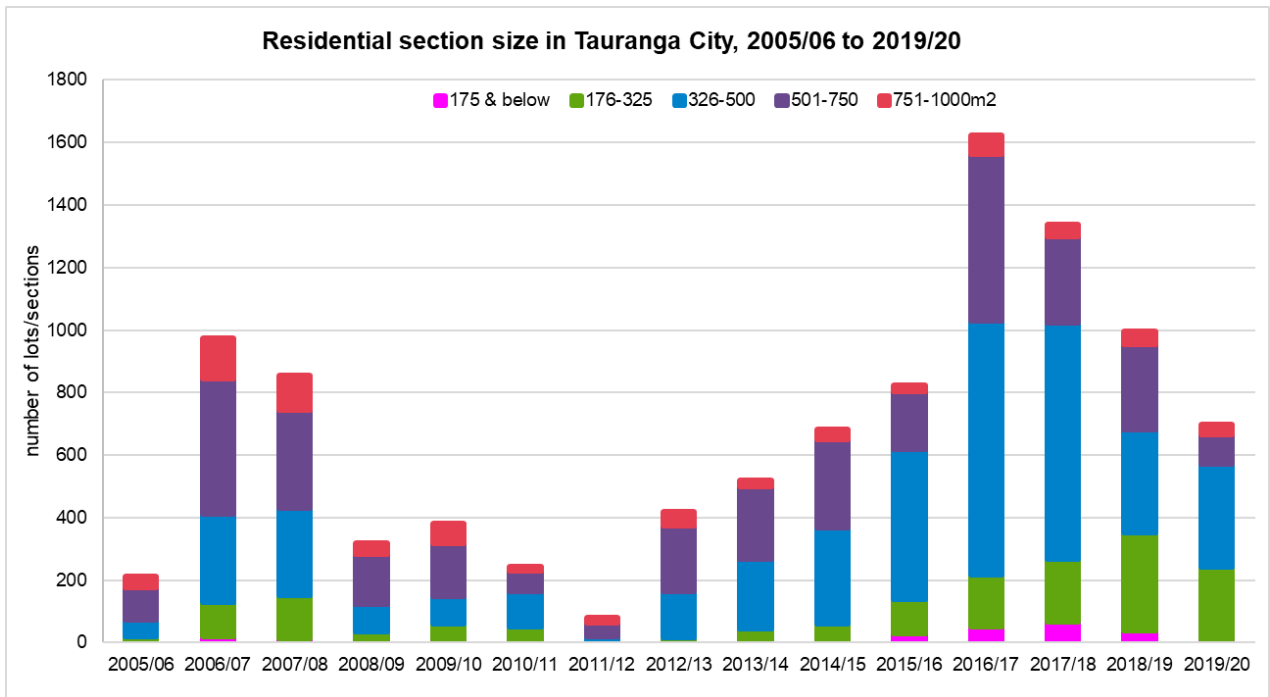


Figure 27 Residential section size in Tauranga City, 2005/06 to 2019/20



Western Bay of Plenty District

In 2019/2020 most of the dwellings were built on a smaller section sizes compared to 2018/2019, with 29% of the dwellings built on a section size of 501-750m² (in 2018/2019), while 30% of the dwellings were built on 326-500m² section size in 2019/2020.

In Katikati and Te Puke more dwellings were consented in 2019/2020 on a section size of 501-750m² with 23 and 27 dwellings respectively while in Omokoroa more dwellings were consented (53 dwellings) on a section size of 326-500m².

Figure 28 Residential section size in WBOPD, 2018/19 to 2019/20

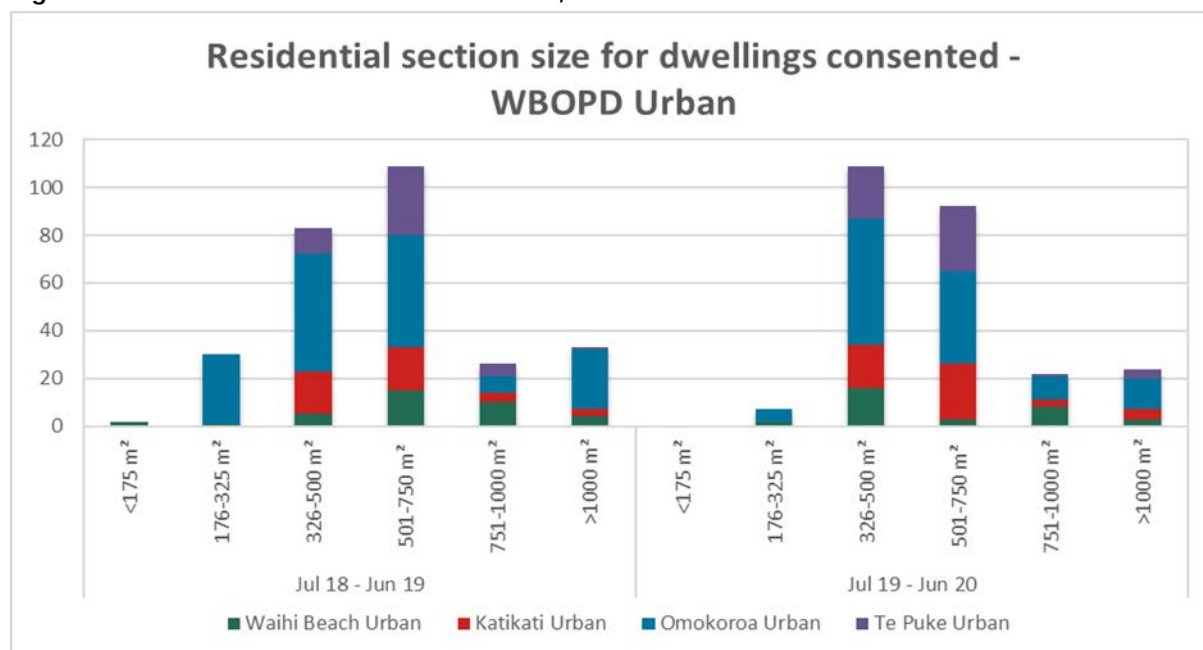


Table 13 Residential lot/section size for dwellings consented in WBOPD, July 2018 to June 2020

Residential lot/section size (m²)	2018/2019		2019/2020	
	Number of lots/sections	Per cent to total	Number of lots/sections	Per cent to total
175 and below	2	0.7	0	0.0
176-325	30	10.8	7	2.8
326-500	83	29.9	109	42.9
501-750	109	39.2	92	36.2
751-1000	26	9.4	22	8.7
Above 1000	28	10.1	24	9.4
Total	283	100.0	254	100.0

Dwelling density in Tauranga City urban growth areas

The table below shows that among the urban growth areas, Wairakei is currently achieving the highest nett area¹³ dwelling density of 16.6 dwellings per ha in the developed areas and 26.2 dwellings per ha in the proposed development areas, which together deliver an overall net area dwelling density of 20.3 dwellings per hectare. Pyes Pa West (the Lakes) and Papamoa have net area dwelling densities of 13.2 dwellings per ha in the developed areas and a respective densities of 16.0 and 25.5 dwellings per ha in the proposed areas. Development areas within each Greenfield UGA have a range of different densities, while further developable areas not currently included in the density calculation may potentially increase density when developed (see Appendix 7).

In comparison, the older greenfield areas released for development in the early 1990's are currently achieving the lower overall densities based on current and proposed development: Bethlehem 12.3, Pyes Pa East 12.1, and Ohaiti 11.4 and Welcome Bay 10.8. Refer to Appendix 7 for more details on density figures and maps for the UGAs.

¹³ Nett area is "nett developable area" as defined in the Tauranga City Plan (see Appendix 7).

Table 14 Residential dwelling density by urban growth areas, Tauranga City, December 2020

Residential Development	Growth Area	Dwelling density (dwellings per ha)		
		Gross area ¹	Nett area ²	Nett site area ³
Developed	Bethlehem	12.07	12.22	15.29
	Pyes Pa West	13.10	13.24	19.31
	Pyes Pa East	11.99	12.13	15.65
	Ohauti	11.01	11.20	13.69
	Welcome Bay	10.64	10.75	12.66
	Papamoa	13.06	13.23	17.48
	Wairakei	16.62	16.57	22.49
Proposed	Bethlehem	13.34	13.34	21.52
	Pyes Pa West	15.97	15.97	19.4
	Pyes Pa East	12.77	12.77	15.27
	Ohauti	13.23	13.23	15.62
	Welcome Bay			
	Papamoa	25.49	25.49	29.02
	Wairakei	26.15	26.15	34.72
Total	Bethlehem	12.15	12.29	15.61
	Pyes Pa West	13.32	13.44	19.32
	Pyes Pa East	12.00	12.13	15.65
	Ohauti	11.21	11.39	13.88
	Welcome Bay	10.64	10.75	12.66
	Papamoa	13.51	13.69	17.97
	Wairakei	20.38	20.34	27.37

¹ Gross Area includes everything within the full Greenfield UGA boundary – includes all roads, business areas, schools, all reserves and stormwater areas

² Nett Area is “Nett Developable Area” as defined in the Tauranga City Plan (see Appendix 7) – only includes residential sites, local and collector roads and neighbourhood reserves

³ Nett Site Area - only includes land within residential site included in the density calculation.

Table 15 Area, yield and residential density in urban growth areas, Tauranga City, December 2020

Growth area	Nett Area (ha)	Dwellings	Vacant sections + proposed sections/ lots or dwellings	Total Yield (Vacant & proposed sections & dwellings)	Residential density (dwellings per ha) ¹
Bethlehem	268.35	2,994	304	3,298	12.29
Pyes Pa West	182.75	1,869	588	2,457	13.44
Pyes Pa East	182.22	2,114	97	2,211	12.13
Ohauti	145.68	1,292	368	1,660	11.39
Welcome Bay	140.28	1,427	66	1,493	10.75
Papamoa	763.44	9,603	849	10,452	13.69
Wairakei	257.37	2,351	2,885	5,236	20.34

¹ includes both developed and proposed dwellings and sections

5 Dwelling Typology

Tauranga City

As observed in the last few years, the types of dwellings¹⁴ consented in Tauranga City vary, with standalone dwellings being the most prevalent dwelling type. In 2019/20, stand alone dwellings comprised more than three quarters (76%) of all the dwellings consented. The remaining quarter was comprised of the other dwelling types, including duplexes, attached dwellings, secondary/minor dwellings, retirement village units in Papamoa, Bethlehem and Wairakei, and a few apartments in the established parts of the city.

¹⁴ TCC classifies the dwellings into the following types: standalone dwellings, duplex, attached dwellings, apartments, retirement village units and secondary/minor dwelling. TCC further classifies dwellings in the retirement village units into standalone, duplex, and attached dwellings.

Among the UGAs, Wairakei had the highest proportion of stand alone dwellings at 45%, which is also equivalent to 34% of all the dwellings consented during the year.

Figure 29 Type of dwellings consented in Tauranga City, July 2019 to June 2020

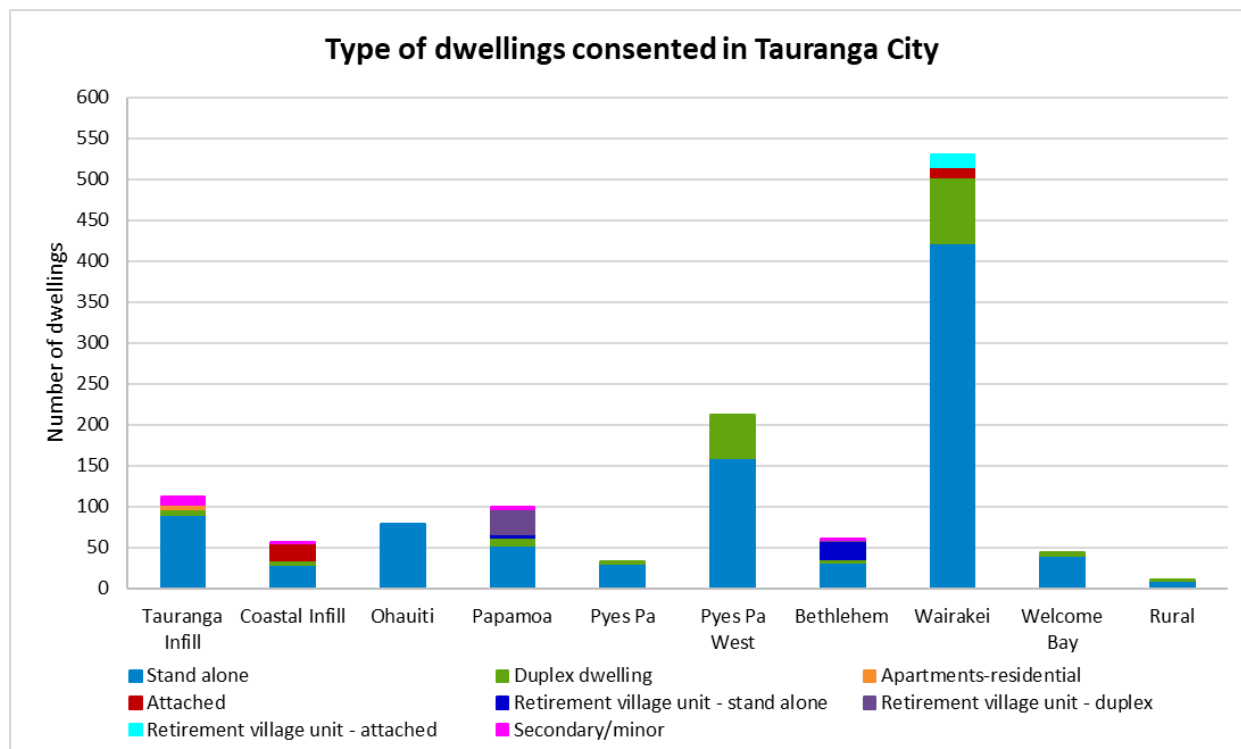


Table 16 Type of dwellings consented in Tauranga City, July 2019 to June 2020

Dwelling Typology	Number of units	Per cent to total
Standalone dwelling	945	76.3
Duplex	166	13.4
Attached dwellings	33	2.7
Secondary/minor dwelling	16	1.3
Apartments – residential	6	less than 1
Subtotal	1,166	94.1
Retirement village unit – standalone dwelling	26	2.1
Retirement village unit – duplex	32	2.6
Retirement village unit – attached dwellings	15	1.2
Subtotal	73	5.9
Total	1,239	100

Western Bay of Plenty District

Over 90% of the dwellings consented in WBOPD are standalone dwellings for both 2018/19 and 2019/20. In 2019/20 only standalone and minor dwellings were built, while in 2018/19 more variety of dwellings were built which include multi-unit dwellings (3%) and attached dwellings (2%).

Figure 30 Type of dwellings consented in WBOPD, July 2018 to June 2020

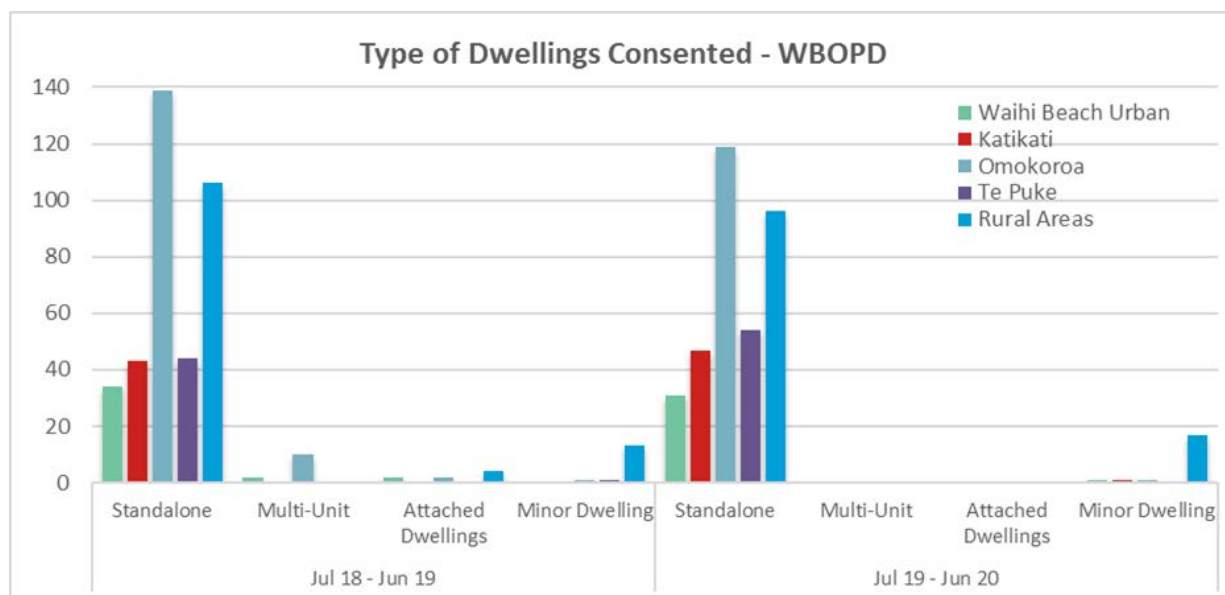


Table 17 Type of dwellings consented in WBOPDC, July 2018 to June 2020

Dwelling Typology	2018/2019		2019/2020	
	Number of Units	Pre cent to Total	Number of Units	Pre cent to Total
Standalone Dwelling	366	91.3	347	94.6
Multi-Unit	12	3.0	0	0.0
Attached Dwelling	8	2.0	0	0.0
Minor Dwelling	15	3.7	20	5.4
Total	401	100	367	100.0

Number of storeys

Tauranga City

Majority (87%) of the dwellings consented in Tauranga City from July 2019 to June 2020 were single level dwellings. Almost 10% of the dwellings were 2-level dwellings and the remaining 2% had 3 storeys. A consented apartment block in the established part of Tauranga (Greerton) had 2 storeys.

Figure 31 Number of storeys for dwellings consented in Tauranga City, July 2019 to June 2020

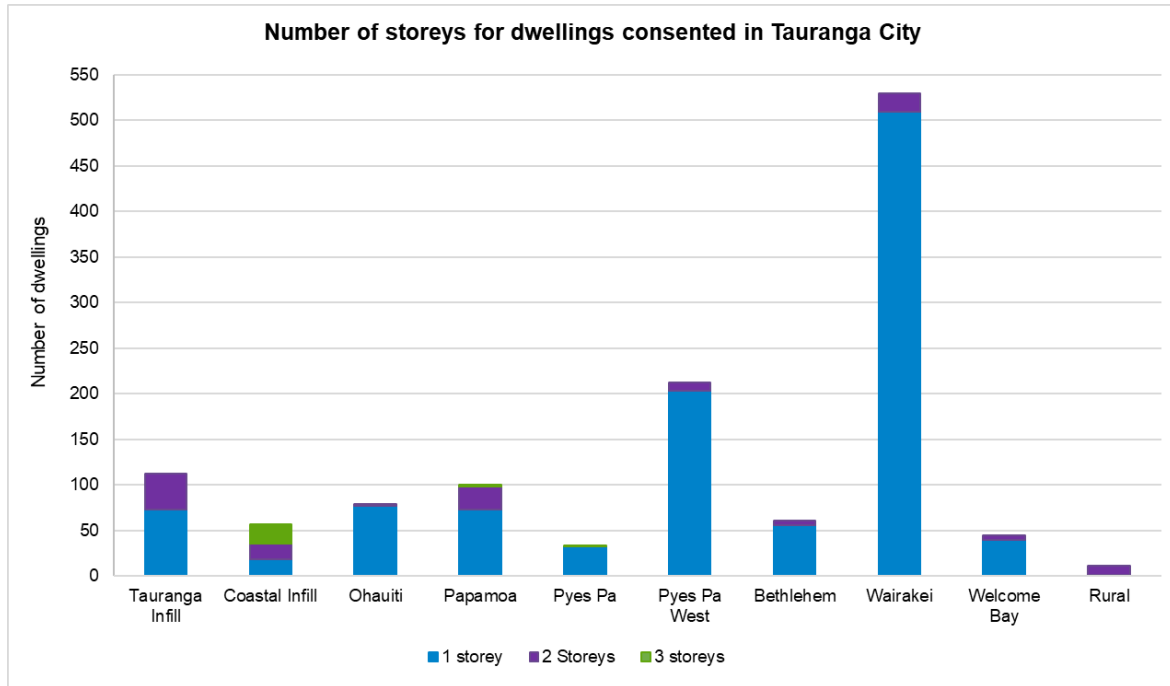


Table 18 Number of storeys for dwellings consented in Tauranga City, July 2019 to June 2020

Number of storeys	Number of dwellings	Per cent to total
1	1,081	87.3
2	133	10.7
3	25	2.0
Total	1,239	100

Western Bay of Plenty District

Majority (88%) of the dwellings consented from July 2019 to June 2020 in WBOPD, were single level dwellings. Record implies 29% of all Omokoroa dwellings were 2-storeys.

Figure 32 Number of storeys for dwellings consented in WBOPD, July 2018 to June 2020

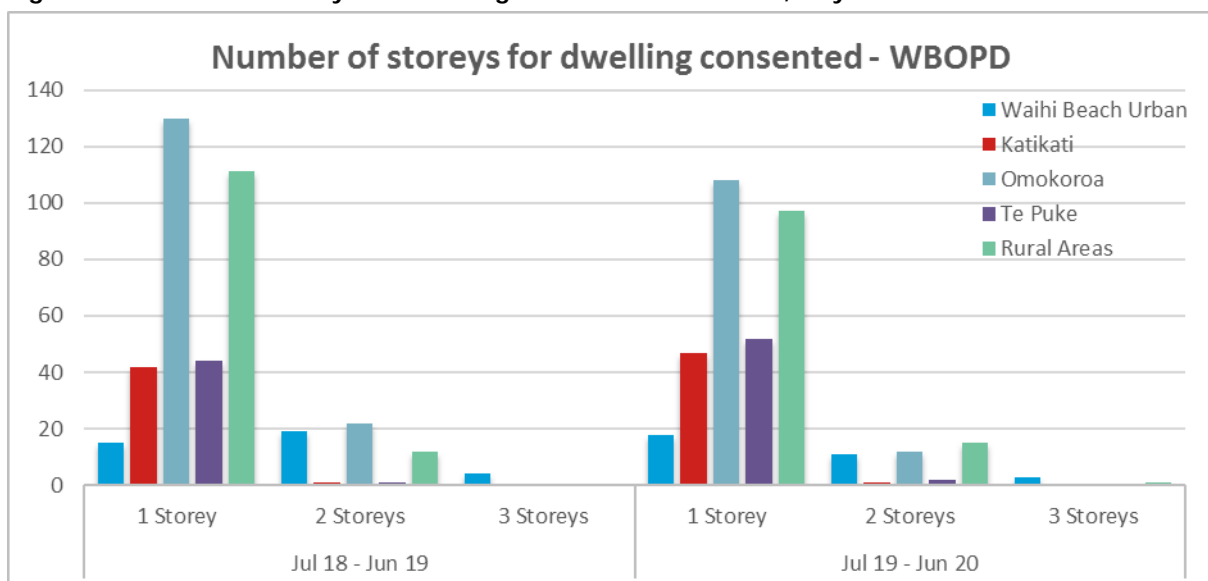


Table 19 Number of storeys for dwellings consented in WBOPD, July 2018 to June 2020

Number of storeys	2018/2019		2019/2020	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	342	85.3	322	87.7
2	55	13.7	41	11.2
3	4	1.0	4	1.1
Total	401	100.0	367	100.0

Number of bedrooms

More than half (58%) of the dwellings consented in Tauranga City from July 2019 to June 2020 were 3-bedroom dwellings. The 2-bedroom and 4-bedroom dwellings comprised a respective 20% and 18% of the dwellings consented.

In WBOPD most of the dwellings consented are 3- (53%) and 4-bedrooms (29%) from July 2019 to June 2020.

Number of bedrooms by growth area

Tauranga City

Of the 3-bedroom dwellings consented in Tauranga City, more than half were located in Pyes Pa West (16%) and Wairakei (46%). Wairakei also had the largest proportion of 2-bedroom (45%) and 4-bedroom (37%) dwellings consented during the year.

In the established parts (infill) of Tauranga, more than half (53%) of the dwellings consented were 3-bedroom dwellings, while 26% and 13% were 2-bedroom and 4-bedroom dwellings, respectively.

Of the dwellings consented In Papamoa, 2-bedroom dwellings had the biggest proportion of 41% while the 3 and 4-bedroom dwellings had a respective proportion of 30% and 23%.

In Bethlehem, more than three fourths (77%) of the dwellings consented were 2 and 3-bedroom dwellings.

Figure 33 Number of bedrooms of dwellings consented in Tauranga City, July 2019 to June 2020

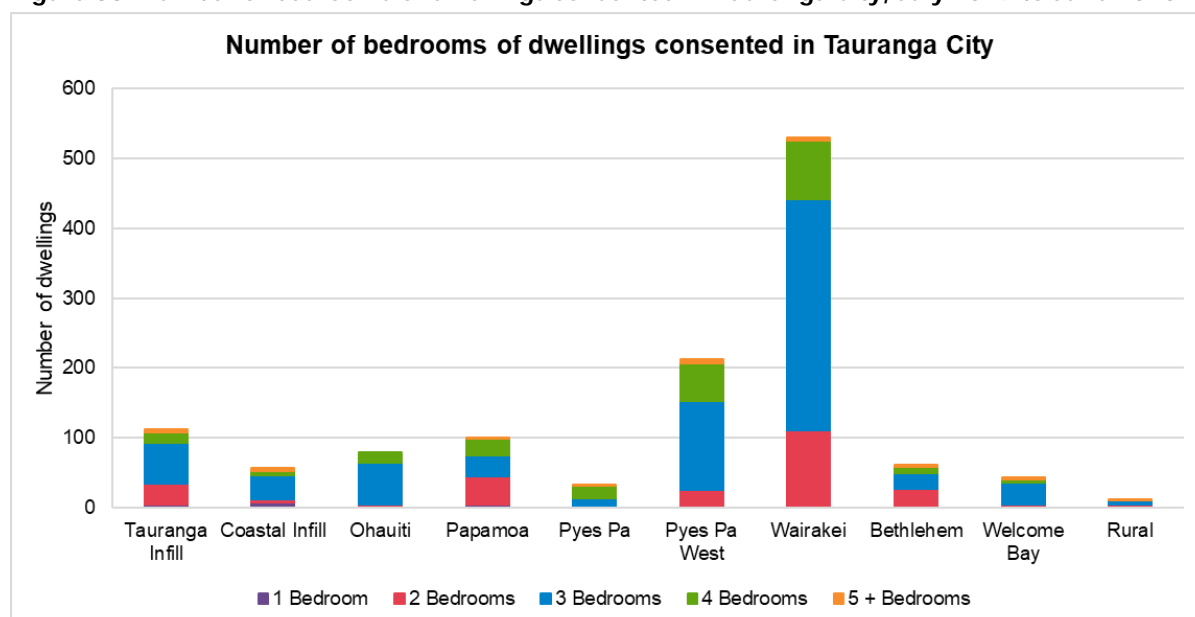
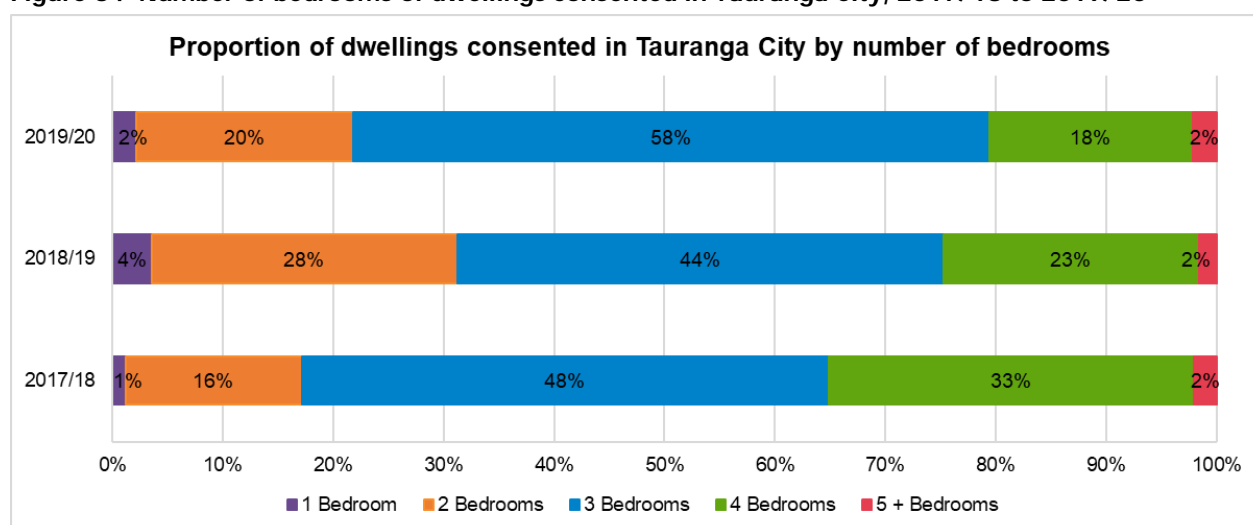


Table 20 Number of bedrooms of dwellings consented in Tauranga City, July 2019 to June 2020

Number of bedrooms	Number of dwellings	Per cent to total
1	24	1.9
2	244	19.7
3	716	57.8
4	228	18.4
5 and above	27	2.2
Total	1,239	100

The figure below shows the fluctuating proportion of 2-bedroom and 3-bedroom dwellings consented in the last three years. It also shows the declining proportion of 4-bedroom dwellings from 33% in 2017/18 to 18% in 2019/20.

Figure 34 Number of bedrooms of dwellings consented in Tauranga City, 2017/18 to 2019/20



Western Bay of Plenty District

In WBOPD-urban, 84% of the dwellings consented are 3-bedroom dwellings, followed by 66% 4-bedroom dwellings from July 2019 to June 2020.

In Omokoroa more 4-bedrooms (39%) were built, while in Te Puke and Katikati more 3-bedrooms (with 19% and 18% respectively). In the rural areas, bigger houses were built with 86% of the dwellings consented are 5+ bedrooms.

Figure 35 Number of bedrooms of dwellings consented in WBOPD, July 2019 to June 2020

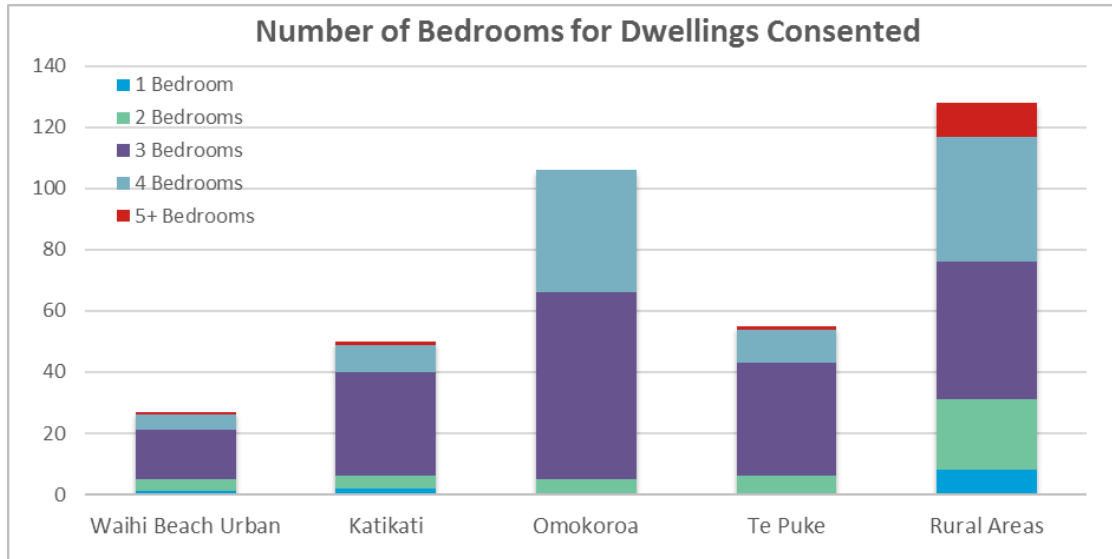
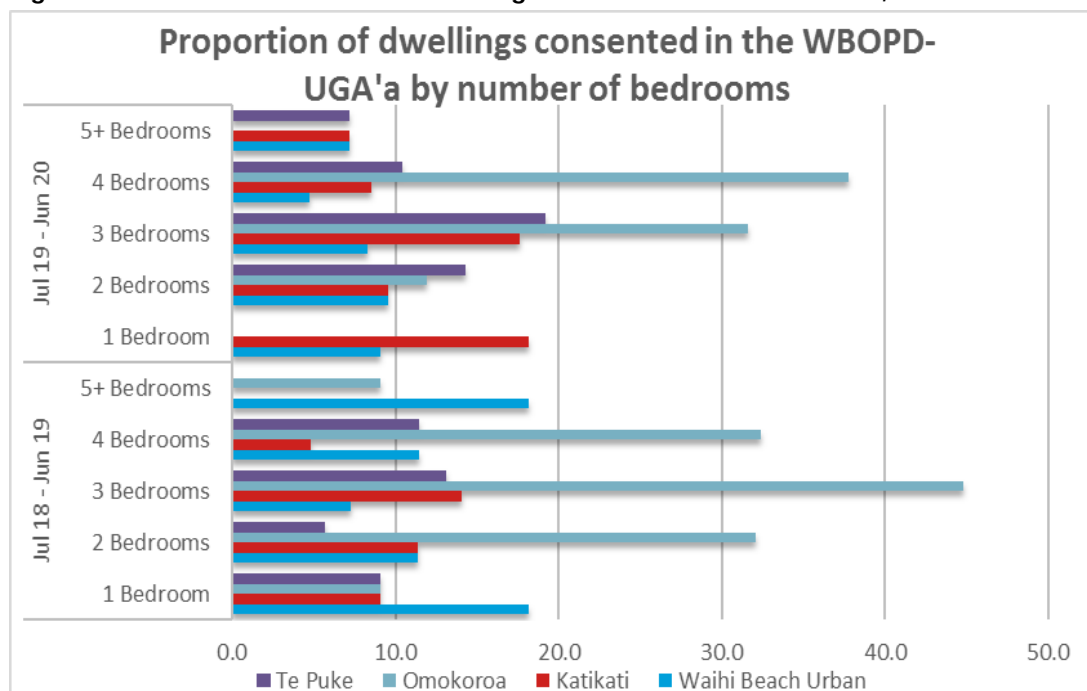


Table 21 Number of bedrooms for dwellings consented in WBOPD, July 2019 to June 2020

Number of Bedrooms	Number of dwellings	Per cent to total
1	11	3.0
2	43	11.7
3	193	52.6
4	106	28.6
5 and above	14	3.8
Total	367	100

In July 2018 to June 2019 more 3-bedroom (45%) dwellings were built in Omokoroa followed by 4- and 2- bedroom (32%) dwellings, while in 2019/2020 more 4-bedroom (39%) and 3-bedroom (38%) dwellings were built. In Te Puke more 3-bedroom dwellings were built with 13% in 2018/19 and 19% in 2019/2020.

Figure 36 Number of bedrooms of dwellings consented in WBOPD-UGA's, 2018/19 to 2019/20



Number of bedrooms by dwelling typology

Tauranga City

From July 2019 to June 2020, more than three fourths of the dwellings consented in Tauranga City were stand alone dwellings, of which 64% were 3-bedroom, 24% were 4-bedroom and 9% were 2-bedroom dwellings. Duplexes comprised 13% of the dwellings consented and most (90%) of these were 2- and 3-bedroom dwellings.

Majority of the dwellings consented in the retirement villages were 2-bedroom stand alone and duplex dwellings.

Eight more secondary or minor dwellings were consented during the year compared to previous year. Half of the secondary or minor dwellings were 1-bedroom dwellings.

Figure 37 Number of dwellings consented in Tauranga City, by type and number of bedrooms, July 2019 to June 2020

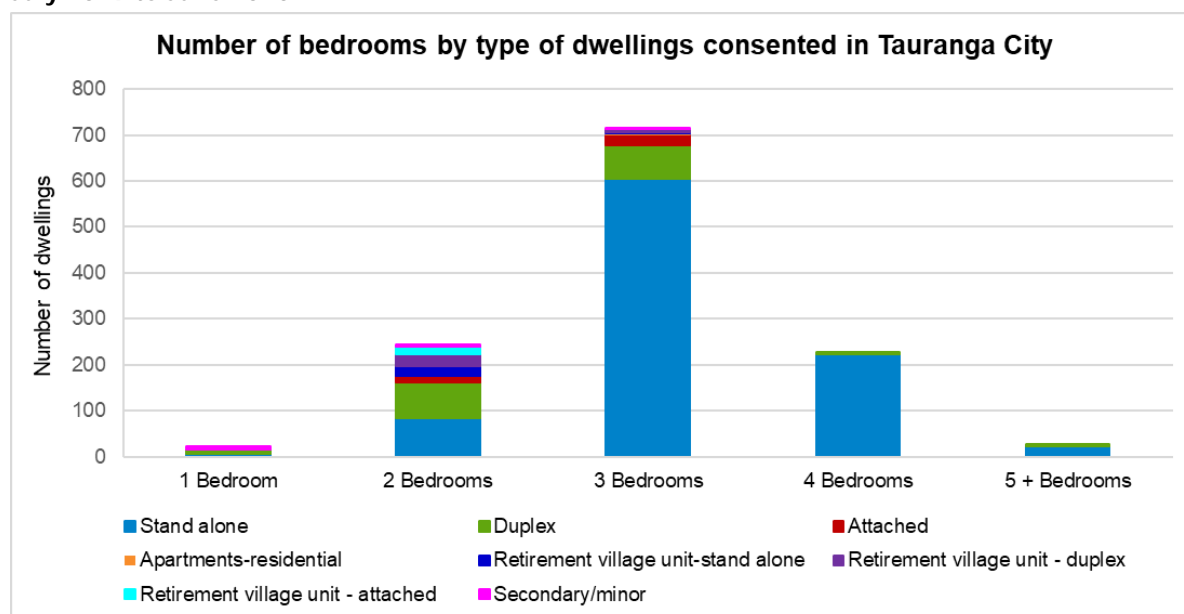


Table 22 Number of bedrooms by type of dwelling for dwellings consented in Tauranga City, July 2019 to June 2020

Type of dwelling	Number of bedrooms						Total
	1	2	3	4	5	6	
Standalone dwelling	7	85	605	224	19	5	945
Duplex dwelling	9	77	73	4	2	1	166
Attached dwellings	-	13	20	-	-	-	33
Secondary/minor dwelling	8	5	3	-	-	-	16
Apartments – residential	-	-	6	-	-	-	6
Sub-total	24	180	707	228	21	6	1,166
Retirement village unit – standalone dwelling	-	23	3	-	-	-	26
Retirement village unit – duplex	-	26	6	-	-	-	32
Retirement village unit – attached dwellings	-	15	-	-	-	-	15
Subtotal	-	64	9	-	-	-	73
Total	24	244	716	228	21	6	1,239

Floor size of dwellings

Tauranga City

In the last three years, dwellings consented in Tauranga City were getting smaller. This is evident in the increasing combined proportion of dwellings having a floor area below 175m² and the declining proportion of dwellings with bigger floor areas. More than half (57%) of the dwellings consented from July 2019 to June 2020 were medium size having floor areas ranging from 126m² to 200m². Bigger dwelling units with floor areas of more than 200m² comprised about 14% of the dwellings consented, 7% lower than the previous year's proportion of 21%. Around 9% of the dwellings were smaller having a floor area of 76m² to 100m².

Figure 38 Floor size of dwellings consented in Tauranga City, July 2019 to June 2020

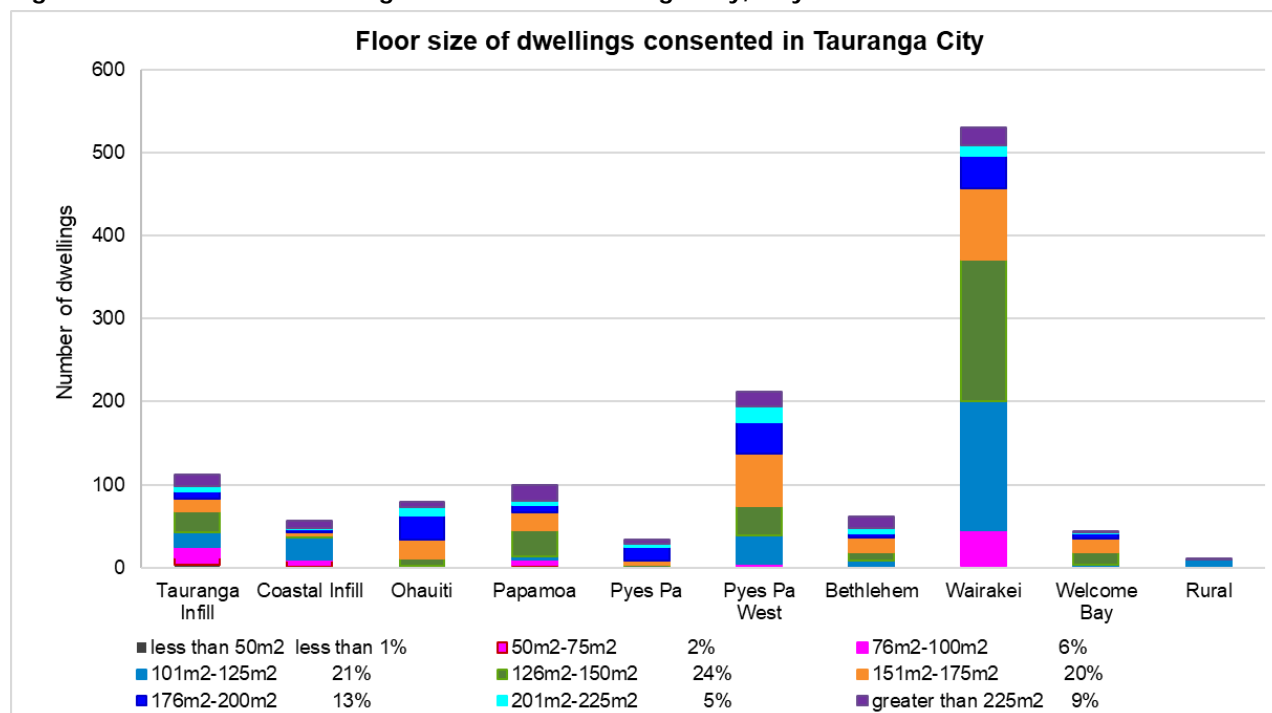
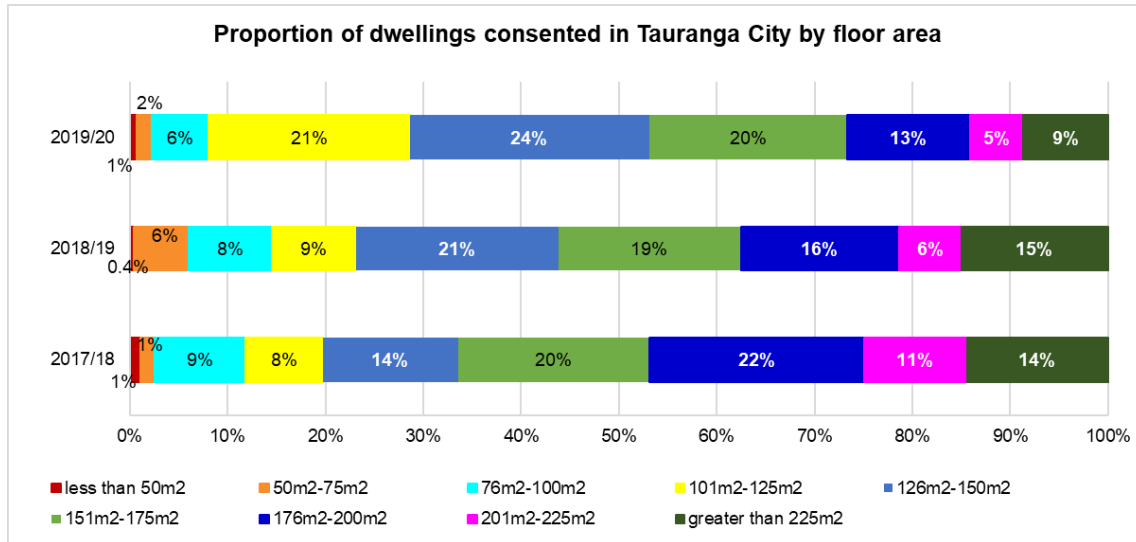


Table 23 Floor size for dwellings consented in Tauranga City, July 2019 to June 2020

Floor size (m ²)	Number of dwellings	Per cent to total
Less than 50m ²	9	Less than 1%
50m ² – 75m ²	19	1.5
76m ² – 100m ²	72	5.8
101m ² – 125m ²	255	20.6
126m ² – 150m ²	303	24.5
151m ² – 175m ²	251	20.3
176m ² – 200m ²	155	12.5
201m ² – 225m ²	68	5.5
Greater than 225m ²	107	8.6
Total	1,239	100

Figure 39 Proportion of dwellings consented in Tauranga City by floor area, 2017/18 to 2019/20



Western Bay of Plenty District

In 2019/2020, most of the consented dwellings in the UGA's of WBOPD have a floor area between 151-175m² (31%), followed by a floor area between 176-200m² (19%). In the rural areas, larger houses are built where 32 of the dwellings consented have a floor area of 250m² or more.

Less dwellings were consented in 2019/2020 with a floor area of 200m² and more compared to 2018/2019.

Figure 40 Floor size of dwellings consented in WBOPD, July 2018 to June 2020

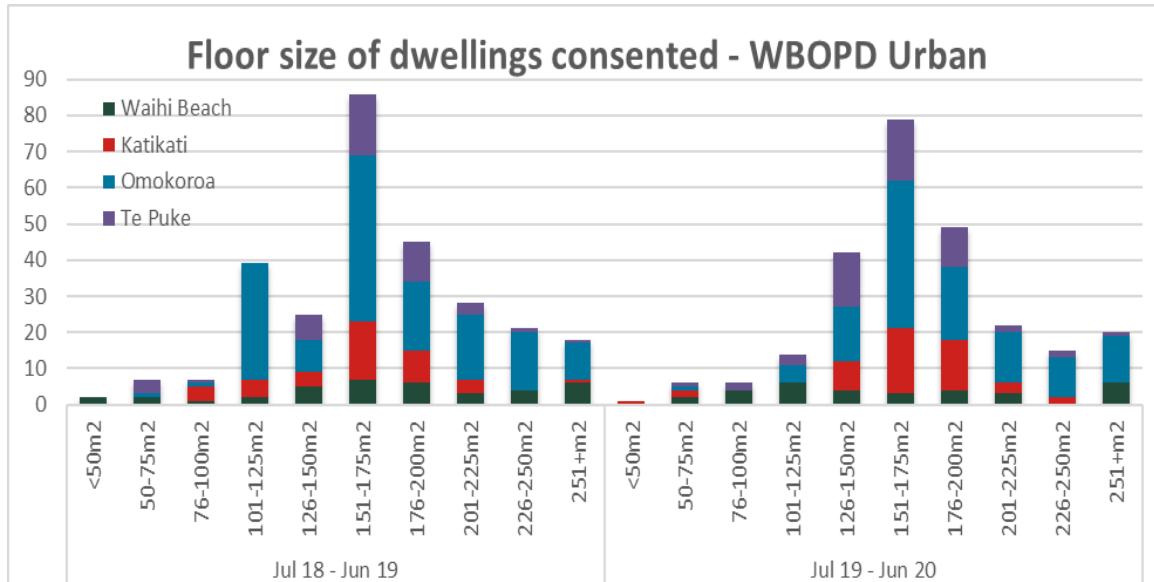


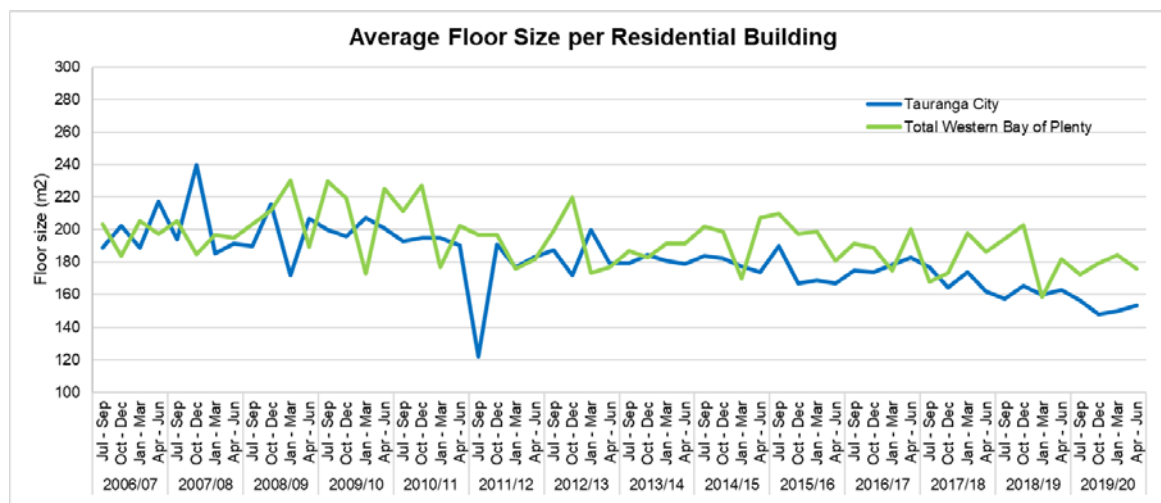
Table 24 Floor size for dwellings consented in WBOPD, July 2018 to June 2020

Floor size (m ²)	2018/2019		2019/2020	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m ²	2	0.5	2	0.5
50m ² - 75m ²	19	4.7	17	4.6
76m ² - 100m ²	15	3.7	18	4.9
101m ² - 125m ²	43	10.7	19	5.2
126m ² - 150m ²	34	8.5	46	12.5
151m ² - 175m ²	94	23.4	88	24.0
176m ² - 200m ²	56	14.0	59	16.1
201m ² - 225m ²	40	10.0	36	9.8
226m ² - 250m ²	41	10.2	30	8.2
Greater than 251m ²	57	14.2	52	14.2
Total	401	100.0	367	100.0

Floor Size per Residential Building

The figure below shows that despite the fluctuations observed in the residential building size in the last 14 years, there is a clear trend toward smaller dwellings. Average floor area declined from July 2006 to June 2020 for both local authority areas. In Tauranga City, the annual average floor area for residential dwellings consented was smaller by 9m² from 2018/19 to in 2019/20 while in WBOPD the average floor area was 4m² smaller during the same period.

Figure 41 Average floor size per residential building, Tauranga City and WBOPD, July 2006 to June 2020



Source: Stats NZ Infoshare

Table 25 Average floor size, Tauranga City and WBOPD

Average floor size (in m ²)	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
152			
Last year	↓	-9	-5.7
Last 5 years (average)	↓	-15	-8.7
Last 10 years (average)	↓	-21	-12.1
<i>Western BOPD</i>			
This year			
177			
Last year	↓	-4	-2.2
Last 5 years (average)	↓	-7	-3.8
Last 10 years (average)	↓	-11	-6.1

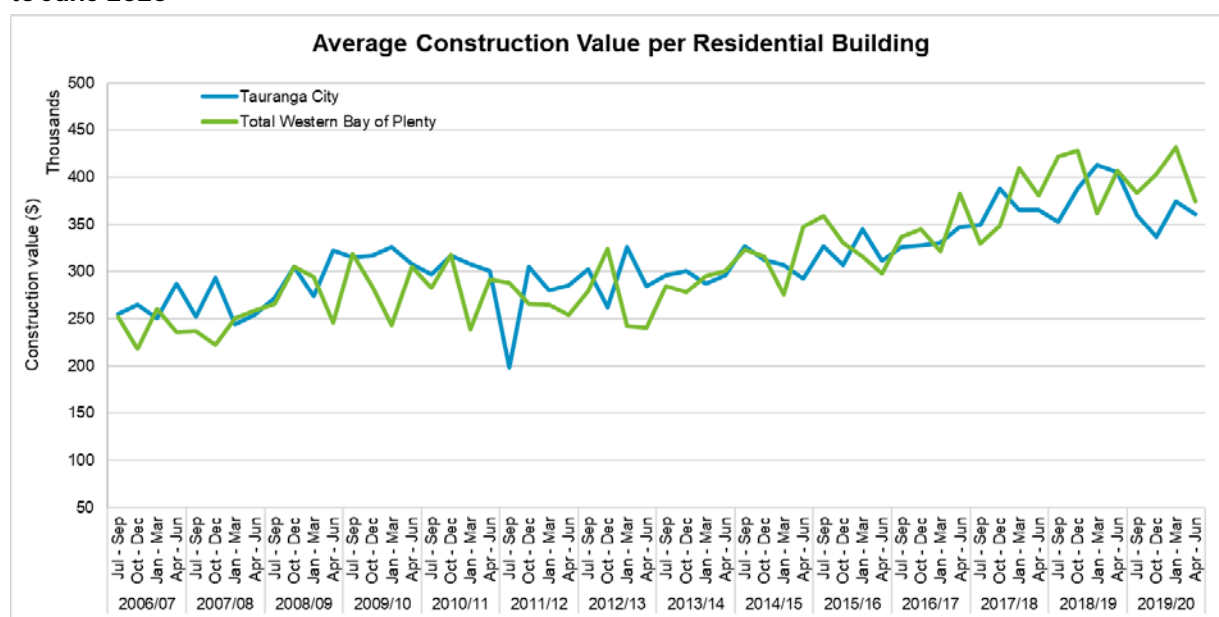
Construction Value per Residential Dwelling

In the sub-region, average construction value per residential dwelling was increasing from July 2006 to June 2020, with fluctuations observed during this period. This construction value excludes land costs associated with new houses.

The table below shows that from July 2019 to June 2020, construction value per residential dwelling had declined compared to the previous year. This is probably due to an increasing proportion of dwellings with smaller floor areas.

The annual construction cost per square meter in Tauranga City was \$50 lower than the previous year, while it was \$26 higher in WBOPD in the same period. Construction costs were higher by more than a quarter than they were in the last ten years.

Figure 42 Average construction value per residential building, Tauranga City and WBOPD, July 2006 to June 2020

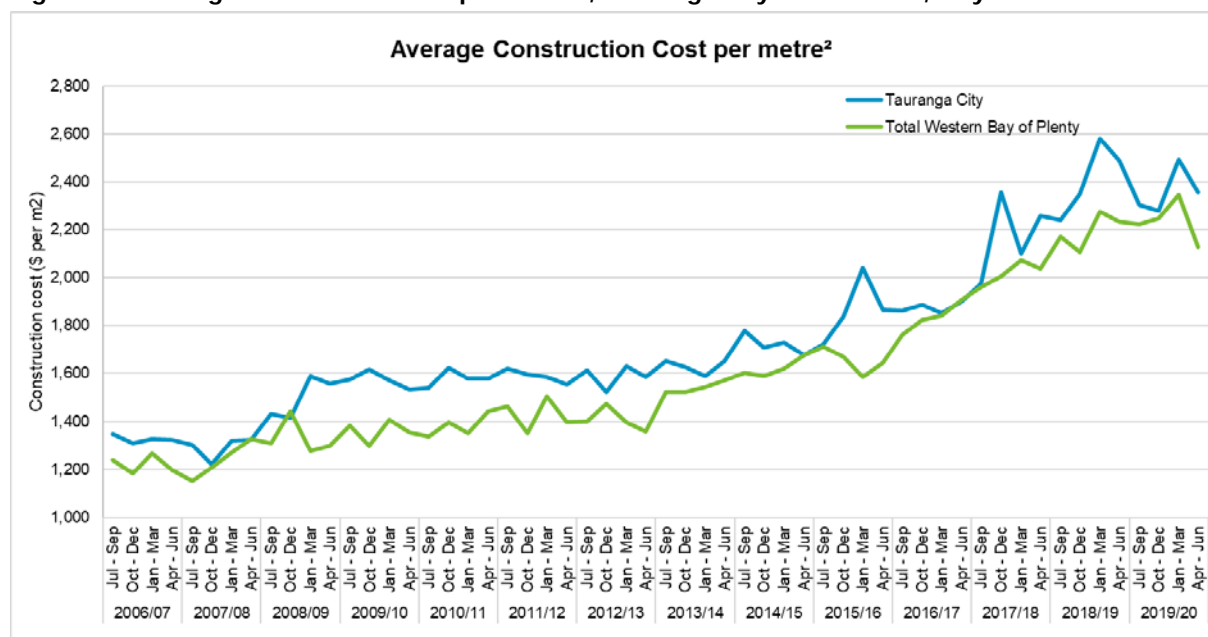


Source: Stats NZ Infoshare

Table 26 Average construction value, Tauranga City and WBOPD

Average construction value	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-\$29,547	-7.6
Last 5 years (average)	↑	\$5,300	1.5
Last 10 years (average)	↑	\$36,486	11.3
<i>Western BOPD</i>			
This year			
Last year	↓	-\$3,978	-1.0
Last 5 years (average)	↑	\$30,646	8.4
Last 10 years (average)	↑	\$70,813	21.8

Figure 43 Average construction cost per metre², Tauranga City and WBOPD, July 2006 to June 2020



Source: Stats NZ Infoshare

Table 27 Average construction cost per square meter, Tauranga City and WBOPD

Average construction cost per m ²	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-\$50	-2.1
Last 5 years (average)	↑	\$266	10.6
Last 10 years (average)	↑	\$482	25.7
<i>Western BOPD</i>			
This year			
Last year	↑	\$26	1.2
Last 5 years (average)	↑	\$244	12.3
Last 10 years (average)	↑	\$500	28.9

Dwelling Consents Issued by Type

As per Statistics New Zealand’s classification¹⁵, standalone houses remained the main type of dwelling in the sub-region. The graphs below show the declining trend in the number of stand alone houses consented in the sub-region in the last four years, even with a slight increase (13 houses) for Tauranga City in 2019/20. However, WBOPD recorded a high proportion of stand alone houses in the last twelve months at 93%, an increase of 8% from the last 5 years’ proportion of 85%. Townhouses, flats and other dwelling units were the next largest type of dwellings consented in both local authorities in the last 12 months.

¹⁵ Statistics New Zealand classifies residential buildings into houses, apartments, retirement village units and townhouses, flats, units and other dwellings. This information is included in addition to Figures 29 and 30 as it provides a time-series data from 2006.

Figure 44 Dwelling consents issued by type, WBOPD, July 2006 to June 2020

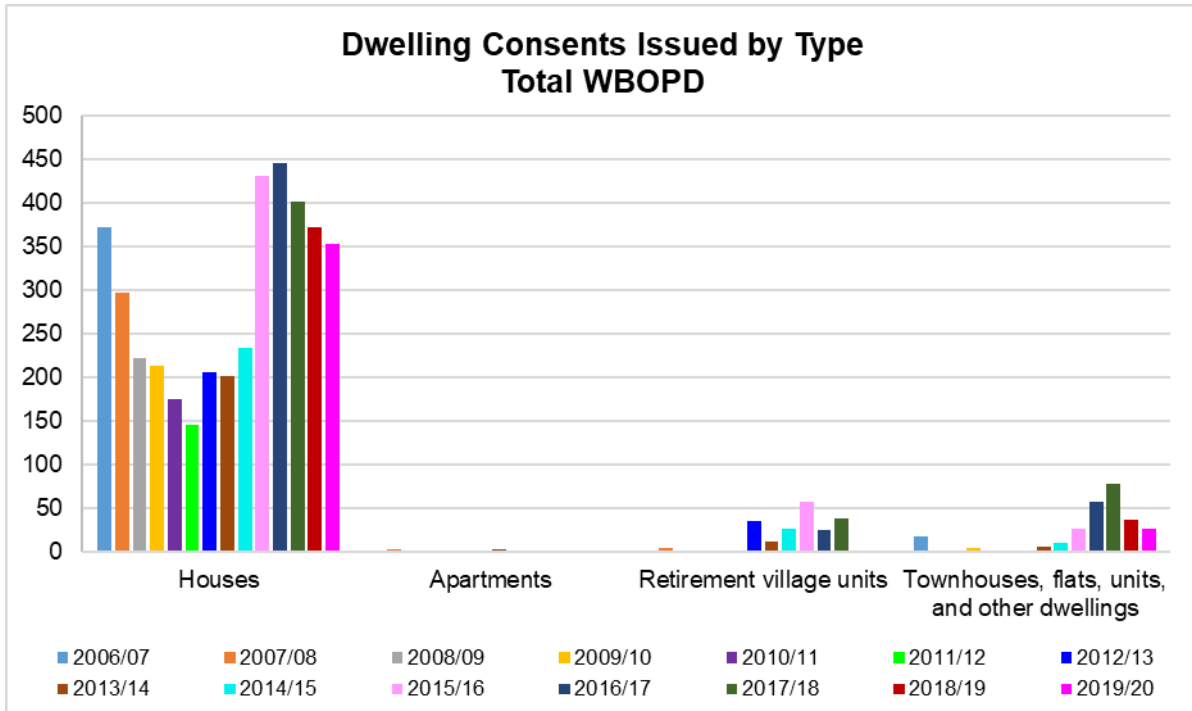


Figure 45 Dwelling consents issued by type, Tauranga City, July 2006 to June 2020

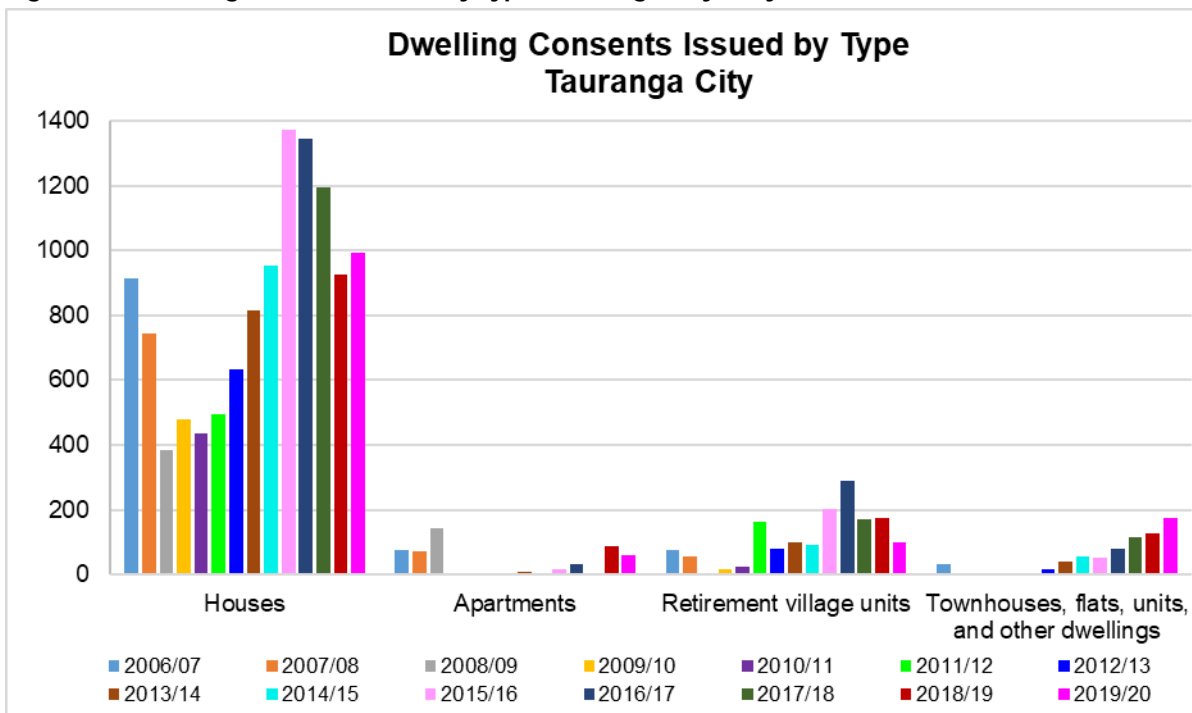


Table 28 All residential buildings, Tauranga City and WBOPD

All residential buildings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	1330			
Last year	1317	↑	13	-1.0
Last 5 years (average)	1505	↓	-175	-9.8
Last 10 years (average)	1145	↑	185	24.1
<i>Western BOPD</i>				
This year	379			
Last year	409	↓	-30	-7.3
Last 5 years (average)	470	↓	-91	-19.3
Last 10 years (average)	341	↑	38	11.2

Table 29 Dwelling Type, Tauranga City and WBOPD

Period	Territorial Authority	Houses	Apartments	Retirement village units	Townhouses, flats, units, and other dwellings
Last 12 months	Tauranga City	75%	4.6%	7.6%	13%
	WBOPD	93%	-	-	6.9%
Last 5 Years	Tauranga City	78%	2.7	12.5%	7.3%
	WBOPD	85%	-	5.2%	9.6%

Table 30 Stand alone dwellings, Tauranga City and WBOPD

Stand alone dwellings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	995			
Last year	927	↑	68	7.3
Last 5 years (average)	1,168	↓	-173	-14.8
Last 10 years (average)	917	↑	78	8.5
<i>Western BOPD</i>				
This year	353			
Last year	372	↓	-19	-5.1
Last 5 years (average)	400	↓	-47	-11.8
Last 10 years (average)	296	↑	57	19.1

6 Business Land Trends

Zoned Business Land

SmartGrowth and the Regional Policy Statement (operative and proposed RPS) require that the business land area, uptake rates and land availability, be monitored in the sub-region. This is done by using zoned land as the basis for the assessment.

Commercial Zoned Land

Tauranga City

Tauranga City has 281.6 hectares of Commercial zoned land as at February 2020. The two Parton Road commercial areas in Papamoa combined provide the largest area of 'Commercial' zoning at 39.3 ha, 2.6 ha greater in area than the Central Business District (CBD) in Tauranga Central, refer to Table 31. Smaller neighbourhood centres include Cherrywood, Bureta, and Welcome Bay. Supermarket based

neighbourhood shopping centres include Bayfair, Bethlehem, Brookfield and Gate Pa. The Tauriko commercial area near the State Highway 29/36 intersection (Tauranga Crossing) has full occupancy.

Future rezoning of land for commercial business activity is planned in Te Tumu in Papamoa East. Te Tumu is proposed to be released for both business and residential development in the latter part of the 2023-2028 planning period. A map of Commercial zoned areas is provided in Appendix 6.

Table 31 Operative and Future Commercial Zoned Land in Tauranga City

Location	Commercial Land (Ha)	
	Operative	Future
Bay Central	8.7	
CBD	36.7	
Eleventh Avenue	16.2	
Greerton	6.2	
Gate Pa	4.7	
Fraser Cove	21.7	
Bethlehem	12.6	
Brookfield	1.5	
Palm Beach	8.6	
Fashion Island	7.4	
Mount Maunganui	12.7	
Bayfair	7.7	
Owens Place	3.2	
Central Parade	1.3	
Cherrywood	0.7	
Historic Village	6.2	
Welcome Bay	1.1	
Tauriko	13.5	
Bureta	0.5	
15 th Avenue	3.6	
Parton Road (2 areas)	39.3	
Judea	2.7	
Wairakei Town Centre	27.0	
Wairakei Neighbourhood Centres	6.6	
Te Tumu ¹		1.4
Other ²	31.2	
Total	281.6	1.4

¹ The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 31 as Industrial will also provide for some commercial activity.

² Includes smaller parcels of Commercial zoned land which generally accommodate convenience type activities (dairies, takeaways etc) such as those areas located on Cambridge and Ohauti roads.

Of Tauranga City's Greenfield UGA's, vacant land was identified within the Bethlehem, Papamoa (Palm Beach and Parton Road) and Papamoa East (Wairakei) commercial zoned areas, refer to Table 32.

Table 32 Uptake of Commercial Zoned Land in Tauranga City

Urban Growth Area Commercial Centres ¹	Area Zoned Commercial (ha)	Vacant Commercial Zoned Land (ha)	Percentage (%) Vacant
Bethlehem	12.57	0.91	7%
Papamoa - Palm Beach	8.55	1.76	21
Papamoa - Parton Road ²	39.28	8.56	22
Pyes Pa West - Tauriko	13.51	0	0
Papamoa East - Wairakei	33.60	33.60	100
Total	107.51	44.83	42

¹ Areas of remaining vacant land in the commercial zoned areas were estimated using GIS mapping tool based on the aerial photographs taken in January/February 2020.

² The occupied area at Parton Road commercial area includes a retirement home (7.4 ha), a stormwater pond (2.8 ha), and a camp ground (1.2 ha). A number of housing developments have recently been approved and are currently under construction in this area.

Western Bay of Plenty District

In WBOPD, Te Puke has the largest commercial zoned land with 10.29 ha, followed by Katikati and Waihi Beach with 9.20 ha and 7.39 ha respectively (refer to Table 33). The 7.39 ha of commercial land in Waihi Beach, largely consists of the Wilson Road shopping centre and an additional 1.55 ha is part of the commercial transitional zone.

Smaller neighborhood centres are located in Te Puna and Paengaroa. Other settlements in the District such as Athenree, Island View/Pios Beach, Minden, Pukehina and Maketu are serviced by comparatively small commercial areas up to 3.3 ha in size.

Table 33 Operative and Future Commercial Zoned Land in the Western Bay of Plenty District

Location	Commercial Land (ha)	
	Operative	Transitional ¹
Waihi Beach	7.39	1.55
Athenree	0.40	
Island View-Pios Beach	0.12	
Katikati	9.20	1.47
Omokoroa ²	4.09	
Minden	3.27	
Te Puna	2.98	
Te Puke	10.29	
Pukehina	0.43	
Maketu	0.94	
Paengaroa	2.15	
Total	41.27	3.01

¹ Transitional Commercial zoned land is located in Waihi Beach and Katikati.

² Exclude the Special Housing Area which falls in the commercial zone.

Availability and Uptake of Industrial Zoned Land

Tauranga City

In Tauranga City, the largest area of industrial zoning is at Mount Maunganui, while the smallest area is at Sulphur Point, refer to Table 34 and Appendix 6. In May 2011 rezoning of 101.1 hectares of land for industrial purposes (Papamoa East Employment zone) was made operative at Wairakei in Papamoa East.

A large proportion of employment land at Wairakei has been rezoned for residential activity following approval of a number of Special Housing Area's under the Housing Accord and Special Housing Area legislation in this locality. This has reduced the employment land by 58.6 hectares to 42.5 hectares. The future Te Tumu urban growth area is expected to provide for some of that loss of employment land at Wairakei.

Table 34 Operative and Future Industrial Zoned Land in Tauranga City

Location	Industrial Land (Ha)	
	Operative	Future
Judea	23.7	
Mt Maunganui	268.1	
Greerton	12.3	
Oropi (Maleme St)	49.5	
Owens Place	6.1	
Sulphur Point	3.0	
Port Industrial	190.7	
Te Maunga	174.6	
Tauriko	251.0	
Wairakei	42.5	
Te Tumu ¹		60.3
Tauriko Extension ²		94.0
Total	1021.5	154.3

¹ The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 34 as Industrial will also provide for some commercial activity.

² Element IMF - Developers of Tauriko Business Estate have advised that the proposed extension south of Belk Road in Tauriko is expected to yield approximately 94 ha of net industrial land.

Table 35 Uptake of Industrial Zoned Land in Tauranga City (as at February 2020)

Area	Vacant (ha) ¹	Partially Vacant (ha)	Total Vacant	Vacant but Not Available (ha)	Partially Vacant but Not Available	Occupied (ha)	Total Occupied (ha)	Total Area (ha) ³
General Industrial Zoned Land²								
Judea	0.00	0.00	0.00	0.00	3.26	20.46	23.72	23.72
Mt Maunganui	6.90	12.84	19.74	1.07	0.00	247.27	248.34	268.08
Oropi	0.89	0.00	0.89	0.59	5.28	42.72	48.59	49.48
Greerton	0.33	0.19	0.52	0.00	0.00	11.76	11.76	12.28
Sulphur Point	0.00	0.00	0.00	0.07	0.00	2.97	3.04	3.04
Te Maunga	42.93	0.00	42.93	9.02	25.33	97.27	131.62	174.55
Owens Place	0.00	0.00	0.00	0.00	0.00	6.13	6.13	6.13
Tauriko	155.42	17.35	172.77	0.71	0.00	77.48	78.19	250.95
Wairakei ⁴	30.11	0	30.11	12.37	0	0	12.37	42.48
Total	236.58	30.38	266.96	23.83	33.87	506.06	563.76	830.71
Port Industry Zone³								
Within Port Security Fence	0.58	0.00	0.58	0.00	0.00	156.56	156.56	157.14
Outside Port Security Fence	0.95	5.81	6.76	0.00	0.00	26.82	26.82	33.57
Total	1.53	5.81	7.34	0.00	0.00	183.38	183.38	190.71

¹ "Vacant" no structures and are largely clear of plant and material. "Partially Vacant" - up to and including 50% of the land contains structures, plant or material. "Not available" - land that is unsuitable or not available for development, due to being on unusable terrain, or designated for reserves, stormwater or future wastewater treatment use. "Occupied" - over 50% of the land contains structures, plant or material.

² General Industrial zoned land includes land zoned Tauriko Industry, Industry, and Papamoa East Employment.

³ Port Industry Zone land is surveyed separately as the majority of this zone applies to the Port of Tauranga which is not accessible for survey, and its function varies from the general industrial areas.

⁴ 12.37 ha of Wairakei Employment land is subject to designation for the future Papamoa East Interchange and classified "vacant but not available".

Table 35 shows the update of industrial zoned land in Tauranga City as at February 2020, in the general industrial zoned land and the port industry zone. Around 32% (or 267 hectares) of the 830.71 hectares of zoned industrial land in Tauranga City was vacant, with 65% (or 172.77 hectares) located at Tauriko industrial area.

In the Port Industry zone 4% (or 7.3 hectares) of the 190.7 hectares of Port Industry zoned land was vacant as at February 2020.

While there was 267 hectares identified as vacant industrial land, it is estimated that this will decrease significantly as new areas are developed for industrial activity (eg: as industrial zoned land is used for road corridors and stormwater reserves, and steep or low lying undevelopable land is deducted).

While the 2020 industrial land survey estimated 173 hectares of vacant land in Tauriko industrial area, an assessment of this area in December 2019 identified that once undevelopable areas and future roads are deducted only approximately 34 hectares of vacant land remains in the developed stages of Tauriko industrial area, with a further 44 hectares of land supply to be released for development in the short term (next 3 years) which is all presold. A further 45 hectares of industrial land, the balance of Tauriko industrial area, was not expected to be able to be brought to market in the next 10 years due mainly to private landowners not wanting to develop or sell their land, however this situation is expected to change with recent sales of land subject to this constraint reported.

An extension of Tauriko Business estate south of Belk Road is expected to increase industrial land supply by approximately 94 hectares.

Western Bay of Plenty District

Te Puke has the largest amount of Industrial land available in Western Bay of Plenty District, with 79.18 ha zoned, while an additional 72 ha of Industrial land is zoned to meet future needs in the town and is expected to yield an additional 45 ha (refer to table 36). Katikati also contains a significant area of Industrial land with 46.64 ha zoned at present. In Omokoroa a part of the industrial land was used for the Special Housing Area with 18.07 ha still operative in Stage 2 of the Omokoroa Structure Plan.

In the western end of the District the Te Puna Rural Business Zone contains 30.58 ha for future use, while Rangioru in the eastern end contains 179 ha of Industrial land zoned in preparation for the Rangioru Business Park.

Table 36 Operative and Future Industrial Zoned Land in the Western Bay of Plenty District

Location	Industrial Land (ha)	
	Operative	Future
Waihi Beach		25.58
Katikati	27.16	35.90
Te Puna		30.58
Omokoroa		18.07
Te Puke	79.18	79.50
Rangioru	37.03	179.64
Paengaroa	9.57	
Total	152.95	369.26

Industrial land in Te Puke includes 72 Hectares from Plan Change 70 which is dependent on roading and infrastructure upgrades.

In the Western Bay of Plenty District, vacant areas of available (able to be built on now) industrial land exist in Katikati, Omokoroa, Te Puke, Rangioru and Paengaroa. Of the total vacant industrial land, 379 ha is vacant but not yet available because more services like water connection and roading need to be added before they become available. In Western Bay of Plenty the largest uptake of industrial land is in Te Puke with 48.4 ha occupied followed by Katikati of 17.3 ha.

New industrial consents can be expected in the Rangioru Business Park after 2021 with the \$18million Provincial Growth Fund granted in July 2020.

Table 37 Uptake of Industrial Zoned Land in the Western Bay of Plenty District

Industrial Zone – 2020								
Area	Vacant (ha)	Vacant but not yet available	Partially Vacant (ha)	Total Vacant (ha)	Not Available (ha)	Total Occupied (ha)	Reserve	Total Area (ha)
Waihi Beach		25.57		25.57				25.57
Katikati	17.61	17.00	11.77	46.38	0.06	17.26	2.34	66.04
Te Puna		30.58		30.58				30.58
Omokoroa	15.62			15.62		2.45	2.35	20.42
Te Puke	7.42	72.29	30.60	110.49		48.39	13.80	172.50
Rangioru ¹	5.48	233.65	31.54	270.67	1.51	3.09		275.27
Paengaroa	1.17		6.96	8.13		1.44		9.57
Maketu			0.11	0.11				0.11
TOTAL	47.30	379.09	80.98	507.37	1.57	72.63	18.49	600.06
%	7.88%	63.18%	13.50%	84.55%	0.26%	12.10%	3.08%	100.00%

¹ Include AFFCO as part of Total Occupied

Business Land Capacity

A Housing and Business Capacity Assessment (2017 HBA) was completed under requirements of the NPS-UDC for SmartGrowth in 2017. Under the NPS-UD, which replaced the NPS-UDC in August 2020, an HBA is required by 31 July 2021 only so far as it relates to housing, while the business capacity assessment of the HBA is required in time to inform the 2024 long-term plan (LTP).

Key findings of the 2017 HBA in respect to business capacity were:

- Development capacity in the commercial zones is well catered across the sub-region, with some emerging pressure on some smaller neighbourhood centres especially if increasing demand for services results from higher densities of residential activity and higher proportions of older residents in these areas.
- The bulk of retail employment growth in Tauranga City is projected to occur in the city centre and the large shopping malls at Tauranga Crossing and Bayfair, located to the west and east respectively; all three of these locations have significant zoned capacity for expansion.
- The projections indicate that Tauriko Business Estate in the western corridor and the Rangioru Business Estate in the eastern corridor will cater for a large proportion of the forecast industrial growth in the sub-region. Other areas for industrial activity of smaller but still significant scale will become available in the eastern corridor at Te Tumu, and in the northern corridor at Te Puna and Omokoroa during the medium term.
- That while short term industrial land demand is provided for, medium term supply requires the roll out of the SmartGrowth settlement pattern to provide for additional industrial capacity including land south of Belk Road at Tauriko and at Te Tumu in Papamoa East.

Since the 2017 HBA was completed Tauriko Business Estate has experienced high land sales and a high rate of industrial land uptake. Enabling works to extend the Tauriko Business Estate to the south of Belk Road is underway with the Tauranga City boundary recently altered to include this future industrial area within Tauranga City. This will potentially add approximately 94 hectares of net industrial land supply in the medium term. While additional industrial land combined with remaining capacity in Tauriko and other industrial areas, and future industrial land provision in Te Tumu is expected to provide sufficient industrial land capacity in the short to medium term for Tauranga City, recent high uptake rates of industrial land if sustained may impact the sufficiency of medium term supply¹⁶.

¹⁶ The Western Bay of Plenty District and Tauranga City Industrial Land Survey Reports will be updated in 2021 with the results to inform the assessment of sufficiency of industrial land capacity in the 2021 SmartGrowth Development Trends report.

The updated business capacity assessment required by 2024 under the NPS-UD will need to re-evaluate the sufficiency of business land, particularly industrial land, to meet future demand. Given the considerable lead in time to structure plan and rezone land, and to deliver infrastructure, it is important that future industrial land is identified, assessed, and where appropriate progressed to maintain continuous and unimpeded industrial land supply.

Business Land/Population Ratio

SmartGrowth requires that the business land to population ratio be monitored, refer to Table 38. The 'business land' ratio has been split into "Industrial" and "Commercial" zoned land. For the sub-region land zoned industrial is considerably higher in total to that zoned commercial resulting in more industrial land per resident reflecting the more expansive nature of this type of business activity.

Table 38 Ratio of Industrial and Commercial Zoned Land per Person in the Western Bay of Plenty Sub region

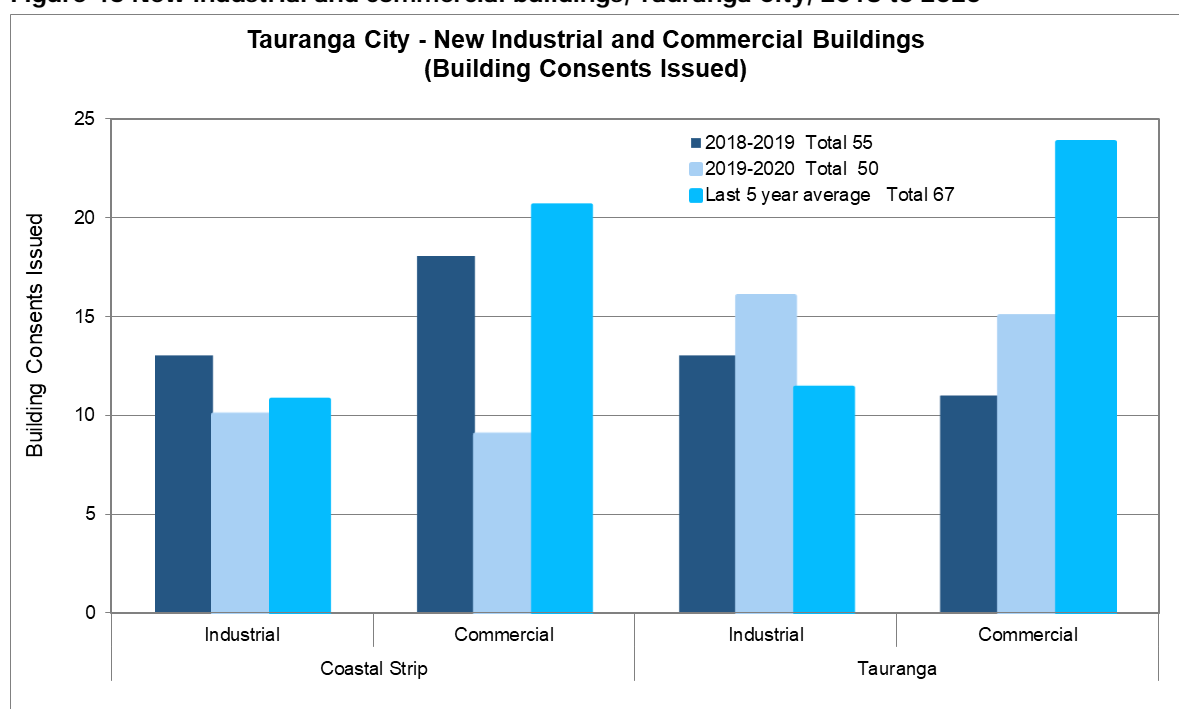
Territorial Authority	2018 Census Population	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
Tauranga City	136,713	1175.80	0.0086	283	0.0020
Western Bay of Plenty District	51,321	600.05	0.0117	41.49	0.0008
Total	188,034	1,682.45	0.0089	321.29	0.0017

Industrial and Commercial Building Consents Issued

Tauranga City

The figure below shows that Tauranga City has 5 less building consents issued for new industrial and commercial buildings in 2019/20 compared to the previous year. This is also lower than the 5 year average of 67 buildings. Tauranga area has 3 more industrial buildings and 4 more commercial buildings consented during the year than the previous year.

Figure 46 New industrial and commercial buildings, Tauranga City, 2018 to 2020



Western Bay of Plenty District

Commercial building consents decreased from 8 consents to 3 consents issued from 2018/2019 to 2019/2020 while one more workshop was built in the industrial area of Te Puke in 2019/2020.

Table 39 Consents for Industrial and Commercial Buildings in the Western Bay of Plenty District

Year	Industrial Building Consents	Commercial Building Consents
01/7/2012 - 30/6/2013	0	0
01/7/2013 - 30/6/2014	0	0
01/7/2014 - 30/6/2015	0	0
01/7/2015 - 30/6/2016	4	2
01/7/2016 - 30/6/2017	6	5
01/7/2017 - 30/6/2018	4	3
01/7/2018 - 30/6/2019	0	8
01/7/2019 - 30/6/2020	1	3
5 Year Average	3.0	4.2

Non-Residential Building Consents Issued by Type

The graphs below illustrate the substantial variation in the type of non-residential buildings consented in the sub-region. In WBOPD, a higher number of farm buildings was recorded due to the more rural nature of activities in the district. Tauranga City had higher number of commercial buildings and factories, industrial and storage buildings consented.

In both areas the number of building consents issued have been relatively high from July 2014 to June 2020 compared to the two years prior when the number of buildings consented was lowest since 2006/2007. In the last 14 years, Tauranga City and WBOP recorded their highest number of non-residential building consents in 2006/2007 at 215 and 169, respectively.

Figure 47 Non-residential building consents, WBOPD (total), 2006 to 2020

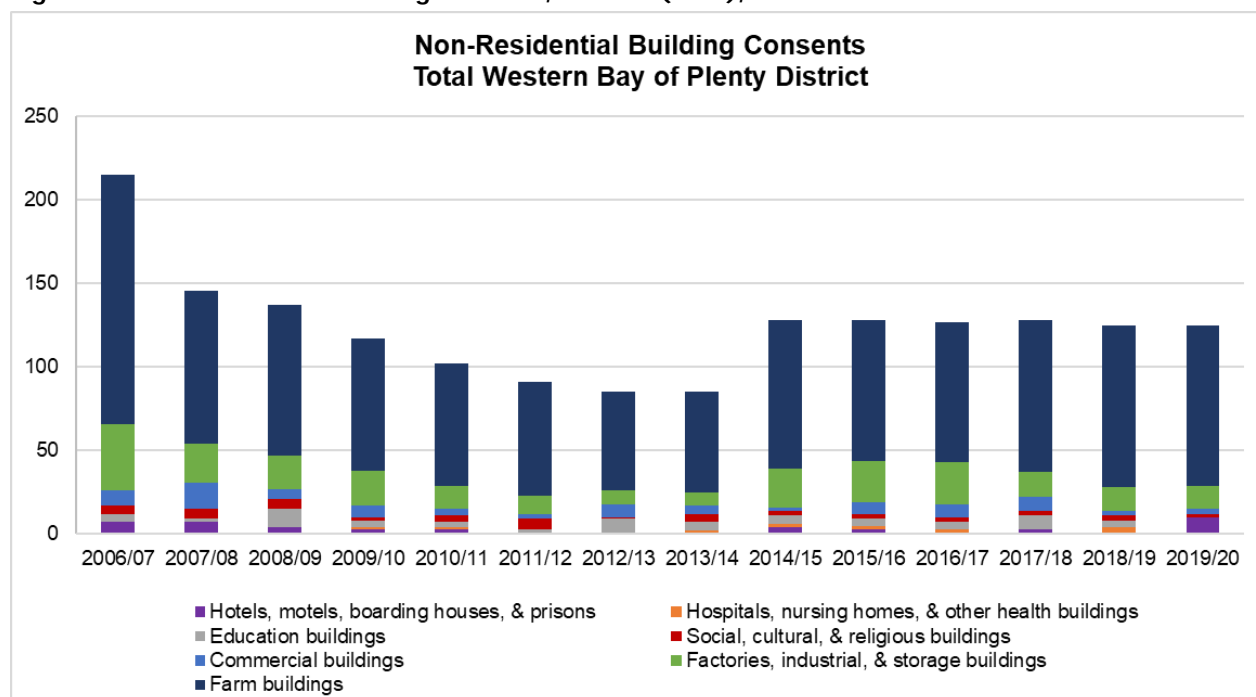
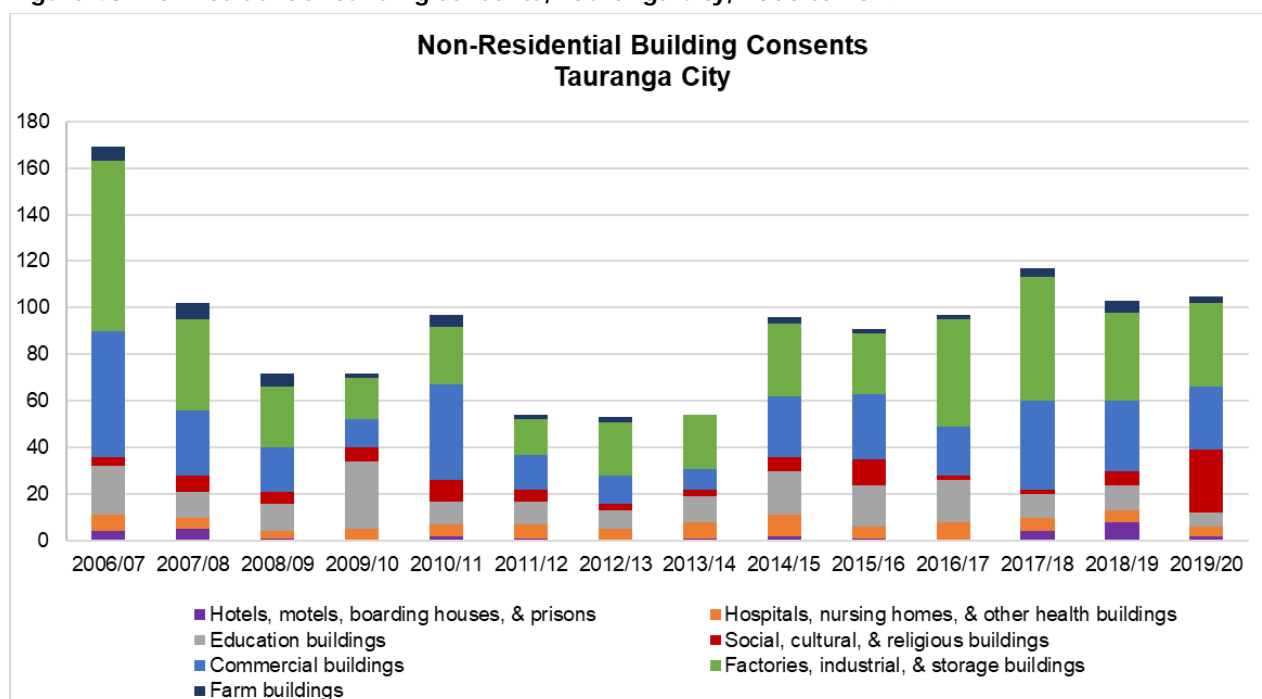


Table 40 All non-residential buildings, Tauranga City and WBOPD

All non-residential buildings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	105			
Last year	103	↑	2	1.9
Last 5 years (average)	103	↑	2	2.3
Last 10 years (average)	87	↑	18	21.1
<i>Western BOPD – Urban</i>				
This year	125			
Last year	125	=		
Last 5 years (average)	127	↓	-2	-1.3
Last 10 years (average)	112	↑	13	11.2

Figure 48 Non-residential building consents, Tauranga City, 2006 to 2019



Source: Statistics NZ Infoshare

Non-Residential Building Consents by Construction Value

The following graphs show that the change in total construction value and number of consents follow a similar trend for both Tauranga City and WBOPD. A number of high value non-residential building consents (like coolstores/ packhouses in WBOPD) has increased the total value above the number of consents from July 2014 to June 2020.

Figure 49 Non-residential building consents and average construction value, WBOPD, 2006 to 2020

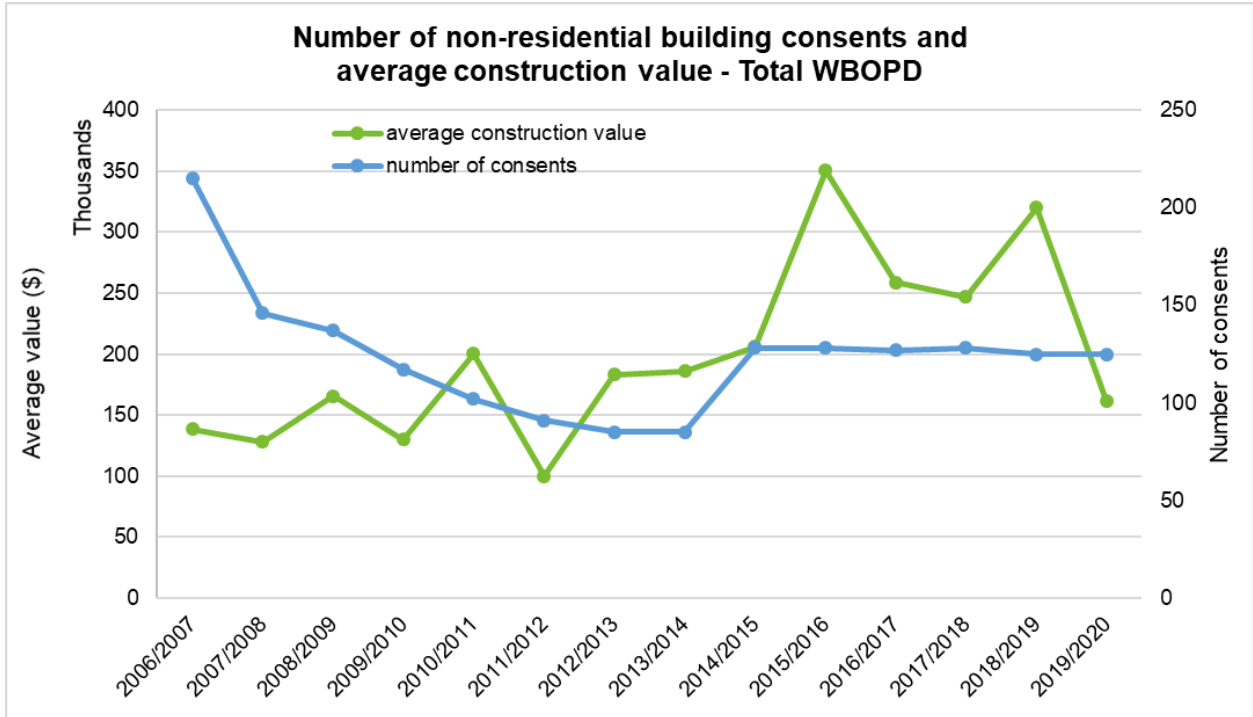
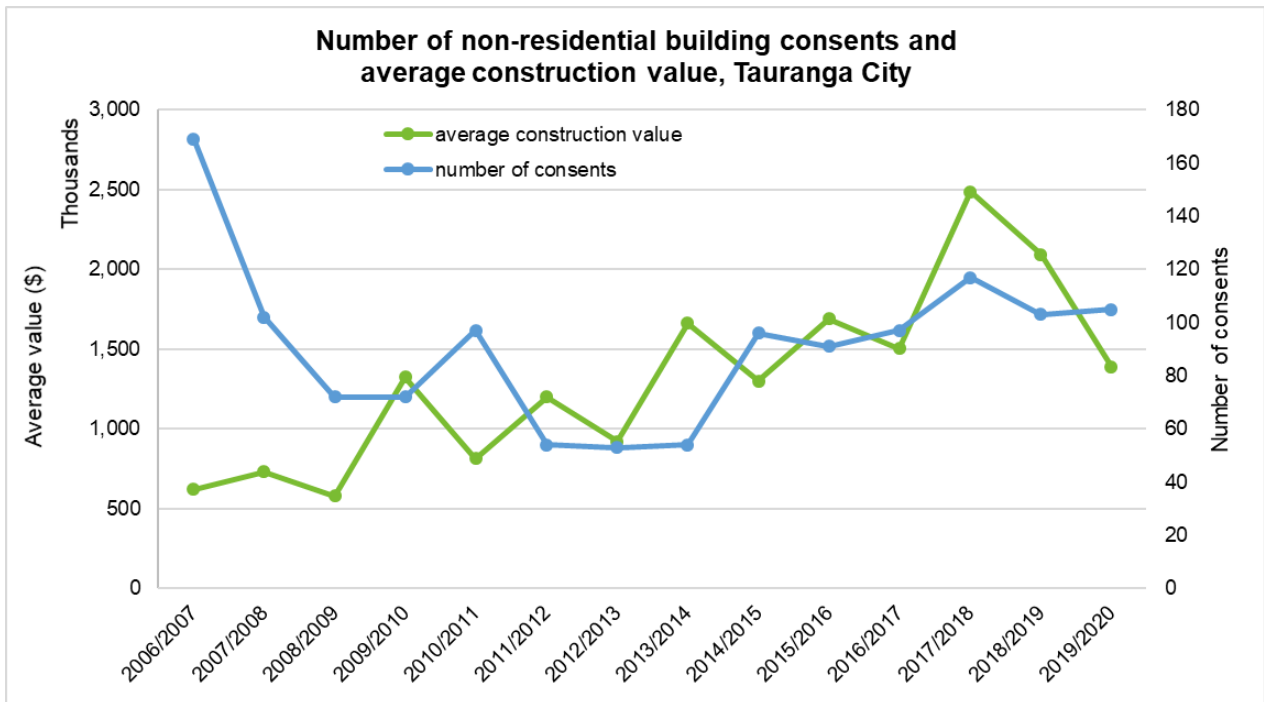


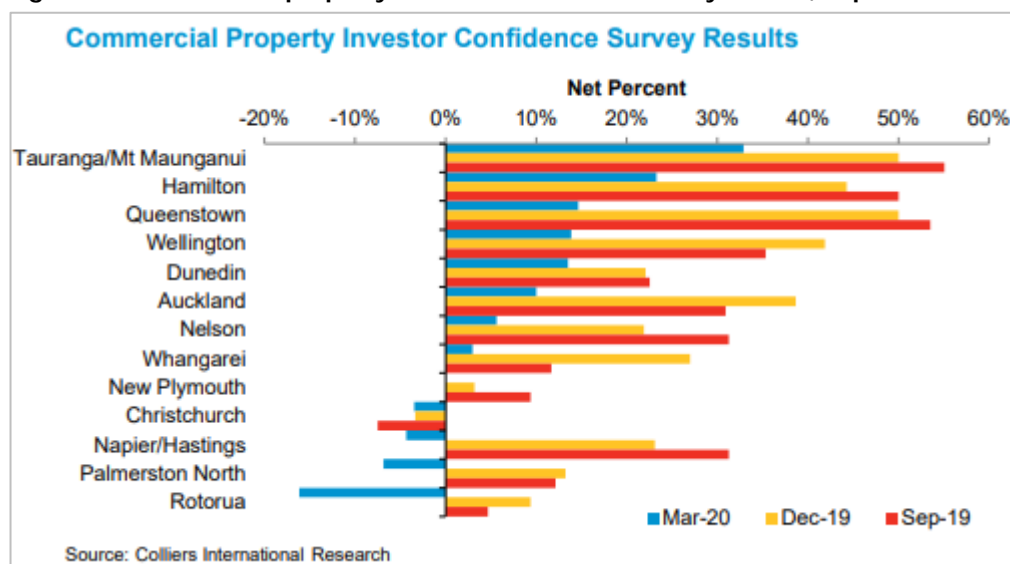
Figure 50 Non-residential building consents and average construction value, Tauranga City, 2006 to 2020



Commercial Property Market

According to Colliers International, Mt Maunganui/Tauranga occupied the top spot for investor’s confidence for 4 consecutive quarters to March 2020 in their most recent survey. This is despite the investor confidence shifting down from record highs. Colliers further stated that while the number of pessimists increased slightly, the reduction in the net positive result is due to a reduction in the number of respondents expecting similar conditions rather than better conditions over the next 12 months.

Figure 51 Commercial property investor confidence survey results, September 2019 to March 2020



The lower investors' confidence was evident in the value of all commercial buildings consented during the year, amounting to \$190 million, a reduction of 47% (\$171 million) from last year's record of \$361 million.

Of the non-residential buildings consented during the year, 34% comprised new commercial buildings, having a value of \$50 million. This was 20% lower than the previous year's record of 63 million and less than one third of all time high record of \$161 million two years ago.

Table 41 Value and per cent share of new commercial building consents to all new non-residential building consents, Tauranga City

Year	Value of consents (million \$)	% share to total value of non-residential building consents
2006/2007	40.7	39.0
2007/2008	24.7	33.1
2008/2009	5.7	13.6
2009/2010	8.5	8.9
2010/2011	40.5	51.2
2011/2012	36.0	55.6
2012/2013	8.5	17.5
2013/2014	15.0	16.7
2014/2015	48.8	39.1
2015/2016	69.2	45.1
2016/2017	28.9	19.8
2017/2018	161.4	55.5
2018/2019	62.8	29.1
2019/2020	50.0	34.26

7 Current and Future Monitoring Reports

As indicated in Section 2, the SmartGrowth Development Trends report continues to report on key SmartGrowth, RPS and NPS-UDC indicators on an annual basis. For the three quarters in between the annual reports, simpler quarterly monitoring reports were prepared to meet the NPS-UDC requirements from September 2017. With the NPS-UD superseding the NPS-UDC in late 2020 further changes may be

required to the SmartGrowth Development Trends report particularly to align with and inform the Housing and Business Capacity Assessment (HBA) (next to be completed by 31 July 2021 for housing), and Future Development Strategies (FDS's).

The quarterly monitoring reports provide SmartGrowth a tool to improve its understanding of housing and business markets and are published in the Councils' websites. With the NPS-UD taking effect in August 2020, quarterly monitoring of the housing and business indicators will be carried through and results will be included in the annual reports, starting with the July 2020 to June 2021 report.

SmartGrowth is committed to improving the annual monitoring document over time. This year marks the second year of monitoring residential section size, typology and number of bedrooms for dwellings consented. These indicators will be monitored continuously on a quarterly basis and included in future annual reports. This is also the second annual report that includes dwelling density for Tauranga City urban growth areas. This will be continuously monitored as future development occurs.

Appendix 1

Explanation of HUD/ MfE Indicators for the National Policy Statement on Urban Development Capacity¹⁷.

Dwelling sales prices (actual) – (SGDT Ref: Section 4.1)

Technical notes

Prices are presented in nominal terms; that is, they have not been adjusted for general inflation. Median prices are heavily influenced by the sale of existing stock, as new builds comprise a small proportion of total sales in any given period. They are also affected by the composition of sales, including the size and quality of dwellings, as well as type (houses, apartments etc.), which may vary by area and over time. This median price series is not adjusted for size and quality of dwellings.

Interpretation

This indicator shows the median prices of residential dwellings sold in each quarter. It provides a broad and recognisable picture of absolute price levels and is therefore a useful starting point for analysing price trends. Significant dwelling price growth can increase the feasibility of new developments (eg suburban apartments). On the other hand, rapid price increases can fuel land banking, where landowners expect continued future increases.

In general, if dwelling prices are rising, we would expect to see dwelling building consent numbers rise in response. If prices are rising without evidence of growth in consents, it may indicate a constraint on supply and should motivate further investigation.

Variations in prices between different areas may reflect a range of factors, including differences in demand for housing due to different wage levels or different levels of consumer and natural amenities; or imbalances between demand and supply due to constraints on housing development. Where price differences persist over long periods of time and coincide with similar rates of housing supply, they are more likely to reflect differences in demand.

Price trends reflect many different forces acting in the market, including but not limited to the effect of urban planning policies. Developing a narrative about which factors are driving price trends is challenging but can provide useful insights for a local authority's planning response to these trends.

Nominal dwelling rents – (SGDT Ref: Section 4.2)

Technical notes

This indicator reflects nominal mean rents as reported in bonds lodged with HUD, in dollars.

The data is for private bonds (private landlords) and hence excludes social housing.

The mean used is the geometric mean. The reason for using this mean is that rents cluster around round numbers, and tend to plateau for months at a time (spiking up by say \$10 or \$20 at a time). This makes analysis of time series difficult and using the geometric mean is a way of removing this clustering effect.

There are a number of caveats on these data series:

- Property type is self-reported so can be inconsistent, particularly the distinction between apartment and flat as there is no clear separation between these categories.
- It captures bonds at the time of lodging (typically at the start of a tenancy), so doesn't reflect subsequent changes in these rents. It will therefore tend to understate the rent over the term of a tenancy.

Interpretation

Like the median dwelling sale price indicator shown in Figure 13, this measure provides a broad and recognisable picture of absolute rent levels, and should therefore be the starting point for analysing trends in rents. In general, strong and persistent growth in rents indicates, even more strongly than house price increases, that housing supply is insufficient to meet demand.

This is because rents tend to be more sensitive to income levels than dwelling prices, and on average, renters also have lower incomes than home owners. For this reason, rent increases tend to follow incomes more closely than house prices and are less volatile.

Estimates of mean rents at a local level may be affected by the composition of rental stock (ie the size and type of rental dwellings). This does not vary markedly between territorial authority areas. However, there may be significant differences between suburbs that may make a 'like for like' comparison difficult. For instance, the Auckland city

¹⁷ National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment, June 2017

centre has a high proportion of one bedroom apartments while other suburbs are dominated by three-bedroom stand-alone houses. More disaggregated data on rent trends for different types of rental accommodation is available on the HUD website.

The rental stock is typically of lower quality and less well maintained than owner-occupied dwellings. This means that comparing average prices with average rents may be misleading as the characteristics of the average rental property are likely to be different than the characteristics of the average dwelling sale.

The chart above presents geometric median rents for five high-growth urban areas. It shows that:

- The cost of renting is highest in Auckland and lowest in Hamilton, which is consistent with differences in median sale prices between cities
- Rents in Christchurch rose rapidly after the 2011 Canterbury Earthquake, due to the shortage of housing resulting from earthquake damage, but they have fallen since the start of 2016.

To assist in interpreting data on rents, information on the share of households living in rented accommodation versus owner-occupied housing, and the characteristics of those households, is available on Statistics New Zealand's website.

Ratio of dwelling sales prices to rents – (SGDT Ref: Section 4.4)

Technical notes

This indicator shows the ratio of nominal median dwelling prices to nominal (geometric) mean rents. The geometric mean is used to help smooth the data by removing the "clustering effect" (where rents cluster at round number amounts).

House prices relate to the whole housing stock in the selected area, not just the rented stock. As owner-occupied housing tends to be of better quality and of higher value than rented stock–this ratio tends to over-state house prices (relative to the median price for rented housing only).

This relationship between rents and house prices is often expressed as a rental yield to investors using the same data, which is calculated by mean rents divided by the median house price.

Interpretation

This indicator reflects the relationship between median house prices and mean rents in the same geographical area.

The higher the house price/rent ratio:

- *The greater the gap between renting and buying.* A ratio of 30 indicates that the price of a median house is 30 times the mean annual rent paid. High ratios will tend to reduce home ownership rates due to it being more attractive or affordable for many to rent than to buy a dwelling.
- *The lower the average yield to an investor from renting out a dwelling.* Investors vary in their motivations for purchasing rental properties, and in the types of properties they are interested in owning. Income-focused investors will seek to maximise rental yields while others may be more motivated by the expectation of capital gains over the longer term. When increases in rents don't keep pace with house prices, investors increasingly rely on capital growth as a source of returns rather than rental yield.

Further analysis of trends in home buyers may assist the interpretation of this measure. CoreLogic has a "buyer classification" that disaggregates sales according to whether the purchasers are first home buyers, existing owner 'movers', or investors. This data also records where investors are based or movers are from, so is a useful indicator of the impacts of one local area on another.'

Housing affordability indicators – (SGDT Ref: Section 4.6)

Technical notes

HAM Buy and Rent measures have been released as an 'experimental' series that will eventually be turned into official statistics on housing affordability.

These measures use data on household incomes and rents from Statistics New Zealand's Integrated Data Infrastructure, Corelogic sales price information, and mortgage interest rates.

For potential home-owning households, HAM Buy calculates what their residual income would be after housing costs if they were to buy a modest (ie lower quartile) first home in the area in which they currently live. For renting households, HAM Rent calculates what their residual income would be after paying the rent.

Households are then classified as being either above or below a 2013 National Affordability Benchmark. This is set as the median affordability for all homeowners and renters, nation-wide, in June 2013.

HAM measures are available for territorial authorities, and also for Auckland wards. At the time this guidance was released, they were only available through the first quarter of 2016, ie with a one-year lag. This indicator will be updated to be more timely in future releases. For further information, refer to HUD's website.

Interpretation

The HAM indicators provide a picture of national and regional housing affordability trends, bringing together the impact of changes in house prices or rents, mortgage interest rates and incomes.

The indicators calculate how much money households have left over after paying for their housing costs. For renting households, HAM Rent reflects how much money is left over after paying rent for an appropriately sized dwelling in the area in which they currently live. For the population of potential first home buyers, HAM Buy reflects how much money they would have left over if they were to transition from renting to home ownership by purchasing a modest home in the area in which they currently live.

These residuals are then compared with a 2013 National Affordability Benchmark, which is the national average for all renting and home-owning households. Because renting households typically have lower incomes relative to housing costs than home owners, more than half of them fall below the 2013 National Affordability Benchmark.

A higher number on the charts indicates a lower level of affordability, as it indicates that more households fall below the affordability benchmarks, and vice versa.

It is most appropriate to use HAM Buy and HAM Rent to understand trends in housing affordability in a particular area. If the share of households that do not meet the affordability benchmark is rising, it indicates that housing is becoming less affordable in an area. Comparisons between cities may be less meaningful.

Differences in the level of HAM indicators between cities could reflect a combination of factors. For instance, Auckland and Wellington have lower HAM Rent indicators than other cities (indicating better rental affordability) in spite of the fact that rents in these cities are generally higher. This reflects the fact that renting households in these cities also have higher incomes.

Given evidence that dwelling sale prices in several cities have risen significantly from 2016, it seems likely that home buyer affordability will have deteriorated. This should be picked up as the indicator is updated.

Appendix 2

Explanation of Development Terms

“Urban” refers to subdivisions or dwelling consents in:

Western Bay of Plenty District - Residential, Future Urban, Commercial, Industrial, or Multi zones.

Tauranga City – Suburban Residential, High Density Residential, City Living, Wairakei Residential, Papamoa East Employment, Town Centre Core (Wairakei), Town Centre Fringe (Wairakei) Marae Community (Urban), Rural-residential, Commercial and Industry zones.

“Rural” refers to subdivisions or dwelling consents in:

Western Bay of Plenty District - Rural, Rural-residential or Lifestyle zones.

Tauranga City – Rural, Rural Marae Community), and Te Tumu Future Urban zones.

Other terms used:

Western Bay of Plenty District – “Other urban areas” refers to minor urban areas such as Maketu, Pukehina, Paengaroa, Tanners Point, Kauri Point etc.

Tauranga City – “Coastal Strip” refers to Mt Maunganui-Papamoa, specifically the area units of Mt Maunganui North, Omanu, Matapihi, Arataki, Te Maunga, Pacific View, Palm Beach, Gravatt, Papamoa Beach East, Palm Springs, and Doncaster. “Tauranga” refers to all other area units in Tauranga City.

Greenfield UGA – Greenfield Urban Growth Area.

SP – Structure Plan.

Subdivision Process

Subdivisions go through a staged approval process that can last up to eight years.

Stage 1 Subdivision Plan

Subdivision is approved by the Council under section 104 of the Resource Management Act 1991 (RMA). This approval has a legal life of up to 5 years.

Stage 2 Survey Plan

This is approved under section 223 RMA. This approval has a legal life of up to 3 years.

Stage 3 Final Approval

Occurs under section 224 RMA. This is confirmation that all conditions of the subdivision consent have been complied with. After the Council issues a Section 224 Certificate individual property titles can be issued, once the subdivision proceeds to title issue under the Land Transfer Act. It is assumed for monitoring purposes that all Section 224 Certificates proceed to title issue.

A distinction is made between subdivisions approved and additional lots created at the Section 224 Certificate stage. The number of subdivisions approved does not necessarily indicate the likely future number of new lots created in the District, and hence the demand for services.

A more accurate indicator of growth is additional lots created at Section 224 approval stage. For monitoring purposes, this figure is used to interpret land uptake rates (along with dwelling consent data) and vacant land supply. In the Western Bay of Plenty District the ratio of urban land uptake in Greenfield

UGA's to rural subdivision is expected to increase as infrastructure is improved at Waihi Beach, Katikati, Omokoroa and Te Puke.

In Tauranga City, the uptake of urban land in Greenfield UGA's is calculated from Section 224/new title information to indicate the proportion of planned capacity that has been "urbanised". The predictive value of this measure is reduced in the infill area primarily in areas where unit title developments are more common (such as Mount Maunganui and Tauranga Central) as these are issued at the time of, or after, the building consent has been approved.

Before a subdivision reaches final approval stage, variations to the original application can be submitted to the Council. Either a variation or the original application may go through to final approval stage. For this reason variations are not included in the total subdivisions approved, so as not to count them twice.

Subdivisions are only indicative of development where additional lots to the original title or titles are created. For this reason all subdivisions reported on do not include resource consent approvals for boundary adjustments or access ways etc. that do not result in additional lots being created.

Building Consent Issue for Dwellings

Western Bay of Plenty District

In the Western Bay of Plenty District, building consents issued for new dwellings provide a good indicator of growth rates in different areas. It should be noted that where dwelling consents are referred to in this report, the figures include consents for new and resited dwellings, but not for additions or alterations to existing dwellings.

Tauranga City

Building consents issued for new dwellings make up about 45% of all building consents issued. New dwellings are recorded in a similar manner to the Western Bay of Plenty District, including new dwellings, relocated dwellings and conversions of existing buildings to dwellings; it does not include additions or alterations to existing dwellings. Where dwellings are demolished or removed from a site, or changed in use to a non-residential activity, they are deducted from the "new dwelling" count to produce an "additional dwelling" count for comparison with the SmartGrowth dwelling projections in Section 3.3 of this report.

Residential Growth Areas

Western Bay of Plenty District

These areas are the settlements of Waihi Beach (including Island View, Pios Beach, and Athenree), Katikati, Omokoroa and Te Puke. These areas have been identified as the urban growth centres for the District in the Western Bay of Plenty District Council.

All residential growth areas in the District; Te Puke, Katikati, Waihi Beach and Omokoroa, are now serviced by comprehensive sewerage schemes while the communities of Maketu/Little Waihi and Pukehina are currently served by septic tanks. Plans for a wastewater collection, treatment and disposal system or transfer pipeline for these areas are currently progressing.

The Western Bay of Plenty District Plan contains different subdivision standards in recognition of the ability of areas to accommodate future growth. This is dependent upon infrastructure availability, particularly wastewater disposal.

- For unsewered urban areas, a minimum net lot size of 1600m² is required to subdivide, as the minimum net lot size is 800m². To allow for access ways, 1800m² is used for monitoring purposes for subdivision potential.
- For sewerred urban areas, a minimum net lot size of 700m² is required to subdivide, as the minimum net lot size is 350m². To allow for access ways, 800m² is used for monitoring purposes

for subdivision potential except in Omokoroa where a minimum lot size of 400m² is permitted in Stage 1 and a minimum of 600m² is allowed in the existing village.

For monitoring purposes, the future growth potential of areas is limited largely by the sewerage systems available.

Tauranga City

The Greenfield UGA's are the developing suburbs of Bethlehem, Pyes Pa, Pyes Pa West (the Lakes), Ohauti, Welcome Bay, Wairakei (Papamoa East) and Papamoa. The Greenfield UGA's are part of a comprehensive infrastructure planning approach to "greenfield" urban development. Areas outside the identified Greenfield UGA's do not have services supplied to them. In this way the Council manages the uptake of land for development.

The other significant areas of urban development is infill development in established residential areas, and residential intensification (currently limited to the Mount Maunganui High Density Residential zoned area northwest of Banks and Salisbury avenues, and the City Living zoned areas surrounding the Tauranga CBD) within established residential areas of Tauranga.

Vacant Land

Vacant residential land is generally identified in the sub-region as either *infill* or *greenfield*. Monitoring infill subdivisions tells us the rate of land uptake within established residential areas. Infill subdivisions are expected to continue to accommodate a substantial proportion of projected growth, especially close to main commercial areas.

In Western Bay of Plenty District, a subdivision yield of 11 sections per hectare is used for determining the development potential of residential greenfield areas. This figure is reflective of current development patterns. In Tauranga City, the yield varies from 9 to 15 sections per hectare in response to physical constraints (e.g. topography) and to the strategic intent for each Greenfield UGA structure plan.

Western Bay of Plenty District

Vacant residential land is identified in the Western Bay of Plenty District as either *infill* or *greenfield* determined by the size of the land parcel. This is reported on for the residential growth areas in the District.

Residential infill existing urban areas of Western Bay District where a land parcel is 800m² or with the potential to enable subdivision to a minimum lot size of 350m². Except in Omokoroa where a minimum lot size of 400m² is permitted in Stage 1 and a minimum of 600m² is allowed in the existing village.

Residential greenfield any land parcel which is subdivided within Greenfield UGAs (constituting "traditional" rezoning of rural land to residential, and subdivision and development for residential purposes).

In the Western Bay of Plenty District a practical figure of potential infill development is calculated by taking the number of developed lots over 800m² (sewered) and 1800m² (unsewered) in a residential zone and multiplying this figure by 56%¹.

¹ Theoretical calculations assume that every developed lot has only one dwelling, and that it is positioned in such a way that there is enough spare land to locate an additional dwelling. This of course is incorrect and a theoretical figure is produced when all of these properties are calculated. To obtain a more realistic figure of properties that could be further developed, the theoretical figure is multiplied by 56% to give a practical figure. This percentage was obtained through a desktop analysis of aerial photographs of Waihi Beach in late 1998. A sample area was examined to obtain a realistic number of developed properties that had potential for further development, without shifting the existing dwelling, and a comparison made back to the theoretical figure calculated for that exercise.

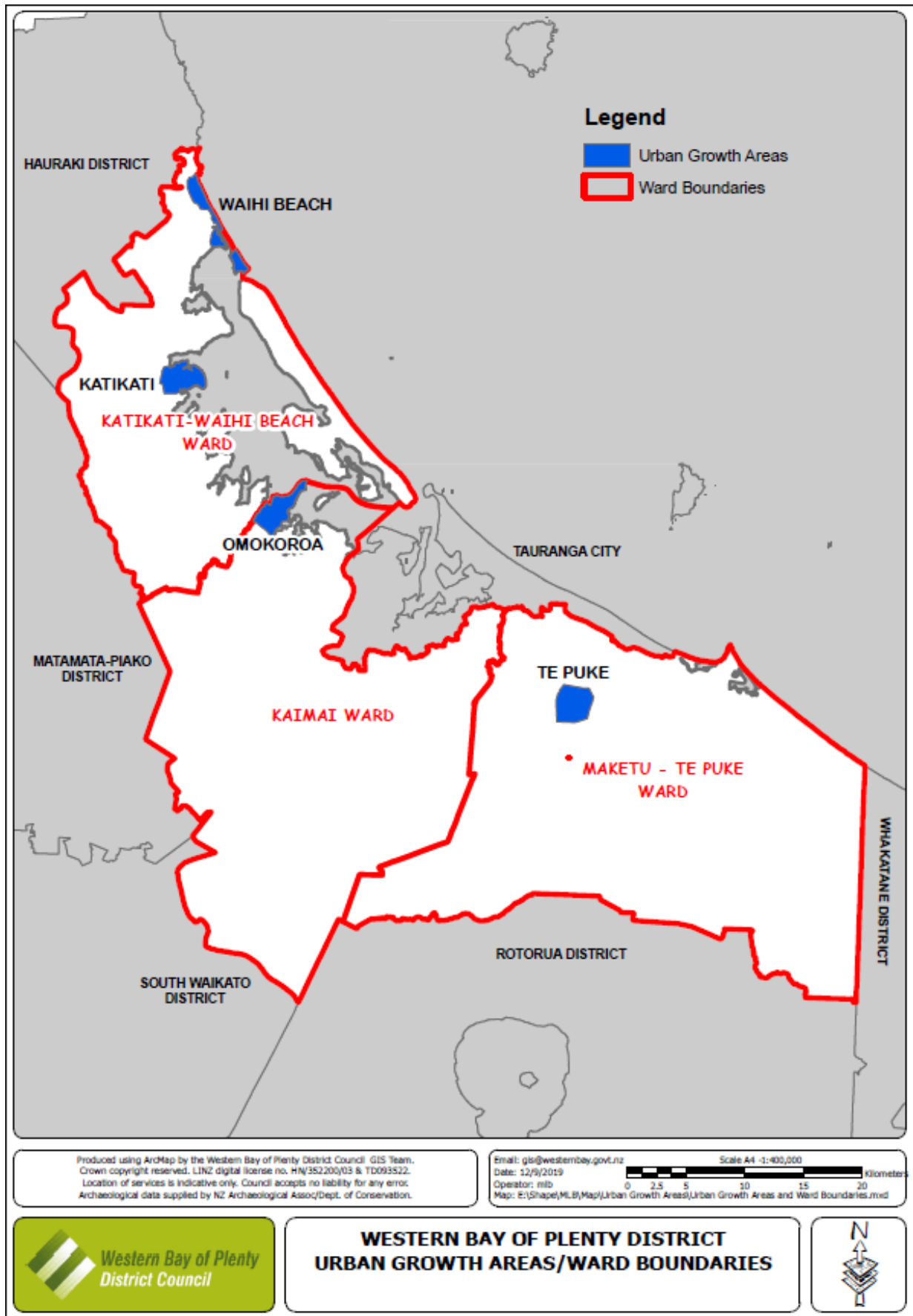
Tauranga City

Vacant residential land is classified in Tauranga City as either Infill, Rural Infill or Greenfield UGA. Within the infill areas some residential intensification is expected within identified Residential Intensification Areas and within general residential infill/ intensification areas where appropriate.

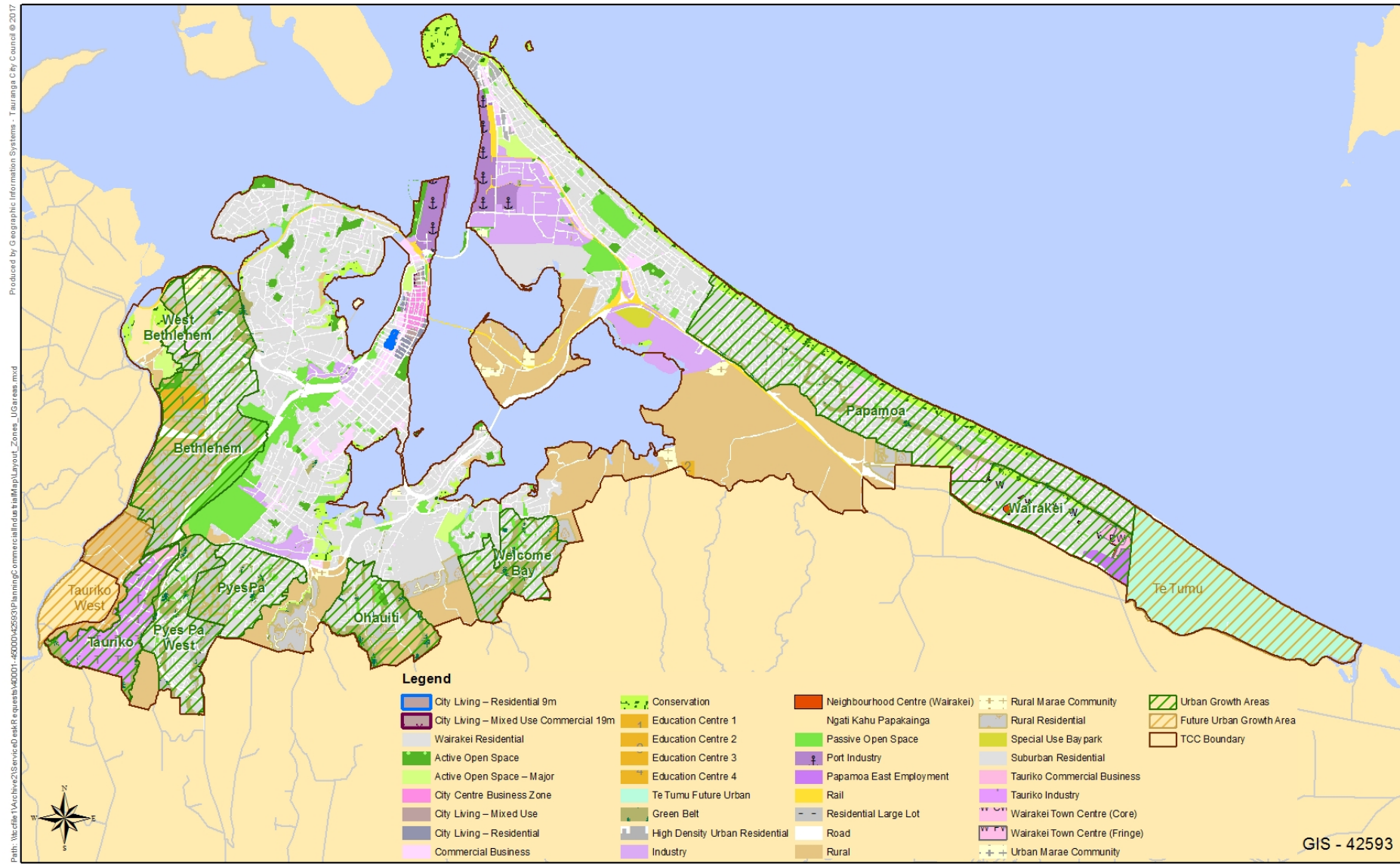
<i>Residential Intensification Areas</i>	currently this classification is applied to development within the High Density Residential zoned area in Mount Maunganui North, and City Living and City Centre zoned areas where greater density is permitted.
<i>Residential infill/ Intensification</i>	existing urban areas of Tauranga zoned Suburban Residential where a land parcel is 650 m ² or with the potential to enable subdivision to a minimum lot size of 325 m ² . Includes residential growth in other zones within the infill area such as in Commercial Business zoned areas.
<i>Rural Infill</i>	Areas of Tauranga City with Rural zoning outside the Greenfield UGA's
<i>Residential Greenfield UGA's</i>	any land parcel which is subdivided within Greenfield UGA's (constituting "traditional" rezoning of rural land to residential, and subdivision and development for residential purposes).

Appendix 3

Western Bay of Plenty District Development Map

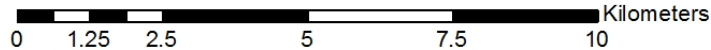


Tauranga City Development Map



PLANNING ZONES AND URBAN GROWTH AREAS

- Tauranga City Council -



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Appendix 4

Dwelling Occupancy by Census Area Unit – Western Bay of Plenty District and Tauranga City

Stats NZ change the geographical areas in 2017 and the Census Area Units (CAU) changed to Statistical Area 2 (SA2). The 2018 Census results were released at SA2 level.

Western Bay of Plenty District (2018 Census)

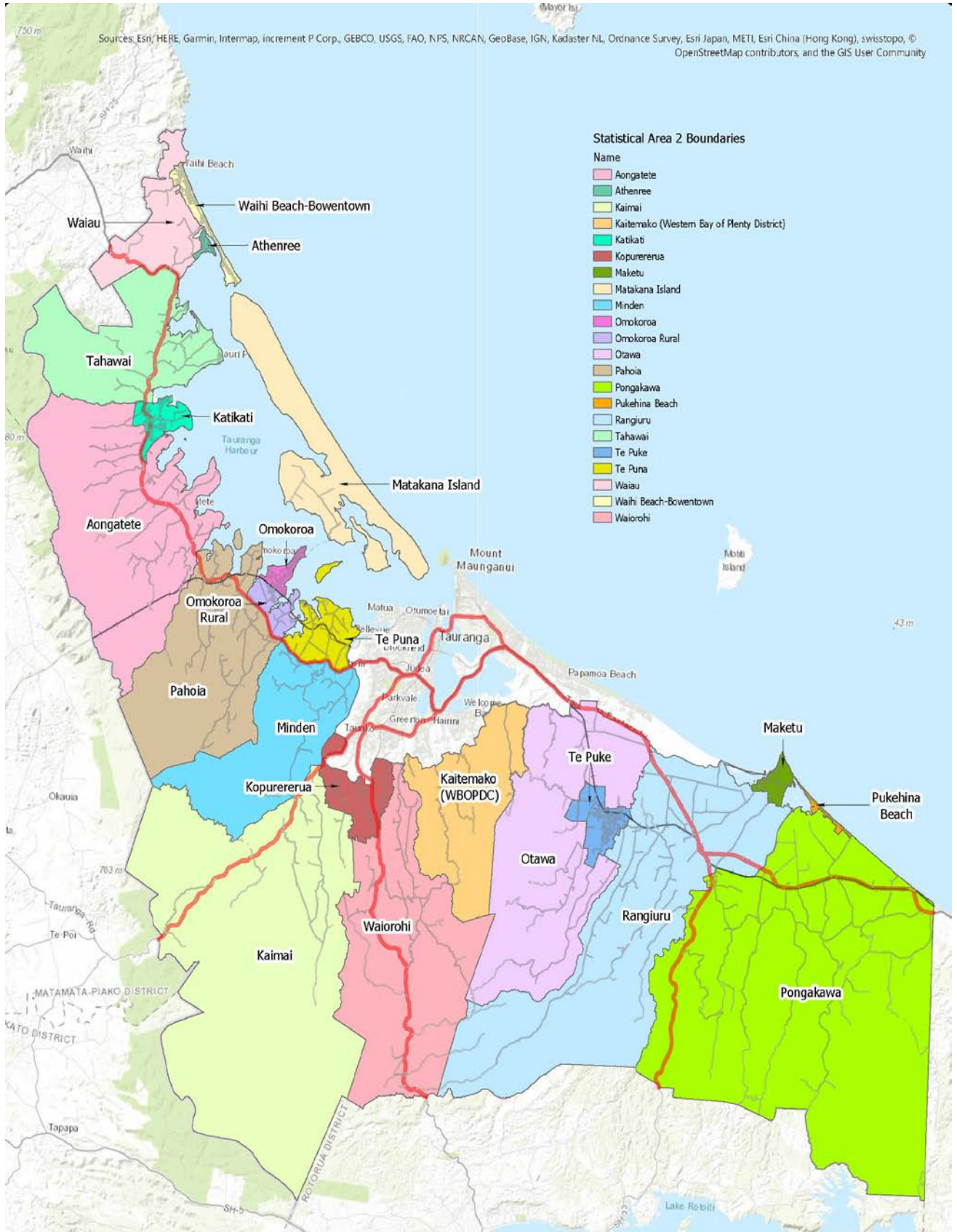
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Waihi Beach-Bowentown	2,484	1,071	1,410	2,481	57
Athenree	804	297	117	414	28
Waiau	333	123	45	168	27
Tahawai	1,833	744	87	831	10
Aongatete	3,279	1,305	108	1,413	8
Katikati	5,010	2,040	147	2,187	7
Matakana Island	183	78	21	99	21
Omokoroa	3,210	1,323	177	1,500	12
Omokoroa Rural	744	282	24	306	8
Te Puna	2,262	750	48	798	6
Pahoia	3,198	1,164	78	1,242	6
Minden	2,133	717	48	765	6
Kaimai	2,028	681	48	729	7
Kopurererua	1,167	417	33	450	7
Kaitemako (WBOPD)	1,752	609	30	639	5
Waiorohi	2,520	825	96	921	10
Otawa	1,932	666	57	723	8
Rangioru	2,676	879	102	981	10
Pongakawa	3,081	1,083	138	1,221	11
Maketu	1,197	414	138	552	25
Pukehina Beach	804	339	324	663	49
Te Puke	8,688	2,805	159	2,964	5
TOTAL	51,318	18,612	3,435	22,047	16

Tauranga City (2018 Census)

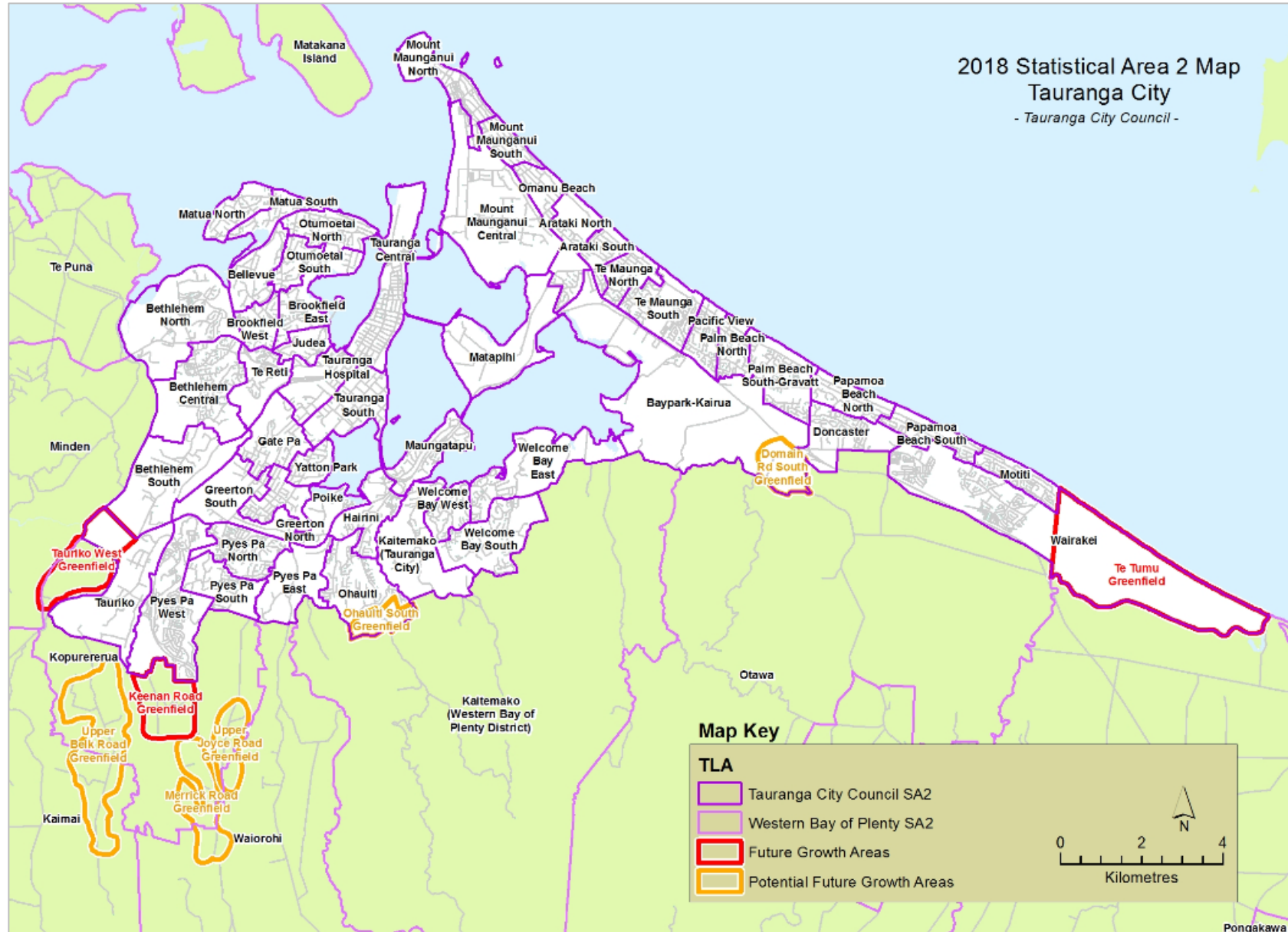
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Matua North	2,844	1,134	81	1,215	7
Mount Maunganui North	3,720	1,575	897	2,472	36
Matua South	2,523	939	63	1,002	6
Bethlehem North	3,387	1,329	99	1,428	7
Bellevue	3,825	1,290	51	1,341	4
Otumoetai North	4,266	1,839	117	1,956	6
Otumoetai South	3,780	1,443	78	1,521	5
Brookfield West	2,928	1,086	51	1,137	4
Bethlehem Central	4,125	1,557	57	1,614	4
Brookfield East	2,808	1,017	51	1,068	5
Mount Maunganui South	3,021	1,107	222	1,329	17
Tauranga Central	3,072	1,134	150	1,284	12
Mount Maunganui Central	309	132	42	174	24
Judea	2,640	1,017	45	1,062	4
Te Reti	1,839	624	24	648	4
Bethlehem South	1,083	351	18	369	5
Omanu Beach	2,916	1,119	168	1,287	13
Tauranga Hospital	2,328	789	78	867	9
Tauriko	177	60	3	63	5
Gate Pa	3,996	1,344	99	1,443	7
Greerton South	720	261	18	279	6
Tauranga South	4,950	2,001	183	2,184	8
Arataki North	3,153	1,242	138	1,380	10
Matapihi	720	192	21	213	10
Pyes Pa West	3,447	1,206	87	1,293	7
Greerton North	3,402	1,416	114	1,530	7
Yatton Park	2,595	798	69	867	8
Pyes Pa North	4,620	1,662	87	1,749	5
Arataki South	2,844	1,005	138	1,143	12
Pyes Pa South	1,419	456	24	480	5
Poike	774	261	18	279	6
Te Maunga North	3,234	1,434	177	1,611	11
Maungatapu	2,847	1,074	69	1,143	6
Hairini	3,324	1,233	84	1,317	6
Pyes Pa East	651	201	15	216	7
Te Maunga South	4,140	1,713	150	1,863	8
Kaitemako (Tauranga City)	1,467	507	36	543	7
Ohauti	3,243	1,224	45	1,269	4
Baypark-Kairua	642	168	24	192	13
Welcome Bay West	2,778	915	66	981	7
Welcome Bay East	2,508	852	48	900	5
Pacific View	3,036	1,074	66	1,140	6
Welcome Bay South	3,441	1,113	48	1,161	4
Palm Beach North	3,159	1,089	81	1,170	7
Palm Beach South-Gravatt	3,834	1,470	129	1,599	8
Papamoa Beach North	2,766	975	114	1,089	10
Doncaster	3,123	1,077	66	1,143	6
Papamoa Beach South	2,688	1,014	138	1,152	12
Motiti	3,321	1,152	174	1,326	13
Wairakei	3,351	1,236	99	1,335	7
TOTAL	137,784	50,907	4,920	55,827	9

Appendix 5

Western Bay of Plenty District Statistical Area 2 Map

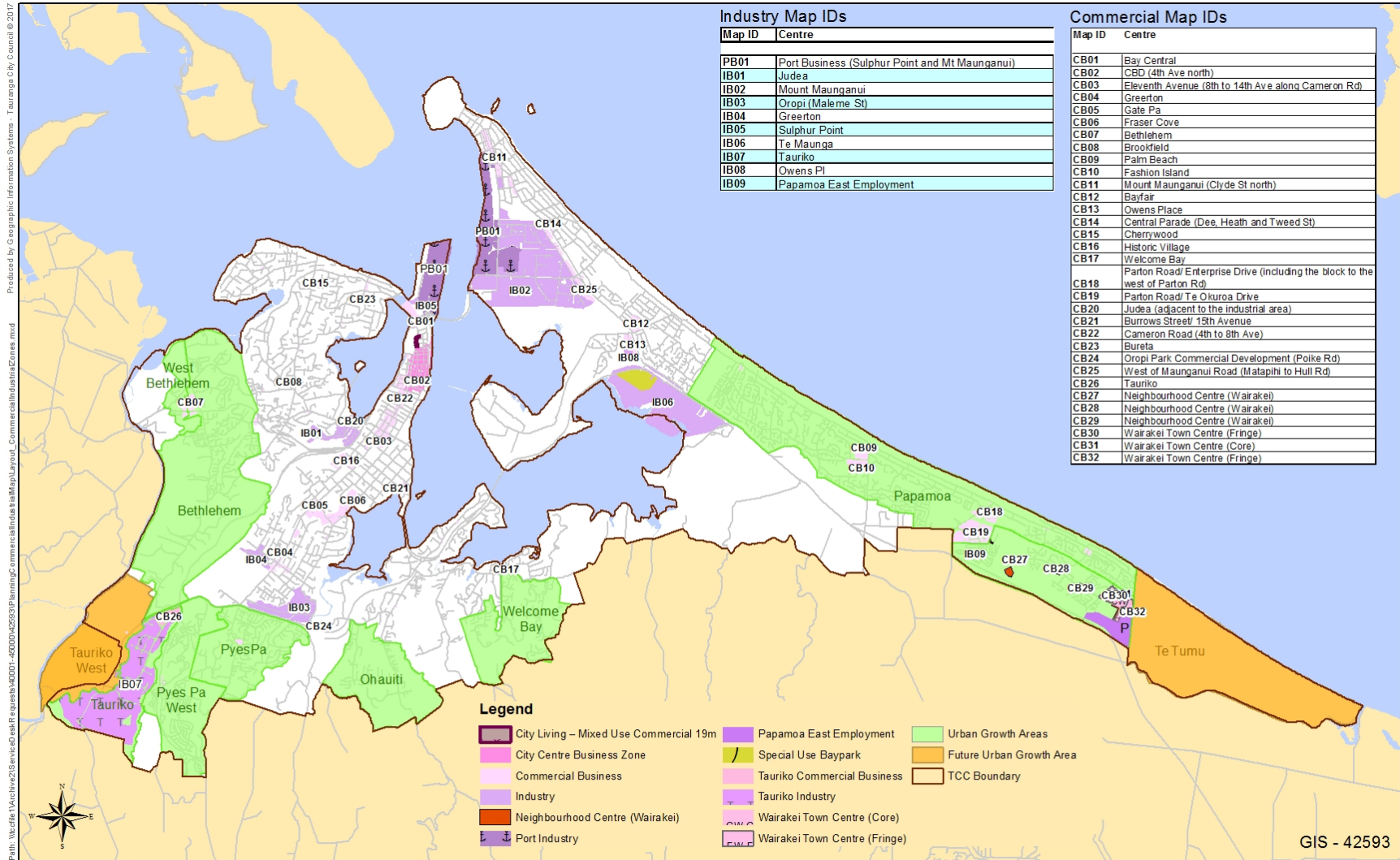


Tauranga City Statistical Area 2 Map



Appendix 6

Tauranga City Commercial and Industry Zoned Areas



COMMERCIAL AND INDUSTRIAL AREAS
 - Tauranga City Council -

0 1.25 2.5 5 7.5 10 Kilometers

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Appendix 7

Tauranga City Plan Definition of Nett Area

Nett area refers to “Nett Developable Area” which is defined in the Tauranga City Plan as a given area of land for greenfield subdivision/development and includes land used for:

- a. Residential activity purposes, including all open space and on-site parking associated with dwellings;
- b. Local roads, collector roads and roading corridors, including pedestrian and cycleways (and excluding expressways, motorways, strategic roads and arterial roads as defined in the *road hierarchy*);
- c. Collector roads and roading corridors (as defined in the road hierarchy) where direct access from allotments is obtained. Where only one side of the collector road or roading corridor has direct access only 50% of the collector road or roading corridor shall be used for the purpose of this definition;
- d. Neighbourhood reserves.
- e. But excludes land that is:
 - i. Stormwater ponds and detention areas;
 - ii. Geotechnically constrained (such as land subject to subsidence or inundation);
 - iii. Set aside to protect significant ecological, cultural, heritage or landscape values;
 - iv. Set aside for non-local recreation, esplanade reserves or access strips that form part of a larger regional, sub-regional, or district network;
 - v. Identified for business use, or for schools, network utilities, hospitals or other district, regional or sub-regional facilities.

Calculation of dwelling density

$$\begin{aligned} \text{Dwelling density} &= \frac{\text{Total Yield}}{\text{Area}} \\ &= \text{number of dwellings per ha} \end{aligned}$$

Where:

$$\begin{aligned} \text{Total Yield} &= \text{total number of dwellings} \\ &= \text{number of dwellings in developed areas} \\ &+ \text{number of proposed sections/lots or dwellings} \end{aligned}$$

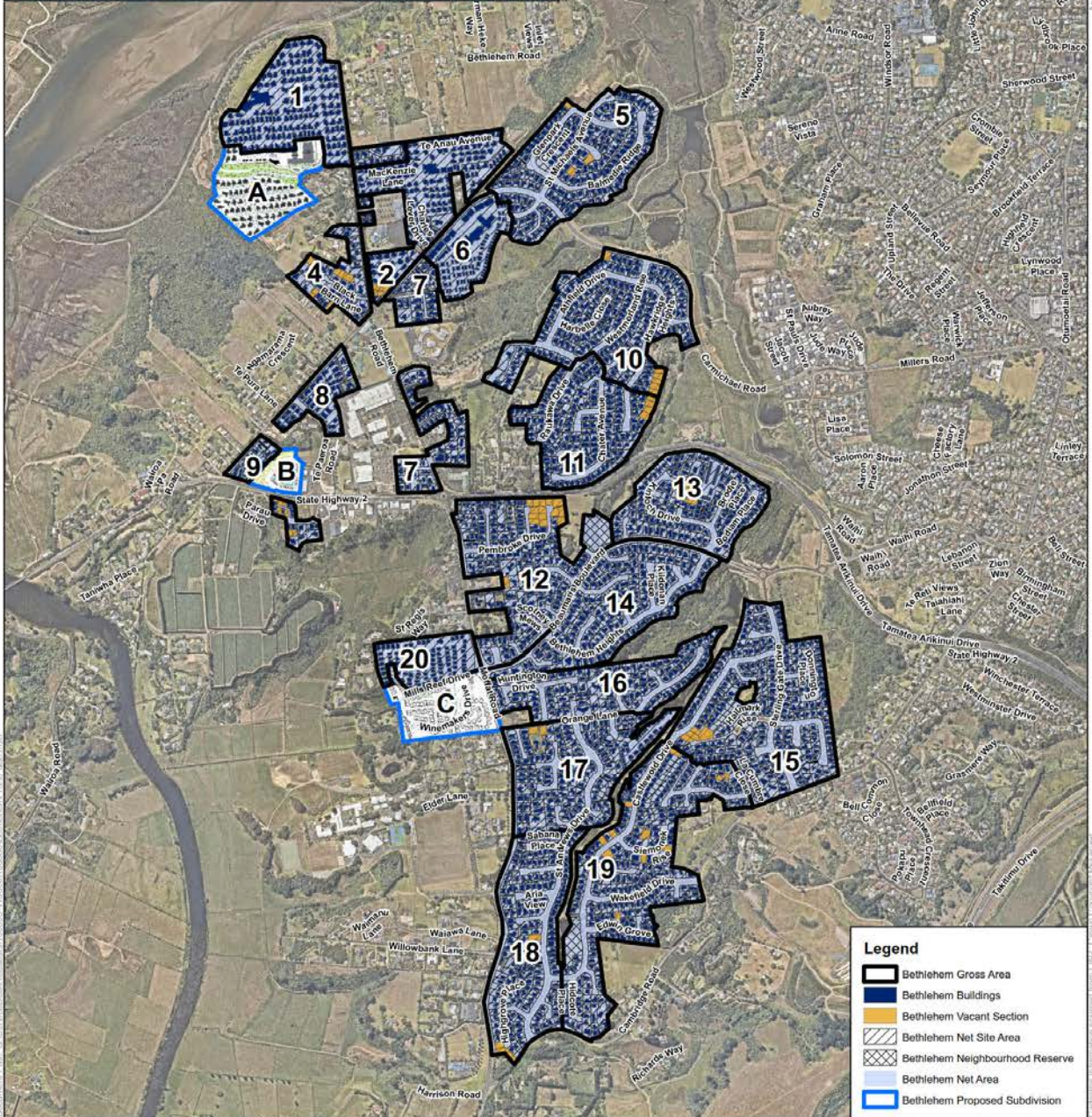
$$\text{Area} = \text{nett area in ha}$$

Change the divisor to get dwelling density for gross area or nett site area

Tauranga City Density Maps

Note that net area is nett area and net site area is nett site area

Area	Dwellings	Vacant Sections	Total Yield	Gross Area(Ha)	Gross Dwellings/Ha	Net Site Area (Ha)	Net Site Dwellings/Ha	Net Area (Ha)	Net Area Dwellings/Ha
1	207	0	207	12.44	16.64	12.09	17.13	12.44	16.64
2	166	6	172	12.52	13.74	11.66	14.75	12.16	14.15
3	19	0	19	1.69	11.27	1.55	12.25	1.69	11.27
4	33	6	39	4.96	7.83	4.35	8.96	4.94	7.90
5	174	3	177	17.65	10.03	13.30	13.31	17.64	10.04
6	279	0	279	6.20	44.97	5.79	48.20	6.20	44.97
7	65	0	65	8.40	7.74	6.37	10.21	7.79	8.34
8	69	0	69	3.88	17.76	3.00	22.98	3.58	19.30
9	31	7	38	2.89	13.17	2.43	15.62	2.89	13.17
10	194	6	200	19.44	10.29	14.64	13.66	19.42	10.30
11	154	4	158	13.79	11.46	10.98	14.39	13.78	11.47
12	164	15	179	18.40	9.73	13.29	13.47	17.55	10.20
13	167	6	173	13.27	13.03	10.73	18.12	13.28	13.05
14	153	0	153	16.77	9.12	12.29	12.45	16.77	9.12
15	253	4	257	24.67	10.42	18.81	13.67	24.35	10.56
16	117	0	117	12.13	9.65	9.53	12.28	12.12	9.66
17	181	2	183	16.08	11.38	12.82	14.27	15.71	11.65
18	168	4	172	17.19	10.01	12.23	14.06	17.07	10.08
19	270	11	281	26.50	10.60	19.66	14.29	26.44	10.63
20	130	0	130	5.32	24.43	5.12	25.37	5.32	24.43
Total	2994	74	3068	254.20	12.07	200.64	15.29	251.10	12.22
Proposed									
A	0	62	62	8.72	7.11	5.30	11.71	8.72	7.11
B	0	100	100	1.86	53.83	1.29	77.35	1.86	53.83
C	0	68	68	6.67	10.20	4.10	16.60	6.67	10.20
Proposed Total	0	230	230	17.25	13.34	10.69	21.52	17.25	13.34
Total Incl Proposed	2994	304	3298	271.45	12.15	211.32	15.61	268.35	12.29



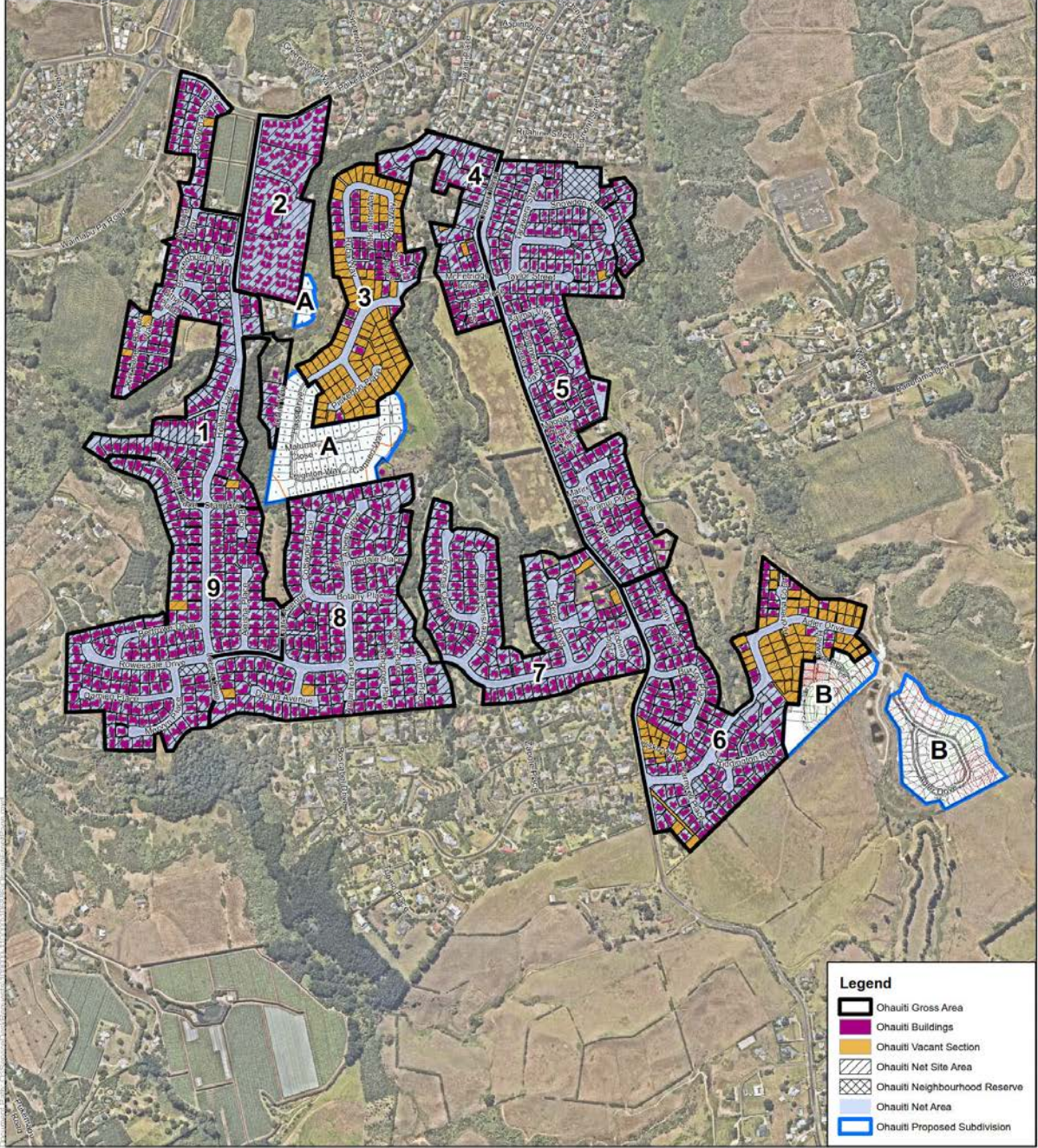
Bethlehem Dwelling Density



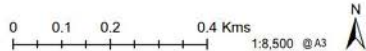
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area(Ha)	Gross Dwellings/Ha	Net Site Area (Ha)	Net Site Dwellings/Ha	Net Area (Ha)	Net Area Dwellings/Ha
1	179	4	183	17.84	10.26	13.83	13.23	17.07	10.72
2	139	0	139	6.95	20.01	7.50	18.54	6.93	20.07
3	45	102	147	10.47	14.04	8.24	17.83	10.42	14.11
4	54	2	56	5.62	9.62	4.95	11.31	5.75	9.74
5	247	1	248	21.85	11.35	15.88	15.62	21.39	11.59
6	149	72	221	18.99	11.64	15.84	13.95	18.95	11.66
7	122	2	124	14.84	8.36	10.83	11.45	13.96	8.88
8	181	2	183	19.63	9.32	16.98	10.78	19.58	9.34
9	176	1	177	17.89	9.89	13.87	12.76	17.88	9.90
Total	1292	186	1478	134.28	11.01	107.93	13.69	131.92	11.20
Proposed									
A	0	68	68	6.31	10.78	5.41	12.56	6.31	6.31
B	0	114	114	7.45	15.30	6.24	18.27	7.45	7.45
Proposed Total	0	182	182	13.76	13.23	11.65	15.62	13.76	13.23
Total Incl Proposed	1292	368	1660	148.04	11.21	119.58	13.88	145.68	11.39



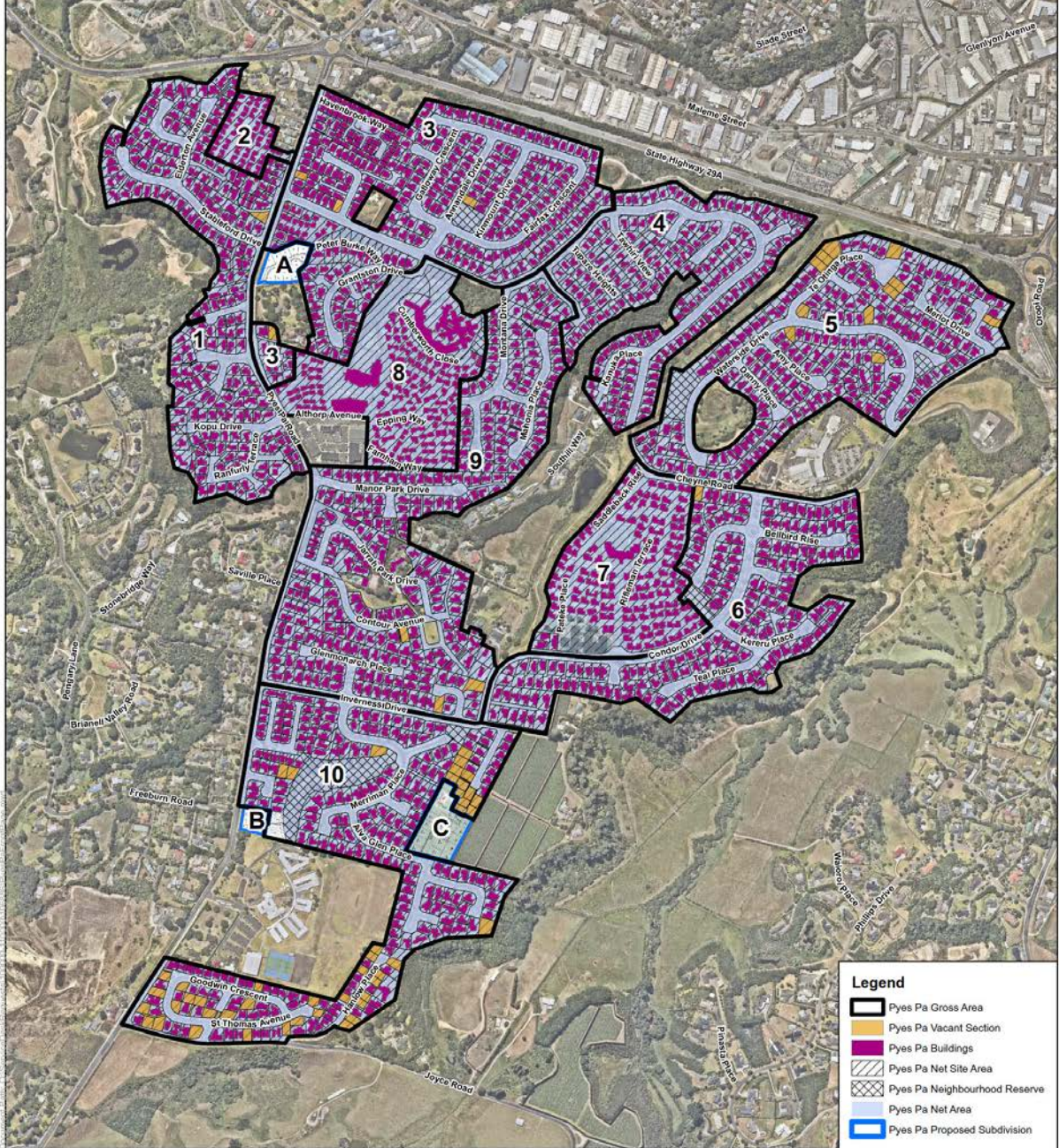
Ohauti Dwelling Density



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Area	Dwellings	Vacant Sections	Total Yield	Gross Area(Ha)	Gross Dwellings/Ha	Net Site Area (Ha)	Net Site Dwellings/Ha	Net Area (Ha)	Net Area Dwellings/Ha
1	227	1	228	19.44	11.73	15.33	14.87	19.44	11.73
2	59	0	59	1.92	30.68	1.90	31.06	1.92	30.68
3	349	4	353	25.75	13.71	18.76	18.82	25.72	13.73
4	180	0	180	15.34	11.74	11.81	15.51	15.33	11.74
5	211	11	222	22.14	10.03	16.48	13.47	22.08	10.05
6	192	1	193	18.60	10.38	13.79	14.00	18.44	10.46
7	188	0	188	10.82	17.38	10.15	18.52	10.82	17.38
8	168	0	168	11.99	14.01	11.53	14.57	11.99	14.01
9	291	3	294	28.42	10.35	20.32	14.47	28.90	10.93
10	249	46	295	27.42	10.76	19.40	15.21	27.14	10.87
Total	2114	66	2180	181.84	11.99	139.27	15.65	179.79	12.13
Proposed									
A	0	11	11	0.75	14.58	0.56	19.51	0.75	14.58
B	0	4	4	0.32	12.65	0.28	14.17	0.32	12.65
C	0	16	16	1.36	11.80	1.18	13.51	1.36	11.80
Proposed Total	0	31	31	2.43	12.77	2.03	15.27	2.43	12.77
Total incl Proposed	2114	97	2211	184.27	12.00	141.30	15.65	182.22	12.13



Pyes Pa Dwelling Density

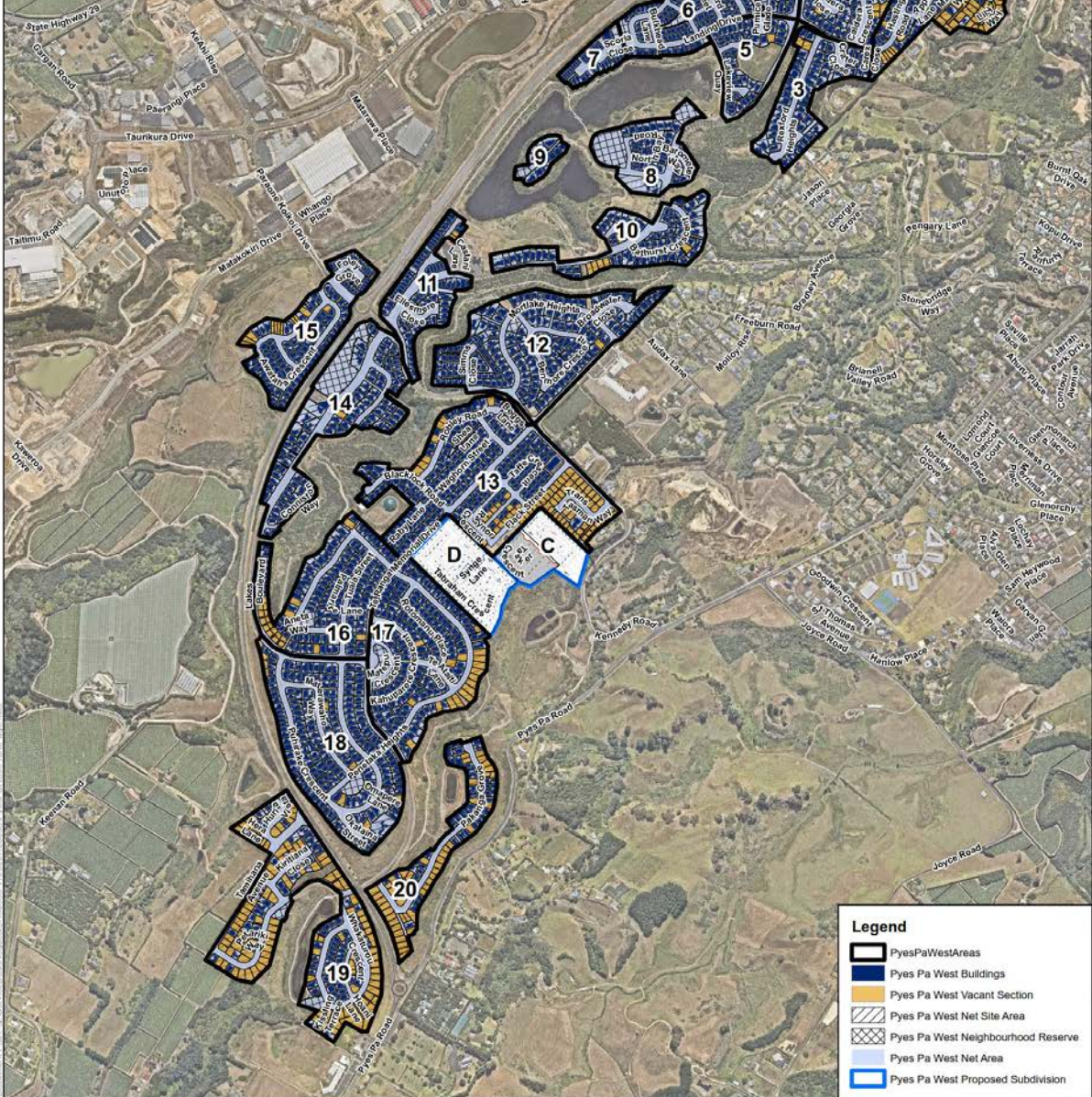


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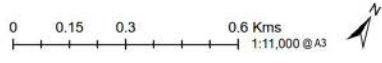


Aerial Photography: February 2020. Copyright and belongs to Teatangiwhi Aerials Pty Ltd. Data source: Information extracted from LINZ, GeoNet, Copyright: Teatangiwhi Aerials Pty Ltd.

Area	Dwellings	Vacant Sections	Total Yield	Gross Area(Ha)	Gross Dwellings/Ha	Net Site Area (Ha)	Net Site Dwellings/Ha	Net Area (Ha)	Net Area Dwellings/Ha
1	103	43	146	9.86	14.81	7.63	10.13	9.86	14.81
2	66	12	78	7.31	10.67	5.24	14.89	7.31	10.67
3	55	3	58	5.85	9.91	4.48	12.95	5.85	9.91
4	53	0	53	4.33	12.25	1.86	26.45	3.05	17.37
5	43	1	44	4.78	9.21	2.24	19.60	3.64	12.10
6	118	0	118	7.11	16.59	3.88	30.43	7.12	16.57
7	36	0	36	1.74	20.64	0.98	36.57	1.83	19.86
8	39	0	39	5.14	7.59	2.64	14.80	6.09	6.41
9	11	0	11	1.17	9.44	0.88	12.49	1.17	9.44
10	65	6	71	6.86	10.86	4.80	14.81	6.47	10.98
11	69	2	71	5.09	13.96	3.33	21.31	5.09	13.96
12	174	1	175	14.00	12.50	10.11	17.31	13.70	12.78
13	205	83	288	18.63	15.46	12.82	22.46	18.08	15.93
14	97	1	98	10.12	9.68	5.80	16.88	11.27	8.70
15	118	12	130	7.18	18.11	5.18	25.11	7.14	18.20
16	123	22	145	10.59	13.89	7.55	19.21	10.64	13.63
17	162	17	179	13.42	13.33	9.34	19.17	13.29	13.47
18	198	9	207	15.43	13.41	11.02	18.79	15.40	13.44
19	88	109	197	16.09	12.24	11.24	17.53	15.86	12.42
20	46	46	92	6.19	14.85	4.76	19.34	6.07	15.15
Total	1869	367	2236	170.88	13.10	115.78	19.31	168.91	13.24
Proposed									
A	0	58	58	4.54	12.78	3.89	14.92	4.54	12.78
B	0	11	11	0.57	18.16	0.57	19.16	0.57	18.16
C	0	58	58	3.61	16.05	2.84	20.40	3.61	16.05
D	0	94	94	5.11	18.39	4.09	23.00	5.11	18.39
Proposed Total	0	221	221	13.84	15.97	11.39	19.40	13.84	15.97
Total Incl Proposed	1869	588	2457	184.52	13.32	127.17	19.32	182.75	13.44

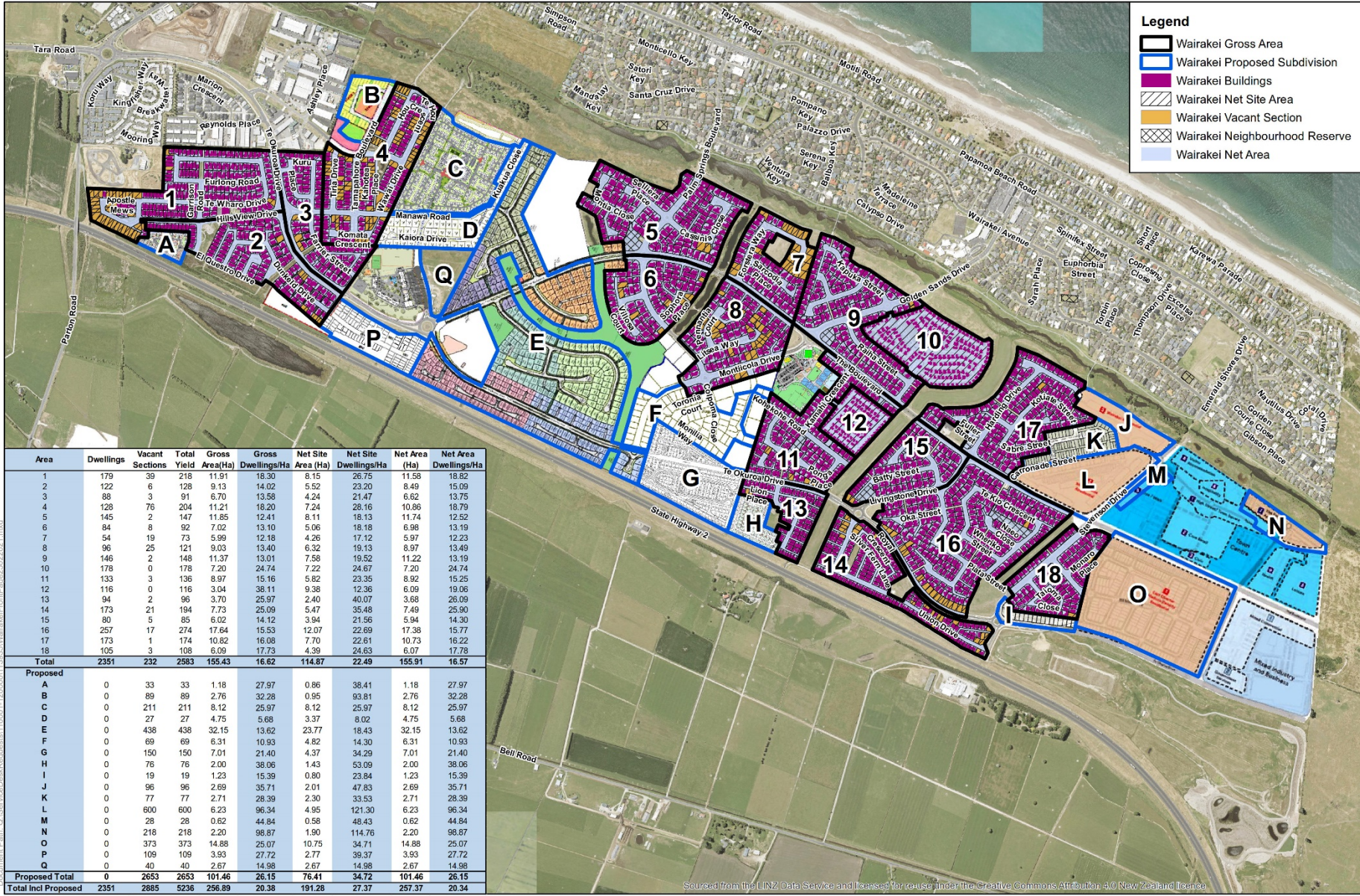


Pyes Pa West Dwelling Density



Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.





Area	Dwellings	Vacant Sections	Total Yield	Gross Area(Ha)	Gross Dwellings/Ha	Net Site Area (Ha)	Net Site Dwellings/Ha	Net Area (Ha)	Net Area Dwellings/Ha
1	179	39	218	11.91	18.30	8.15	28.75	11.58	18.82
2	122	6	128	9.13	14.02	5.52	23.20	8.49	15.09
3	88	3	91	6.70	13.58	4.24	21.47	6.62	13.75
4	128	76	204	11.21	18.20	7.24	28.16	10.86	18.79
5	145	2	147	11.85	12.41	8.11	18.13	11.74	12.52
6	84	8	92	7.02	13.10	5.06	18.18	6.98	13.19
7	54	19	73	5.99	12.18	4.26	17.12	5.97	12.23
8	96	25	121	9.03	13.40	6.32	19.13	8.97	13.49
9	146	2	148	11.37	13.01	7.56	19.52	11.22	13.19
10	178	0	178	7.20	24.74	7.22	24.67	7.20	24.74
11	133	3	136	8.97	15.16	5.82	23.35	8.92	15.25
12	116	0	116	3.04	38.11	9.38	12.36	6.09	19.06
13	94	2	96	3.70	25.97	2.40	40.07	3.68	26.09
14	173	21	194	7.73	25.09	5.47	35.48	7.49	25.90
15	80	5	85	6.02	14.12	3.94	21.56	5.94	14.30
16	257	17	274	17.64	15.53	12.07	22.69	17.38	15.77
17	173	1	174	10.82	16.08	7.70	22.61	10.73	16.22
18	105	3	108	6.09	17.73	4.39	24.63	6.07	17.78
Total	2351	232	2583	155.43	16.62	114.87	22.49	155.91	16.57
Proposed									
A	0	33	33	1.18	27.97	0.86	38.41	1.18	27.97
B	0	89	89	2.76	32.28	0.95	93.81	2.76	32.28
C	0	211	211	8.12	25.97	8.12	25.97	8.12	25.97
D	0	27	27	4.75	5.68	3.37	8.02	4.75	5.68
E	0	438	438	32.15	13.62	23.77	18.43	32.15	13.62
F	0	69	69	6.31	10.93	4.82	14.30	6.31	10.93
G	0	150	150	7.01	21.40	4.37	34.29	7.01	21.40
H	0	76	76	2.00	38.06	1.43	53.09	2.00	38.06
I	0	19	19	1.23	15.39	0.80	23.84	1.23	15.39
J	0	96	96	2.69	35.71	2.01	47.83	2.69	35.71
K	0	77	77	2.71	28.39	2.30	33.53	2.71	28.39
L	0	600	600	6.23	96.34	4.95	121.30	6.23	96.34
M	0	28	28	0.62	44.84	0.58	48.43	0.62	44.84
N	0	216	216	2.20	98.87	1.90	114.76	2.20	98.87
O	0	378	378	14.88	25.07	15.75	34.71	14.88	25.07
P	0	109	109	3.93	27.72	2.77	39.37	3.93	27.72
Q	0	40	40	2.67	14.98	2.67	14.98	2.67	14.98
Proposed Total	0	2653	2653	101.46	26.15	76.41	34.72	101.46	26.15
Total Incl Proposed	2351	2885	5236	256.89	20.38	191.28	27.37	257.37	20.34

Wairakei Dwelling Density



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Papamoa Dwelling Density



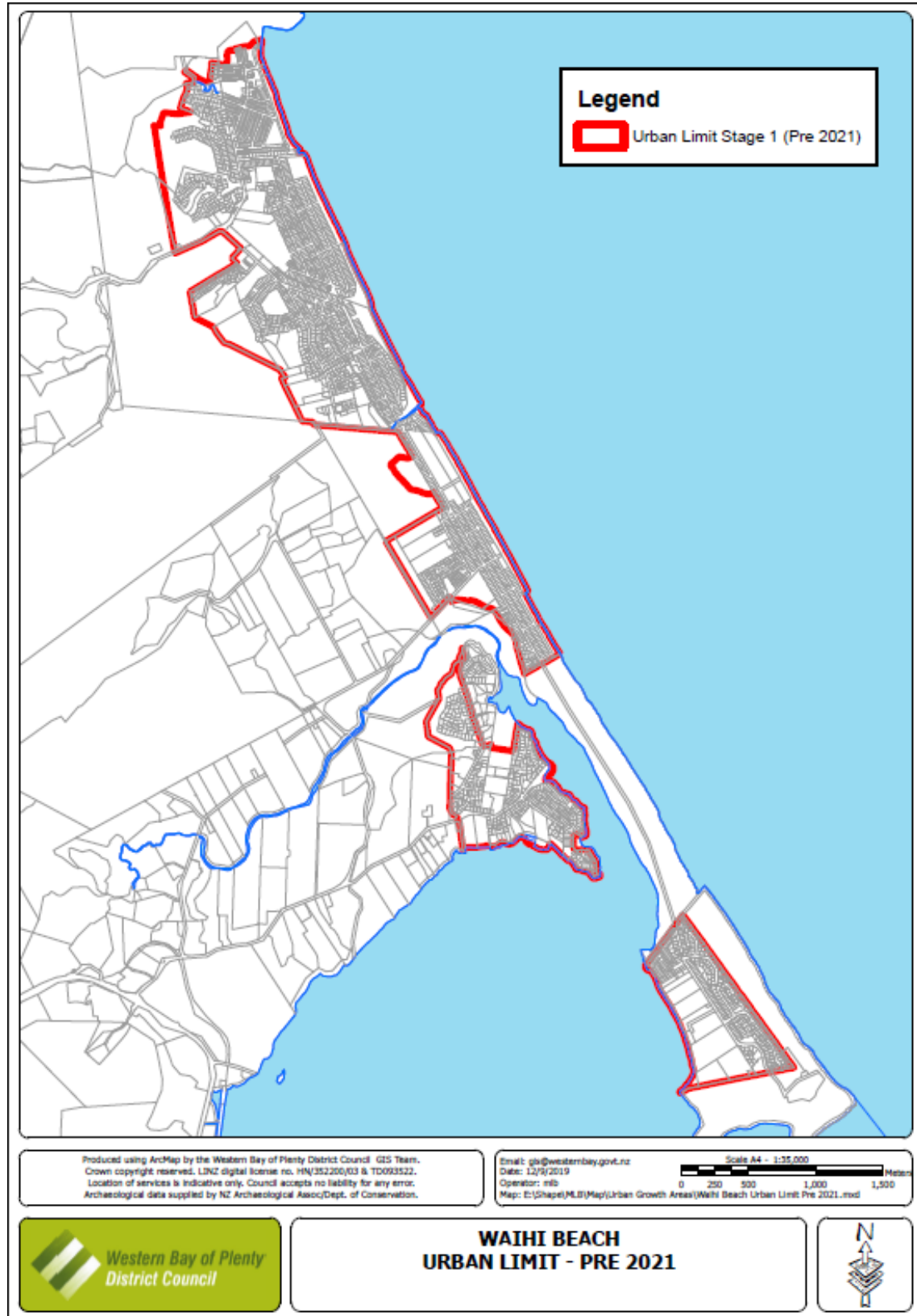
Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.



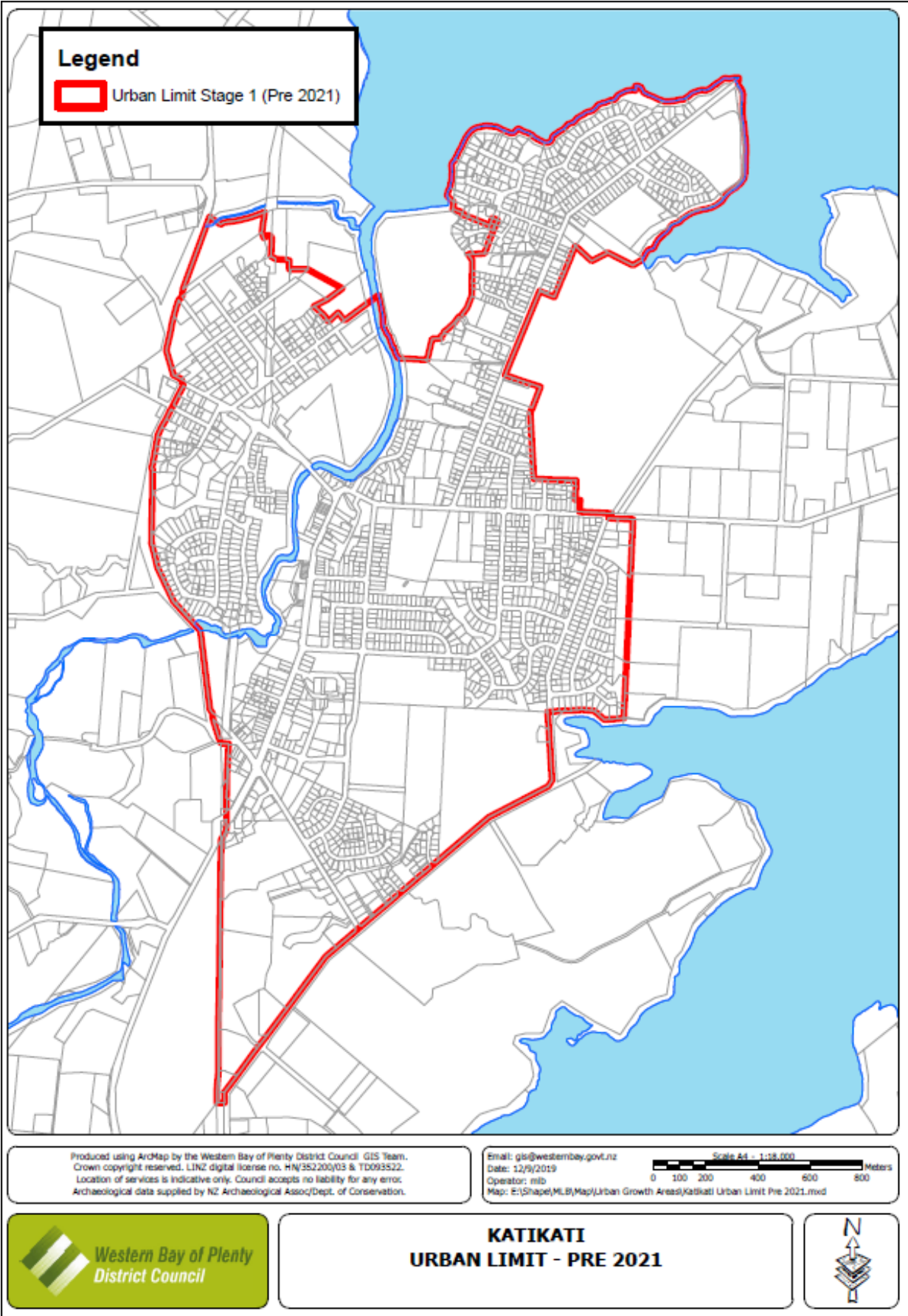
Appendix 8

Western Bay of Plenty District Stage 1 Areas for Urban Growth Area Sequencing

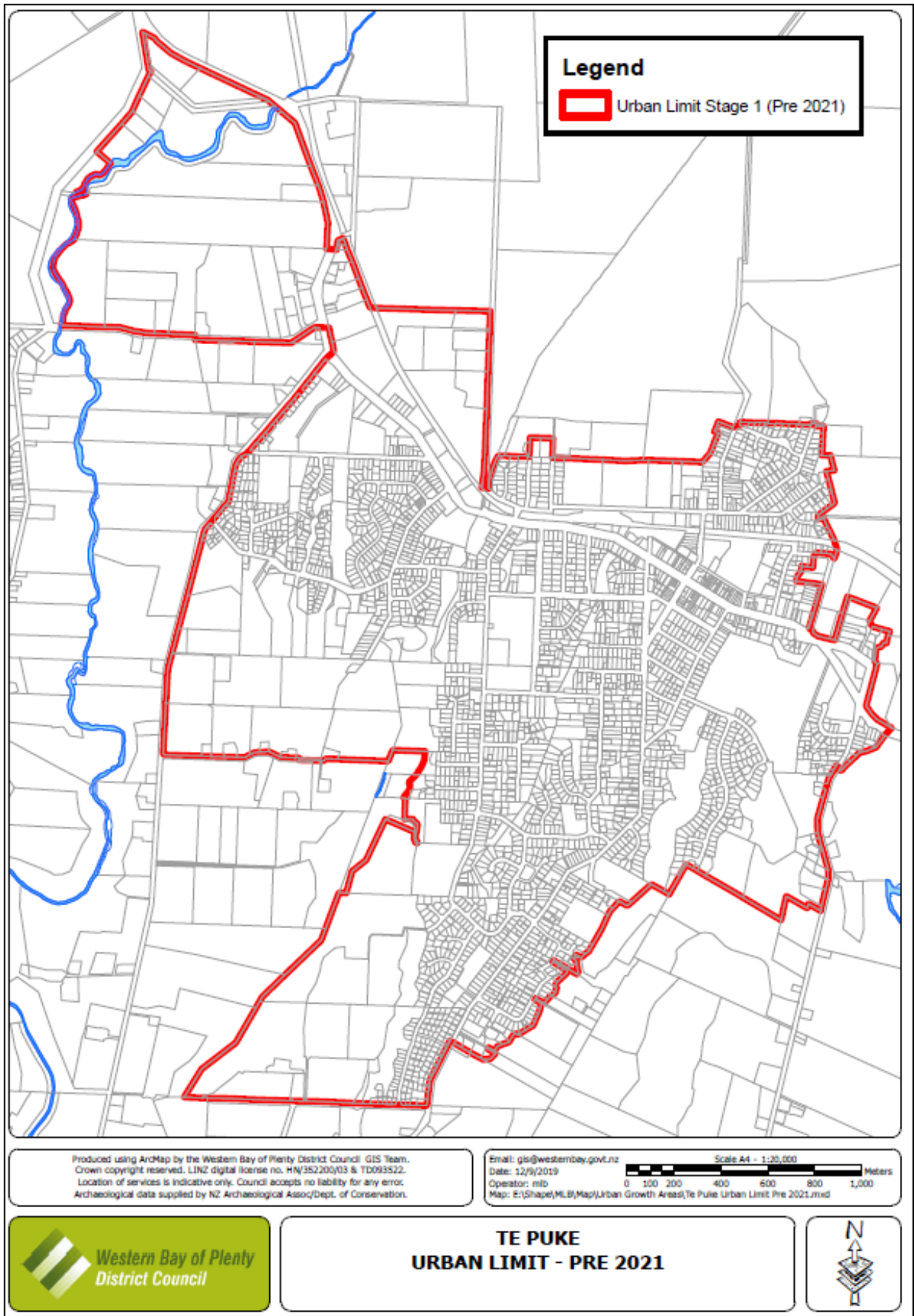
Waihi Beach



Katikati



Te Puke



Omokoroa

