SmartGrowth Development Trends

Technical Report 2021

Tauranga City

Western Bay of Plenty District Council

BAY OF PLENTY REGIONAL COUNCIL TOI MOANA

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SmartGrowth: Development Trends Technical Report 2021

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

2020 – 2021

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Executive Summary

Executive Summary – July 2020 to June 2021
Comparison with previous year

Indicator	Tauranga City	Western Bay of Plenty District
 Dwelling consents issued	▲ 19%	▲ 47%
 New lots created	▼ -3%	▼ -12%
 Dwelling sales prices	▲ 19%	▲ 22%
 Dwelling rents	▲ 8.1%	= -
 Dwellings sold	▼ -2.5%	▼ -2.3%
 Mean floor size	▼ -5m^2	▼ -5m^2
 2-Bedroom dwellings	▲ 97%	▲ 14%
 3-Bedroom dwellings	▼ -10.5%	▲ 54%
 Non-residential buildings	▼ -9.5%	▲ -28%

Legend: ▲ Up = Same as previous ▼ Down

Residential Building Activity

Sub-region

- Building consents issued for new dwellings increased by 26% (413 consents) in 2020/2021, in the Western Bay of Plenty sub-region compared to the previous year (refer Figure 1).

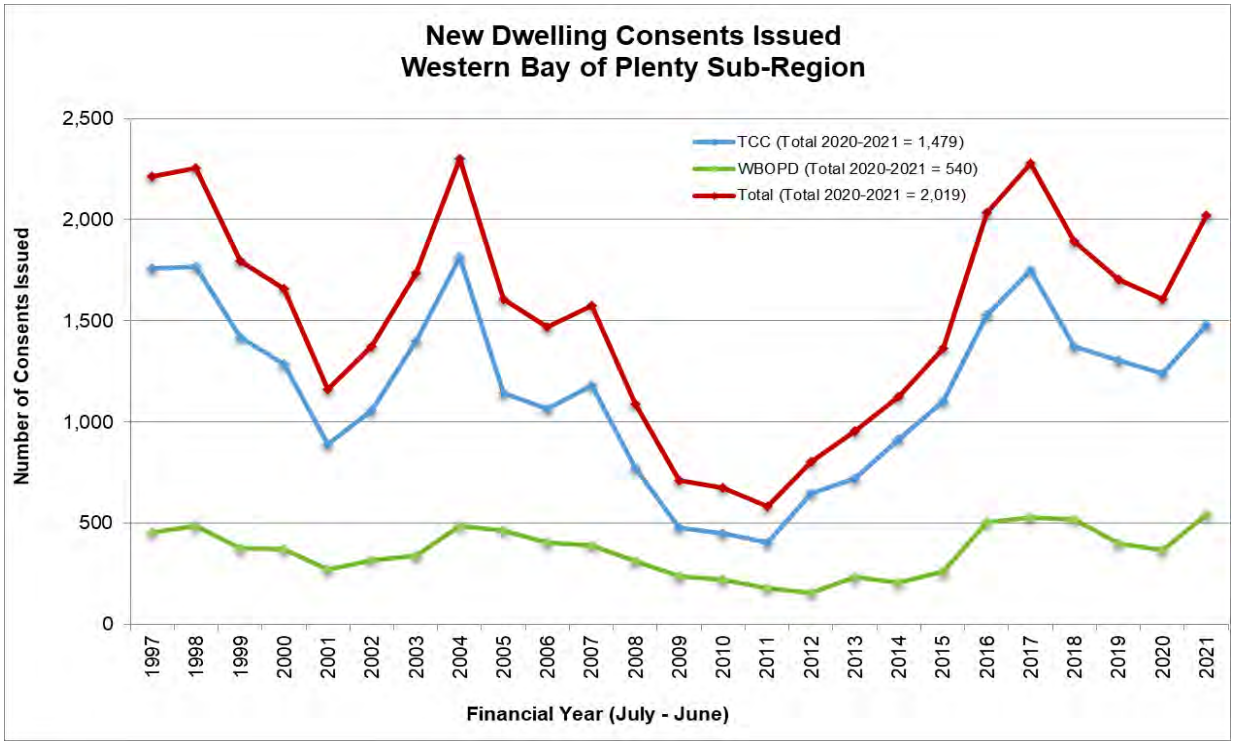
Tauranga City

- In Tauranga City, 69% of the new dwellings consented in 2020/21 were located in the Greenfield Urban Growth Areas (UGAs), with the number of dwellings declining by 4% from the previous year.
- The infill areas accommodated the remaining 31% of the dwellings, which increased from 169 to 456 dwellings from 2019/20 to 2020/21. The Farmers' redevelopment contributed around 26% (121 dwellings) to the 2020/21 dwellings consented in the infill areas.
- Building consents issued for new dwellings in 2020/21 increased in Bethlehem, Pyes Pa, Ohauiti, and Papamoa Greenfield Urban Growth Areas from the 2019/20 results, while it declined in other UGAs (refer Table 1).

Western Bay of Plenty District - WBOPD

- In the UGA's, dwelling consents issued is still the highest for Ōmokoroa with 274 consents, an increase of 155 consents from 2019/2020 to 2020/2021.
- Dwelling consents issued increased in Waihi Beach-Bowentown with 18 consents, while both Te Puke (-22%) and Katikati (-10%) UGA's decreased in 2020/2021 compared to the previous year.
- Dwelling consents issued increased overall by 172 consents (or 47%) for Western Bay of Plenty District (refer to Figure 1).

Figure 1 New dwelling consents issued, Western Bay of Plenty sub-region, 1997 to 2021



From the lowest point in the last five years in 2019/20, dwelling consents issued in the sub-region increased by more than 26%, or 413 dwellings. Both Western Bay of Plenty District and Tauranga City recorded increases of 47% (173 dwellings) 19% or 240 dwellings, respectively during the reference period.

Residential Subdivision Activity

Sub-region

- Subdivision development in the sub-region declined by 5% from the 2019/20 results.

Tauranga City

- Subdivision activity was continuously declining in the last five years, from a high point in 2016/17 at 1,723 new lots, to the lowest point in 2020/21 at 698 new lots.
- In 2020/21, 82% of additional lots created in Tauranga City were in the Greenfield UGA's.

Western Bay of Plenty District

- The number of new lots created at 224 stage decreased in most of the urban growth areas (UGA's), except for Te Puke with 4 new lots created from 2019/2020 to 2020/2021
- All the rural areas increased in the number of new lots created from 2019/2020 to 2020/2021 with most of the increase in the Minden Statistical Area 2 (refer to table 2).
- More subdivision consents are expected for Ōmokoroa and Te Puke in the end of 2021 due to the staging of subdivision by the developers.

Table 1 Trends Summary – Tauranga City – 2019/2020 Compared to 2020/2021

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

Table 2 Trends Summary - WBOPD (Total) – 2019/2020 Compared to 2020/2021

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

Residential Development Capacity

Sub-region

- Dwelling consents issued in the Sub-region are higher than the dwelling projections between 1 July 2018 and 30 June 2021, with 350 (7%) more new dwelling consents issued than projected.
- Of the total estimated yield for the Greenfield UGA's in the sub-region, 26% capacity remained as at 30 June 2021.

Tauranga City

- In Tauranga City, the number of dwellings consented during the year to June 2021 were higher than the SmartGrowth projections by 23.6% or 283 dwellings.
- Remaining Greenfield UGA capacity was 22% as at 30 June 2021.
- Wairakei (Papamoa East) Greenfield UGA has the highest percentage of capacity remaining (52%), while Pyes Pa UGA has the least (4%).
- Tauranga City has a short term (0-3 years) projected dwelling supply shortfall under two scenarios (85% greenfield and 15% infill intensification and 65% greenfield and 35% 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 65%/35% 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 67 more dwelling consents were issued than projected compared to the SmartGrowth dwelling projection as at 30 June 2021.
- Remaining Greenfield UGA capacity was 39% as at 30 June 2021 (refer to Table 7).
- Ōmokoroa UGA (total) has the largest remaining capacity available with 60% (3,230 dwellings), Waihi Beach-Bowentown UGA has the lowest capacity remaining in Western Bay of Plenty District with 15% (519 dwellings).

Residential Sales and Rents

Tauranga City

- Average selling price (12 month rolling average)[1] increased by 19.5% to $825,000 in the last 12 months to 30 June 2021.
- Average dwelling rent (12 month rolling average) increased by 8.1% to $541 in the last 12 months to 30 June 2021.

Western Bay of Plenty District

- Average selling price (12 month rolling average) increased by 21.7% from $644,181 in June 2020 to $783,987 in June 2021.
- Average dwelling rent (12 month rolling average) declined by 0.7% to $422 in last 12 months to 30 June 2021.

Dwelling Typology

Tauranga City

- Standalone dwellings accounted for 60% of the dwellings consented in Tauranga City in 2020/21, declining from 76% in 2019/20.
- The decline in the proportion of stand alone dwellings were accompanied by the increase in the proportion of other dwelling typologies, including apartments, "townhouses, flats, units and other dwellings", and less for "retirement village units".[2]
- More than 75% of the dwellings consented in Tauranga City were single level dwellings.
- 7% of the dwellings consented were part of the 15-storey Elizabeth Towers building (Farmers' redevelopment).
- 2 and 3-bedroom dwellings comprised more than 75% of the dwellings consented in the last two years, with an increase of 12% in the proportion of 2-bedroom dwellings and a decrease of 15% of 3-bedroom dwellings consented in 2020/21 compared to 2019/20.
- From 2019/20 to 2020/21, 3-bedroom stand alone dwellings declined from 49% to 34% of all the dwellings consented.
- 67% of the dwellings consented in Tauranga City had floor areas smaller than 176m^2.
- Mean floor size of residential buildings decreased by 5m^2 from 152m^2 in 2019/20 to 147m^2 in 2020/21.

[1] Dwelling sales prices data was sourced from HUD NPS-UD dashboard. The 12-month rolling average selling price is calculated as the average of the monthly median selling prices across the 12 months to the reference month, hence, it is typically lower than the observed market selling prices.

[2] Dwelling typologies are Statistics New Zealand's classifications, with data published monthly through Infoshare

Western Bay of Plenty District

- In 2020/2021 most of the dwellings consented in WBOPD were standalone dwellings (92%), followed by minor dwellings (5.4%) and 1.3% townhouses with over 90% of the dwellings were single storey dwellings (refer to table 17 & 19).
- 41% of the 2-storey dwellings were built in Ōmokoroa (18 dwellings), followed by Waihi Beach-Bowentown with 32% (14 dwellings).
- More than half (55%) of the dwellings consented in WBOPD were 3-bedrooms followed by 4-bedrooms (30%). In Ōmokoroa 61% of the dwellings consented were 3-bedroom dwellings.
- In Katikati and Te Puke the highest percentage of dwellings built has a floor area between 126-150m² (40% and 42% respectively), followed by a floor area in Ōmokoroa between 151-175m² (table 23).
- Mean floor size of residential building consents decreased by 5m² from 177m^2 in 2019/20 to 172m^2 in 2020/21.
- Stand alone "houses" and "townhouses, flats, units and other dwellings" were the only dwelling typologies consented during the year, comprising 90% and 10%, respectively.

Business Land and Activity

Sub-region

- Vacant industrial zoned land is currently available at Oropi, Te Maunga, Mount Maunganui, Tauriko, 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

- Tauranga City has a total of 24 new industrial and 25 commercial buildings consented in 2020/21, 2 less industrial buildings and 1 more commercial building compared to the previous year.

Western Bay of Plenty District

- Industrial building consents continue to be slow in 2020/2021 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 twentieth year that Tauranga City Council and Western Bay of Plenty District Council jointly monitor and report development trends in the sub-region. From 2007, the annual Development Trends Report 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 District[3]) as a high growth urban area. The National Policy Statement on Urban Development (NPS-UD) superseded NPS-UDC effective 20 August 2020 and classified the Tauranga urban area as tier 1 urban environment.

The NPS-UD requires under Section 3.9 "Monitoring Requirements" that every tier 1, 2, and 3 local authority must monitor, quarterly, the following[4]:

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.

The NPS-UD also requires every Tier 1, 2, and 3 local authority to publish the results of its monitoring at least annually.

In the last three years, the SmartGrowth Development Trends Report incorporated a number of relevant indicators that meet NPS-UDC/UD 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.

The NPS-UD also requires Tier 1 and Tier 2 local authorities to prepare a Housing and Business Development Capacity Assessment (HBA) every 3 years. In 2018, SmartGrowth completed the first HBA[5] that includes information about the range of business uses and dwelling types, and provides evidence-based estimates of demand and feasible capacity. The 2021 Housing Development Capacity Assessment was completed in July 2021 and sets out the housing component required for the Tauranga Tier 1 urban environment covering the urban areas of Tauranga City and the Western Bay of Plenty District.

SmartGrowth also progressed work on a 30-year Future Development Strategy (FDS) to drive the discussion and decision-making needed to manage the expected growth in the sub-region. Public

[3] 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.

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

[5] SmartGrowth Housing and Business Development Capacity Assessment for Tauranga City and WBOPD-Urban

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[6].

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.

Monitoring and reporting on the NPS-UDC 2016 Policy PB6 started in December 2017, while Policy PB7 indicators of price efficiency were incorporated in the annual and quarterly monitoring reports from March 2018 to March 2020.

This year's annual report includes the NPS-UD 2020 monitoring results from September 2020. The Ministry of Housing and Urban Development (HUD) provided guides[7] to support the implementation of the NPS-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.

The NPS-UD also required Tier 1 and Tier 2 local authorities to provide a competitiveness margin of development capacity over and above expected demand. The 2019/20 monitoring included a "competitiveness margin" added on top of the projected growth; plus 20% in the short-medium term (next 10 years) and plus 15% in the long term (11-30 years).

Table 3 outlines the indicators that are relevant to the NPS-UD 2020 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.17
		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.41
		Rents	Detailed Geographic Data on Dwelling Rents (Tauranga City and total WBOPD)	p.19
		Prices	Detailed Geographic Data on Dwelling Sale Prices (Tauranga City and total WBOPD)	p.18
	Business	Type	Building Consents by Type – Non-Residential (Tauranga City and total WBOPD)	p.50
b) Supply of dwellings	Residential	New Lots	New Lots Created (Tauranga City and WBOPD's Urban Areas)	p.10
		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.12
c) Housing affordability	Residential	Prices	Housing Affordability Measure (HAM) – Buy (Tauranga City and total WBOPD)	p.21
		Rents	Housing Affordability Measure (HAM) – Rents (Tauranga City and total WBOPD)	p.22

[6] A full HBA (both Housing and Business assessment) and FDS is required to be completed in time to inform 2024-2034 Long Term Plans.

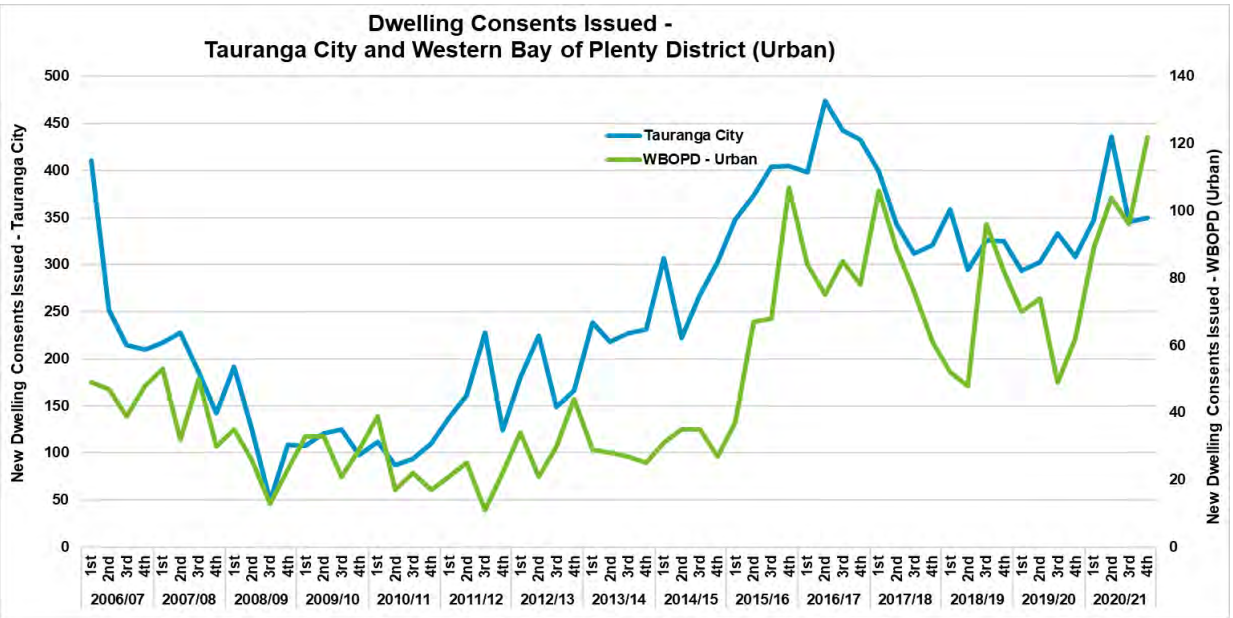
[7] The National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment (MBIE), June 2017 is still being used per advice from HUD.

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 2021



Residential building activities in the sub-region did not seem to be affected by COVID-19.

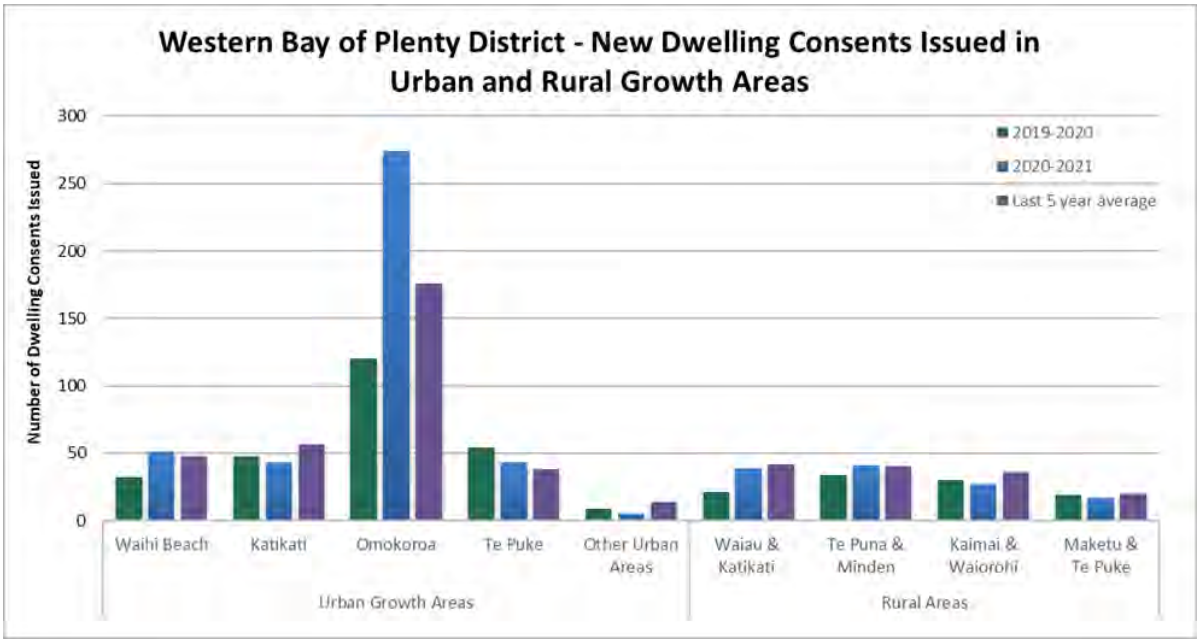
In the urban areas of WBOPD, dwelling consents issued increased by 61.2% (or 156 consents) from 2019/2020 to 2020/2021 while dwelling consents for total WBOPD increased with 172 (or 46.7%) consents in the same period. Most of the dwellings were consented in Ōmokoroa with 274 dwellings.

In Tauranga City, dwelling consents issued increased by 19% (or 240 dwellings) from 2019/20 to 2020/21. It was also higher compared to the averages in the last 5 and 10 years. In the last ten years, the highest annual record for new dwellings consented was in 2017 (1,748) and the lowest record was in 2012 (650).

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

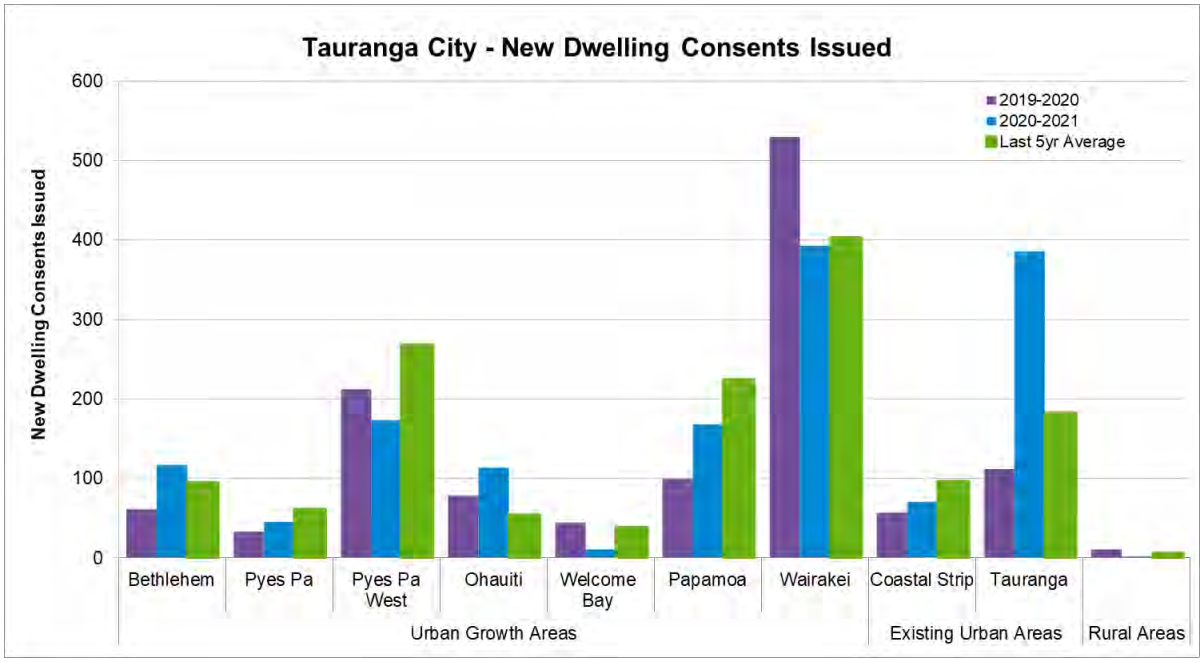
Dwelling consents		Trend	Change	% Change
Tauranga City				
This year	1,479			
Last year	1,239	↑	240	19%
Last 5 years (average)	1,429	↑	50	3%
Last 10 years (average)	1,206	↑	273	23%
Western BOPD – total				
This year	540			
Last year	367	↑	173	47%
Last 5 years (average)	471	↑	69	15%
Last 10 years (average)	372	↑	168	45%
Western BOPD – urban				
This year	411			
Last year	255	↑	156	61%
Last 5 years (average)	319	↑	92	29%
Last 10 years (average)	232	↑	179	77%

Figure 3 Dwelling consents issued by growth area, WBOPD, 2019 to 2021



Dwelling consents issued in 2020/2021 increased by 58% in the Greenfield UGA's and 19% in the rural areas, compared to 2019/2020. The UGA's still have the highest increase in dwelling consents issued, with Ōmokoroa increase with 154 consents and Waihi Beach-Bowentown with 19 consents, compared to the previous year while dwelling consents issued in the rural areas increased in Waiau/ Katikati (with 18 consents) and Te Puna/ Minden (with 7 consents).

Figure 4 New dwelling consents issued by growth area, Tauranga City, 2019 to 2021

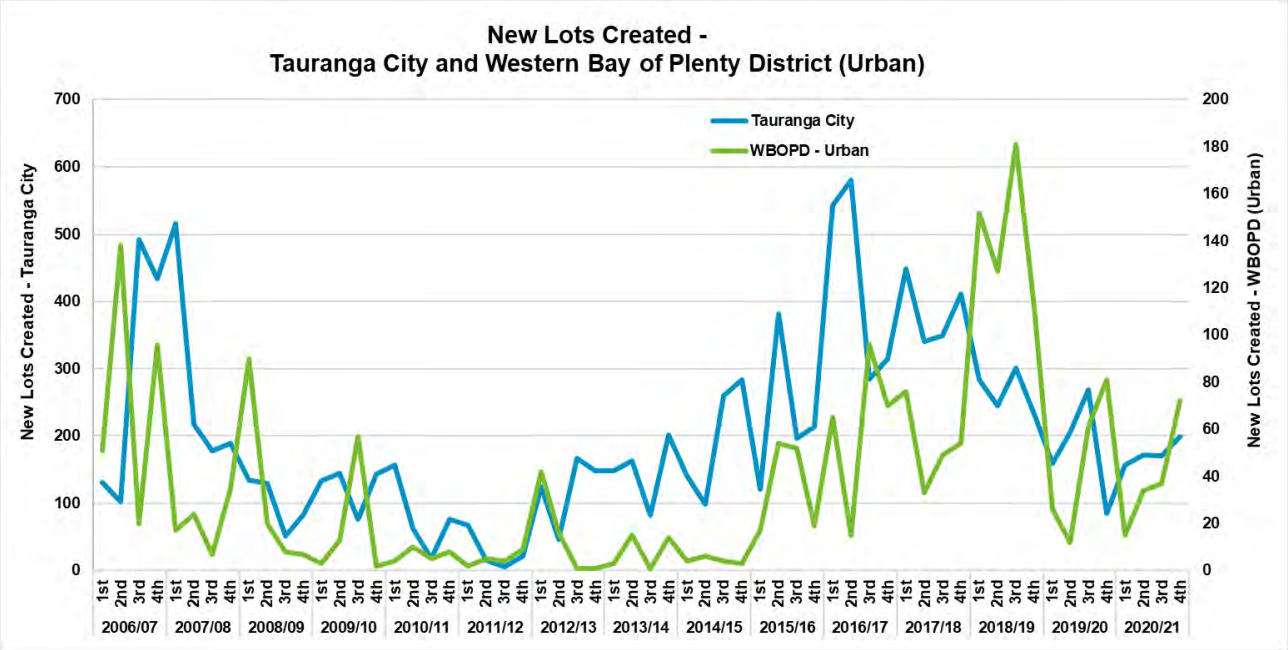


In Tauranga City, a total of 1,479 new dwellings were consented in 2020/21, where 69% were located in the Greenfield UGAs, with the remaining 31% issued in the existing urban areas. Although there's an overall increase of 19% in the number of dwellings consented in the City in 2020/21 compared to the previous year, the Greenfield UGAs recorded a decline of 4% or 38 dwellings. Conversely, dwelling consents issued in the existing urban areas were 2.7 times higher than the previous year's figure, due to multi-unit/high density development consented that includes Elizabeth Towers (Farmers' townhouses and apartments) and apartments on 4th Avenue and Montgomery Road.

From 2019/20 to 2020/21, Bethlehem, Pyes Pa, Ohauiti and Papamoa recorded increases of 12-68 dwelling consents issued, while Pyes Pa West (The Lakes), Welcome Bay and Wairakei recorded declines of 33-137, with Wairakei having the highest decline.

New Lots Created

Figure 5. New lots created, Tauranga City and WBOPD (urban), July 2006 to June 2021



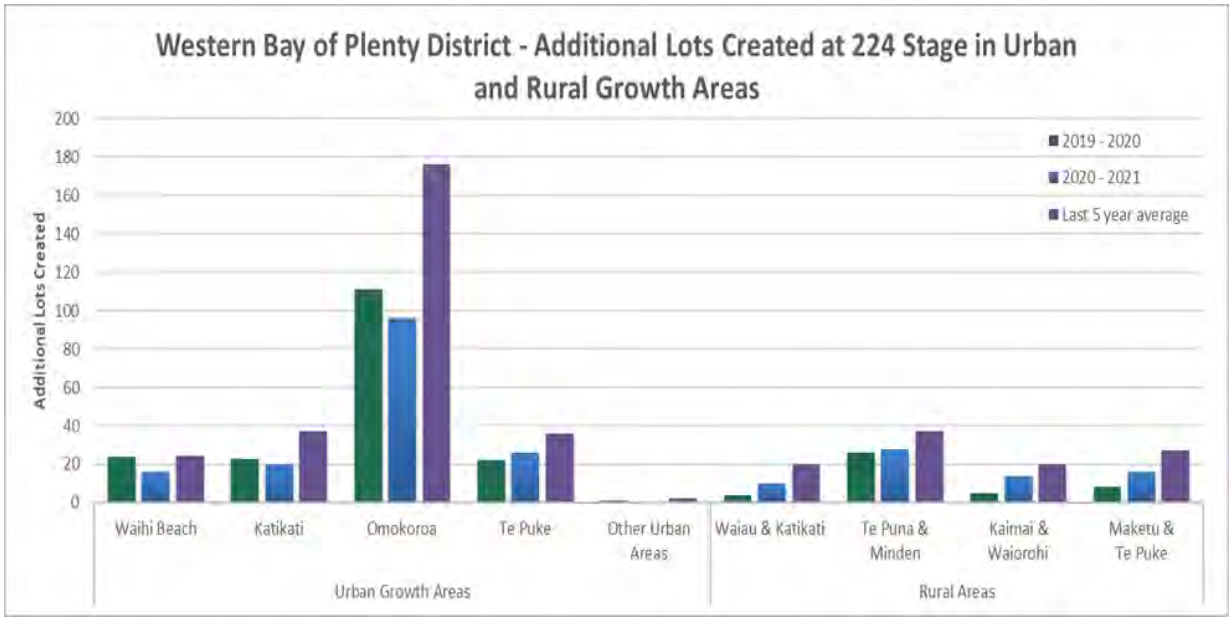
Subdivision activity in WBOPD-urban had a significant decline from 2018/2019 with 72% or 414 less lots created in UGAs compared to 2020/2021. Subdivision is expected to increase from the end of 2021 with new development in Ōmokoroa and Te Puke. New lots created in the UGA's were the lowest in 2014/2015 with an average of 4 new lots created per quarter, compared to the average of 40 new lots created in 2019/2020.

The shortage in the supply of zoned land for subdivision was evident in Tauranga City. Subdivision activity was declining in the last five years, from a high point in 2016/17 at 1,723 new lots, to the lowest point in 2020/21 at 698 new lots created. On a monthly basis, new lots created declined from 144 in 2016/17 to 60 and 58 new lots per month in 2019/20 and 2020/21, respectively.

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

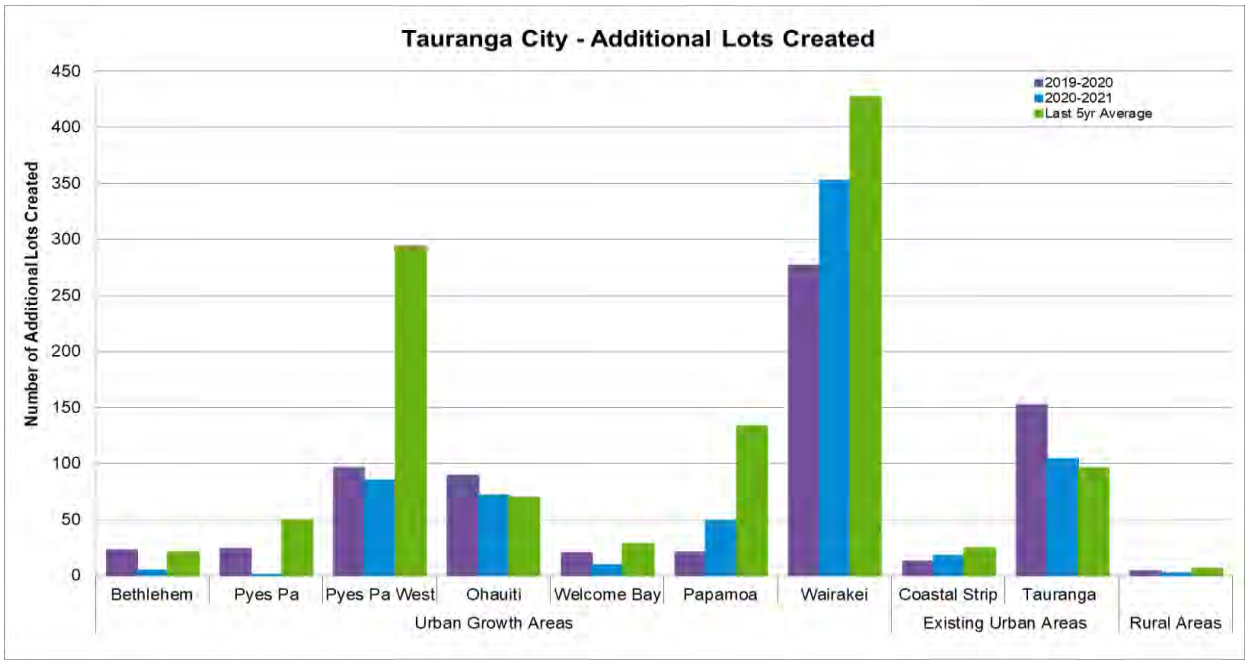
New lots		Trend	Change	% Change
Tauranga City				
This year	698			
Last year	718	↓	-20	-2.8
Last 5 years (average)	1,150	↓	-452	-39.3
Last 10 years (average)	864	↓	-166	-19.2
Western BOPD – Urban				
This year	159			
Last year	180	↓	-21	-11.7
Last 5 years (average)	274	↓	-115	-41.9
Last 10 years (average)	164	↓	-5	-3.1

Figure 6 Additional lots created by growth area, WBOPD, 2019 to 2021



New lots created declined in all the urban growth areas in 2020/2021, except in Te Puke with 4 more subdivision consents created, while all the rural areas increased for the same period. New lots created in Ōmokoroa and Te Puke are still the highest with 96 and 26 respectively, while the rural areas with the highest subdivision activity was Te Puna/ Minden with 28 new lots created. Ōmokoroa and Te Puke will fluctuate with subdivision activities due to the timing of the stages by developers.

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



Of the 698 new lots created in 2020/21, 82% or 574 lots were created in Greenfield UGAs, while 122 lots or 17% were created in existing urban areas. Compared to the previous year, subdivision development in the Greenfield UGAs increased by 5% or 25 new lots, while it declined by 25% or 43 lots in the existing UGAs in the same period.

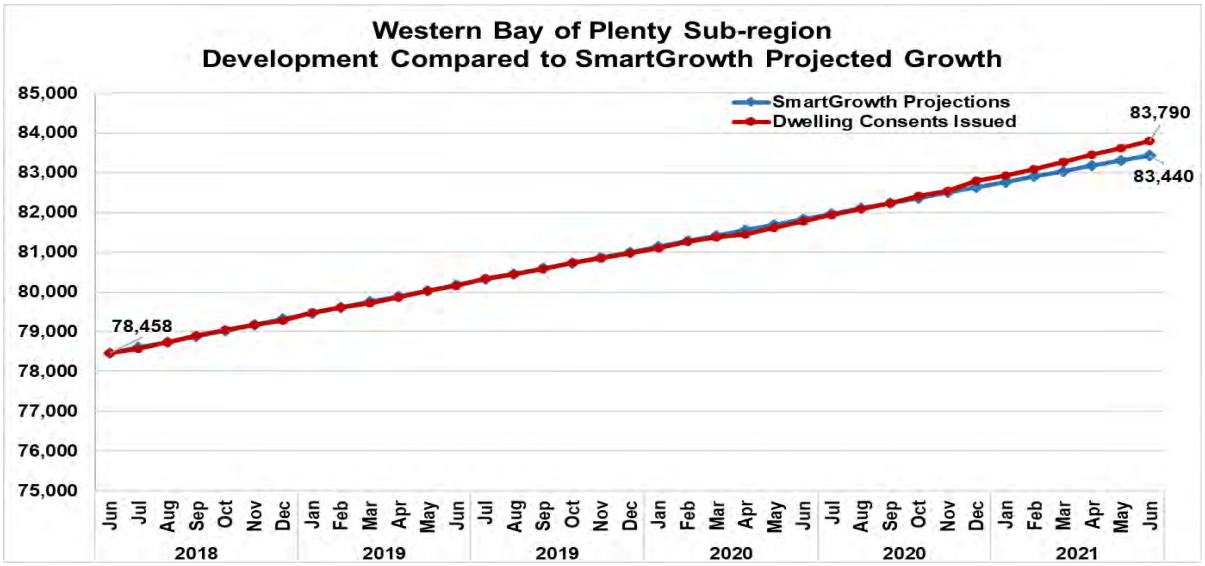
Among the Greenfield UGAs, subdivision activity was highest in Wairakei in the last five years, at an average of 427 new lots per year. In 2020/21, subdivision activity increased by a respective 133% (28 lots) and 27% (76 lots) in Papamoa and Wairakei compared to the previous year while it declined by 11% to 78% in other Greenfield UGAs, with the highest decline in Bethlehem.

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 Waikato[8] in 2014. Since the release of the 2018 Census results, the NIDEA projections were re-aligned to accommodate the higher population increase as per Census and the population estimates that Statistics New Zealand releases annually.

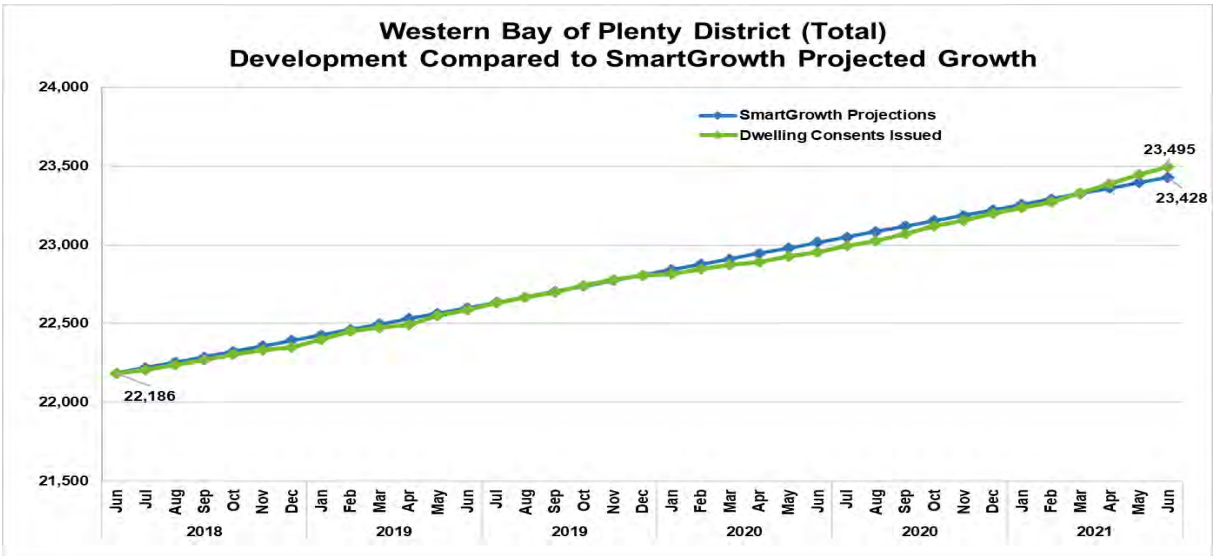
At June 2018, the population for the Western Bay of Plenty sub-region was 195,400[9]. The population of the sub-region is projected to increase to 281,960 people (+86,560 people) by 2050, while the number of dwellings is projected to increase from 78,663 to 114,650 over that period.

Figure 8 Dwelling consents issued compared to SmartGrowth projected growth, WBOP sub-region, 2018 to 2021



Dwelling consents issued in the Sub-region are higher than the dwelling projections between 1 July 2018 and 30 June 2021, with 347 (7%) more new dwelling consents issued than projected.

Figure 9 Dwelling consents issued compared to SmartGrowth projected growth, WBOPD, 2018 to 2021

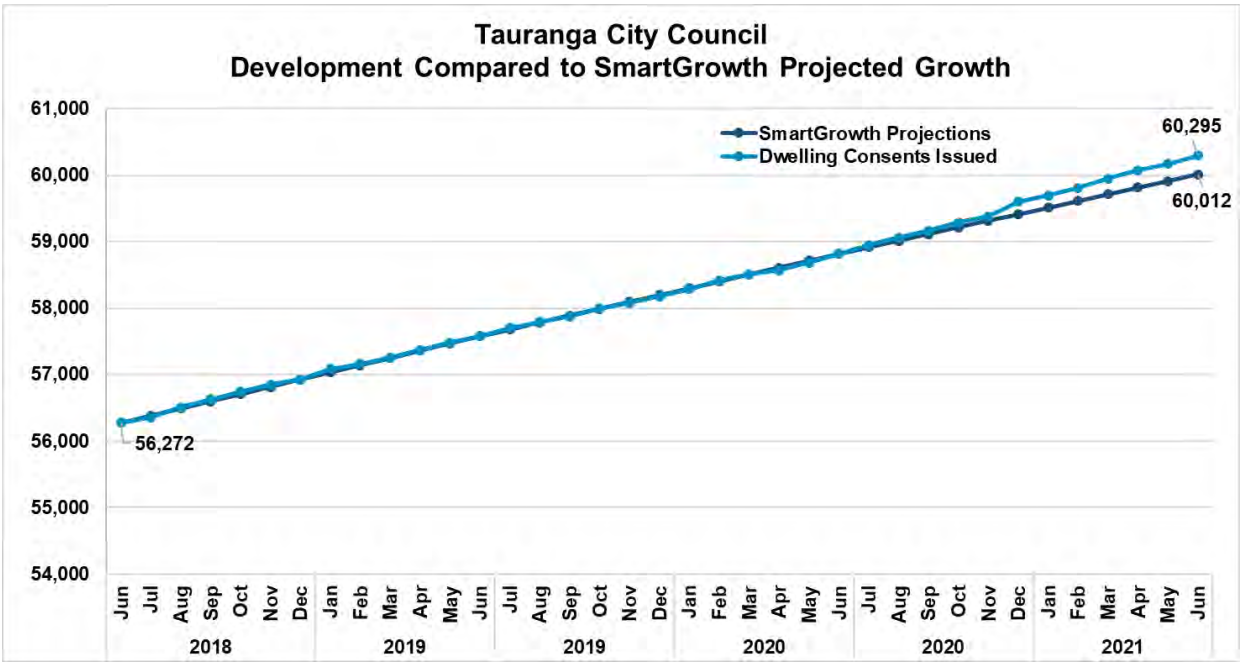


[8] The revised projections were adopted by the SmartGrowth Committee on 28 May 2014 and updated by both Councils in April 2021.

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

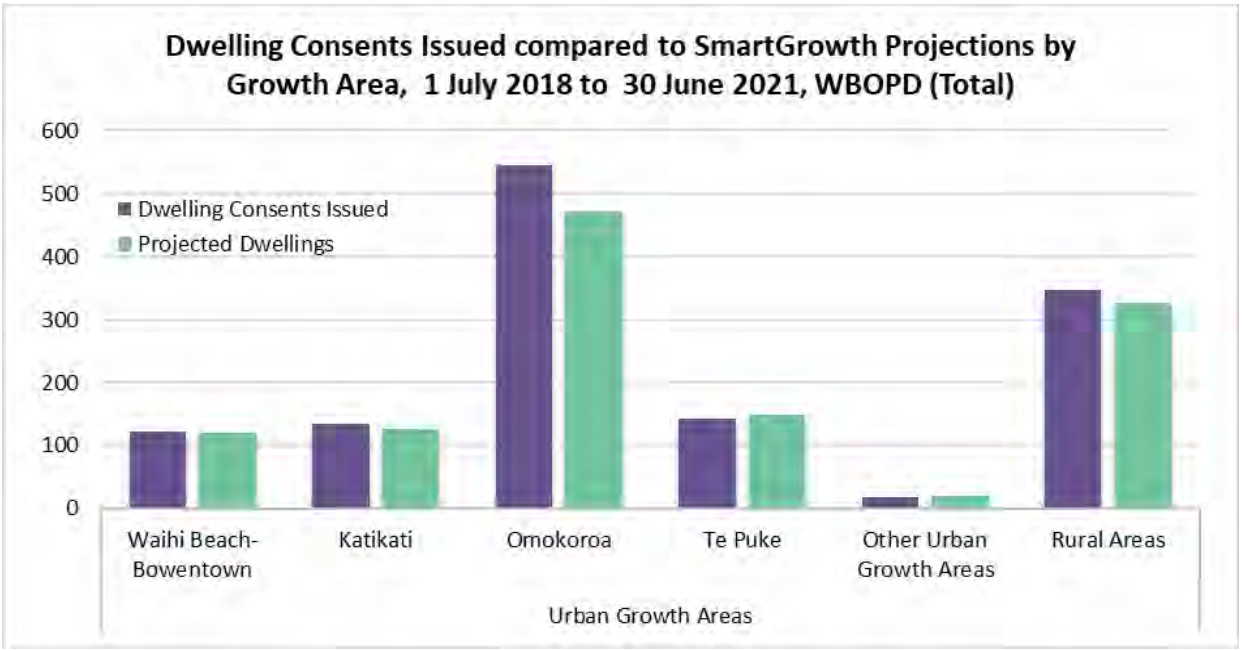
Dwelling consents issued in WBOPD are very close to the dwellings projected with 67 more dwelling consents issued than the SmartGrowth projections between 1 July 2018 and 30 June 2021.

Figure 10 Dwelling consents issued compared to SmartGrowth projected growth, Tauranga City, 2018-2021



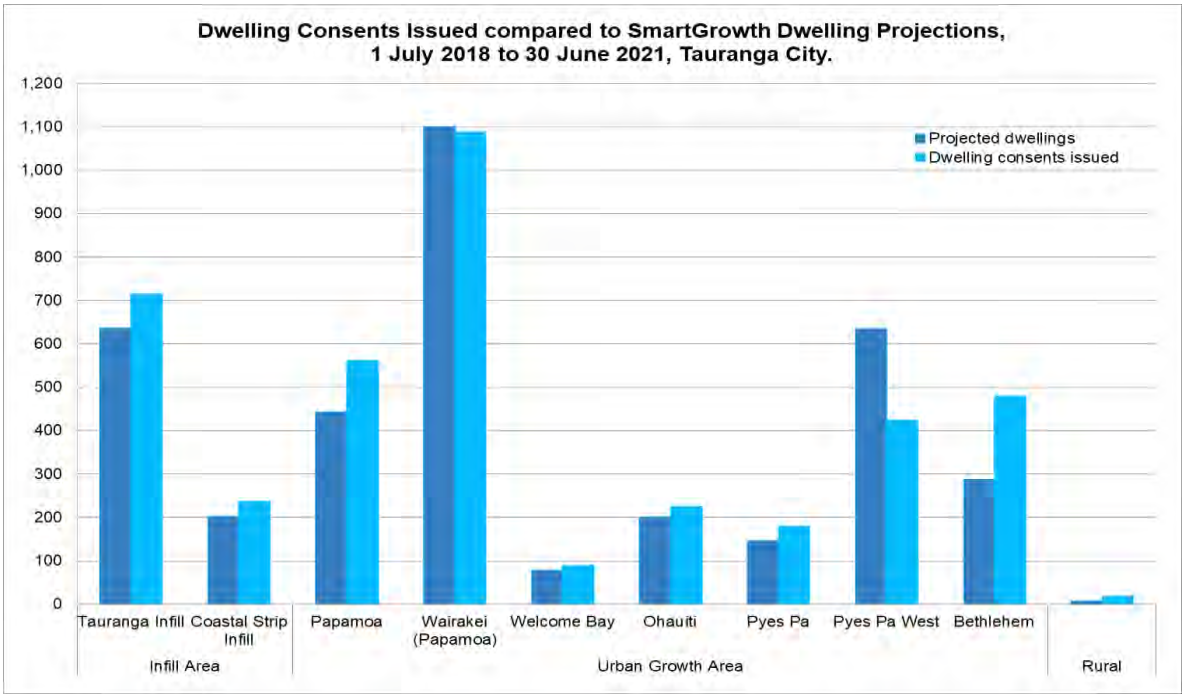
In Tauranga City, the number of dwellings consented between 1 July 2018 and 30 June 2021 were higher than the SmartGrowth projections by 7.6% (or 283 dwellings consents).

Figure 11 Dwelling consents issued compared to SmartGrowth projections by growth area, WBOPD, 1 July 2018 to 30 June 2021



From July 2018 to June 2021, the actual dwelling consents issued are close to the dwelling projections, except for Ōmokoroa with 73 more dwellings than projected. In the rural areas, 21 more dwellings were consented (347 consents) compared to SmartGrowth projections of 326 consents.

Figure 12 Dwelling consents issued compared to SmartGrowth projections by growth area, Tauranga City, 1 July 2018 to 30 June 2021



Tauranga City has 283 (8%) more dwellings consented than the SmartGrowth projected allocation for the period July 2018 to June 2021, with more than half of this increment located in the Greenfield UGAs. While Wairakei recorded the biggest proportion (more than one third or 36%) of the new dwellings consented in the UGAs, it was slightly (1% or 12 dwellings) less than the SmartGrowth projections. Pyes Pa West also had lower number of dwellings consented (211 or 33%) than projected while all other UGAs recorded increments of 12% to 27%.

In the same period, 115 more dwellings were consented in the infill areas compared to the SmartGrowth projections, with Tauranga infill and Coastal strip recording a respective 12% and 18% increase, respectively. The actual number of dwellings consented in Tauranga infill area included the multi-unit/high density development/ redevelopment, including Elizabeth Towers (Farmers' townhouses and apartments), apartments at 4th Avenue and Montgomery Road.

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 (4%), and the lowest remaining dwelling capacity (113 dwellings), refer to Table 6.

Papamoa UGA which has the largest expected yield, has estimated potential for a further 1,290 dwellings. The majority of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block.

Wairakei UGA in Papamoa East was made operative in May 2011, providing further capacity for an estimated 5,500 dwellings. At 30 June 2021 it had the largest remaining dwelling capacity (2,860 dwellings) and highest percentage of capacity remaining (52%).

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 with release for development anticipated from 2025. Keenan Road and Ohauiti South future Greenfield UGA areas are expected to be the next areas to be structure planned for release post 2031.

By June 2024 it is estimated that capacity for a further 3,833 dwellings will remain in the current operative Greenfield UGA's, which is 12% of the total estimated yield of these UGA's, falling to 888 dwellings (or 3% of total yield) by 2031. For the future Greenfield UGA's it is anticipated that a further 11,700 dwellings will be added to the yield by 2031, with capacity for a further 8,300 dwellings (or 71%) of this additional yield estimated to remain at June 2031. It is anticipated that remaining dwelling capacity at Wairakei in 2031 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 with the balance (15%) accommodated in the established Infill Intensification parts of the City, and the second where the split is 65% Greenfield UGA and 35% 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 65% scenario without "competitiveness margin" applied[10].

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

				Short term (3 years)		Medium Term (10 years)	
Greenfield Urban Growth Area (UGA)	Estimated Yield - Total Dwellings	June 2021 total dwellings (existing and consented)	Remaining capacity as at June 2021	Estimated uptake June 2021 – June 2024	Estimated remaining capacity at June 2024	Estimated uptake June 2024-June 2031	Estimated remaining capacity at June 2031
Bethlehem	4,700	3,775	925	250	675	450	225
Pyes Pa	2,750	2,637	113	60	53	45	8
Pyes Pa West	2,550	2,172	378	300	78	100	-22
Ohauiti	1,800	1,579	221	150	71	50	21
Welcome Bay	2,150	1,944	206	50	156	100	56
Papamoa	11,900	10,610	1,290	450	840	800	40
Wairakei[1]	5,500	2,640	2,860	900	1,960	1,400	560
UGA (current) Sub-Total	31,350	25,357	5,993	2,160	3,833	2,945	888
Te Tumu [2]	6,000					1,700	4,300
Tauriko West [2]	3,000					1,700	1,300
Keenan Road [3]	2,000						2,000
Ohauiti South [3]	700						700
UGA (future) Sub-Total	11,700					3,400	8,300
Greenfields Total	43,050	25,357	5,993	2,160	3,833	6,345	9,188

	85% Greenfield/ 15% Infill Intensification		65% Greenfield/ 35% Infill Intensification	
	Short term	**Medium Term**	**Short term**	**Medium Term**
Projected Dwellings (Citywide)	3,513	7,904	3,513	7,904
Greenfield UGA Projection	2,986	6,718	2,283	5,138
Greenfield UGA plus 20% NPS-UD Competitiveness Margin	3,583	8,062	2,740	6,165
Estimated Greenfield Dwelling Uptake	2,160	6,345	2,160	6,345
City Shortfall[4]	**826**	**373**	**123**	**1,207**
City Shortfall Including NPS-UD Competitiveness	**1,529**	**1,954**	**826**	**373**

[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 post 2031.
[4] Red numbers indicate a shortfall, Blue numbers a surplus.

[10] 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 6[11]. 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 now 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 Ōmokoroa and Te Puke UGA's have the largest design capacity in the District consisting of over 4,300 dwellings. Waihi Beach has a large design capacity, but it has the lowest remaining capacity available due to coastal inundation areas.

Ōmokoroa UGA has the largest dwelling capacity remaining in the District with 3,233 dwellings with Stage 3 Structure Plan becoming operative by end of 2021. Both Katikati and Te Puke (Structure Plan 3) UGA's have large dwelling capacity remaining with 1,700 and 1,320 dwellings respectively.

There is still enough availability of land under the NPS-UD 20% competitiveness margin for the short, medium term and the 15% competitive margin for the long term, projected uptake in total Western Bay of Plenty District.

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

				Short Term - 3 years		Medium Term - 10 years	
Urban Growth Area	Total Capacity (Dwellings)	June 2021 Total dwellings (existing and consented)	Remaining capacity at June 2021	Protected uptake July 2021 – June 2024	Estimated remaining capacity at June 2024	Protected uptake July 2024 – June 2031	Estimated remaining capacity at June 2031
WB-Bowentown/ Athenree	3,553	3,034	519	106	413	82	331
Katikati*	3,988	2,288	1,700	110	1,590	255	1,335
Ōmokoroa**	5,385	2,152	3,233	480	2,753	1,175	1,578
Te Puke	4,387	3,067	1,320	275	1,045	735	310
Greenfields (current) Sub-Total	17,313	10,541	6,772	971	5,801	2,247	3,554

*Katikati capacity calculation includes the Park Road dairy farm and Tetley Road orchard.

**Ōmokoroa – Total include Stage 1, 2 and 3

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 5[12].

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.

[11] Western Bay Sub-Region Residential Development Capacity Review, Veros Property Services, May 2019

[12] 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 uncoccupied 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

Dwelling sales prices in the sub-region have continuously increased since June 2020. In June 2021, the average dwelling sales prices (12-month rolling average) in Tauranga City increased by 6.5 per cent compared to the previous quarter, while WBOPD had an increase of 2.1% in the same period. Compared to the same month the previous year, dwelling sales prices were 20% and 22% higher in Tauranga City and WBOPD respectively. House prices more than doubled in both territorial authorities in the last ten years.

Figure 13 Dwelling sales prices, Tauranga City and WBOPD, 2001/2021

Table 8 Dwelling Sales Prices (12-month rolling average[1])

Dwelling Sales Price		Trend	Change	% Change
Tauranga City				
June 2021	$825,000			
March 2021	$775,000	↑	$50,000	6.5
June 2020	$690,500	↑	$134,500	19.5
June 2017	$599,750	↑	$225,250	37.6
June 2011	$358,750	↑	$466,250	130
Western BOPD – Urban				
June 2021	$783,987			
March 2021	$767,521	↑	$16,466	2.1
June 2020	$644,181	↑	$139806	21.7
June 2017	$591,616	↑	$192,371	32.5
June 2011	$388,597	↑	$395,390	101.7

[1] Dwelling sales prices data was sourced from HUD NPS-UD dashboard. The 12-month rolling average selling price is calculated as the average of the monthly median selling prices across the 12 months to the reference month (e.g June, March), hence, it is typically lower than the observed market selling prices

Based on the dwellings sold during the year, Te Puke East recorded the highest increase in median house price among the WBOPD urban areas as at June 2021 compared to the same month in the previous year at 43%, followed by Omokoroa and Waihi Beach at 17% and 14%, respectively.

In Tauranga City, the median house price in Pacific View was almost three times the previous year's level as at June 2021, having increased by 194%. The other area units that recorded significant increases in median house prices in the same period include Otumoetai North (122%), Mount Maunganui North (88%) and Bethlehem (80%). Conversely, Tauranga Central recorded the biggest decline of 23% in median house price in the same period.

Figure 14 Dwelling sales prices, June 2021

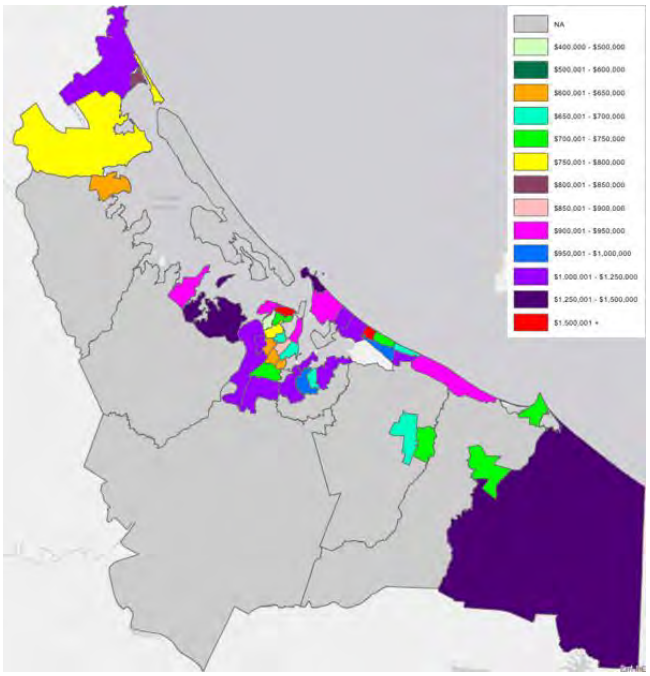
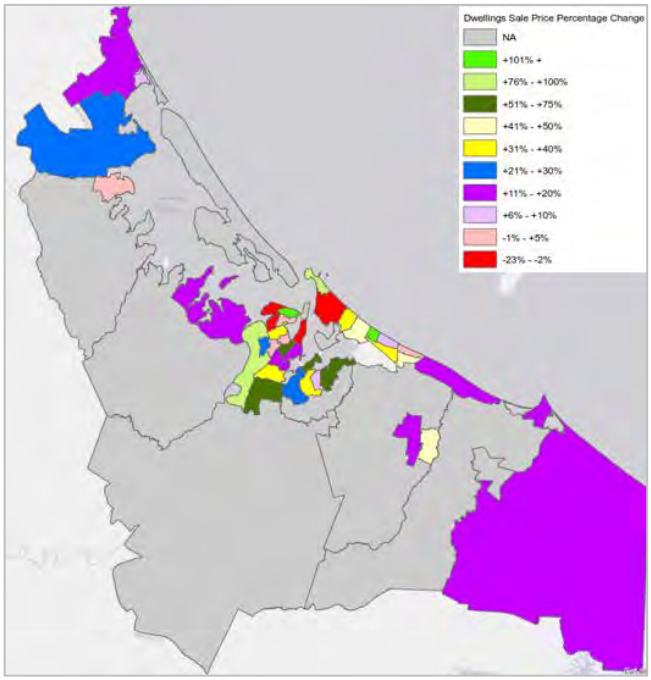


Figure 15 Change in dwelling sales prices, June 2020 to June 2021



Source of raw data: HUD NPS-UD

Dwelling Rents

While dwelling rents in Tauranga City had been increasing in the last ten years, rent fluctuations were observed in WBOPD, which were particularly evident in the last three years as shown in the figure below[13]. It must be noted that these results may not be a true indication of the current rental market as they only reflect properties where bonds have been lodged in the previous 6 months of the reference quarter. Refer to Appendix 1 for an explanation of this indicator.

Figure 16 Dwelling rents, Tauranga City and WBOPD (urban), 2001/2021

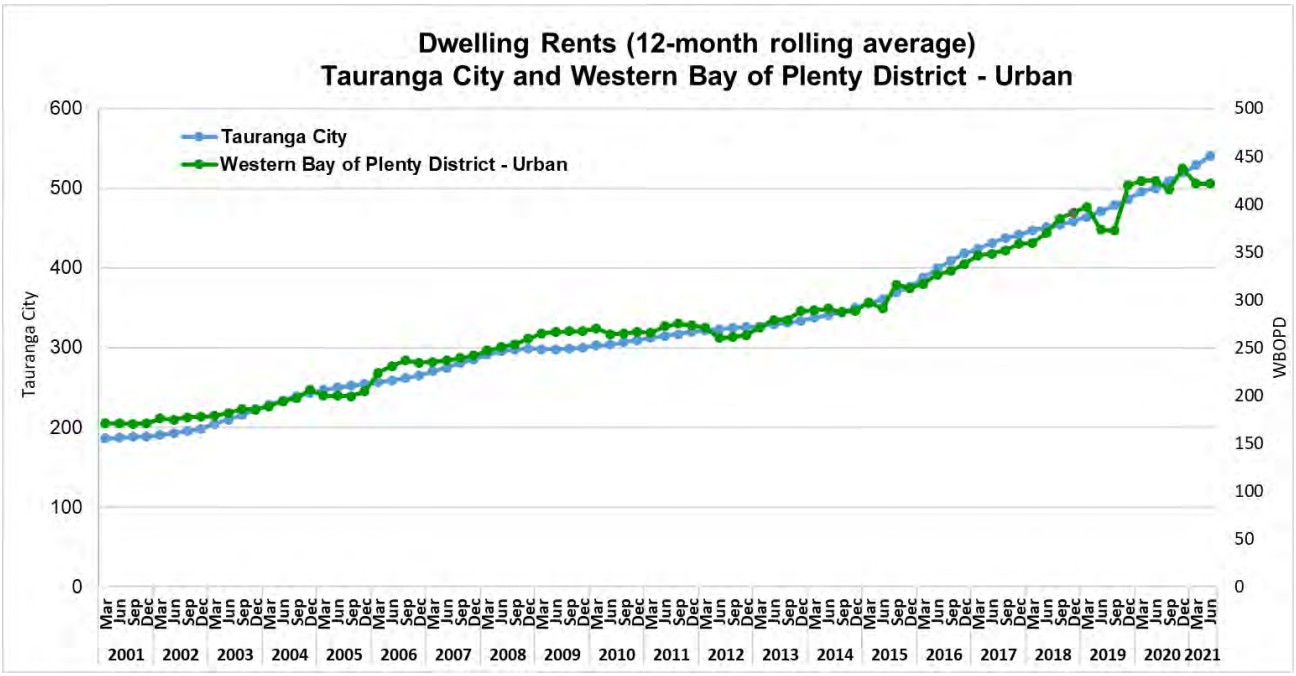
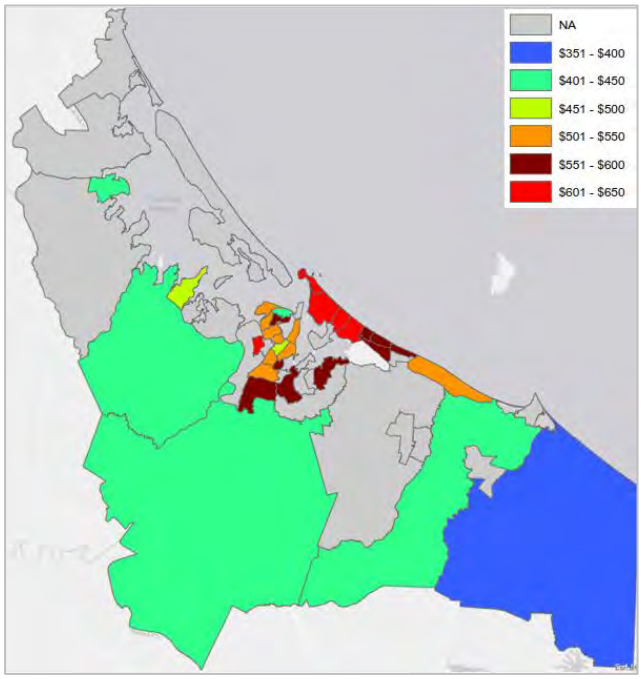


Table 9 Dwelling rents

Dwelling Rents		Trend	Change	% Change
Tauranga City				
June 2021	$541			
March 2021	$529	↑	$12	2.3
June 2020	$500	↑	$41	8.1
June 2017	$432	↑	$109	25.3
June 2011	$315	↑	$226	71.8
Western BOPD – Urban				
June 2021	$422			
March 2021	$422	=	-	-
June 2020	$425	↓	-$3	-0.7
June 2017	$348	↑	$74	21.1
June 2011	$272	↑	$150	54.8

Source of raw data: HUD NPS-UD

Figure 17 Weekly dwellings rents by area unit, Tauranga and WBOPD, to June 2021



[13] The market rent information released by the Ministry of Housing and Urban Development comes from bond data lodged at Tenancy Services.

Dwellings Sold

The figure below shows that the restricted movement due to COVID-19 affected the housing market in the sub-region during the second quarter of 2020, in terms of sales volume. While sales recovered towards the end of 2020, declines were evident to June 2021. It can be noted that resident homeowners were reluctant to sell their properties as it's becoming difficult to find a house they can buy.

Tauranga City had 67 less dwellings sold (19%) in 2020/21 compared to 2019/20, while WBOPD had 15 less dwellings sold (2%) in the same period. Refer Appendix 1 for an explanation of this indicator.

Figure 18 Dwellings sold, Tauranga City and WBOPD, 2001 to 2021

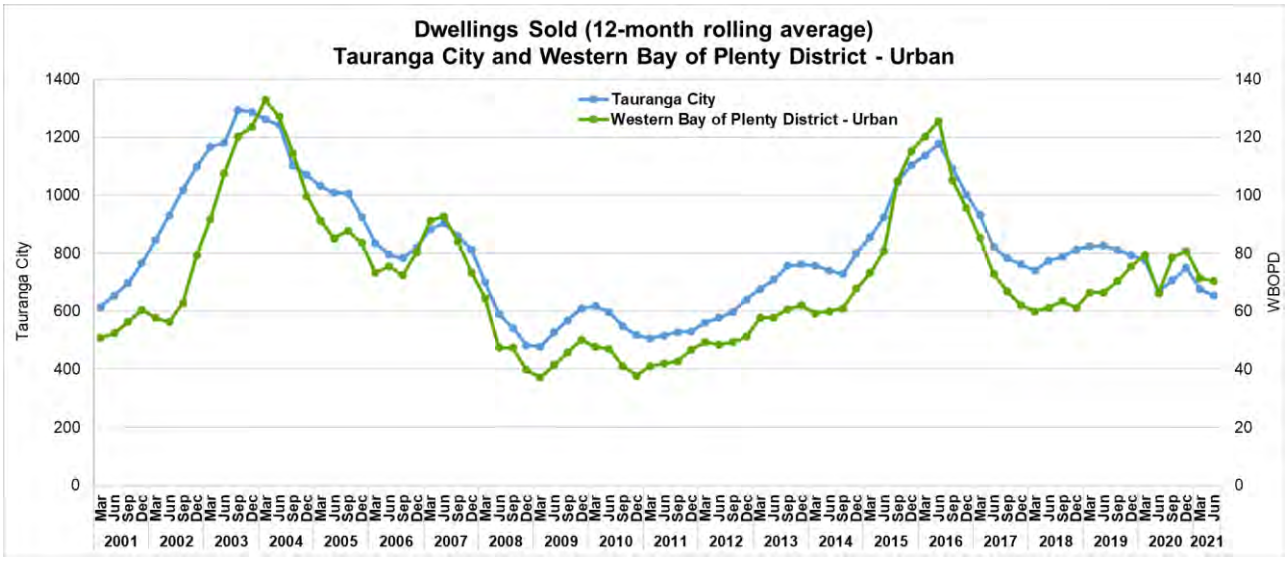


Figure 19 Dwellings sold, July 2020 to June 2021

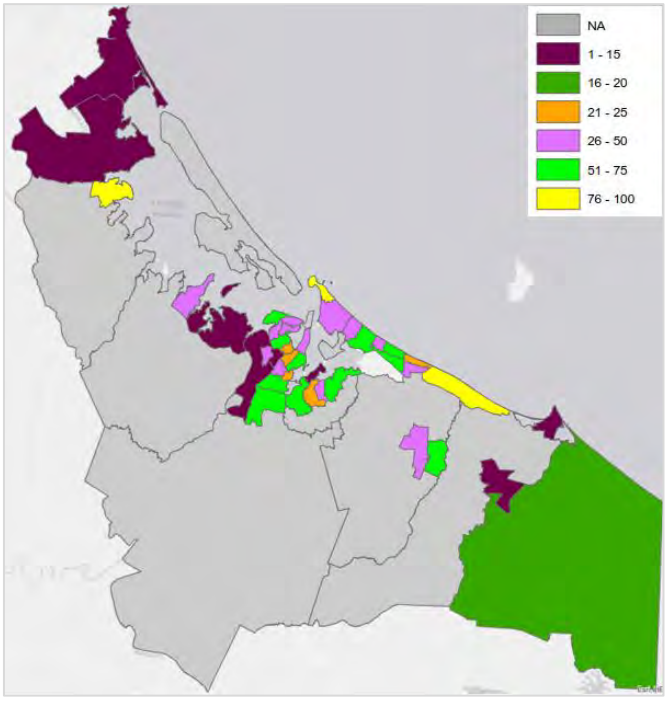
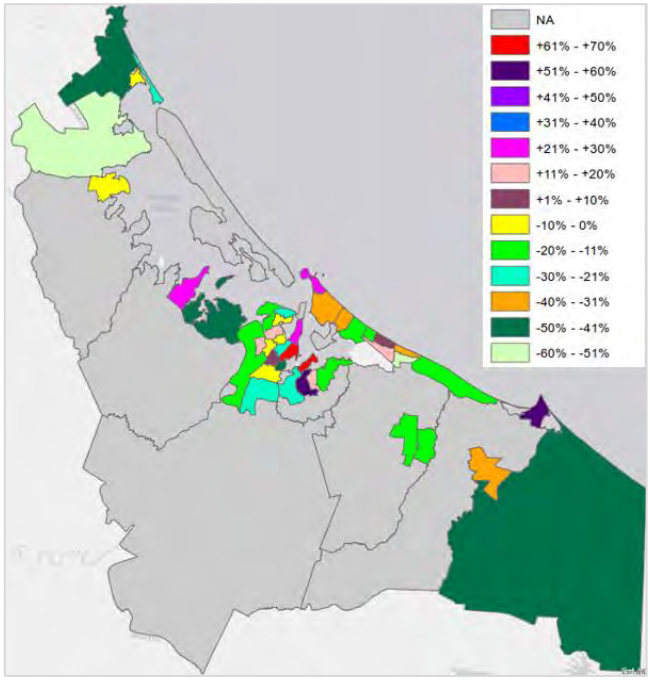


Figure 20 Percentage change in annual dwellings sold, 2019/20 to 2020/21

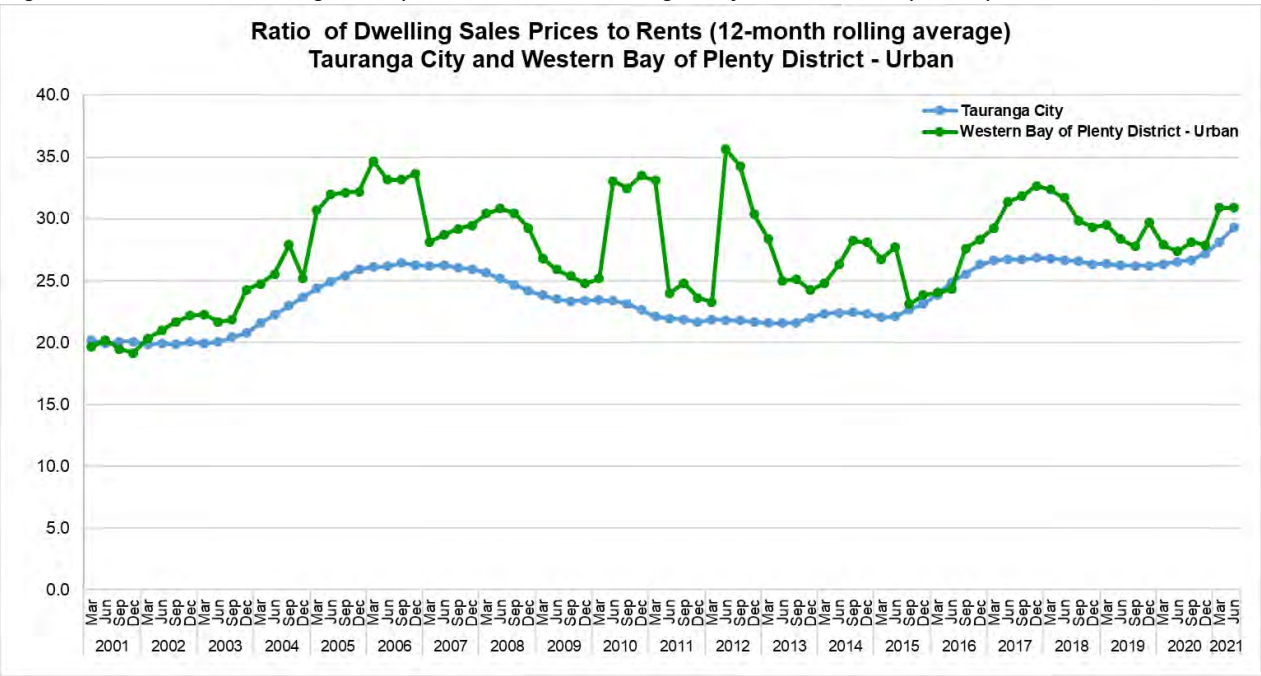


Source of raw data: HUD NPS-UD

Ratio of Dwelling Sales Prices to Rent

In the sub-region, the ratio between house prices to mean annual rent had increased in the last 20 years as shown in the figure below. As at June 2021, Tauranga City and WBOPD recorded an actual ratio of 31 which signals that it's becoming more affordable to rent than to purchase a house in the sub-region 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 2021



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 show 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

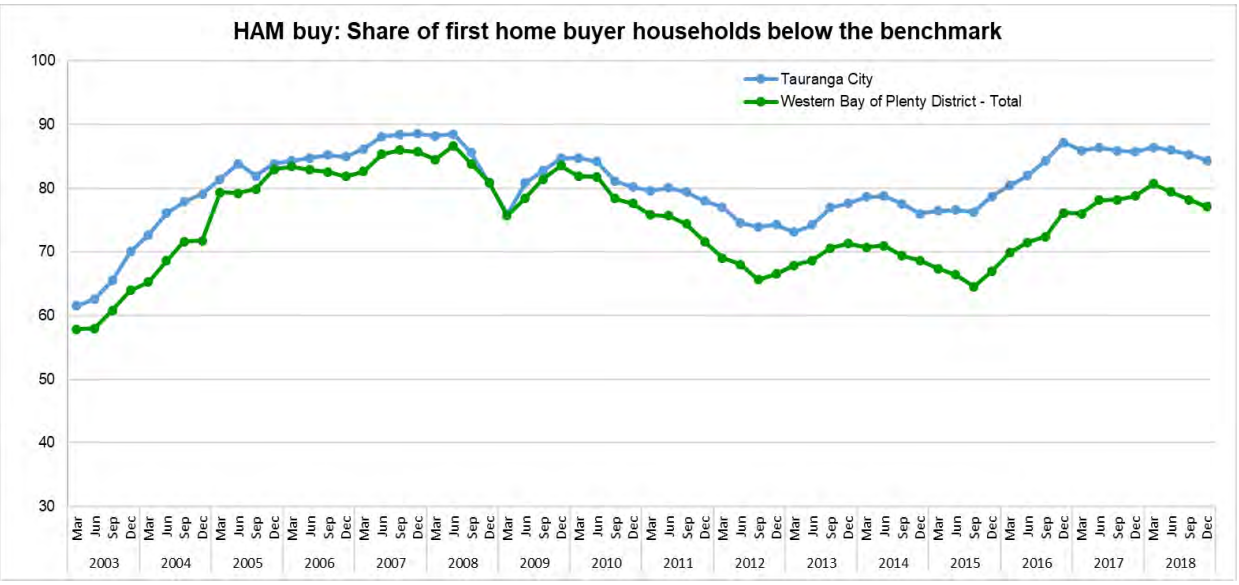


Table 10 HAM Buy

HAM-Buy		Trend	% Change
Tauranga City			
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
Western BOPD			
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 of raw data: HUD NPS-UD

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

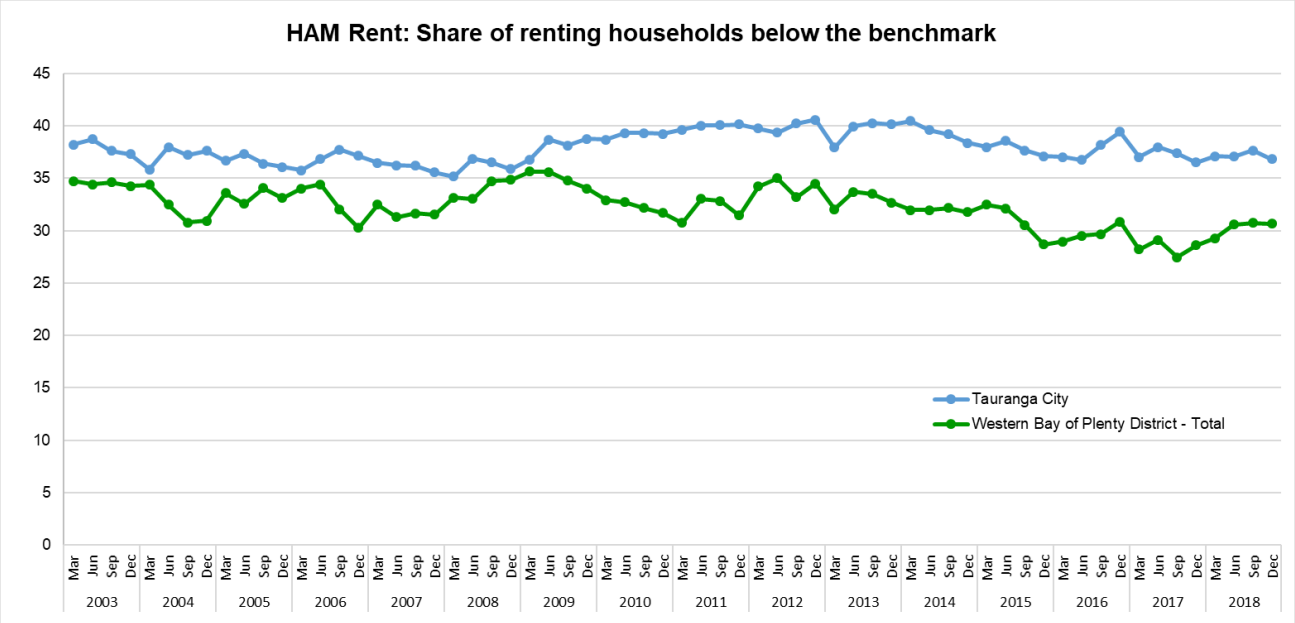


Table 11 HAM Rent

HAM-Rent		Trend	% Change
Tauranga City			
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
Western BOPD			
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 of raw data: HUD NPS-UD

4 Residential section size

Tauranga City

From July 2018 to June 2021 residential section size decreased in Tauranga City with the new lots created measuring 500m^2 and below comprising nearly three-fourths (71%) of all the new lots created. Nearly one-third (32%) of the new lots created in 2020/21 were in the lot size range of 326m^2 to 500m^2. The new lots bigger than 750m^2 particularly those in the suburban residential zones may further be subdivided in the future.

Table 12 Residential lot/section size for additional lots created in Tauranga City, July 2019 to June 2021

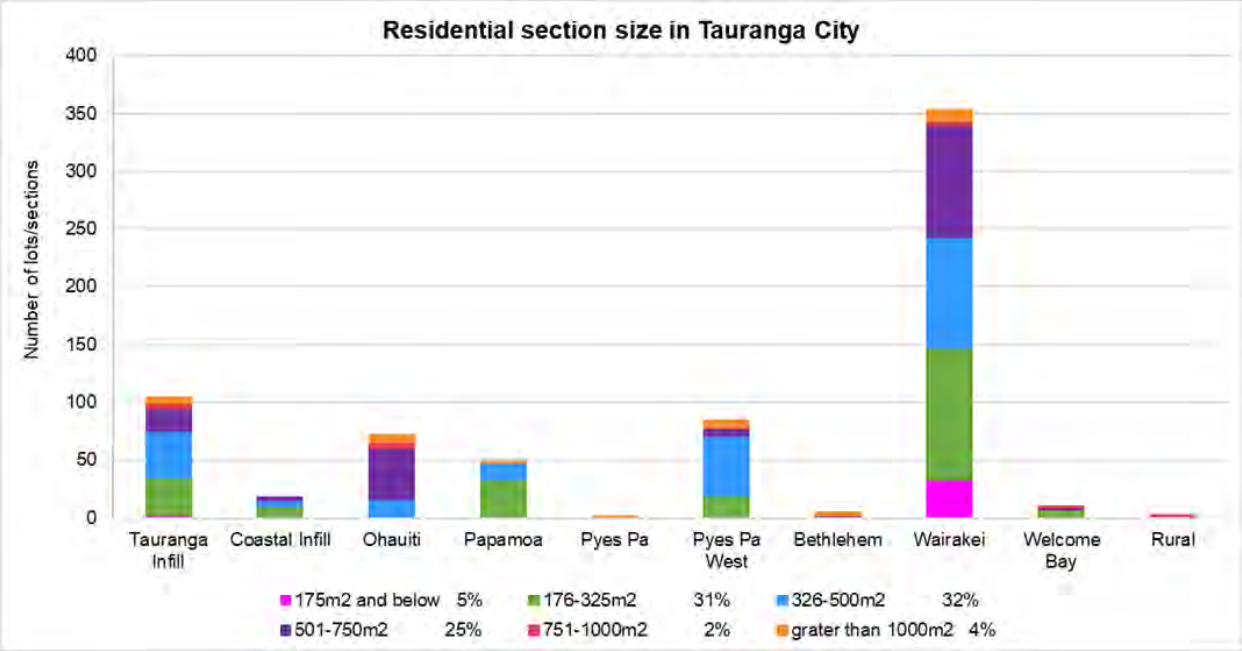
Residential lot/ section size (m^2)	Dwelling yield per ha	2019/20		2020/21	
		Number of lots/sections	Percent of total	Number of lots/sections	Percent of total
175 and below	40 & above	10	2	35	5
176-325	21-39	232	32	217	31
326-500	14-21	331	46	223	32
501-750	9-14	94	13	177	25
751-1000	7-9	29	4	16	2
Above 1000	Below 7	22	3	30	4
Total		718	100	698	100

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

Tauranga City urban growth area

More than 82% of the new lots created from July 2020 to June 2021 were located in the Greenfield UGAs, with 60% of these lots measuring 176m^2 to 500m^2. Among the Greenfield UGAs, Ohauiti had the biggest prevalent lot size of 501m^2 to 750m^2, while Papamoa had the smaller prevalent lot size of 176m^2 to 325m^2. Pyes Pa West had a prevalent lot size of 326m^2 to 500m^2. In Wairakei, 87% of the new lots created were almost equally distributed among the three lot sizes from 176m^2 to 750m^2.

Figure 24 Residential lot/section size for additional lots created in Tauranga City, July 2020 to June 2021



Historical residential lot/section size

The reduced availability of zoned land for residential development in Tauranga City had a consequential impact on the number of lots created, with this year's number being lower than half of the 2016/17 level when subdivision activity was at its peak. The proportion of new lots with area smaller than 501m^2 fluctuated from 63% in 2016/17 to 80% in 2019/20 and to 68% in 2020/21. Correspondingly, the proportion of new lots with area larger than 500m^2 declined from 37% in 2016/17 to 20% in 2019/20 and 32% in 2020/21.

Since July 2014, the 325m^2 to 500m^2 lot size category was the most prevalent. There was an observed shift between lot size categories "501m^2 to 750m^2" and "176m^2 to 325m^2" with the latter being higher in number from July 2018. Assessment of resource consents for residential subdivisions that are in the development pipeline indicates that the number of smaller lots will further increase.

Figure 25 Residential section size in Tauranga City, 2005/06 to 2020/21

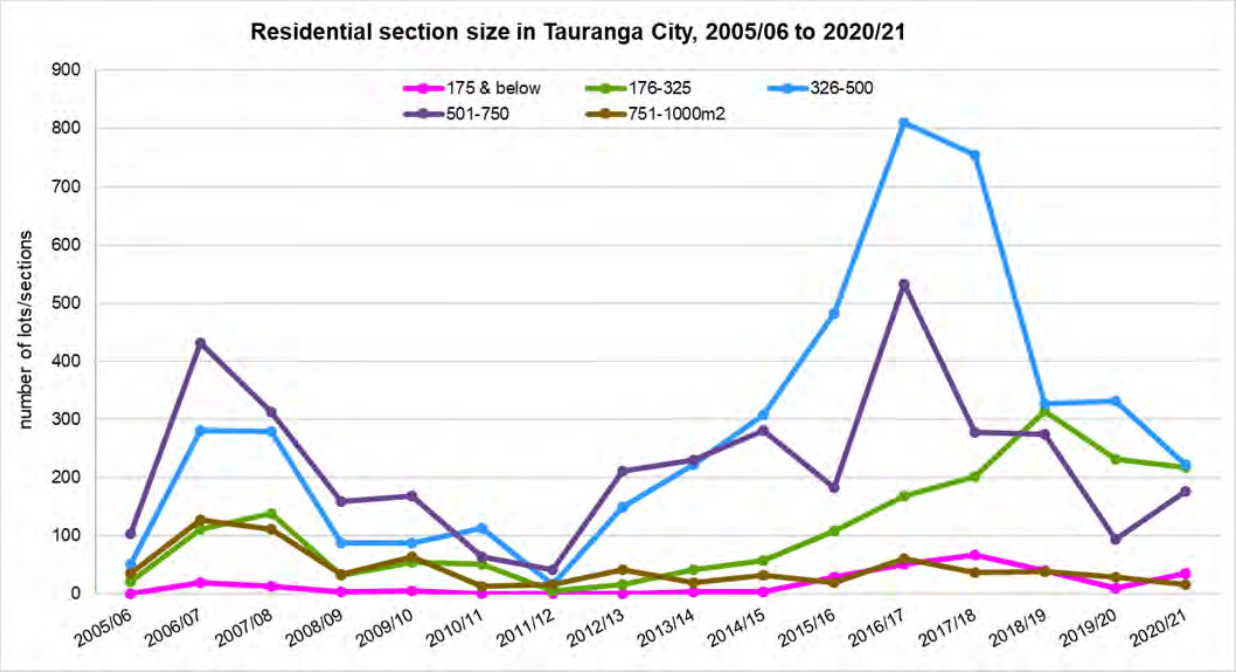


Figure 26 Residential section size in Tauranga City, 2005/06 to 2019/20

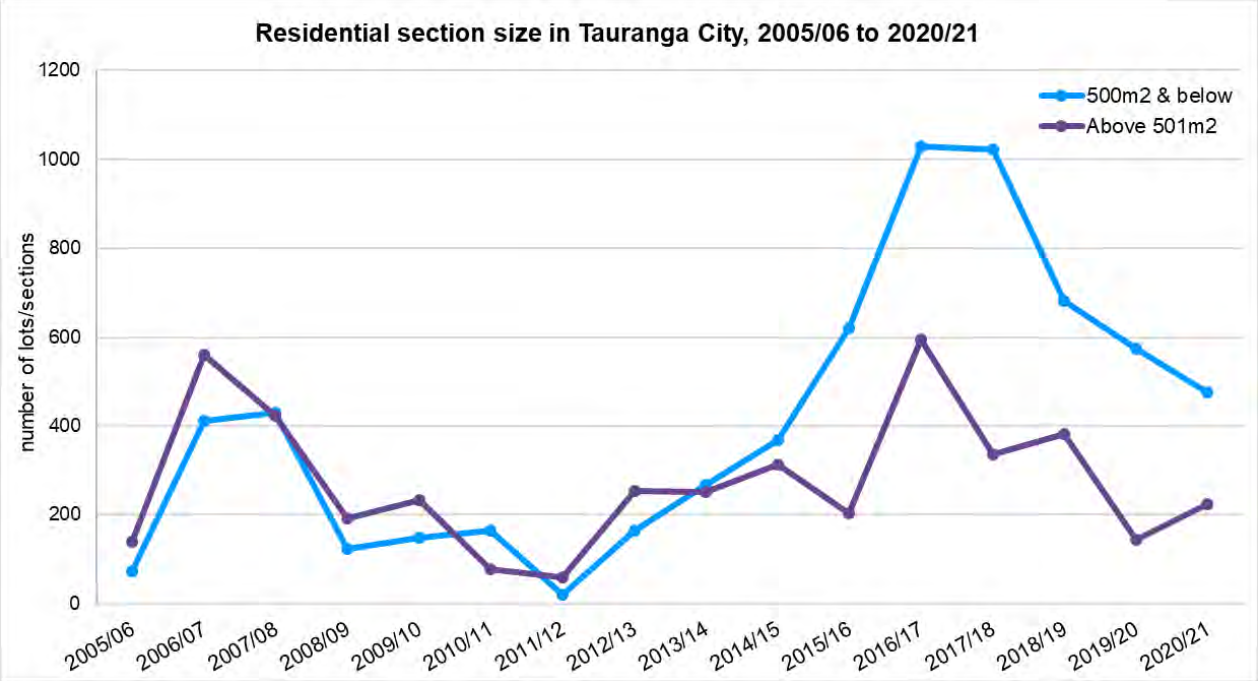
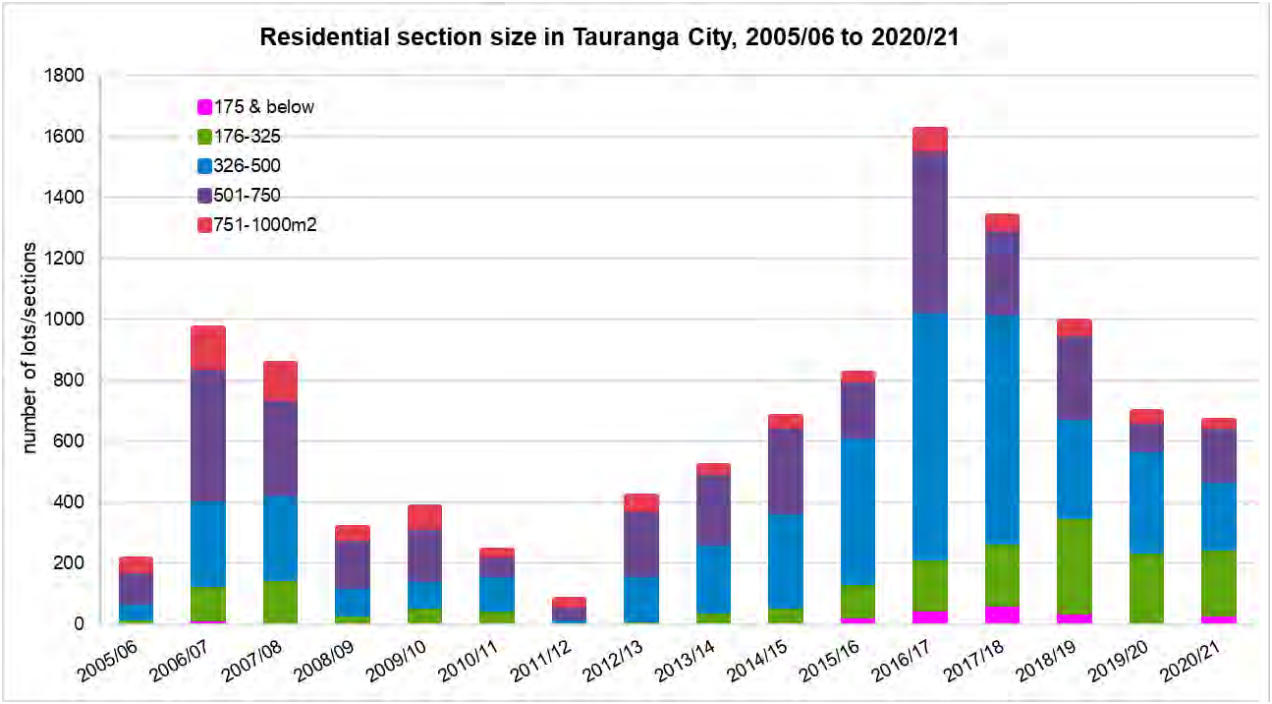


Figure 27 Residential section size in Tauranga City, 2005/06 to 2020/21



Western Bay of Plenty District

Most of the dwellings in the Urban Growth Areas were built on a smaller section sizes in 2020/2021 compared to 2019/2020, with 38% of the dwellings built on a section size of 501-750m², followed by 37% dwellings built on a 326-500m² section size (in 2020/2021).

In 2020/2021 most of the dwellings consented in Ōmokoroa were on a section size of 501-750m² (120 dwellings) followed by a section size of 326-500m² (105 dwellings). In Katikati more dwellings were consented in 2019/2020 on a section size of 501-750m² with 23 dwellings, while in 2020/2021 21 dwellings were consented on a section size of 326-500m².

Figure 28 Residential section size in WBOPD, 2019/20 to 2020/21

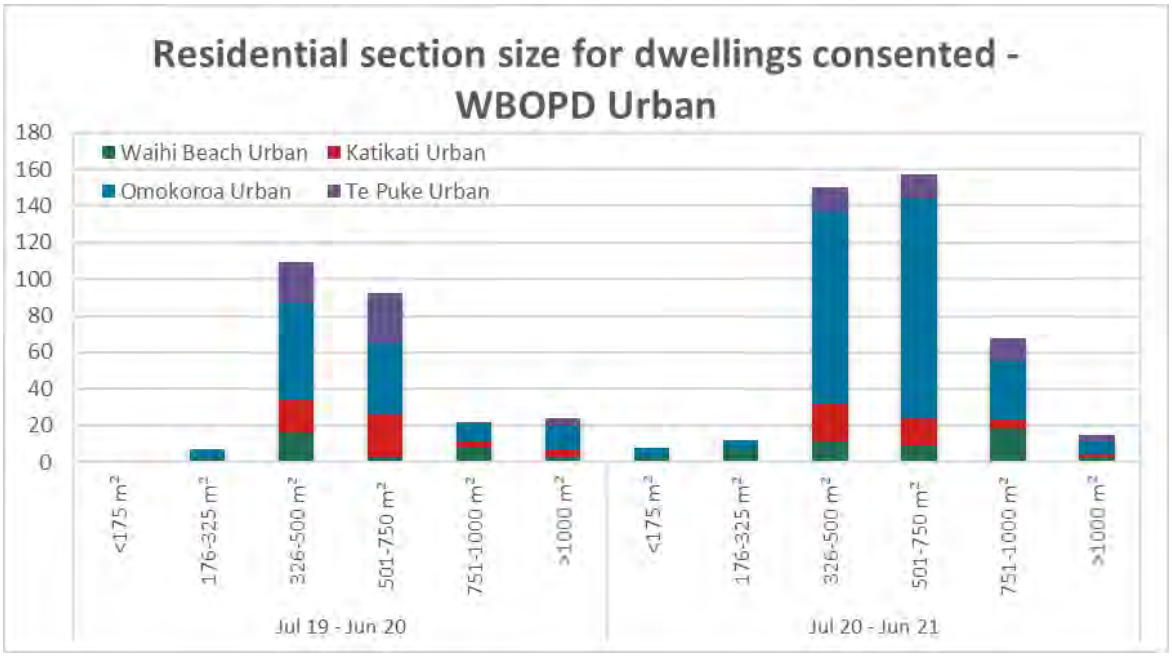


Table 13 Residential lot/section size for dwellings consented in WBOPD, July 2018 to June 2020

	2019/2020		2020/2021	
Residential lot/section size (m^2)	Number of lots/sections	Per cent to total	Number of lots/sections	Per cent to total
175 and below	0	0.0	8	1.9
176-325	7	2.8	12	2.9
326-500	109	42.9	150	36.5
501-750	92	36.2	158	38.4
751-1000	22	8.7	68	16.5
Above 1000	24	9.4	15	3.6
Total	254	100.0	411	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 area dwelling density of 16.9 dwellings per ha in the developed areas and 28.7 dwellings per ha proposed in currently undeveloped areas, which together deliver an overall nett area dwelling density of 20.7 dwellings per ha. Pyes Pa West (the Lakes) and Papamoa have overall nett area dwelling densities of 13.9 and 13.7 dwellings per ha, respectively. 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 12.4, Pyes Pa East 12.2, and Ohauiti 11.6 and Welcome Bay 10.6. Refer to Appendix 7 for more details on density figures and maps for the UGAs.

Table 14 Residential dwelling density by urban growth areas, Tauranga City, December 2021

Residential Development	Growth Area	Dwelling density (dwellings per ha)		
		Gross area[1]	Nett area[2]	Nett site area[3]
Developed	Bethlehem	12.11	12.26	15.39
	Pyes Pa West	13.29	13.62	19.68
	Pyes Pa East	12.01	12.18	15.71
	Ohauiti	11.09	11.32	14.35
	Welcome Bay	10.49	10.62	13.80
	Papamoa	13.10	13.29	17.65
	Wairakei	17.19	16.91	24.33
Proposed	Bethlehem	14.32	14.32	22.74
	Pyes Pa West	17.32	17.32	20.71
	Pyes Pa East	14.01	14.01	17.73
	Ohauiti	15.52	15.52	18.07
	Welcome Bay			
	Papamoa	26.53	26.53	29.06
	Wairakei	28.67	28.67	43.71
Total	Bethlehem	12.27	12.41	15.82
	Pyes Pa West	13.55	13.86	19.76
	Pyes Pa East	12.03	12.20	15.73
	Ohauiti	11.35	11.57	14.58
	Welcome Bay	10.49	10.62	13.80
	Papamoa	13.48	13.66	18.04
	Wairakei	20.89	20.66	30.26

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 2021

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	273.85	3,065	333	3,398	12.41
Pyes Pa West	181.28	2,103	410	2,513	13.86
Pyes Pa East	181.71	2,155	61	2,216	12.20
Ohauiti	145.38	1,442	240	1,682	11.57
Welcome Bay	140.28	1,426	46	1,472	10.62
Papamoa	765.38	9,794	664	10,458	13.66
Wairakei	263.71	2,670	2,777	5,447	20.66

[1] includes both developed and proposed dwellings and sections

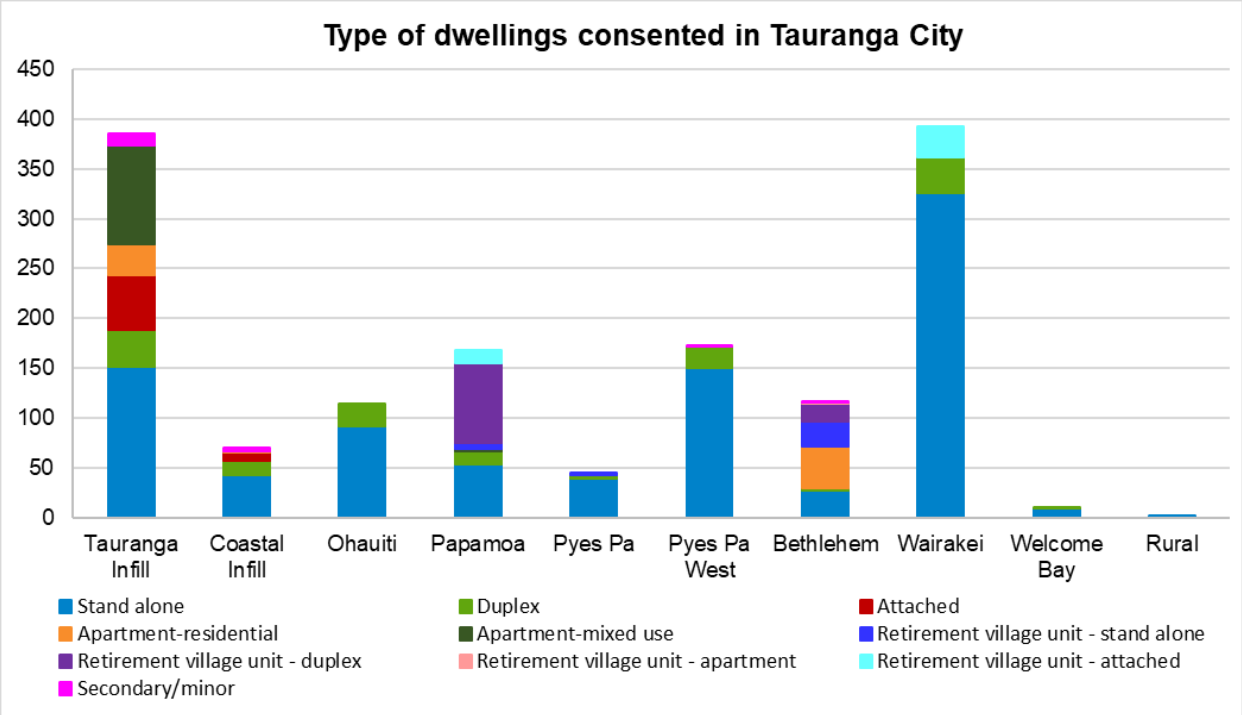
5 Dwelling Typology

Tauranga City

Stand alone or detached dwelling was the most prevalent type of dwelling[14] consented in Tauranga City in the last few years. In 2020/21, stand alone dwellings recorded a significant decline of 16% from the previous year's proportion of 76%. Conversely, attached dwellings comprised of duplex, apartments (mixed and residential), and 3 or more dwellings attached increased by 16% from the previous year's record of 20% of all the dwellings consented.

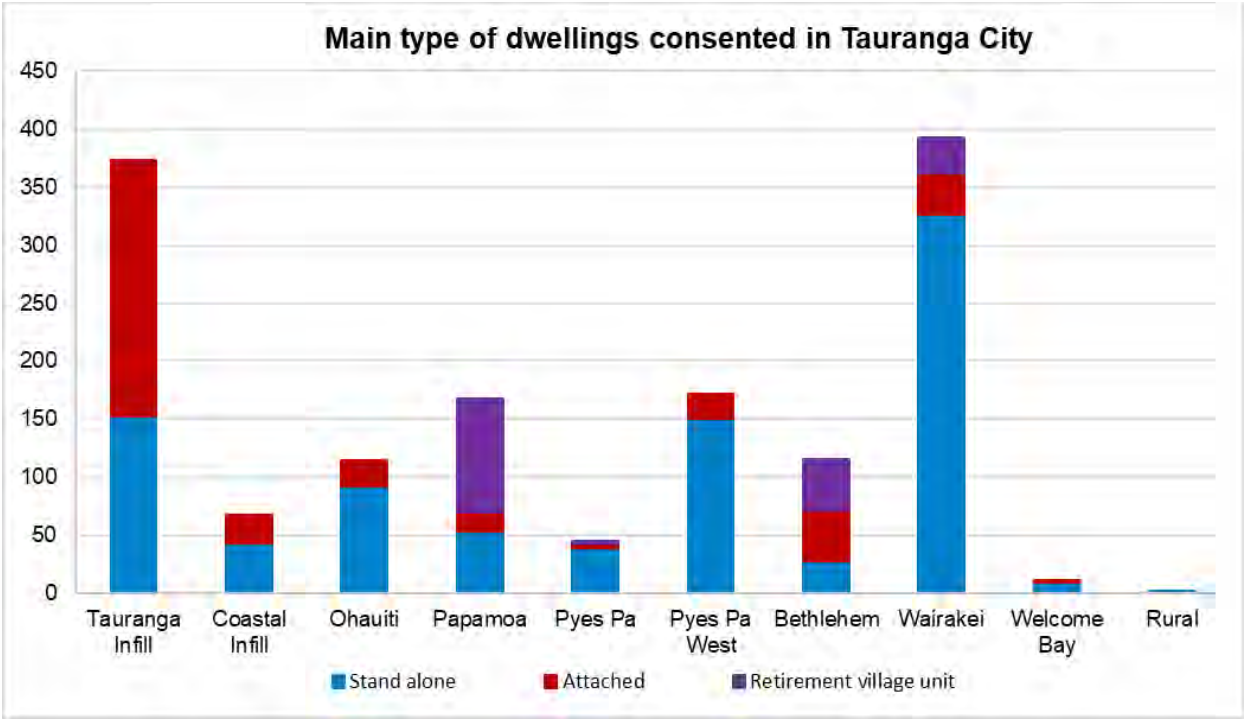
Among the Greenfield UGAs, Wairakei had the highest proportion of stand alone dwellings at 47%, which is also equivalent to 22% of all the dwellings consented during the year. Notably, 42% of all the attached dwellings were consented in the existing Tauranga infill areas, where Elizabeth Towers (Farmers' redevelopment) contributed more than half of the attached dwellings consented.

Figure 29 Type of dwellings consented in Tauranga City, July 2020 to June 2021



[14] TCC classifies the dwellings into the following types: standalone dwellings, duplex, attached dwellings, apartments (residential and mixed use), retirement village units and secondary/minor dwelling. TCC further classifies dwellings in the retirement village units into standalone, duplex, and attached dwellings.

Figure 30 Main type of dwellings consented in Tauranga City, July 2020 to June 2021



The figure below shows the type of dwellings consented in Tauranga City infill areas and greenfield UGAs by City Plan zone. The Farmers redevelopment located in the city centre – business zone contributed around 26% (121 dwellings comprising 98 apartment units and 23 townhouses or attached dwellings) to the dwellings consented in the infill areas from July 2020 to June 2021.

Figure 31 Type of dwellings consented in Tauranga City, by City Plan zone and growth area, July 2020 to June 2021

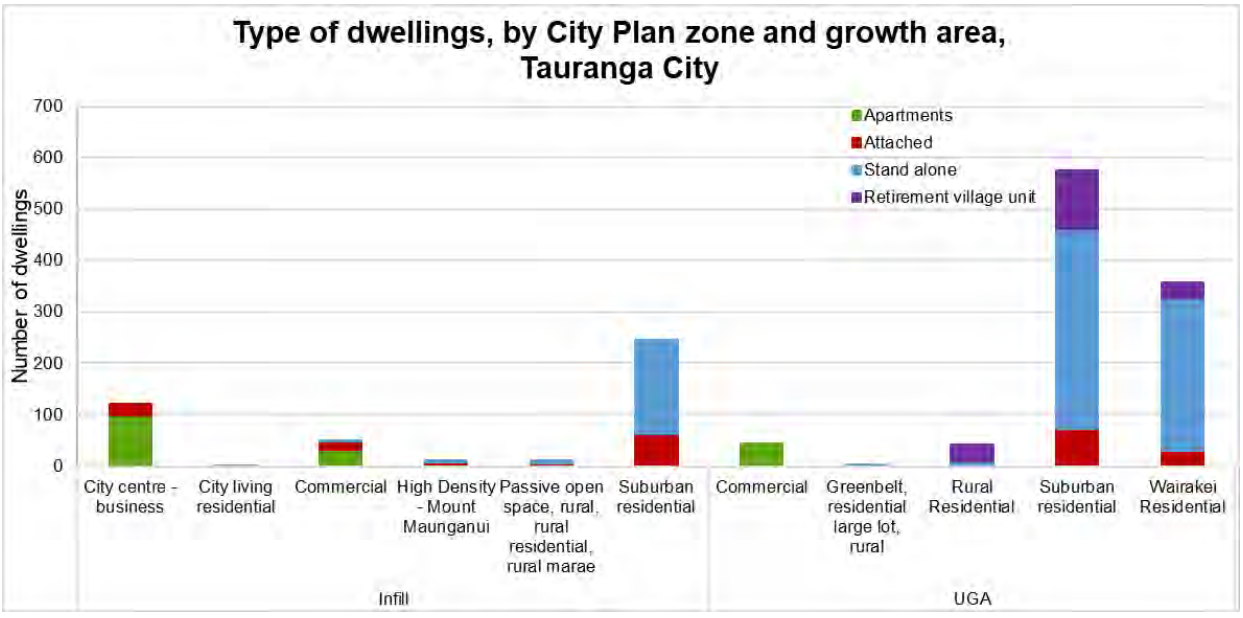


Table 16 Type of dwellings consented in Tauranga City, July 2019 to June 2021

Dwelling Typology	2019/20		2020/21	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Standalone dwelling	945	76.3	893	60.4
Duplex	166	13.4	152	10.3
Attached dwellings	33	2.7	63	4.3
Secondary/minor dwelling	16	1.3	18	1.2
Apartments – residential	6	less than 1	76	5.1
Apartments – mixed use			101	6.8
Subtotal	1,166	94.1	1,303	88.1
Retirement village unit – standalone dwelling	26	2.1	34	2.3
Retirement village unit – duplex	32	2.6	97	6.6
Retirement village unit – attached dwellings	15	1.2	44	3.0
Retirement village unit – apartment			1	less than 1
Subtotal	73	5.9	176	11.9
Total	1,239	100	1,479	100

Western Bay of Plenty District

Over 90% of the dwellings consented in WBOPD are standalone dwellings for both 2019/20 and 2020/21. In 2020/2021 more variety of dwellings were built which include duplex dwellings (0.7%), townhouses (1.3%) and attached retirement units (0.9%) while in 2019/20 only standalone and minor dwellings were built. More variety of dwellings are expected for the coming years (like duplexes/townhouses/multi-unit dwellings).

Figure 32 Type of dwellings consented in WBOPD, July 2019 to June 2021

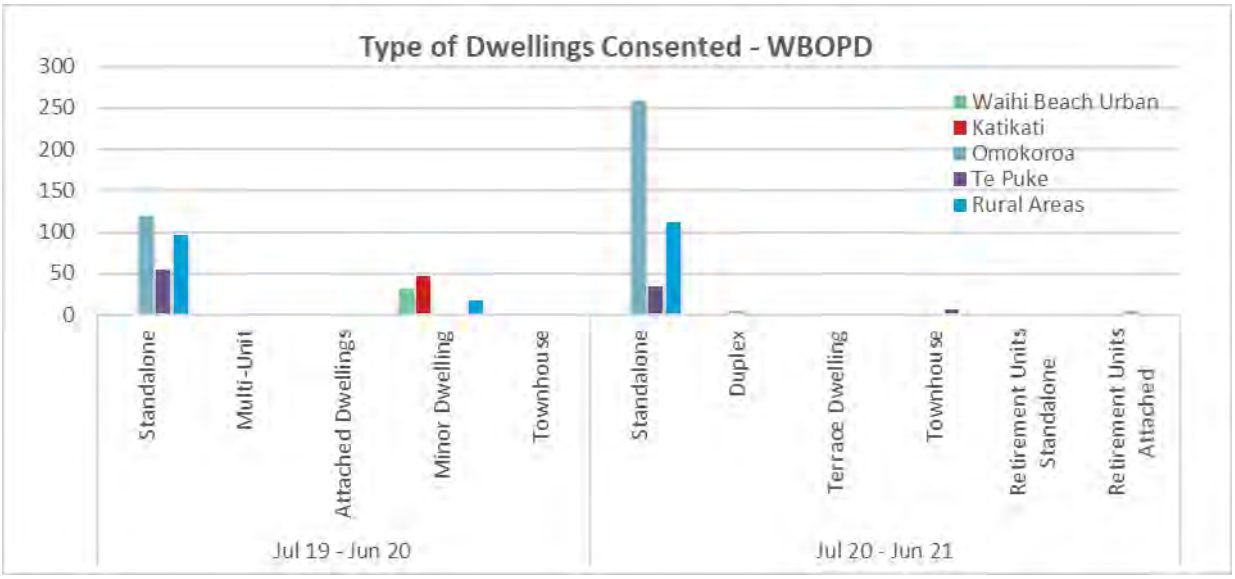


Table 17 Type of dwellings consented in WBOPDC, July 2019 to June 2021

	2019/2020		2020/2021	
Dwelling Typology	Number of dwellings	Per cent to Total	Number of dwellings	Per cent to Total
Standalone Dwelling	347	94.6	495	91.7
Duplex Dwelling	-	-	4	0.7
Terrace Dwelling	-	-	-	-
Minor Dwelling	20	5.4	29	5.4
Townhouse	-	-	7	1.3
Retirement village unit – standalone dwelling	-	-	-	-
Retirement village unit – attached dwellings	-	-	5	0.9
Total	367	100.0	540	100.0

Number of storeys

Tauranga City

More than 75% of the dwellings consented in Tauranga City from July 2020 to June 2021 were single level dwellings, with the remaining quarter comprising 2 or more storeys. Almost 11% of the dwellings were 2-level dwellings. Around 7% or 98 of the dwellings were apartments that were part of the 15-storey Elizabeth Towers (Farmers) building in the Tauranga central business district.

Figure 33 Number of storeys for dwellings consented in Tauranga City, July 2020 to June 2021

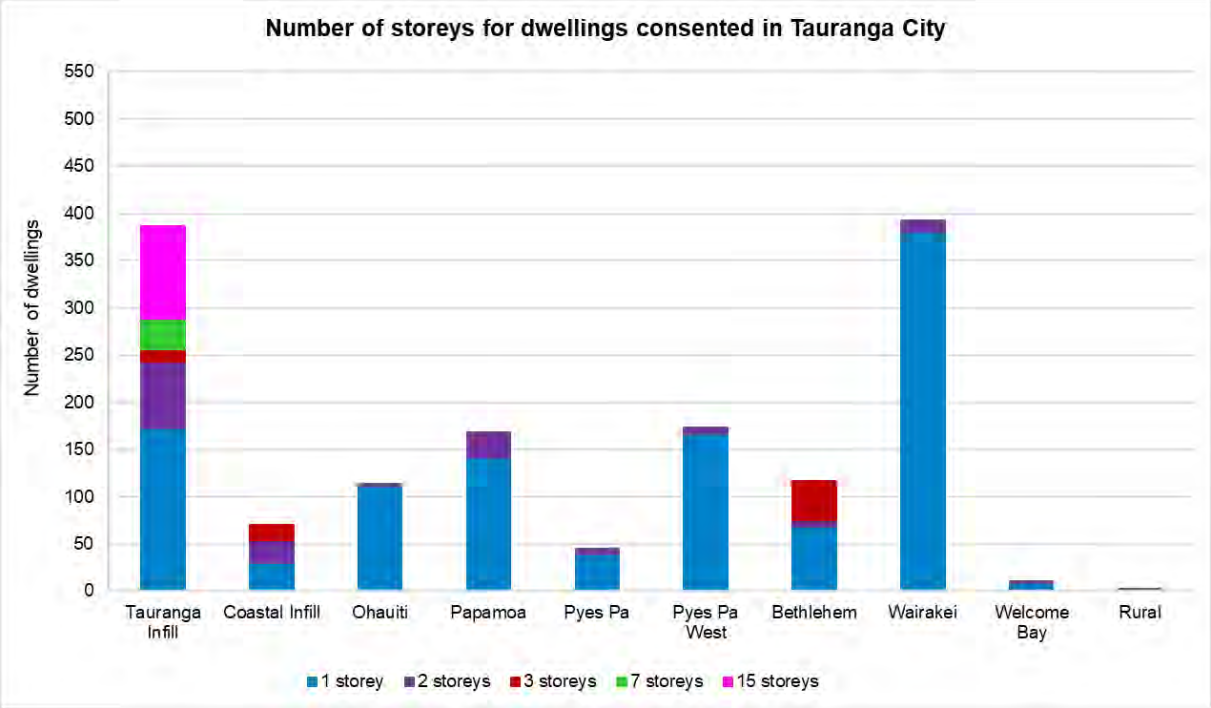


Table 18 Number of storeys for dwellings consented in Tauranga City, July 2020 to June 2021

	2019/20		2020/21	
Number of storeys	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	1,081	87.3	1,117	75.5
2	133	10.7	161	10.9
3	25	2.0	71	4.8
7			32	2.2
15			98	6.6
Total	1,239	100	1,479	100

Western Bay of Plenty District

Majority (92%) of the dwellings consented from July 2020 to June 2021 in WBOPD, were single level dwellings. Ōmokoroa has the most 2-storey dwellings (41%) followed by 32% in Waihi Beach-Bowentown.

Figure 34 Number of storeys for dwellings consented in WBOPD, July 2019 to June 2021

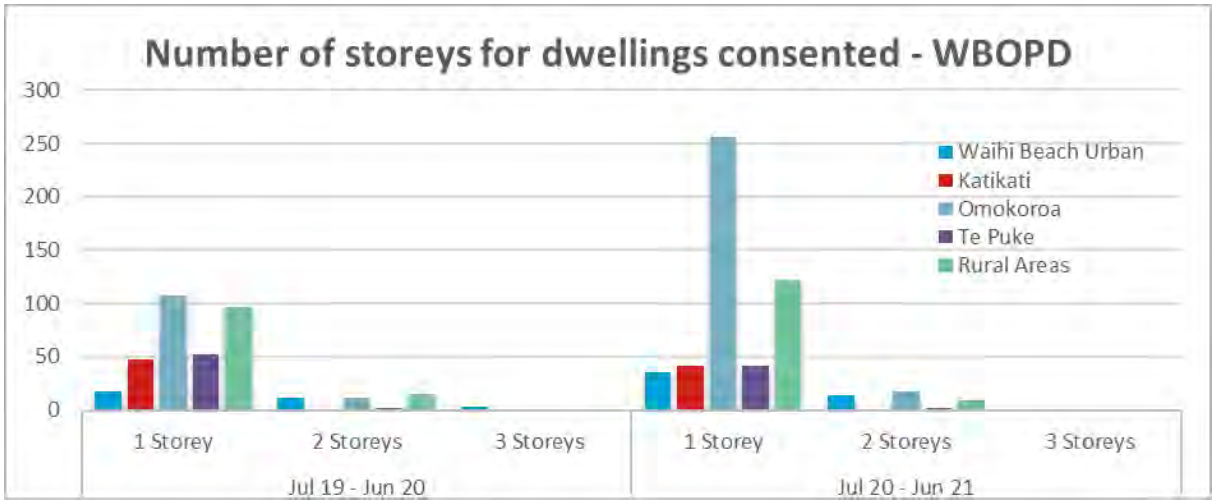


Table 19 Number of storeys for dwellings consented in WBOPD, July 2019 to June 2021

	2019/2020		2020/2021	
Number of storeys	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	322	87.7	496	91.9
2	41	11.2	44	8.1
3	4	1.1	0	0.0
Total	367	100.0	540	100.0

Number of bedrooms

More than three-fourths of the dwellings consented in Tauranga City had 2 and 3 bedrooms, with the remaining quarter having 1 (5%), 4 (18%), and 5 + (2%) bedrooms.

In WBOPD most of the dwellings consented are 3- (55%) and 4-bedrooms (30%) from July 2020 to June 2021.

Number of bedrooms by growth area

Tauranga City

More than one-third (34% or 218 dwellings) of the 3-bedroom dwellings consented in Tauranga City were located in Wairakei while 38% were in the other Greenfield UGAs. Around 23% of the 3-bedroom dwellings were consented in the established parts (infill) of Tauranga and the remaining 4% were in the Coastal infill areas.

The biggest proportion (35%) of the 2-bedroom dwellings consented were in the Tauranga infill areas, with the majority comprised of the apartments at Elizabeth Towers, and 4th Avenue. Around 23% of the 2-bedroom dwellings were located in Papamoa, with the majority consisting of the attached dwellings at the Pacific Lakes retirement village.

The 4-bedroom dwellings comprising 18% of all the dwellings consented in the City were distributed in the Greenfield and existing urban growth areas, with Wairakei recording the biggest proportion (31% or 83 dwellings) and Welcome Bay having the least at 2 dwellings.

Figure 35 Number of bedrooms of dwellings consented in Tauranga City, July 2020 to June 2021

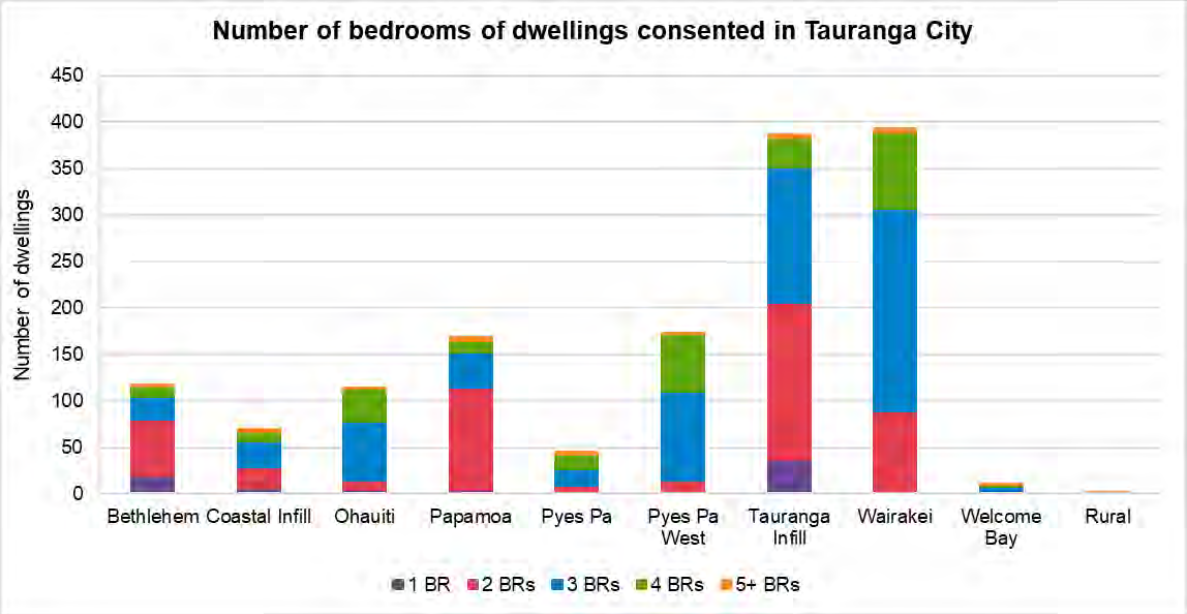
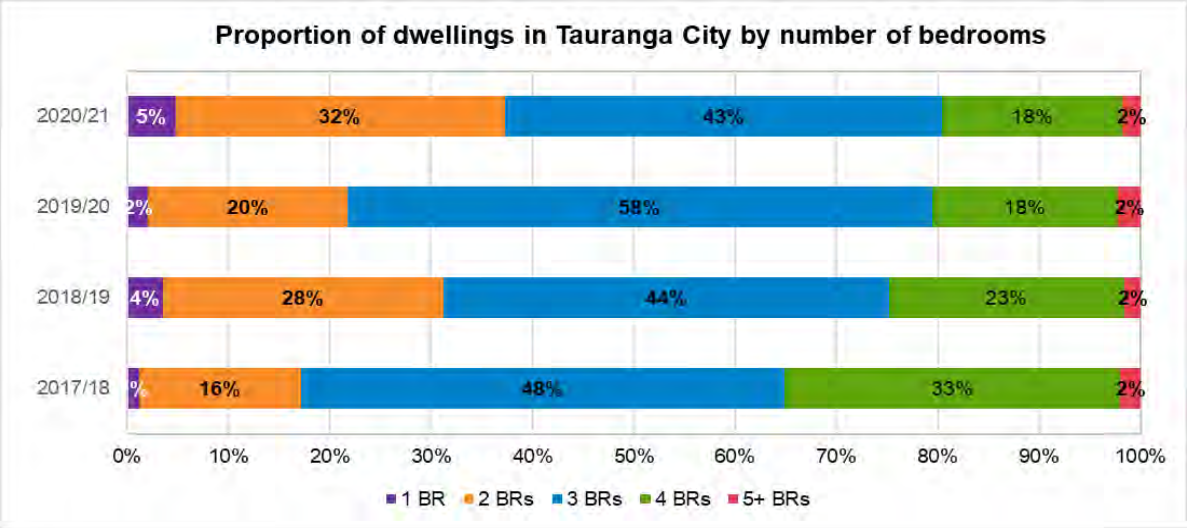


Table 20 Number of bedrooms of dwellings consented in Tauranga City, July 2020 to June 2021

Number of bedrooms	2019/20		2020/21	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	24	1.9	71	4.8
2	244	19.7	480	32.5
3	716	57.8	639	43.2
4	228	18.4	263	17.8
5 and above	27	2.2	26	1.8
Total	1,239	100	1,479	100

The figure below shows another significant shift in dwelling typology in Tauranga City in terms of the number of bedrooms of the dwellings consented. The proportion decline from 58% to 43% for 3-bedroom dwellings from 2019/20 to 2020/21 was accompanied by corresponding increase of 3% and 12% for 1-bedroom and 2-bedroom dwellings, respectively, in the same period. There was no change observed in the proportion of dwellings with 4 or more bedrooms.

Figure 36 Number of bedrooms of dwellings consented in Tauranga City, 2017/18 to 2020/21



Western Bay of Plenty District

In WBOPD-urban, more 3-bedroom dwellings are consented (84%) followed by 72% 4-bedroom dwellings from July 2020 to June 2021.

In Ōmokoroa there is a 1 percentage point difference between the number of 3-bedroom and 4-bedroom dwellings consented with 56.4% and 57.1% respectively, while in Te Puke (8.1%) and Katikati (11.1%) more 3-bedrooms are consented. In rural areas, more one bedroom dwellings (55%) were consented followed by bigger houses with 50% of dwellings consented being 5+ bedrooms.

Figure 37 Number of bedrooms of dwellings consented in WBOPD, July 2020 to June 2021

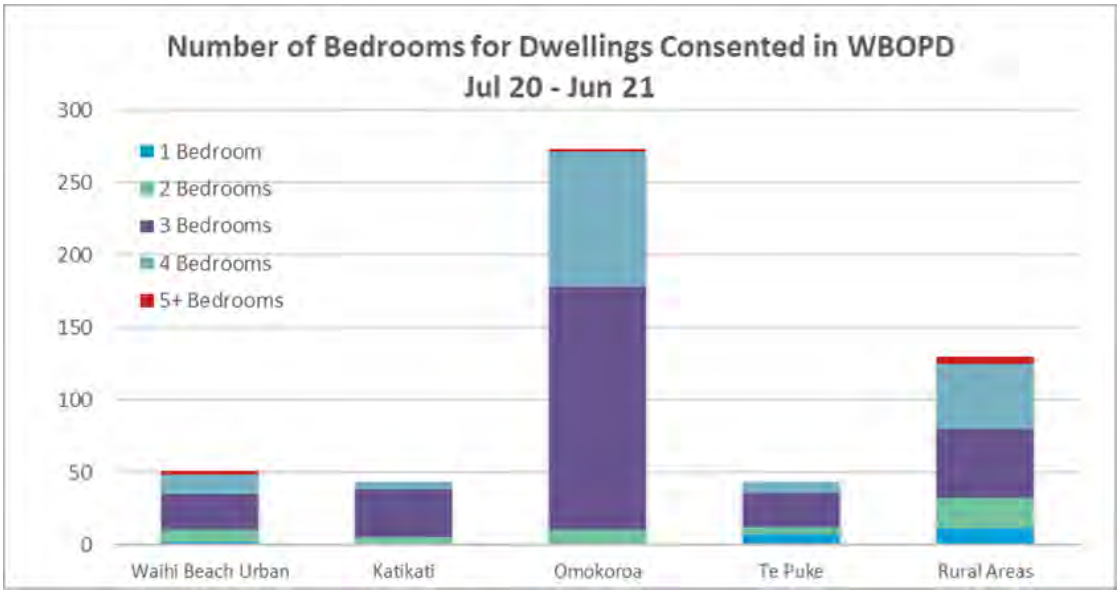


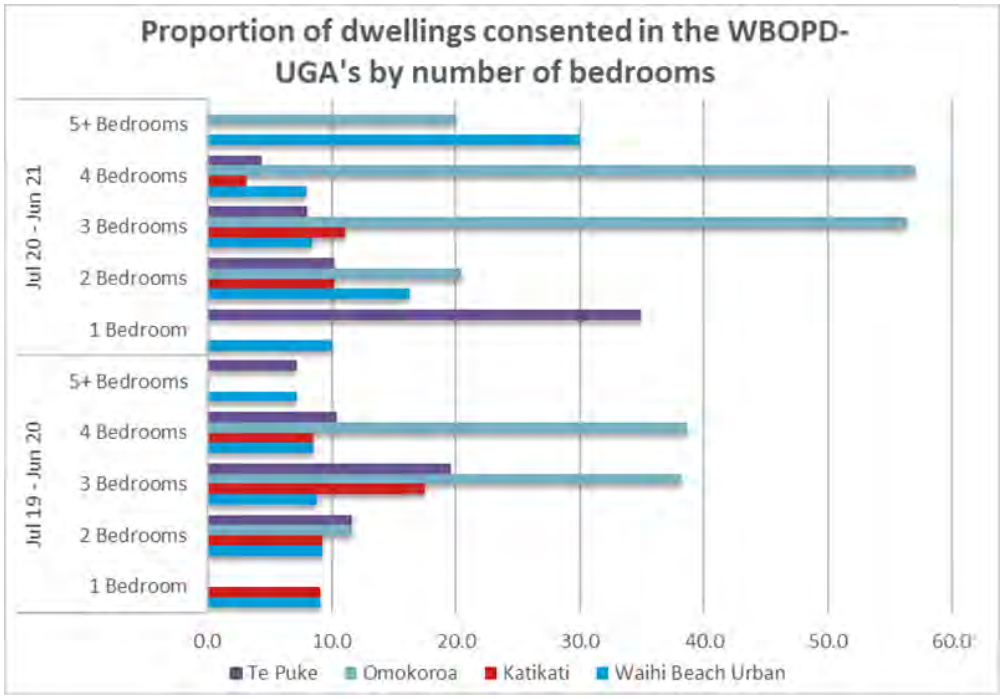
Table 21 Number of bedrooms for dwellings consented in WBOPD, July 2019 to June 2021

	2019/20		2020/21	
Number of Bedrooms	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	11	3.0	20	3.7
2	43	11.7	49	9.1
3	193	52.6	298	55.2
4	106	28.6	163	30.2
5 and above	14	3.8	10	1.9
Total	367	100	540	100.0

In 2020/2021 more 2-bedroom dwellings (57.1%) were consented in all the urban areas compared to 2019/2020 with 41.9%. More 5-bedroom dwellings were built in Waihi Beach-Bowentown with 30% and in the rural areas with 50%.

In 2020/2021, 3-bedrooms and 4-bedrooms were more prominent in Omokoroa while in Katikati and Te Puke more 2-bedroom and 3-bedroom dwellings were built.

Figure 38 Number of bedrooms of dwellings consented in WBOPD-**UGA's, 2019/20** to 2020/21



Number of bedrooms by dwelling typology

Tauranga City

Of the 60% stand alone dwellings consented in Tauranga City from July 2020 to June 2021, more than half were 3-bedroom dwellings, and more than a quarter had 4 bedrooms.

More than three-fourths of the duplexes had 2 (38%) and 3 (41%) bedrooms, while 15% had 1 bedroom. Majority (70%) of the apartments (mixed use and residential), had 2 bedrooms, while 16% had 1 bedroom and 14% had 3 bedrooms.

In the retirement villages, more attached dwellings (81%) were consented than stand alone or detached dwellings (19%). The stand alone dwellings had 2 (22 dwellings or 65%) or 3 (12 dwellings or 35%) bedrooms. Majority (93% or 132) of the attached dwellings had 2 bedrooms, and only 7% (10 dwellings) had 3 bedrooms.

Two more secondary or minor dwellings (18 total dwellings) were consented during the year compared to previous year. These dwellings were comprised of the converted garages, sleep outs or offices, and additions/alterations to existing dwellings to create additional independent dwelling unit. Sixty-one per cent (11 dwellings) of the secondary or minor dwellings were 1-bedroom dwellings while one-third (6 dwellings) had 2 bedrooms and only one dwelling had 3 bedrooms.

Figure 39 Number of dwellings consented in Tauranga City, by type and number of bedrooms, July 2020 to June 2021

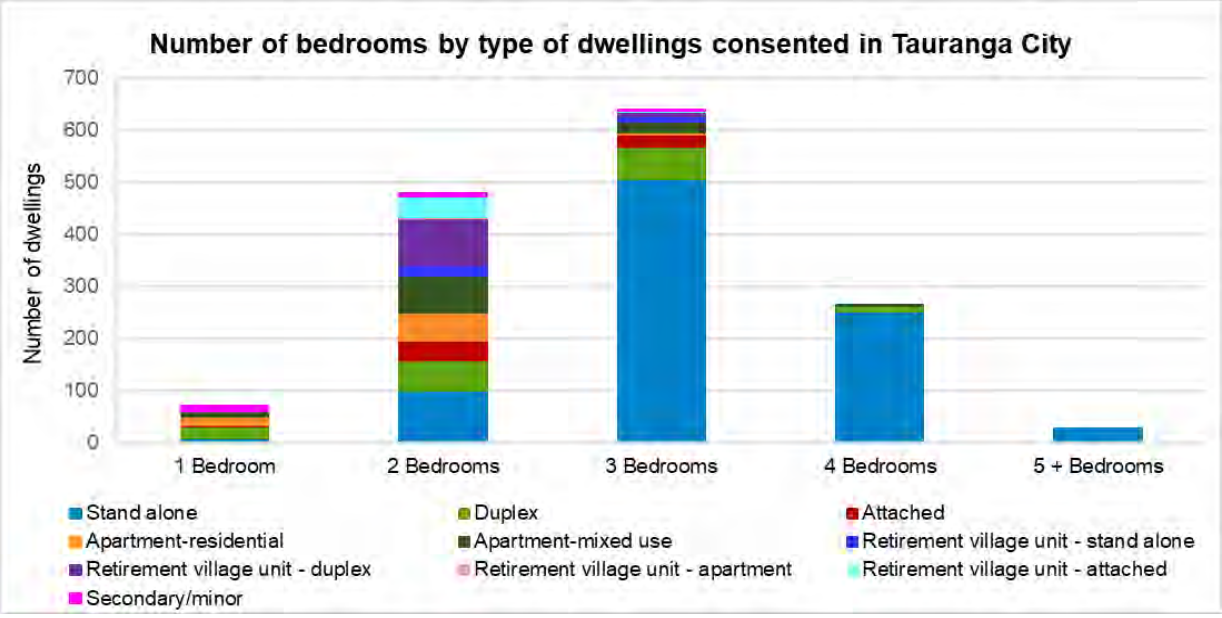


Table 22 Number of bedrooms by type of dwelling for dwellings consented in Tauranga City, July 2020 to June 2021

Type of dwelling	Number of bedrooms					Total
	1	2	3	4	5	
Standalone dwelling	8	100	507	252	26	893
Duplex dwelling	23	57	62	10	-	152
Attached dwellings	1	39	23	-	-	63
Secondary/minor dwelling	11	6	1	-	-	18
Apartments – residential	18	54	4	-	-	76
Apartments – mixed use	10	70	20	1		101
Sub-total	71	326	617	263	26	1,303
Retirement village unit – standalone dwelling	-	22	12	-	-	34
Retirement village unit – duplex	-	90	7	-	-	97
Retirement village unit – attached dwellings	-	41	3	-	-	44
Retirement village unit - apartment		1				1
Subtotal	-	154	22	-	-	176
Total	71	480	639	263	26	1,479

Floor size of dwellings

Tauranga City

Dwellings consented in Tauranga City were getting smaller in the last four years. However, the proportion of dwellings having a floor area smaller than 176m^2 declined to 67% in 2020/21 (67%) compared to the previous year's 74%. Dwellings with floor areas bigger than 176m^2 were nearly half of all dwellings consented in 2017/18 and declined to 33% in 2020/21.

Figure 40 Floor size of dwellings consented in Tauranga City, July 2020 to June 2021

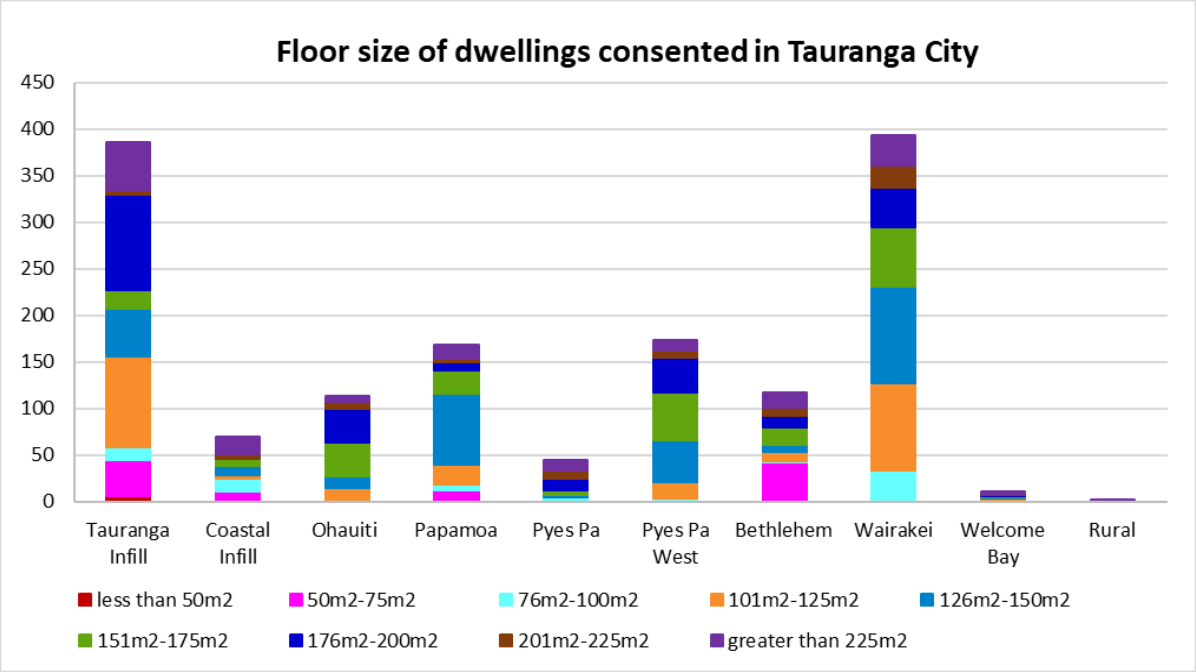
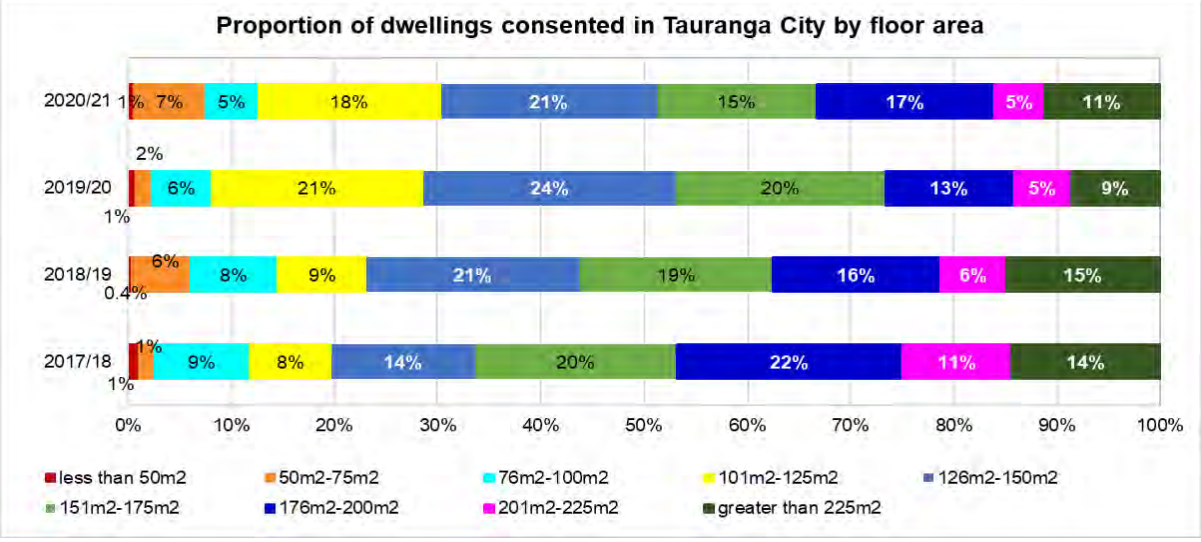


Table 23 Floor size for dwellings consented in Tauranga City, July 2019 to June 2021

Floor size (m^2)	2019/20		2020/21	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than $50m^2$	9	less than 1	9	less than 1%
$50m^2$ – $75m^2$	19	1.5	102	6.9
$76m^2$ – $100m^2$	72	5.8	76	5.1
$101m^2$ – $125m^2$	255	20.6	262	17.7
$126m^2$ – $150m^2$	303	24.5	309	20.9
$151m^2$ – $175m^2$	251	20.3	229	15.5
$176m^2$ – $200m^2$	155	12.5	255	17.2
$201m^2$ – $225m^2$	68	5.5	71	4.8
Greater than $225m^2$	107	8.6	166	11.2
Total	1,239	100	1,479	100

Figure 41 Proportion of dwellings consented in Tauranga City by floor area, 2017/18 to 2020/21



Western Bay of Plenty District

In both 2019/2020 and 2020/2021, most of the consented dwellings in the UGA's of WBOPD have a floor area between 151-175m² (31% and 28%), followed by a floor area between 176-200m² (20% and 23%). In the rural areas, larger houses are built where 32 of the dwellings consented have a floor area of 250m² or more.

Figure 42 Floor size of dwellings consented in WBOPD, July 2019 to June 2021

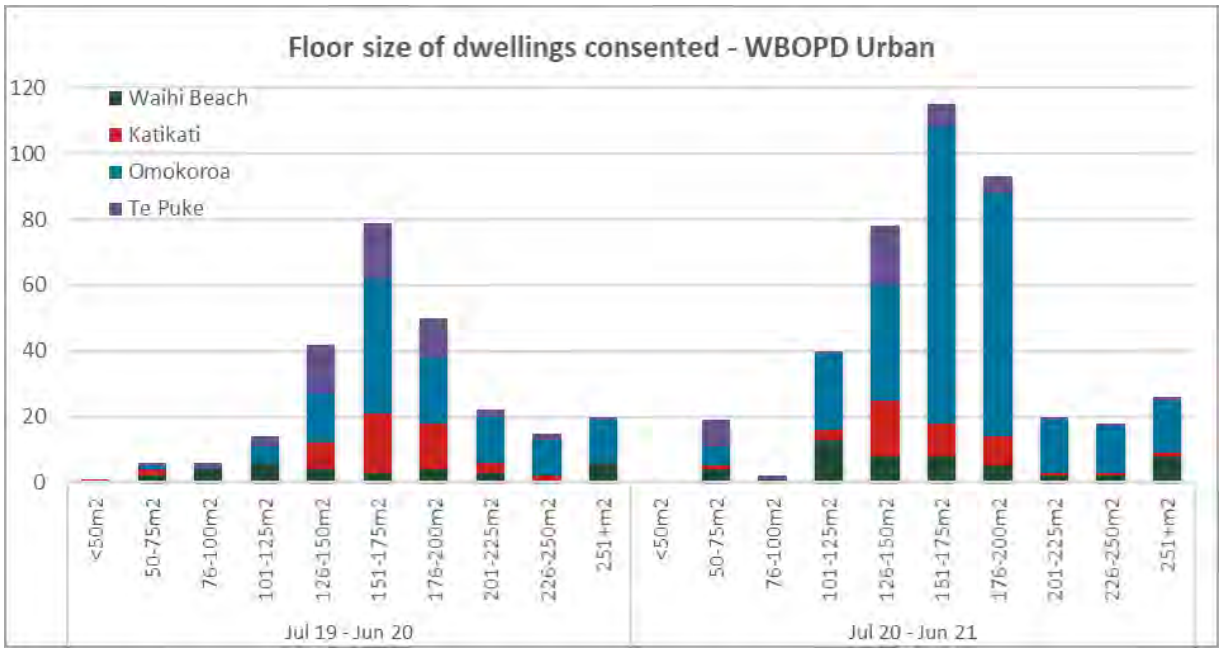


Table 24 Floor size for dwellings consented in WBOPD, July 2019 to June 2021

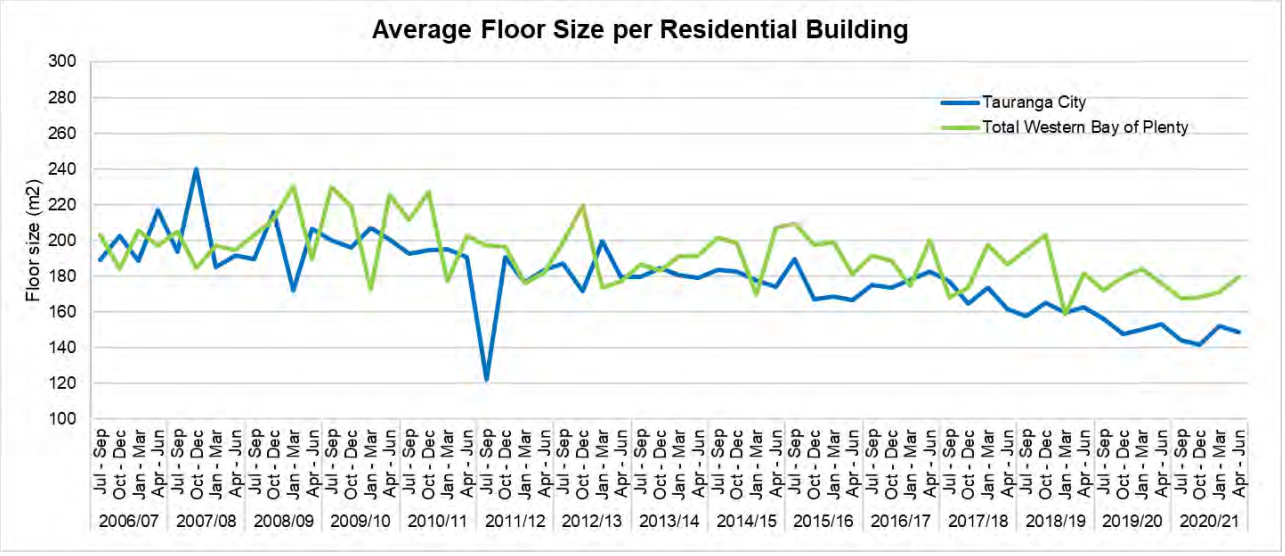
	2019/2020		2020/2021	
Floor size (m²)	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m²	2	0.5	0	0.0
50m² - 75m²	17	4.6	35	6.5
76m² - 100m²	18	4.9	10	1.9
101m² - 125m²	19	5.2	44	8.1
126m² - 150m²	46	12.5	86	15.9
151m² - 175m²	88	23.9	124	23.0
176m² - 200m²	60	16.3	111	20.6
201m² - 225m²	36	9.8	42	7.8
226m² - 250m²	30	8.2	30	5.6
Greater than 251m²	52	14.1	58	10.7
Total	368	100.0	540	100.0

Floor Size per Residential Building

Residential buildings in the sub-region had significantly become smaller in the last 15 years. In Tauranga City, annual average floor size declined from 197m² in 2006/07 to 147m² in 2020/21. Although both local authorities had the same residential building size in 2006/07, WBOPD had bigger residential buildings from 2008/09 than Tauranga City. Residential building size in WBOPD declined from 197m² in 2006/07 to 172m² in 2020/21.

In 2020/21, average floor size per residential building in both local authorities were 5m² smaller compared to the previous year.

Figure 43 Average floor size per residential building, Tauranga City and WBOPD, July 2006 to June 2021



Source: Stats NZ Infoshare

Table 25 Average floor size, Tauranga City and WBOPD

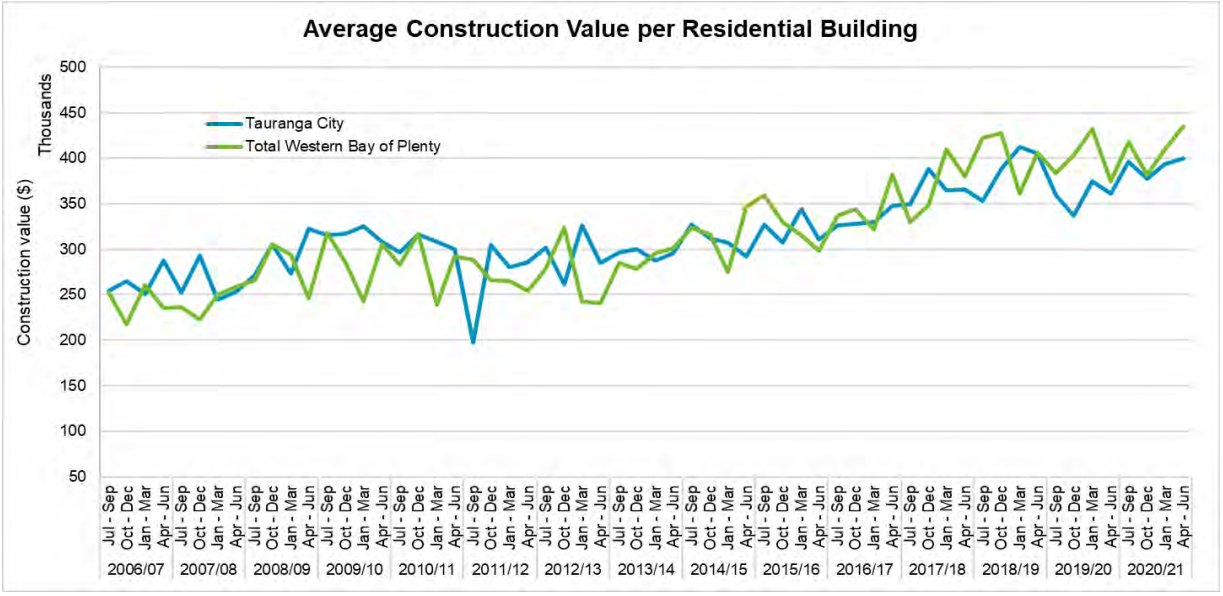
Average floor size (in m^2)		Trend	Change	% Change
Tauranga City				
This year	147			
Last year	152	↓	-5	-3.3
Last 5 years (average)	161	↓	-14	-8.7
Last 10 years (average)	168	↓	-21	-12.5
Western BOPD				
This year	172			
Last year	177	↓	-5	-2.8
Last 5 years (average)	180	↓	-8	-4.4
Last 10 years (average)	178	↓	-6	-3.4

Construction Value per Residential Dwelling

In the last 15 years to June 2021, annual average construction value per residential building increased quite significantly, by almost 50% in Tauranga City and 71% in WBOPD.

Tauranga City's average construction cost per square metre was historically higher than WBOPD's, which can be attributed to the smaller floor size. In 2020/21, construction cost per square metre increased by $307 in Tauranga City and $162 in WBOPD, compared to the previous year. Construction costs were higher by more than 30% than they were in the last ten years.

Figure 44 Average construction value per residential building, Tauranga City and WBOPD, July 2006 to June 2021

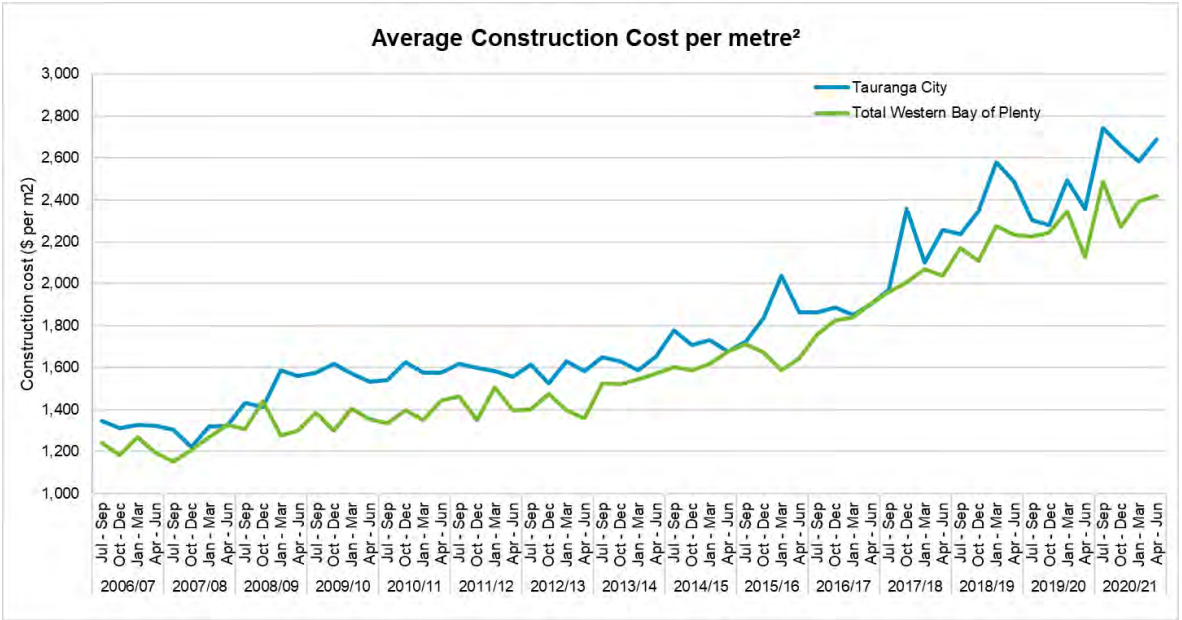


Source: Stats NZ Infoshare

Table 26 Average construction value, Tauranga City and WBOPD

Average construction value		Trend	Change	% Change
Tauranga City				
This year	$391,293			
Last year	$358,858	↑	$32,434	9.0
Last 5 years (average)	$367,450	↑	$23,842	6.5
Last 10 years (average)	$331,016	↑	$60,277	18.2
Western BOPD				
This year	$412,215			
Last year	$395,725	↑	$16,490	4.2
Last 5 years (average)	$383,411	↑	$28,804	7.5
Last 10 years (average)	$337,787	↑	$74,427	22.0

Figure 45 Average construction cost per metre^2, Tauranga City and WBOPD, July 2006 to June 2021



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
Tauranga City				
This year	$2,667			
Last year	$2,360	↑	$307	13.0
Last 5 years (average)	$2,294	↑	$373	16.3
Last 10 years (average)	$1,987	↑	$680	34.2
Western BOPD				
This year	$2,392			
Last year	$2,230	↑	$162	7.3
Last 5 years (average)	$2,134	↑	$257	12.0
Last 10 years (average)	$1,831	↑	$560	30.6

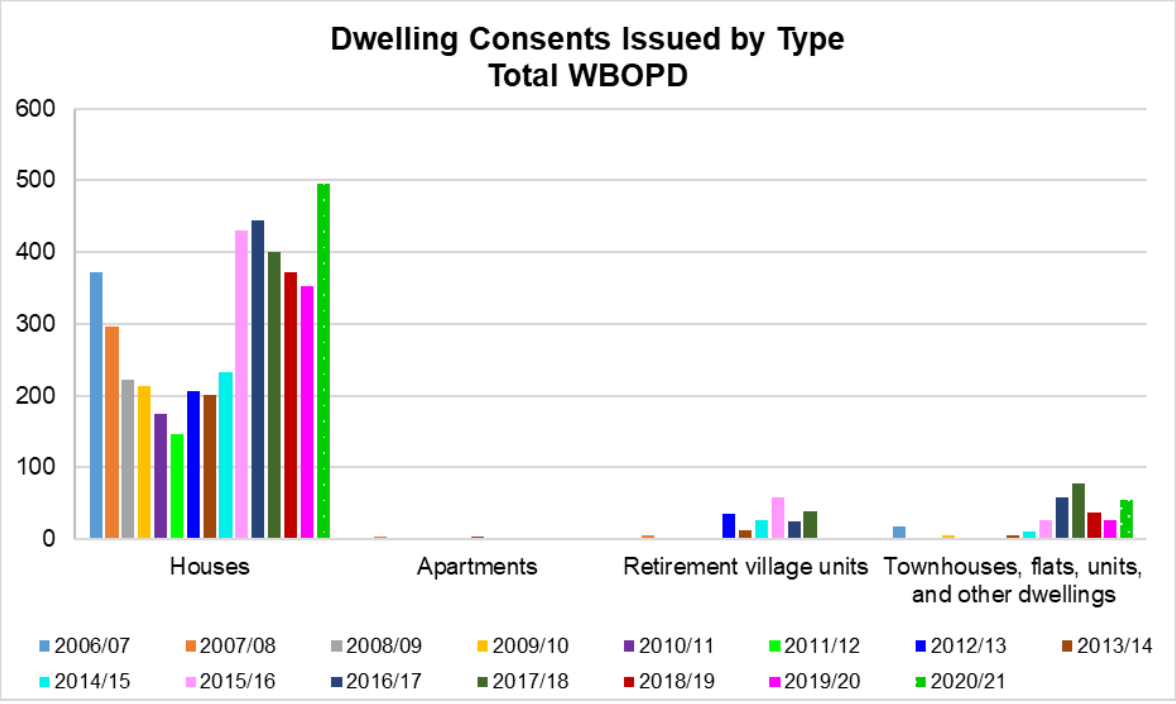
Dwelling Consents Issued by Type

Statistics New Zealand classifies residential buildings into houses, apartments, retirement village units and townhouses, flats, units and other dwellings[15]. By this classification, standalone houses were the main type of dwelling consented in the sub-region in the last 15 years.

Tauranga City recorded a 17% decline in the proportion of stand alone houses consented in 2020/21 (58%) from 75% in 2019/20. The rest of the residential buildings consented in Tauranga City during the year were spread over retirement village units (14%); townhouses, flats, units & other dwellings (16%); and apartments (11%).

Although the majority of the dwellings consented in WBOPD were stand alone houses, its proportion also declined from 93% in 2019/20 to 90% in 2020/21. Townhouses, flats and other dwelling units comprised the remaining 10% of the residential buildings consented in WBOPD in 2020/21.

Figure 46 Dwelling consents issued by type, WBOPD, July 2006 to June 2021



15 Residential statistics from Statistics New Zealand were included in addition to Figures 29 and 30 to provide time-series data from 2006.

Figure 47 Dwelling consents issued by type, Tauranga City, July 2006 to June 2021

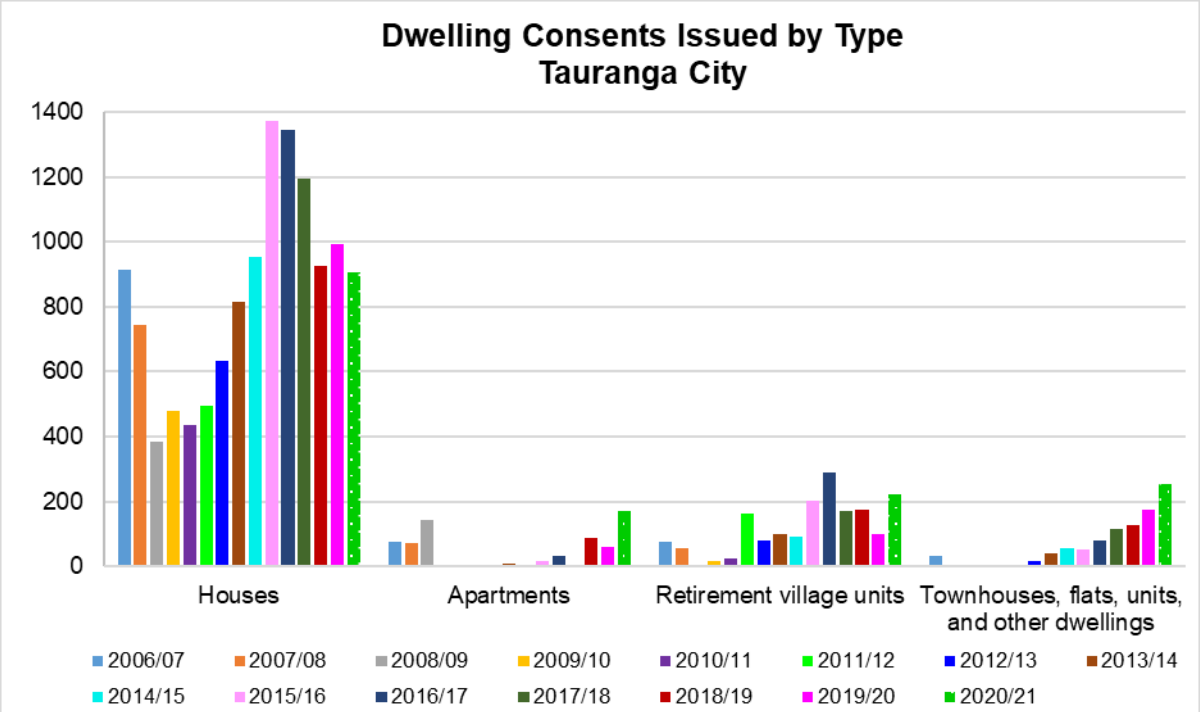


Table 28 All residential buildings, Tauranga City and WBOPD

All residential buildings		Trend	Change	% Change
Tauranga City				
This year	1553			
Last year	1330	↑	223	16.8
Last 5 years (average)	1488	↑	65	4.4
Last 10 years (average)	1254	↑	299	23.8
Western BOPD				
This year	551			
Last year	379	↑	172	4.5
Last 5 years (average)	477	↑	74	15.5
Last 10 years (average)	378	↑	173	45.8

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	58.4%	11.1%	14.2%	16.3%
	WBOPD	90%	-	-	10%
Last 5 Years	Tauranga City	72.2%	4.8%	12.9	10.1%
	WBOPD	86.7%	-	2.6%	10.7%

Table 30 Stand alone dwellings, Tauranga City and WBOPD

Stand alone dwellings		Trend	Change	% Change
Tauranga City				
This year	907			
Last year	995		-88	-8.8
Last 5 years (average)	1,074		-167	-15.5
Last 10 years (average)	965		-58	-6.0
Western BOPD				
This year	496			
Last year	353		143	40.5
Last 5 years (average)	413		83	20.1
Last 10 years (average)	328		168	51.2

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 2021. 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	
15th 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 Ohauiti 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	0.62	7
Papamoa - Palm Beach	8.55	1.76	21
Papamoa - Parton Road[2]	39.28	7.8	22
Pyes Pa West - Tauriko	13.51	0	0
Papamoa East - Wairakei	33.60	33.60	100
Total	107.51	43.78	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 2021.

[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.

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 41.2 hectares, with a further 11.2 hectares of this to be taken for the future Papamoa Eastern Interchange (PEI). 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	174.0	
Tauriko	245.2	
Wairakei	41.2	
Te Tumu[1]		60.3
Tauriko Extension[2]		91.8
Total	1013.8	152.1

[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 91.8 ha of net industrial land.

Table 35 Uptake of Industrial Zoned Land in Tauranga City (as at May 2021)

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 Land[2]								
Judea	0.00	0.00	0.00	0.00	3.26	20.46	23.72	23.72
Mt Maunganui	6.67	13.73	20.40	1.07	0.00	246.63	247.70	268.09
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	37.98	0.00	37.98	8.41	25.30	102.29	136.00	173.98
Owens Place	0.00	0.00	0.00	0.00	0.00	6.13	6.13	6.13
Tauriko	92.31	12.68	104.99	41.50	0.00	98.70	140.20	245.18
Wairakei[4]	29.98	0	29.98	11.19	0	0	11.19	41.17
Total	168.16	26.59	194.75	62.83	33.84	531.65	628.32	823.07
Port Industry Zone[3]								
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	33.58
Total	1.53	5.81	7.34	0.00	0.00	183.38	183.38	190.72

[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] 11.19 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 May 2021, in the general industrial zoned land and the port industry zone. Around 24% (or 194.8 hectares) of the 823.07 hectares of zoned general industrial land in Tauranga City was vacant, with 55% (or 105.0 hectares) located at Tauriko industrial area[16].

In the Port Industry zone 4% (or 7.3 hectares) of the 190.7 hectares of Port Industry zoned land was vacant as at May 2021.

While there was 194.8 hectares identified as vacant industrial land, it is estimated that this will decrease 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) – see Table 36.

The 2021 industrial land survey estimated 46.5 hectares of zoned industrial land in Tauriko would be lost to escarpments, and future roads and stormwater ponds leaving approximately 99.8 hectares of vacant land in Tauriko industrial area. Of this approximately 47.8 hectares was ready to be occupied for industrial activity (subdivided, earthworked, services in place), however all of this land had been sold by the developer Element IMF. Limited opportunities to purchase or lease land from new owners was evident at survey in May 2021 with 7 properties with buildings and 13 vacant sites available for purchase or lease in Tauriko.

[16] See the "Tauranga City Industrial Land Survey 2021", November 2021.

Table 36 Status of vacant industrial zoned land

General Industrial Zone	Gross (all vacant land)	Nett (estimate)[1]	Ready to go land[2]
Judea	0	0	0
Mt Maunganui	20.40	20.4	20.4
Oropi	0.89	0.89	0.89
Greerton	0.52	0.52	0.52
Sulphur Point	0	0	0
Te Maunga	37.98	27.98	4.98
Owens Place	0	0	0
Tauriko[3]	104.99	99.74	47.81
Wairakei	29.98	22.58	0
subtotal	194.75	172.11	74.60
Port Industry subtotal	5.81	5.81	5.81
Total	200.56	177.92	80.41

1. Nett developable area of land (estimated "nett" area) removes land that will be external to the site, such as roads, escarpments and stormwater reserves.
2. Site earthworks completed, services in place, ready to be occupied for industrial activity.
3. Known "Future" escarpments, stormwater ponds, and roads have already been deducted from Tauriko to estimate its "Gross" vacant land figure.

Over all industrial areas in Tauranga City as at May 2021, 74.6 hectares of industrial land was assessed to be ready to be occupied for industrial activity, and 31 properties with buildings and 18 vacant sites were available for purchase or lease.

An extension of Tauriko Business estate south of Belk Road is expected to increase industrial land supply by approximately 91.8 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 large area of industrial land with 27.16 ha zoned at present. In Ōmokoroa a part of the industrial land was used for the Special Housing Area with 18.07 ha still operative in Stage 2 of the Ōmokoroa Structure Plan, with another 8ha planned in Stage 3.

In the western end of the District the Te Puna Rural Business Zone contains 30.58 ha for future use, while Rangiuru in the eastern end contains 179.64 ha of Industrial land zoned in preparation for the Rangiuru Business Park.

Table 37 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
Rangiuru	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, Ōmokoroa, Te Puke, Rangiuru 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 Rangiuru Business Park after 2021 with the $18million Provincial Growth Fund granted in July 2020.

Table 38 Uptake of Industrial Zoned Land in the Western Bay of Plenty District

Industrial Zone – 2021								
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
Ōmokoroa	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
Rangiuru[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 Rangiuru 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.
- 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 91.8 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 supply.

For longer term industrial land provision to 2050, additional land will need to identified and planning progressed. Additional areas are yet to be identified but are unlikely to be in Tauranga City due to land constraints. Further investigation is required in the wider Western BOP, and potentially beyond, to identify and progress the delivery of suitable land for industrial activity.

The updated business capacity assessment required under the NPS-UD will need to re-evaluate the sufficiency of business land, particularly industrial land, to meet future demand[17]. 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 39 Ratio of Industrial and Commercial Zoned Land per Person in the Western Bay of Plenty Sub region

Territorial Authority	2021 Estimated Resident Population	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
Tauranga City	155,200	1165.9	0.0075	283	0.0018
Western Bay of Plenty District	58,100	600.05	0.0103	44.28	0.00076
Total	213,300	1,765.95	0.0083	327.28	0.0015

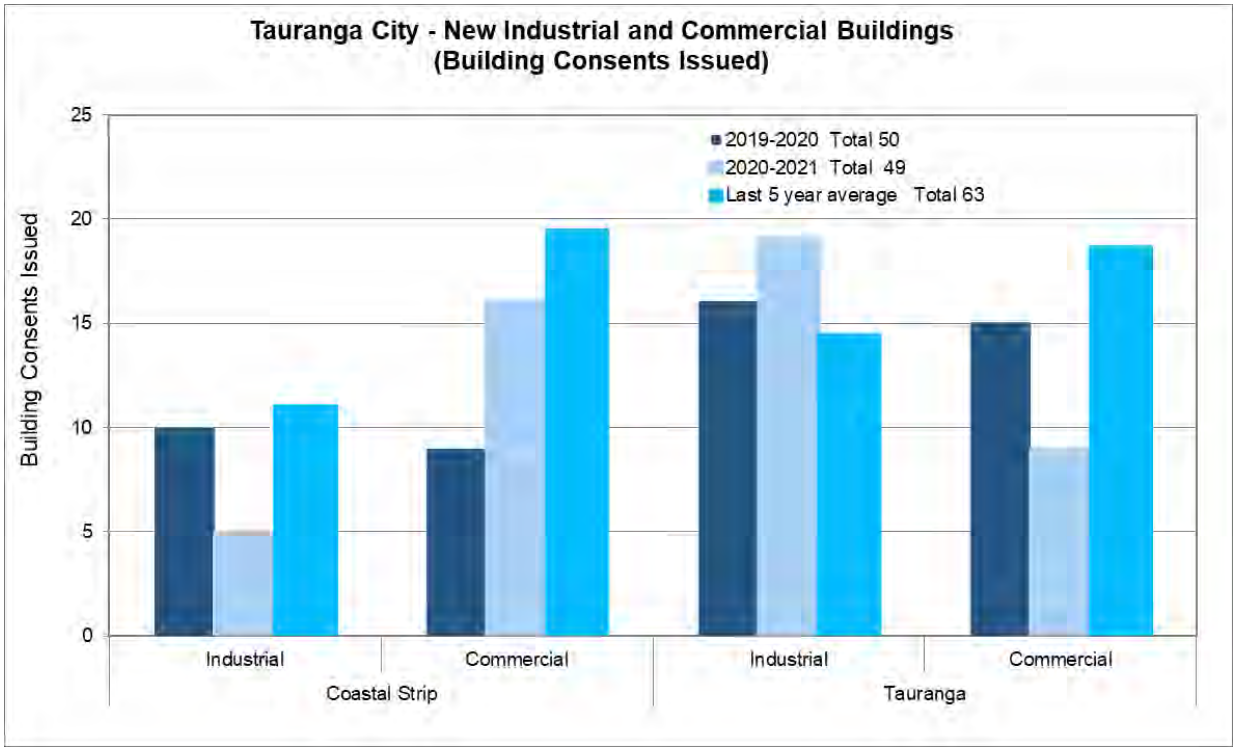
Industrial and Commercial Building Consents Issued

Tauranga City

Tauranga City has a total of 24 new industrial and 25 commercial buildings consented in 2020/21, 2 less industrial buildings and 1 more commercial building compared to the previous year. Of the total 49 buildings consented during the year, 21 were located in the Coastal Strip and 28 were located in the Tauranga area.

[17] The full HBA (both housing and business assessments) is expected to be completed by December 2022 to inform the Future Development Strategy (FDS); both are required under the NPS-UD to be completed in time to inform the 2024-2034 LTP.

Figure 48 New industrial and commercial buildings, Tauranga City, 2019 to 2021



Western Bay of Plenty District

Commercial building consents decreased from 8 consents to 3 consents issued from 2018/2019 to 2019/20 and 2020/21 while one more workshop was built in the industrial area of Te Puke in the same period.

Table 40 Consents for Industrial and Commercial Buildings in the Western Bay of Plenty District

Year	Industrial Building Consents	Commercial Building Consents
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
01/7/2020 - 30/6/2021	1	3
5 Year Average	2.4	4.4

Non-Residential Building Consents Issued by Type

The type of non-residential buildings consented vary between the two local authorities. WBOPD had a higher number of farm buildings consented due to the more rural nature of activities in the district, while Tauranga City had more commercial buildings and factories, industrial and storage buildings consented.

Both local authorities had less non-residential buildings consented in 2020/21 compared to the previous year, with Tauranga City having a total of 95 buildings and WBOPD had 90 buildings consented. While WBOPD had 29 less farm buildings consented during the year, Tauranga City had 9 more commercial buildings and factories, industrial, and storage buildings.

Figure 49 Non-residential building consents, WBOPD (total), 2006 to 2021

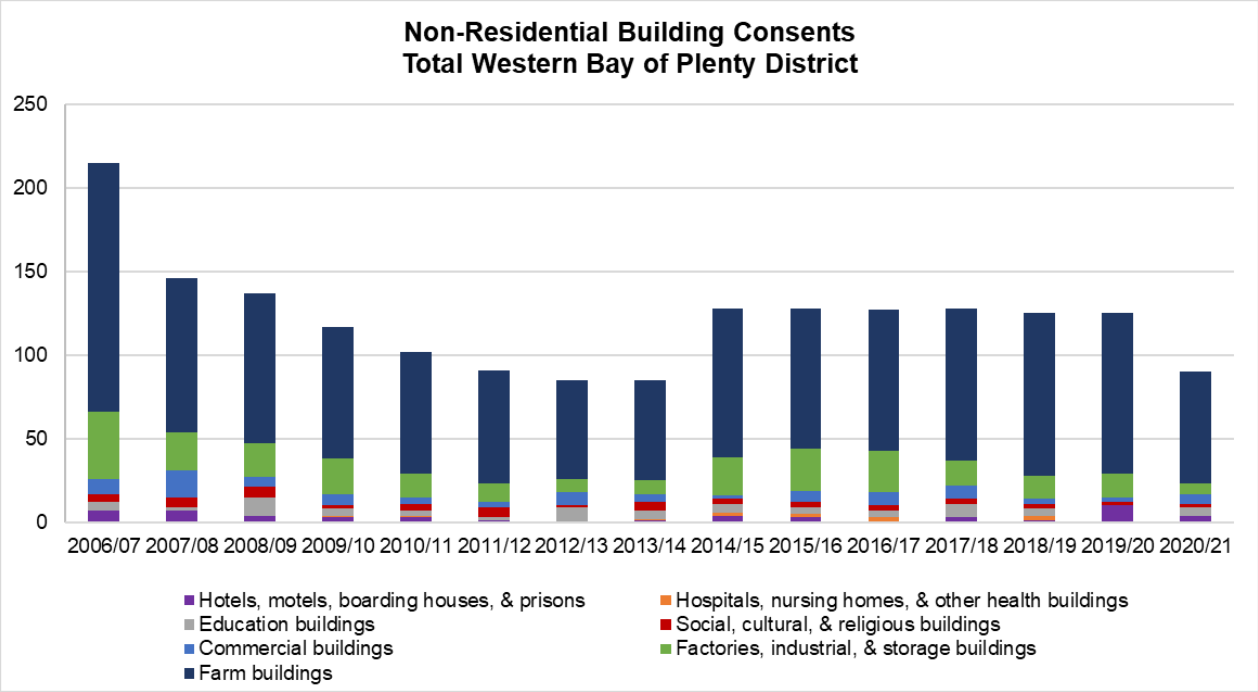
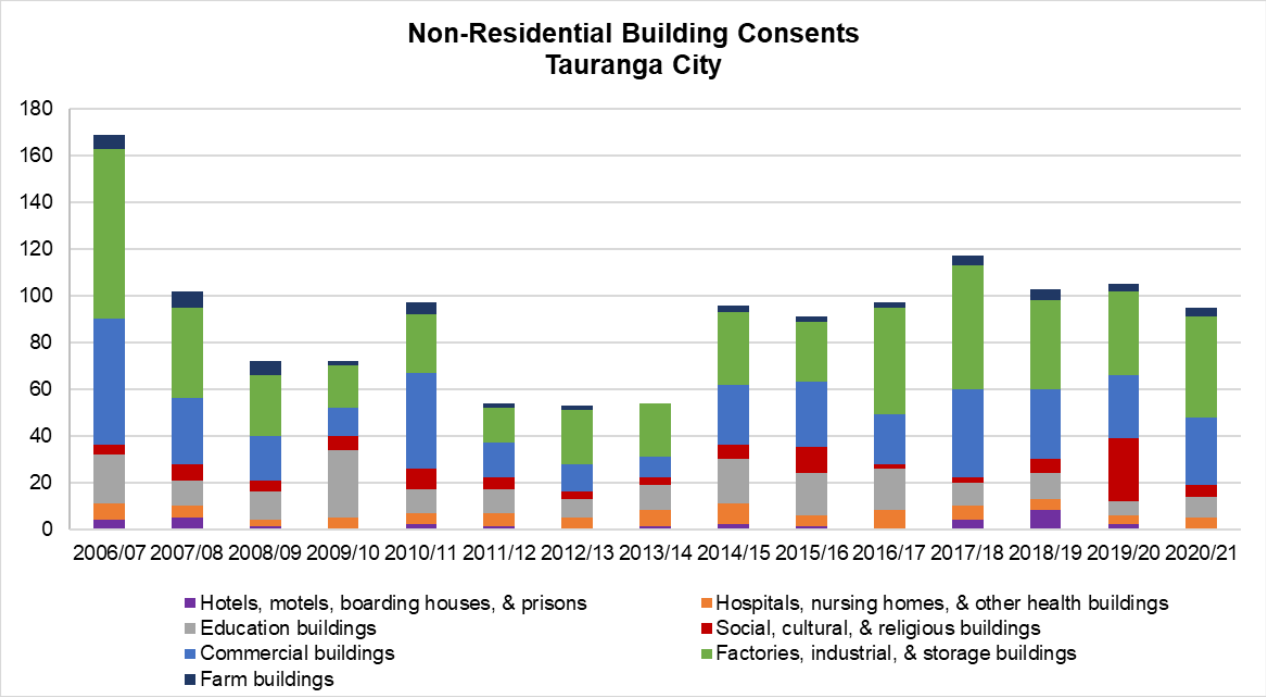


Figure 50 Non-residential building consents, Tauranga City, 2006 to 2021



Source: Statistics NZ Infoshare

Table 41 All non-residential buildings, Tauranga City and WBOPD

All non-residential buildings		Trend	Change	% Change
Tauranga City				
This year	95			
Last year	105	↓	-10	-9.5
Last 5 years (average)	103	↓	-8	-7.8
Last 10 years (average)	87	↑	8	21.1
Western BOPD – Urban				
This year	90			
Last year	125	↓	-35	-28%
Last 5 years (average)	119	↓	-29	-24.4
Last 10 years (average)	111	↓	-21	-18.9

Non-Residential Building Consents by Construction Value

While the number of non-residential building consents had declined from 2019/20 to 2020/21 for both local authorities, the average construction value had increased. A number of high value non-residential building consents (like cool stores/ packhouses in WBOPD and factories and industrial buildings in Tauranga City) had increased the total value from July 2020 to June 2021.

Figure 51 Non-residential building consents and average construction value, WBOPD, 2006 to 2021

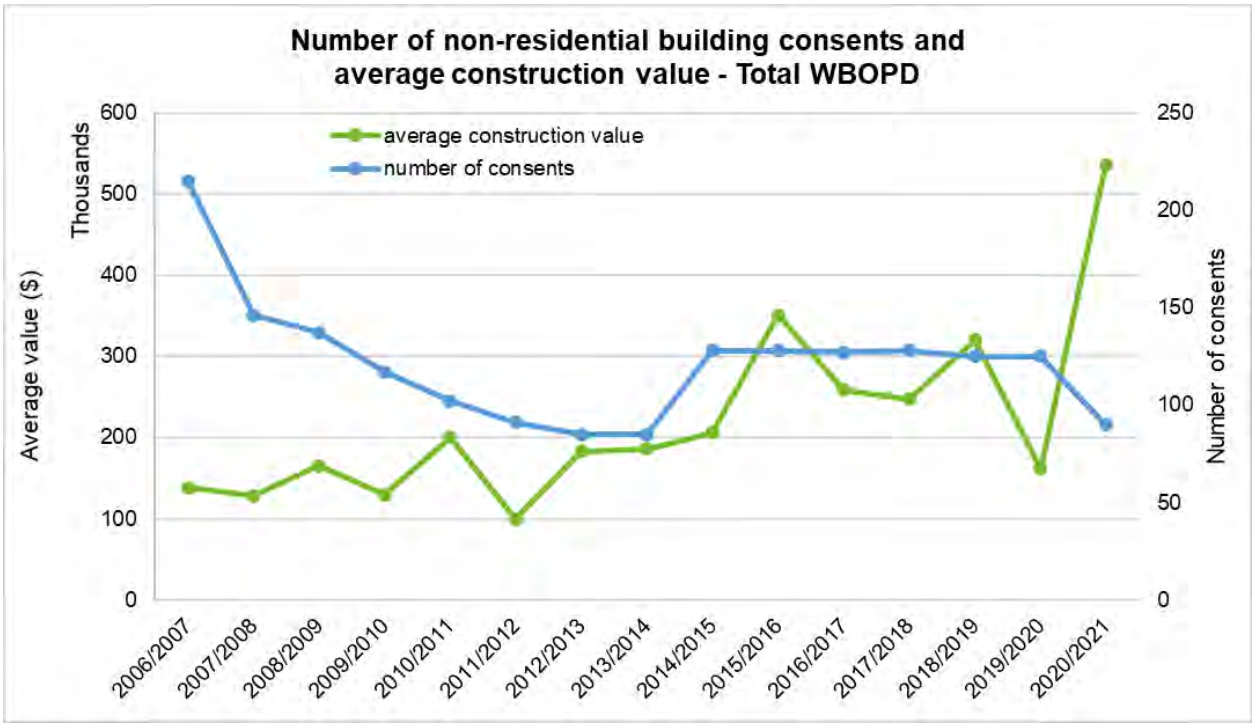
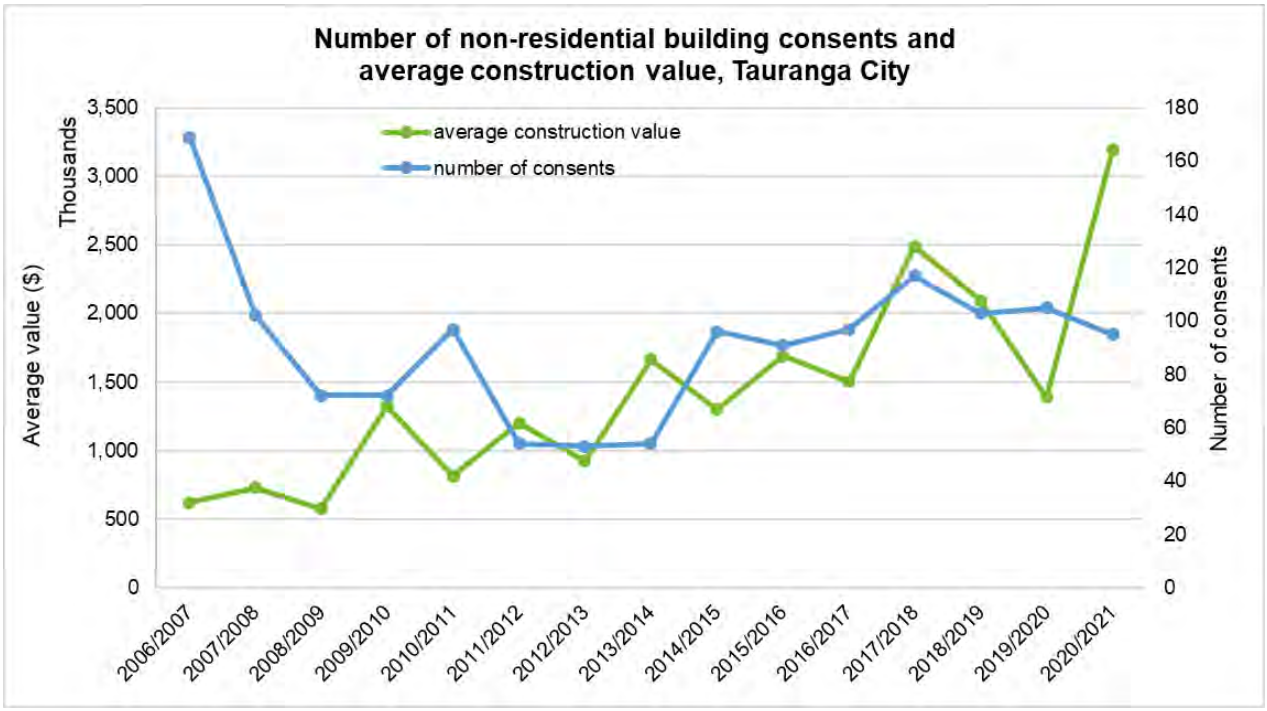


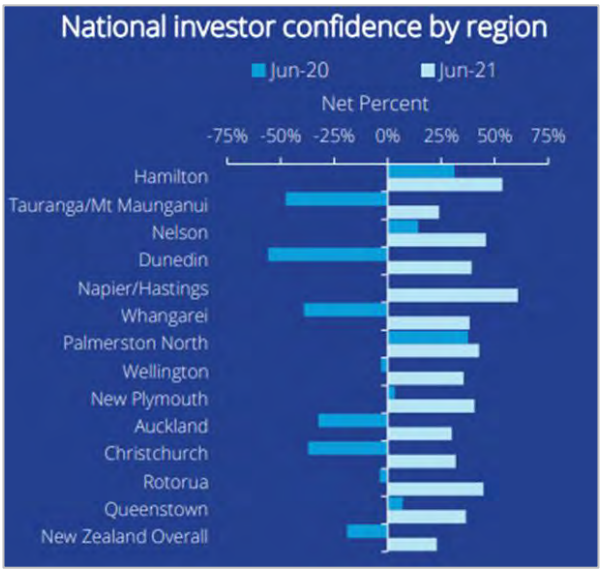
Figure 52 Non-residential building consents and average construction value, Tauranga City, 2006 to 2021



Commercial and Industrial Property Market

Based on the June 2021 survey by Colliers International, commercial and industrial investor confidence in Mt Maunganui/Tauranga had shifted upward from a net negative score in the previous year to more than 20% this year. It can be noted that prior to COVID-19, Mt Maunganui/Tauranga had occupied the top spot in net investor confidence ratings.

Figure 53 Commercial property investor confidence survey results, June 2021 vs. June 2020



The rebound in investors' confidence in June 2021 can be substantiated by the increase in the value of all commercial buildings consented during the year, amounting to $413.97 million, an increase of 118% ($223.8 million) from last year's record of $190 million.

Of the new non-residential buildings consented during the year, 8.9% comprised new commercial buildings, having a value of $27 million. This was 46% lower than the previous year's record of $50 million and the lowest record in the last 5 years.

Table 42 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
2020/2021	27.0	8.9

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-UD indicators on an annual basis. Simpler quarterly monitoring reports were prepared in between the annual reports in the three years of implementing NPS-UDC from September 2017. With the NPS-UD superseding the NPS-UDC in late 2020, the quarterly monitoring results are incorporated in the SmartGrowth Development Trends Report. It also includes information that aligns with the recently completed 2021 Housing Development Capacity Assessment, and this and subsequent reports will inform the full Housing and Business Development Capacity Assessment and Future Development Strategy (FDS) required to be produced in time to inform 2024-2034 Long Term Plans (LTP's) .

Monitoring results are recorded either monthly or quarterly, depending on the frequency of release or availability of data from providers/sources. With the NPS-UD taking effect in August 2020, quarterly monitoring of the housing and business indicators was carried through and results were included in this annual report.

SmartGrowth is committed to improving the annual monitoring document over time. This year marks the third 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 third 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 Capacity[18].

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

[18] 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 1600m^2 is required to subdivide, as the minimum net lot size is 800m^2. To allow for access ways, 1800m^2 is used for monitoring purposes for subdivision potential.
- For sewered urban areas, a minimum net lot size of 700m^2 is required to subdivide, as the minimum net lot size is 350m^2. To allow for access ways, 800m^2 is used for monitoring purposes

for subdivision potential except in Omokoroa where a minimum lot size of 400m^2 is permitted in Stage 1 and a minimum of 600m^2 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), Ohauiti, 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 800m^2 or with the potential to enable subdivision to a minimum lot size of 350m^2. Except in Omokoroa where a minimum lot size of 400m^2 is permitted in Stage 1 and a minimum of 600m^2 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 800m^2 (sewered) and 1800m^2 (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.

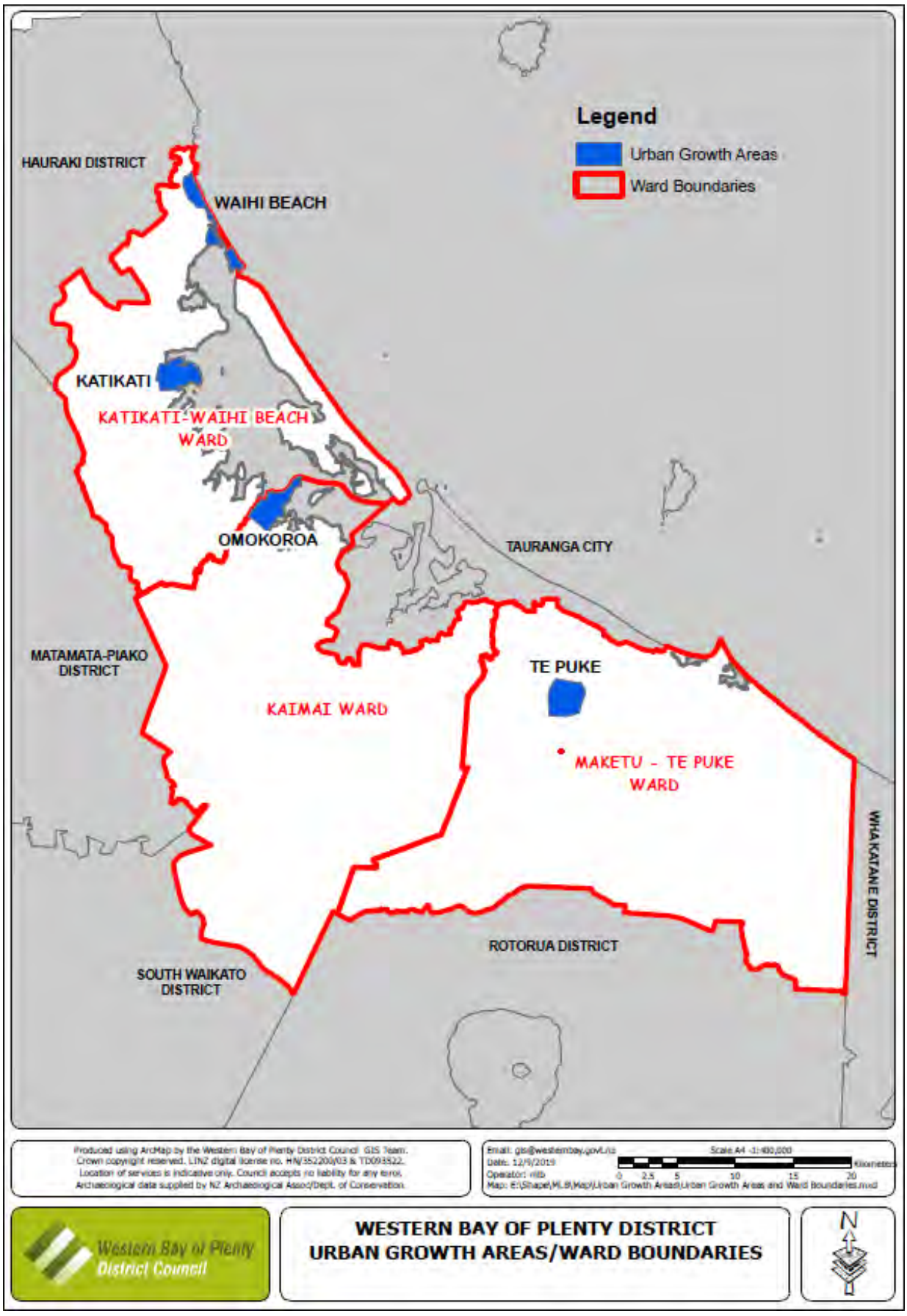
Tauranga City

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.

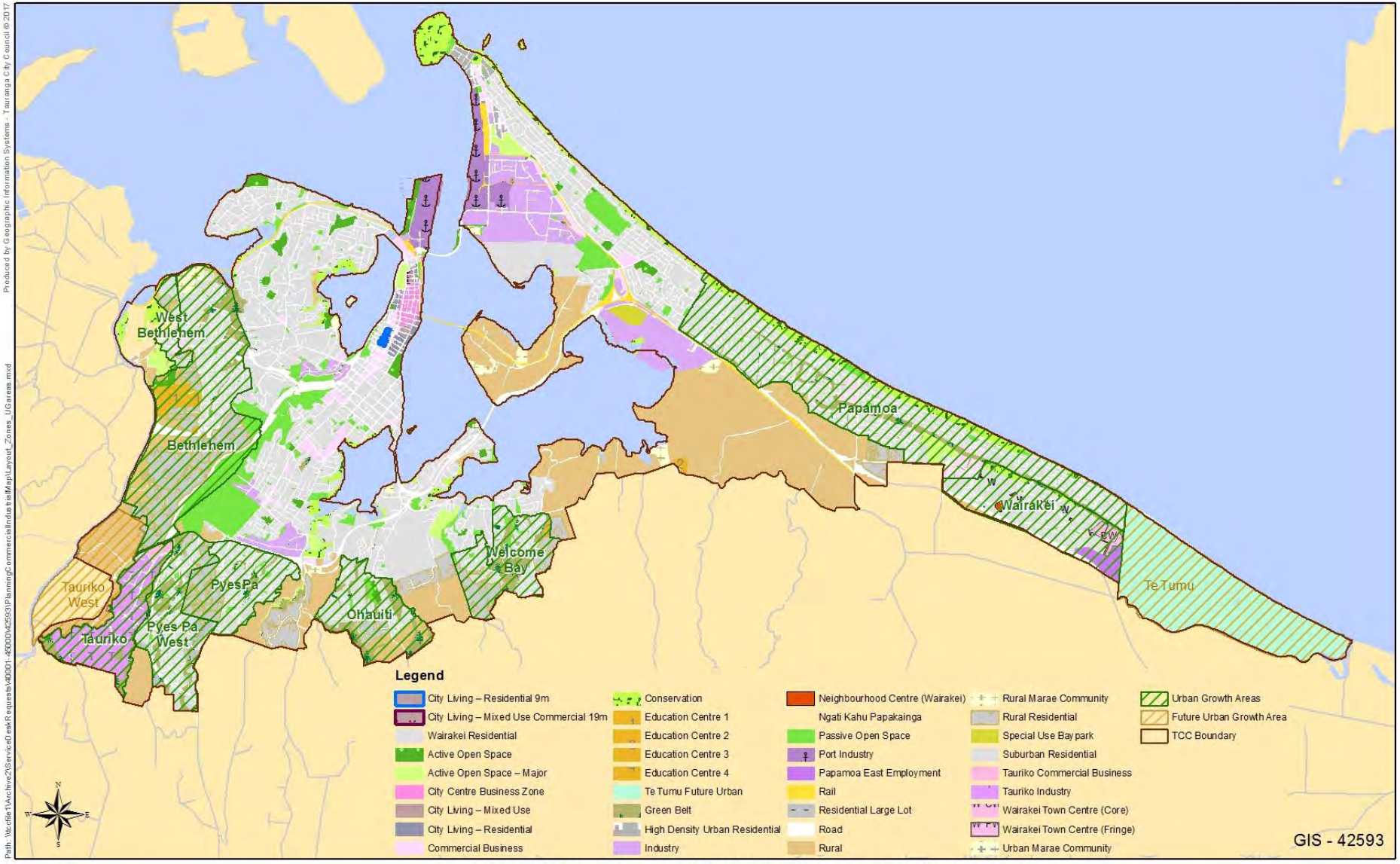
Residential Intensification Areas	currently this classification is applied to development within the High Density Residential zoned area in Mount Maunganui North, and City Living and City Centre zoned areas where greater density is permitted.
Residential infill/ Intensification	existing urban areas of 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.
Rural Infill	Areas of Tauranga City with Rural zoning outside the Greenfield UGA's
Residential Greenfield UGA's	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 -

0 1.25 2.5 5 7.5 10 Kilometers

Tauranga City

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 4

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

Stats NZ changed 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)

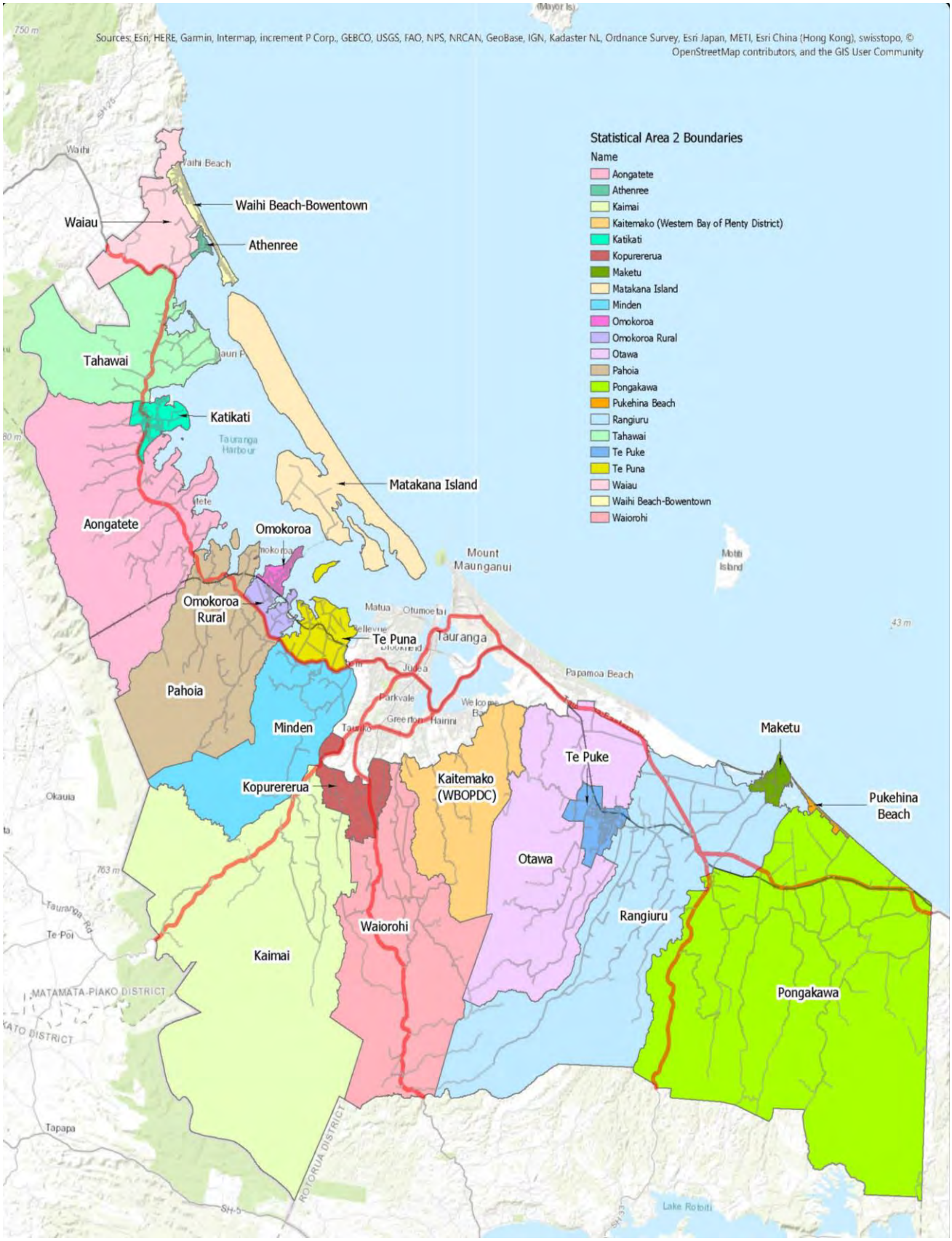
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Waihi Beach-Bowentown	2,484	1,071	1,410	2,481	57
Athenree	804	297	117	414	28
Waiau	333	123	45	168	27
Tahawai	1,833	744	87	831	10
Aongatete	3,279	1,305	108	1,413	8
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
Rangiuru	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)

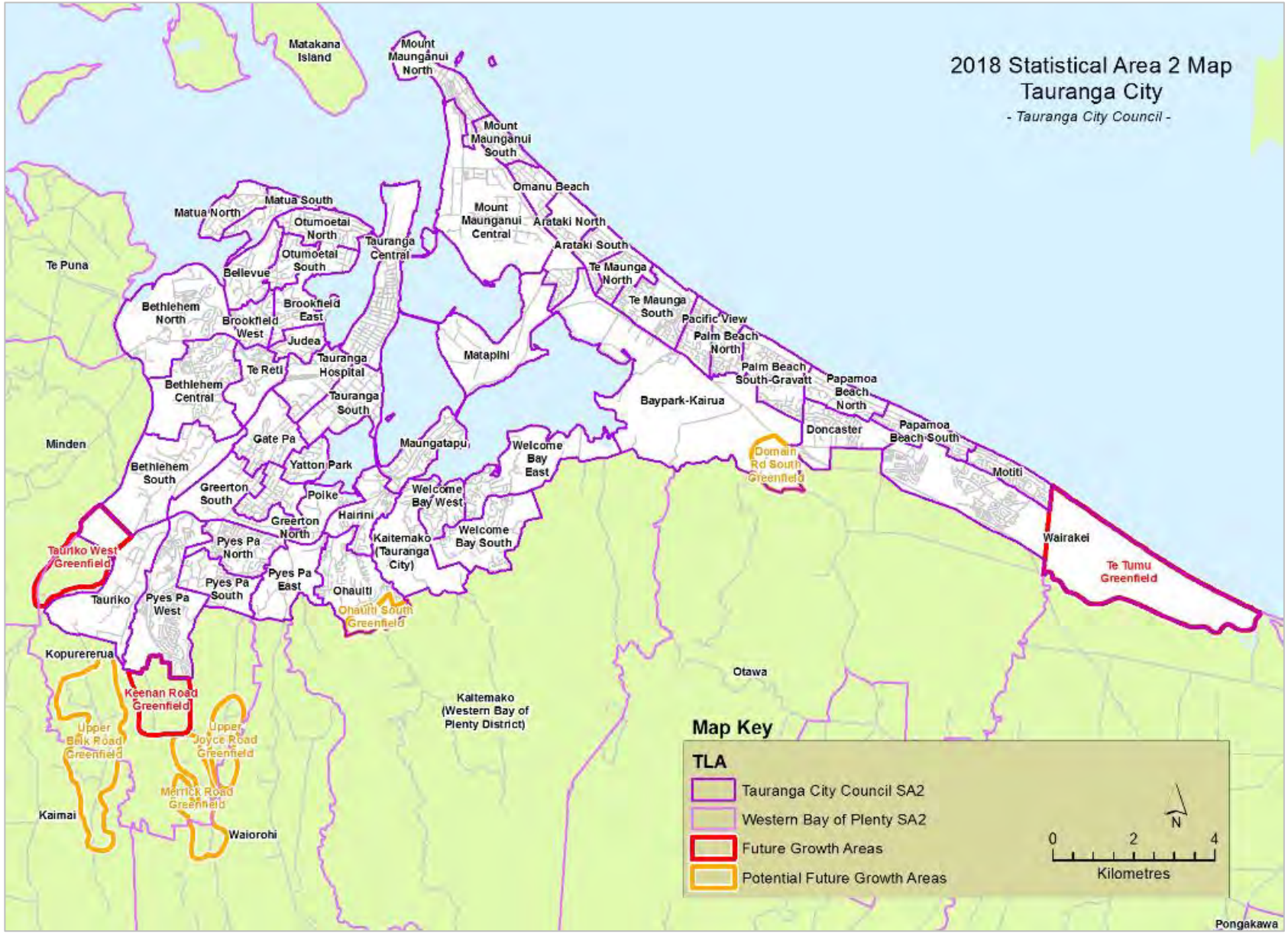
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Matua North	2,844	1,134	81	1,215	7
Mount Maunganui North	3,720	1,575	897	2,472	36
Matua South	2,523	939	63	1,002	6
Bethlehem North	3,387	1,329	99	1,428	7
Bellevue	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
Ohauiti	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

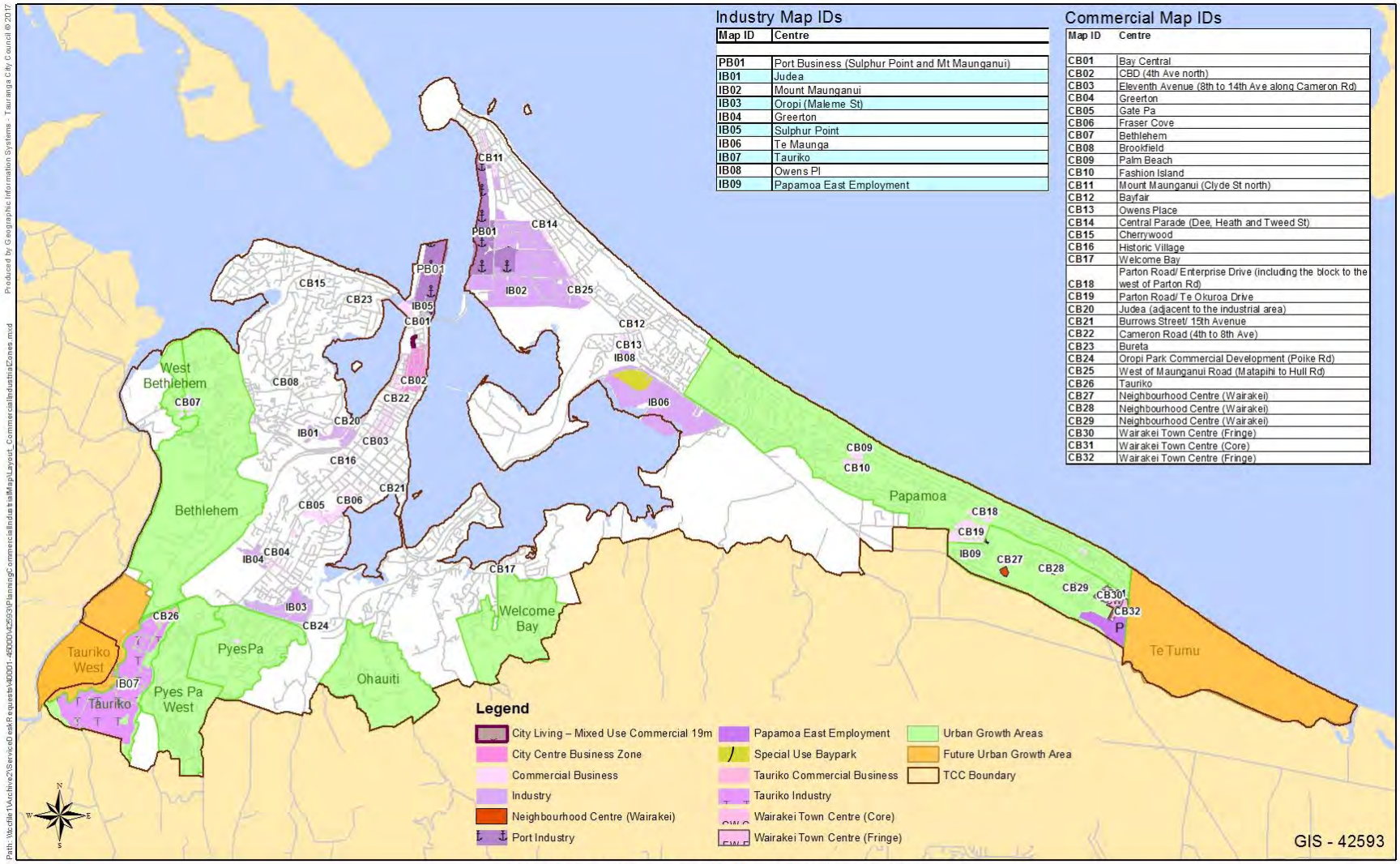


Tauranga City Statistical Area 2 Map



Appendix 6

Tauranga City Commercial and Industry Zoned Areas



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

$$\text{Dwelling density} = \frac{\text{Total Yield}}{\text{Area}}$$

= number of dwellings per ha

Where:

Total Yield = total number of dwellings
= number of dwellings in developed areas
+ number of proposed sections/lots or dwellings

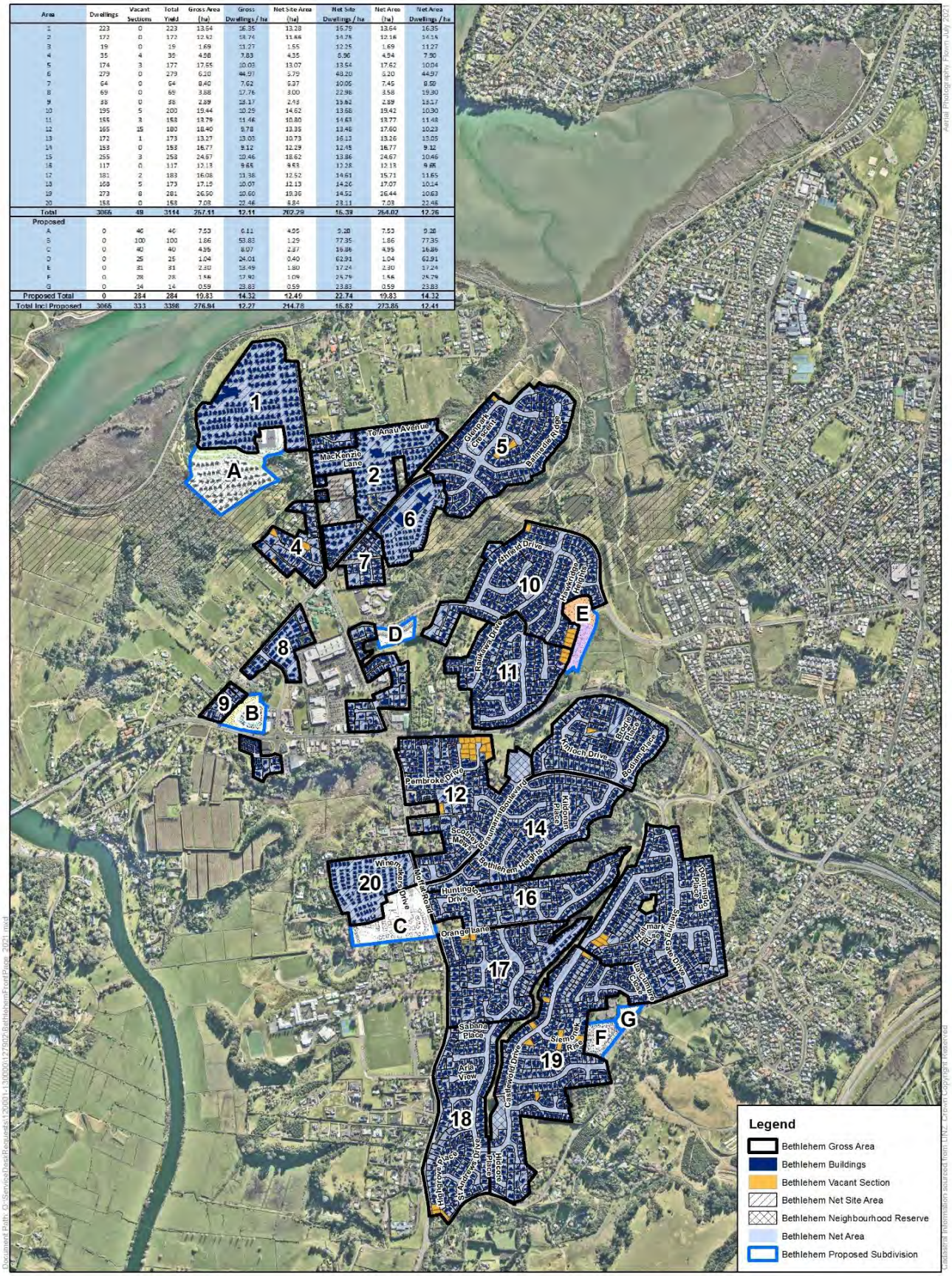
Area = nett area in ha

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	223	0	223	13.64	16.35	13.28	16.79	13.64	16.35
2	172	0	172	12.92	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	35	4	35	4.58	7.83	4.35	8.06	4.94	7.90
5	174	3	177	17.55	10.03	13.07	13.54	17.62	10.04
6	279	0	279	6.20	44.97	5.79	48.20	6.20	44.97
7	64	0	64	8.40	7.62	5.27	10.06	7.45	8.59
8	69	0	69	3.88	17.76	3.00	22.98	3.58	19.30
9	38	0	38	2.89	13.17	2.43	15.62	2.89	13.17
10	195	5	200	19.44	10.29	14.62	13.68	19.42	10.30
11	155	3	158	13.79	11.46	10.80	14.63	13.77	11.48
12	165	15	180	18.40	9.78	13.35	13.48	17.60	10.23
13	172	1	173	13.27	13.03	10.73	16.13	13.26	13.05
14	153	0	153	16.77	9.12	12.29	12.45	16.77	9.12
15	255	3	258	24.67	10.46	18.62	13.86	24.67	10.46
16	117	0	117	17.13	6.85	9.43	12.38	12.13	9.65
17	181	2	183	16.08	11.38	12.52	14.61	15.71	11.65
18	168	5	173	17.15	10.07	12.13	14.26	17.07	10.14
19	273	8	281	26.90	10.60	19.36	14.52	26.44	10.63
20	158	0	158	7.08	22.46	5.84	28.11	7.03	22.46
Total	3065	48	3114	267.51	12.11	202.78	16.39	264.02	12.26
Proposed									
A	0	46	46	7.53	6.11	4.65	9.28	7.53	9.28
B	0	100	100	1.86	53.83	1.29	77.35	1.86	77.35
C	0	40	40	4.95	8.07	2.37	16.86	4.95	16.86
D	0	25	25	1.04	24.01	0.40	62.91	1.04	62.91
E	0	31	31	2.30	13.49	1.80	17.24	2.30	17.24
F	0	28	28	1.56	17.90	1.09	25.79	1.56	25.79
G	0	14	14	0.59	23.83	0.59	23.83	0.59	23.83
Proposed Total	0	284	284	19.83	14.32	12.49	22.74	19.83	14.32
Total Incl Proposed	3065	333	3398	276.94	12.27	214.78	15.82	273.85	12.41



Bethlehem Dwelling Density

0 100 200 400 600 m

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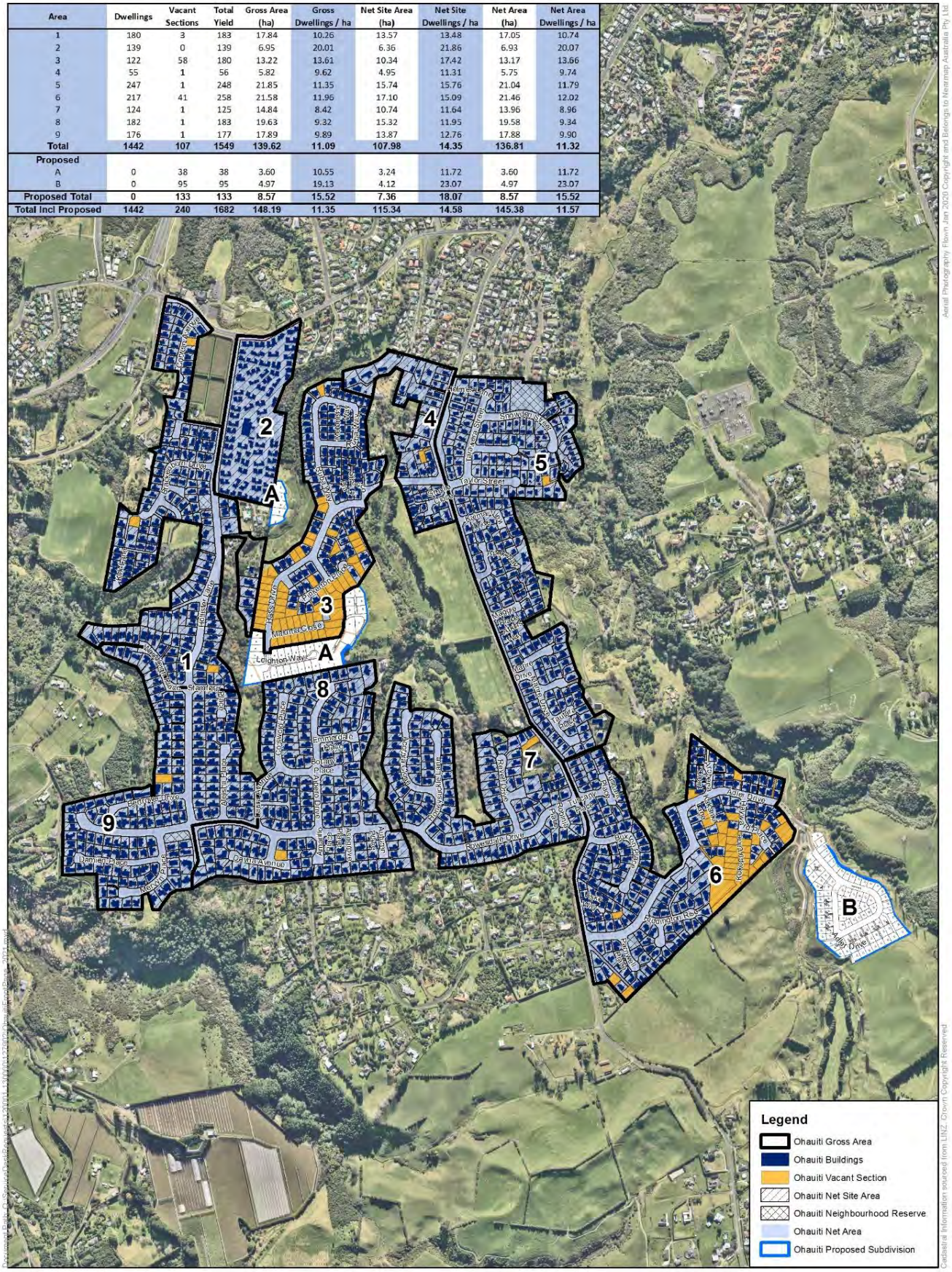
Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.

Tauranga City

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	180	3	183	17.84	10.26	13.57	13.48	17.05	10.74
2	139	0	139	6.95	20.01	6.36	21.86	6.93	20.07
3	122	58	180	13.22	13.61	10.34	17.42	13.17	13.66
4	55	1	56	5.82	9.62	4.95	11.31	5.75	9.74
5	247	1	248	21.85	11.35	15.74	15.76	21.04	11.79
6	217	41	258	21.58	11.96	17.10	15.09	21.46	12.02
7	124	1	125	14.84	8.42	10.74	11.64	13.96	8.96
8	182	1	183	19.63	9.32	15.32	11.95	19.58	9.34
9	176	1	177	17.89	9.89	13.87	12.76	17.88	9.90
Total	**1442**	**107**	**1549**	**139.62**	**11.09**	**107.98**	**14.35**	**136.81**	**11.32**
Proposed									
A	0	38	38	3.60	10.55	3.24	11.72	3.60	11.72
B	0	95	95	4.97	19.13	4.12	23.07	4.97	23.07
Proposed Total	**0**	**133**	**133**	**8.57**	**15.52**	**7.36**	**18.07**	**8.57**	**15.52**
Total Incl Proposed	**1442**	**240**	**1682**	**148.19**	**11.35**	**115.34**	**14.58**	**145.38**	**11.57**



Ohauiti Dwelling Density

0 0.1 0.2 0.4 Kms

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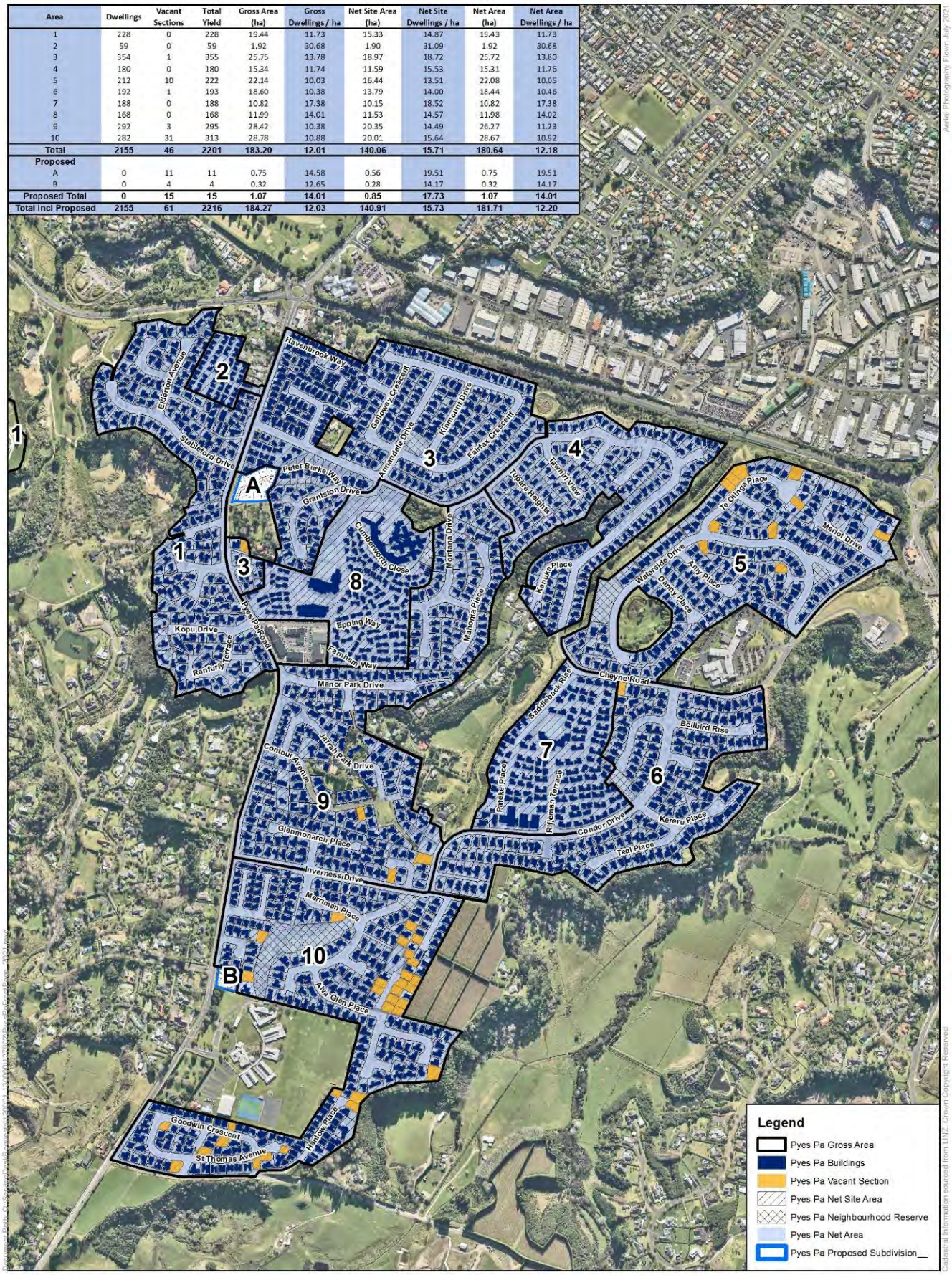
Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.

Tauranga City

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	228	0	228	19.44	11.73	15.33	14.87	19.43	11.73
2	59	0	59	1.92	30.68	1.90	31.09	1.92	30.68
3	354	1	355	25.75	13.78	18.97	18.72	25.72	13.80
4	180	0	180	15.34	11.74	11.59	15.53	15.31	11.76
5	212	10	222	22.14	10.03	16.44	13.51	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	11.98	14.02
9	292	3	295	28.42	10.38	20.35	14.49	26.27	11.23
10	282	31	313	28.78	10.88	20.01	15.64	28.67	10.92
Total	**2155**	**46**	**2201**	**183.20**	**12.01**	**140.06**	**15.71**	**180.64**	**12.18**
Proposed									
A	0	11	11	0.75	14.58	0.56	19.51	0.75	19.51
B	0	4	4	0.32	12.65	0.28	14.17	0.32	14.17
Proposed Total	**0**	**15**	**15**	**1.07**	**14.01**	**0.85**	**17.73**	**1.07**	**14.01**
Total Incl Proposed	**2155**	**61**	**2216**	**184.27**	**12.03**	**140.91**	**15.73**	**181.71**	**12.20**



Pyes Pa Dwelling Density

0 0.1 0.2 0.4 Kms
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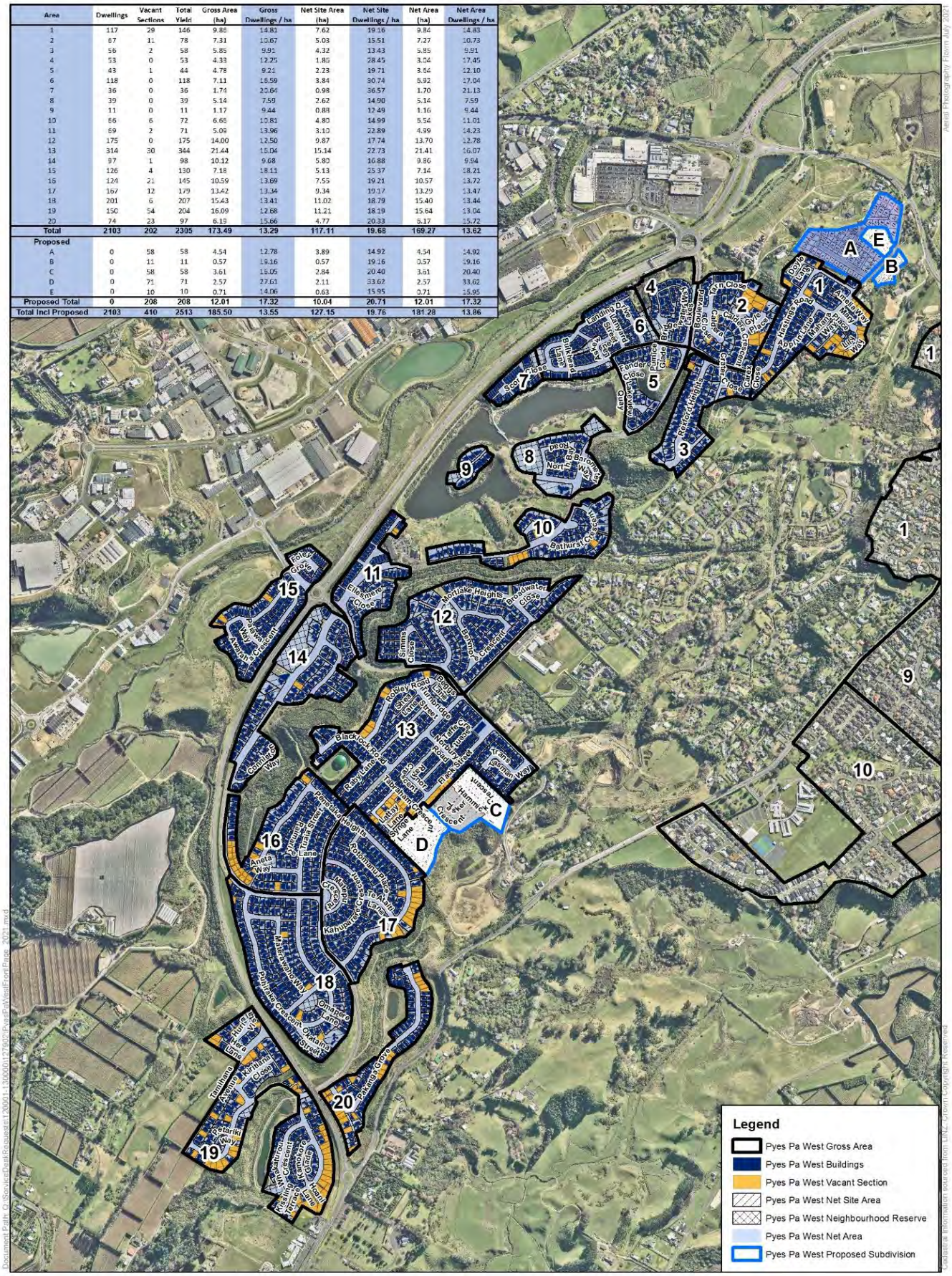
Tauranga City

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	117	29	146	9.86	14.81	7.62	19.16	9.84	14.83
2	67	11	78	7.31	10.67	5.03	15.51	7.27	10.73
3	56	2	58	5.85	9.91	4.32	13.43	5.85	9.91
4	53	0	53	4.33	12.25	1.85	28.45	3.04	17.45
5	43	1	44	4.78	9.21	2.23	19.71	3.54	12.10
6	118	0	118	7.11	16.59	3.84	30.74	5.92	17.04
7	36	0	36	1.74	20.64	0.98	36.57	1.70	21.13
8	39	0	39	5.14	7.59	2.62	14.90	5.14	7.59
9	11	0	11	1.17	9.44	0.88	12.49	1.16	9.44
10	66	6	72	6.66	10.81	4.80	14.99	5.54	11.01
11	69	2	71	5.09	13.96	3.10	22.89	4.99	14.23
12	175	0	175	14.00	12.50	9.87	17.74	13.70	12.78
13	314	30	344	21.44	15.04	15.14	22.73	21.41	16.07
14	97	1	98	10.12	9.68	5.80	16.88	9.86	9.94
15	126	4	130	7.18	18.11	5.13	25.37	7.14	18.21
16	124	21	145	10.59	13.69	7.55	19.21	10.57	13.72
17	167	12	179	13.42	13.34	9.34	19.17	13.29	13.47
18	201	6	207	15.43	13.41	11.02	18.79	15.40	13.44
19	150	54	204	16.09	12.68	11.21	18.19	15.64	13.04
20	74	23	97	6.13	15.66	4.77	20.33	6.17	15.72
Total	**2103**	**202**	**2305**	**173.49**	**13.29**	**117.11**	**19.68**	**169.27**	**13.62**
Proposed									
A	0	58	58	4.54	12.78	3.89	14.92	4.54	14.92
B	0	11	11	0.57	19.16	0.57	19.16	0.57	19.16
C	0	58	58	3.61	16.05	2.84	20.40	3.61	20.40
D	0	71	71	2.57	27.61	2.11	33.62	2.57	33.62
E	0	10	10	0.71	14.06	0.63	15.95	0.71	15.95
Proposed Total	**0**	**208**	**208**	**12.01**	**17.32**	**10.04**	**20.71**	**12.01**	**17.32**
Total Incl Proposed	**2103**	**410**	**2513**	**185.50**	**13.55**	**127.15**	**19.76**	**181.28**	**13.86**



Pyes Pa West Dwelling Density

0 0.15 0.3 0.6 Kms

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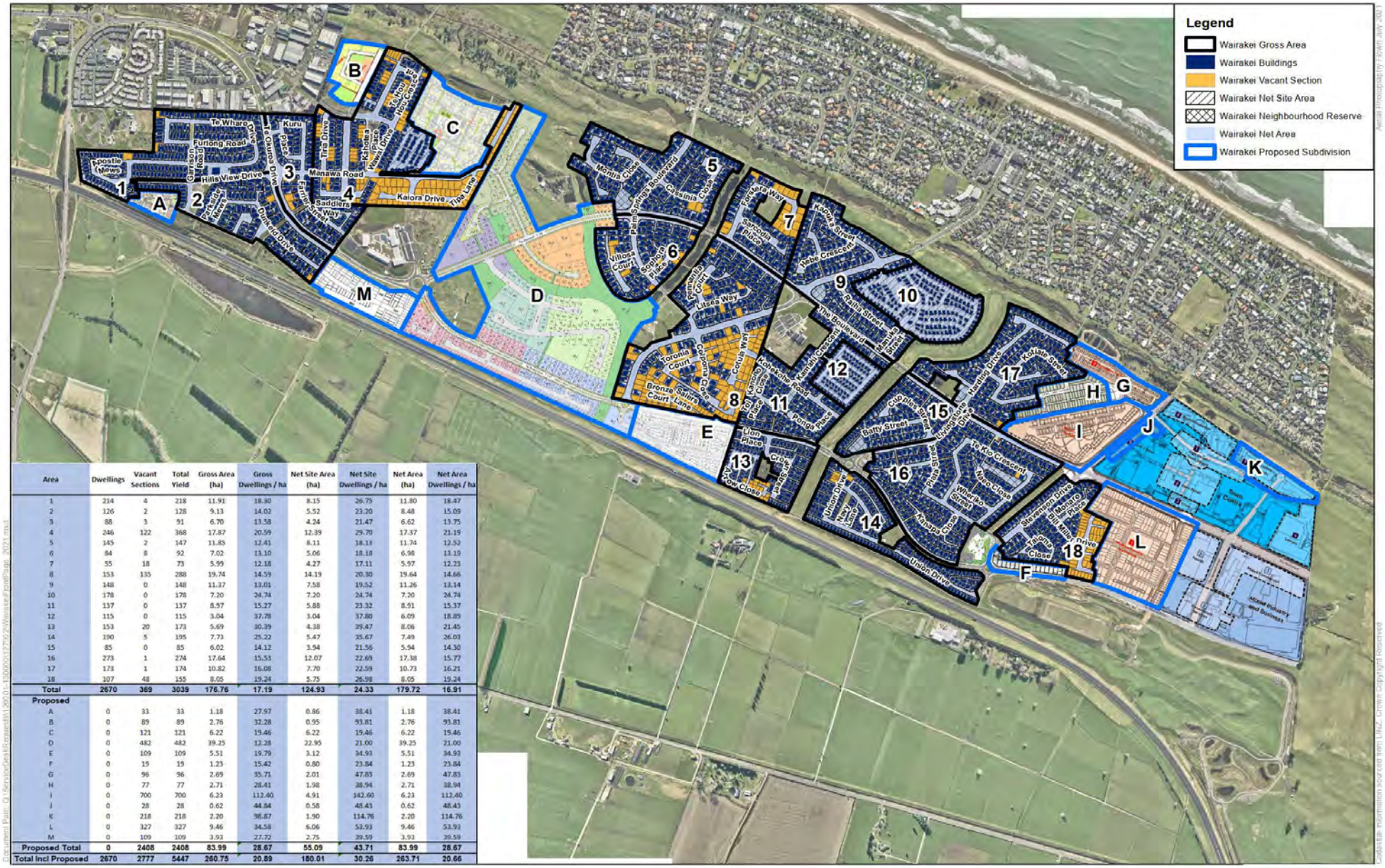

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	214	4	218	11.91	18.30	8.15	26.75	11.80	18.47
2	126	2	128	9.13	14.02	5.52	23.20	8.48	15.09
3	88	3	91	6.70	13.58	4.24	21.47	6.62	13.75
4	246	122	368	17.87	20.59	12.39	29.70	17.37	21.19
5	145	2	147	11.85	12.41	8.11	18.18	11.74	12.52
6	84	8	92	7.02	13.10	5.06	18.18	6.98	13.19
7	55	18	73	5.95	12.18	4.27	17.11	5.97	12.23
8	153	135	288	19.74	14.59	14.19	20.30	19.64	14.66
9	148	0	148	11.37	13.01	7.58	19.52	11.26	13.14
10	178	0	178	7.20	24.74	7.20	24.74	7.20	24.74
11	137	0	137	8.97	15.27	5.88	23.32	8.91	15.37
12	115	0	115	3.04	37.78	3.04	37.80	6.09	18.89
13	153	20	173	5.69	30.39	4.38	39.47	8.06	21.45
14	190	5	195	7.73	25.22	5.47	35.67	7.49	26.03
15	85	0	85	6.02	14.12	3.94	21.56	5.94	14.30
16	273	1	274	17.64	15.53	12.07	22.69	17.38	15.77
17	173	1	174	10.82	16.08	7.70	22.59	10.73	16.21
18	107	48	155	8.05	19.24	5.75	26.98	8.05	19.24
Total	**2670**	**369**	**3039**	**176.76**	**17.19**	**124.93**	**24.33**	**179.72**	**16.91**
Proposed									
A	0	33	33	1.18	27.97	0.86	38.41	1.18	38.41
B	0	89	89	2.76	32.28	0.95	93.81	2.76	93.81
C	0	121	121	6.22	19.46	6.22	19.46	6.22	19.46
D	0	482	482	39.25	12.28	22.95	21.00	39.25	21.00
E	0	109	109	5.51	19.79	3.12	34.93	5.51	34.93
F	0	19	19	1.23	15.42	0.80	23.84	1.23	23.84
G	0	96	96	2.69	35.71	2.01	47.83	2.69	47.83
H	0	77	77	2.71	28.41	1.98	38.94	2.71	38.94
I	0	700	700	6.23	112.40	4.91	142.60	6.23	112.40
J	0	28	28	0.62	44.84	0.58	48.43	0.62	48.43
K	0	218	218	2.20	98.87	1.90	114.76	2.20	114.76
L	0	327	327	9.46	34.58	6.06	53.93	9.46	53.93
M	0	109	109	3.93	27.72	2.75	39.59	3.93	39.59
Proposed Total	**0**	**2408**	**2408**	**83.99**	**28.67**	**55.09**	**43.71**	**83.99**	**28.67**
Total Incl Proposed	**2670**	**2777**	**5447**	**260.75**	**20.89**	**180.01**	**30.26**	**263.71**	**20.66**

Wairakei Dwelling Density

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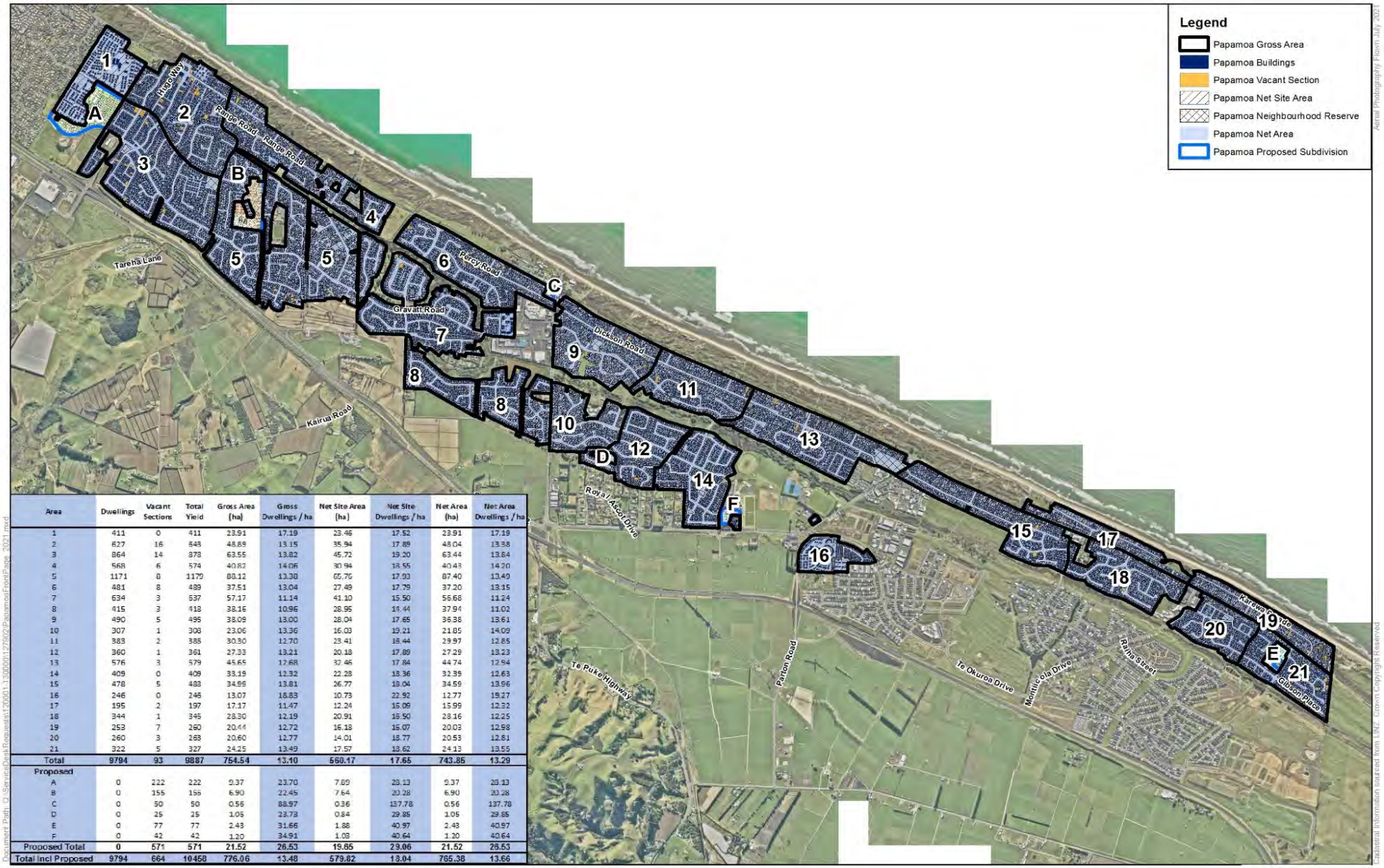
Tauranga City



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	411	0	411	23.91	17.19	23.46	17.52	23.91	17.19
2	627	16	643	48.89	13.15	35.94	17.89	48.04	13.38
3	864	14	878	63.55	13.82	45.72	19.20	63.44	13.84
4	568	6	574	40.82	14.06	30.94	18.55	40.43	14.20
5	1171	8	1179	88.12	13.30	65.76	17.93	87.40	13.49
6	481	8	489	37.51	13.04	27.49	17.79	37.20	13.15
7	534	3	537	57.17	11.14	41.10	15.50	56.68	11.24
8	415	3	418	38.16	10.96	28.95	14.44	37.94	11.02
9	490	5	495	38.09	13.00	28.04	17.65	36.38	13.61
10	307	1	308	23.06	13.36	16.03	19.21	21.85	14.09
11	383	2	385	30.30	12.70	23.41	16.44	29.97	12.85
12	360	1	361	27.33	13.21	20.18	17.89	27.29	13.23
13	576	3	579	45.65	12.68	32.46	17.84	44.74	12.94
14	409	0	409	33.19	12.32	22.28	18.36	32.39	12.63
15	478	5	483	34.99	13.81	26.77	18.04	34.59	13.96
16	246	0	246	13.07	18.83	10.73	22.92	12.77	19.27
17	195	2	197	17.17	11.47	12.24	15.09	15.99	12.32
18	344	1	345	28.30	12.19	20.91	16.50	28.16	12.25
19	253	7	260	20.44	12.72	16.18	16.07	20.03	12.98
20	260	3	263	20.60	12.77	14.01	18.77	20.53	12.81
21	322	5	327	24.25	13.49	17.57	18.62	24.13	13.55
Total	9794	93	9887	754.54	13.10	560.17	17.65	743.85	13.29
Proposed									
A	0	222	222	9.37	23.70	7.69	28.13	9.37	28.13
B	0	155	155	6.90	22.45	7.64	20.28	6.90	20.28
C	0	50	50	0.56	88.97	0.36	137.78	0.56	137.78
D	0	25	25	1.05	23.73	0.84	29.85	1.05	29.85
E	0	77	77	2.43	31.66	1.88	40.97	2.43	40.97
F	0	42	42	1.20	34.91	1.03	40.64	1.20	40.64
Proposed Total	0	571	571	21.52	26.53	19.65	29.06	21.52	26.53
Total Incl Proposed	9794	664	10458	776.06	13.48	579.82	18.04	765.38	13.66

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Papamoa Dwelling Density

0 0.25 0.5 1 1.5 Kms
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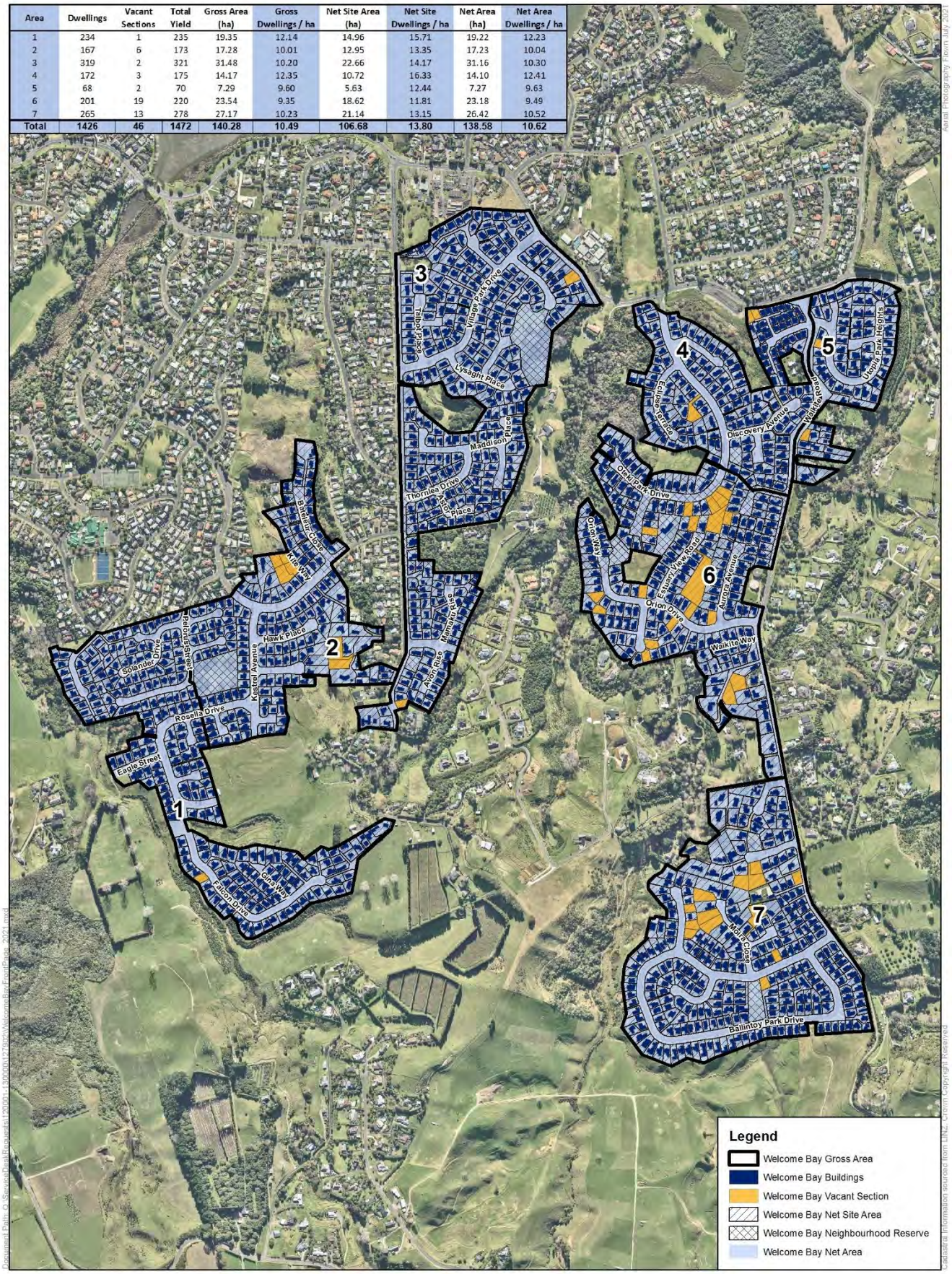
Tauranga City

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	234	1	235	19.35	12.14	14.96	15.71	19.22	12.23
2	167	6	173	17.28	10.01	12.95	13.35	17.23	10.04
3	319	2	321	31.48	10.20	22.66	14.17	31.16	10.30
4	172	3	175	14.17	12.35	10.72	16.33	14.10	12.41
5	68	2	70	7.29	9.60	5.63	12.44	7.27	9.63
6	201	19	220	23.54	9.35	18.62	11.81	23.18	9.49
7	265	13	278	27.17	10.23	21.14	13.15	26.42	10.52
Total	1426	46	1472	140.28	10.49	106.68	13.80	138.58	10.62



Welcome Bay Dwelling Density

0 0.1 0.2 0.4 Kms

1:8,000 @A3

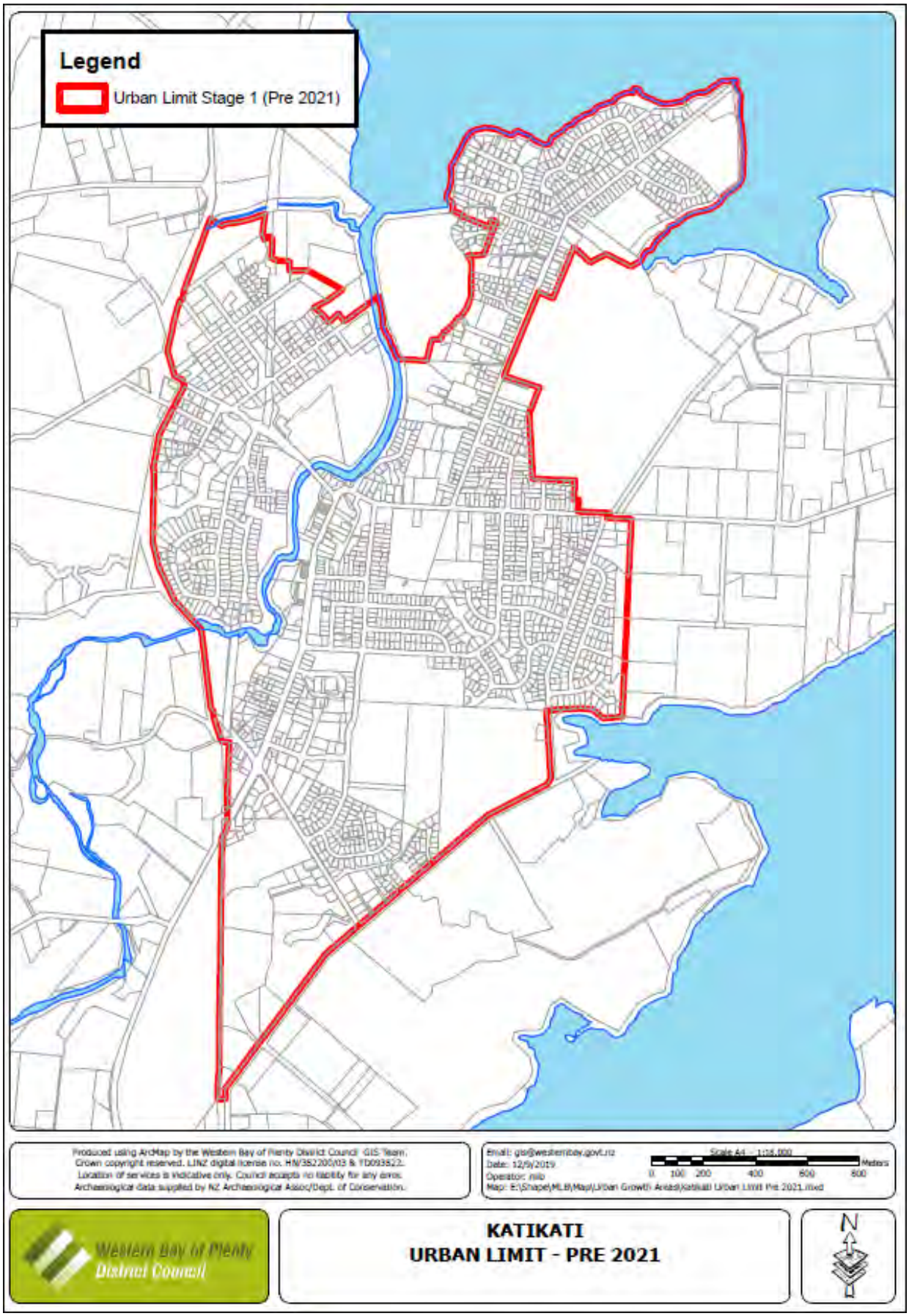
N

Appendix 8

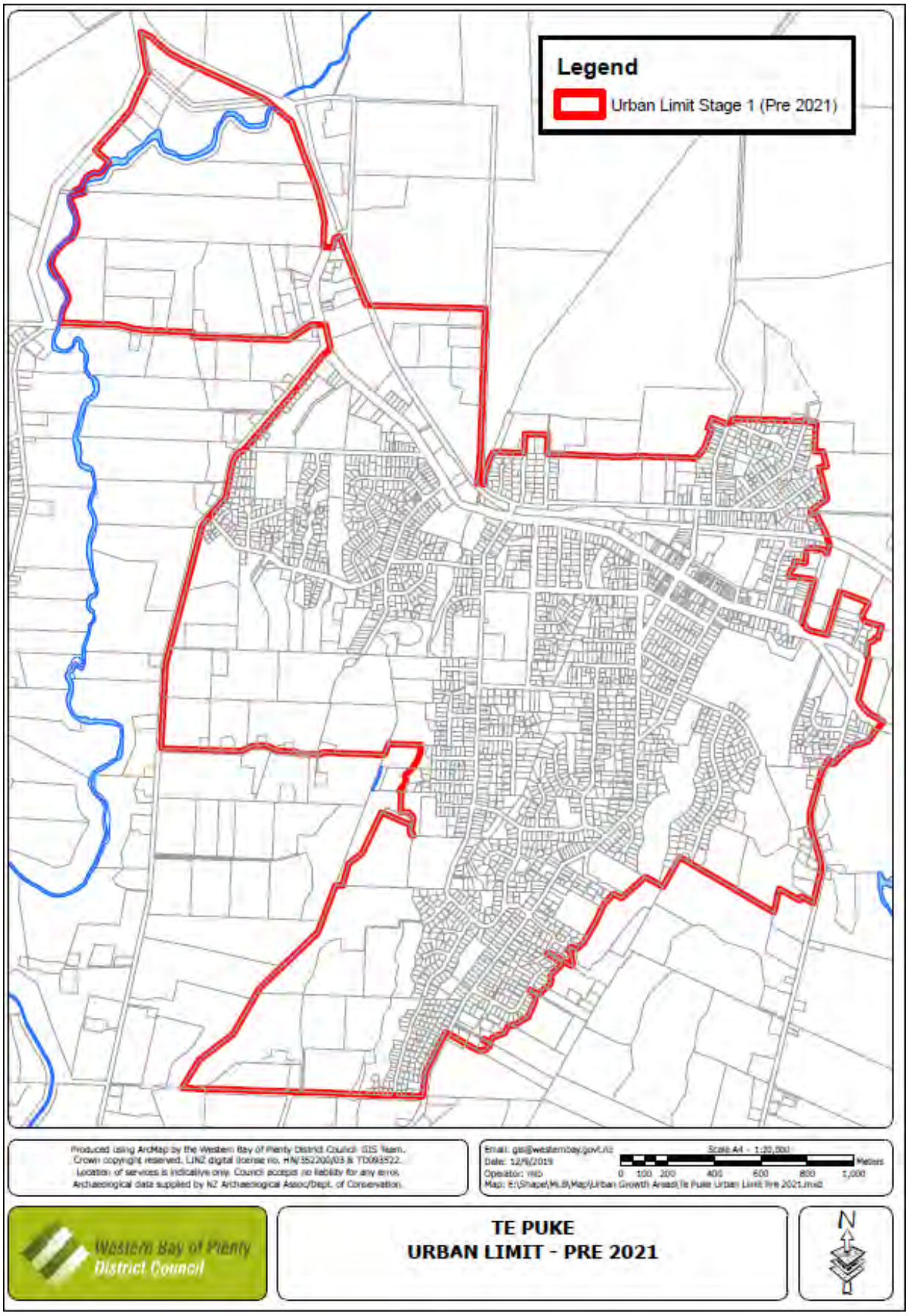
Western Bay of Plenty District Stage 1 Areas for Urban Growth Area Sequencing

Waihi Beach

Katikati


Legend
Urban Limit Stage 1 (Pre 2021)
Produced using ArcMap by the Western Bay of Plenty District Council GIS Team.
Crown copyright reserved. LINZ digital license no. HN/382200/03 & YD093822.
Location of services is indicative only. Council accepts no liability for any errors.
Archaeological data supplied by NZ Archaeological Assoc/Dept. of Conservation.
Email: gis@westernbay.govt.nz
Date: 12/9/2019
Operator: nsp
Map: E:\Shape\MLB\Map\Urban Growth Areas\Katikati Urban Limit Pre 2021.mxd
Scale A4 1:24,000
0 100 200 400 600 800
Meters
Western Bay of Plenty District Council
KATIKATI
URBAN LIMIT - PRE 2021
N

Te Puke


Legend
Urban Limit Stage 1 (Pre 2021)
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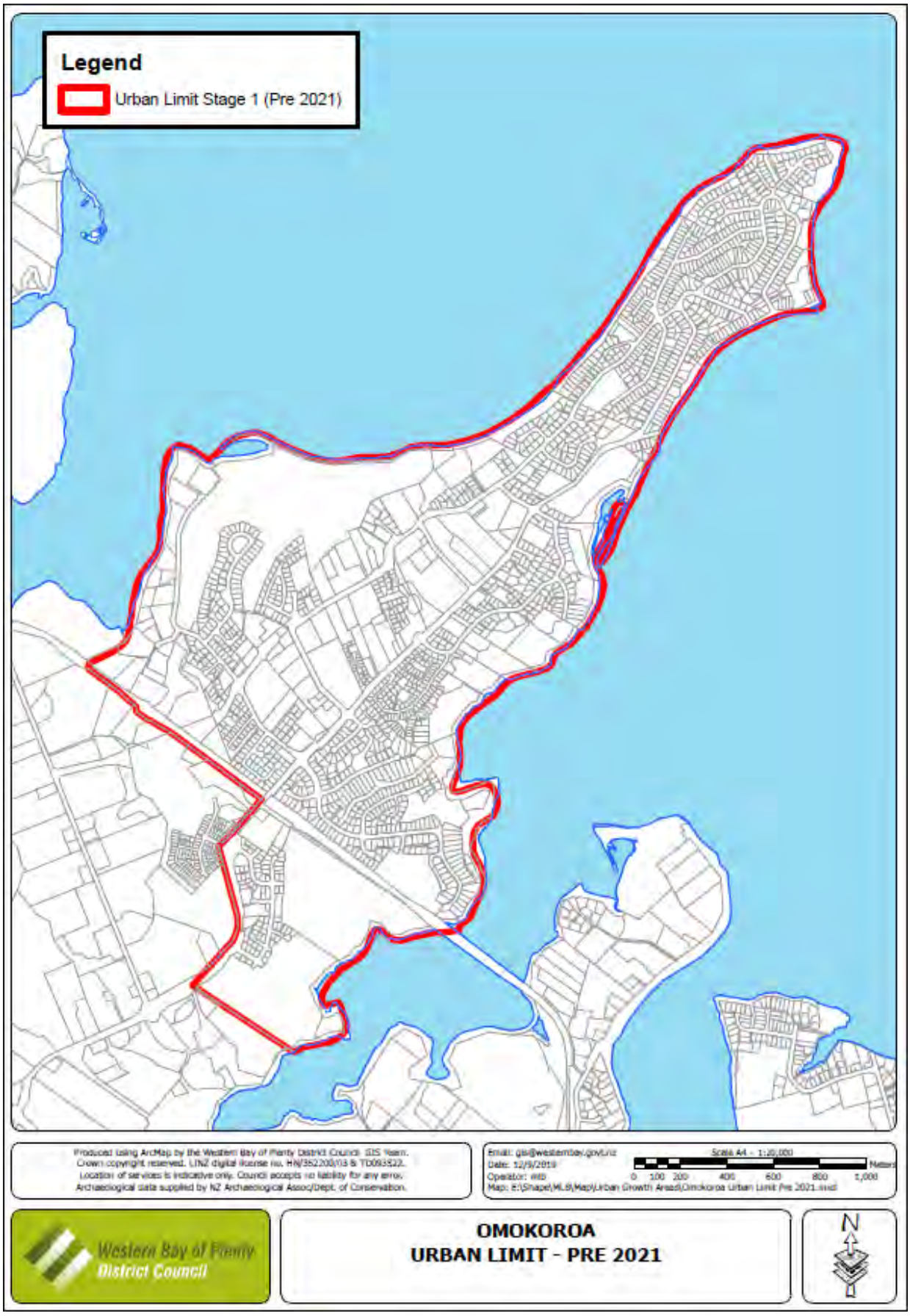
Location of services is indicative only. Council accepts no liability for any error.
Archaeological data supplied by NZ Archaeological Assoc/Dept. of Conservation.
Email: gis@westernbay.govt.nz
Date: 12/9/2019
Operator: mb
Map: E:\Shape\MLB\Map\Urban Growth Areas\Te Puke Urban Limit Pre 2021.mxd
Scale A4 - 1:20,000
Meters
0 100 200 400 600 800 1,000
Western Bay of Plenty District Council
TE PUKE
URBAN LIMIT - PRE 2021
N

Omokoroa


Legend
Urban Limit Stage 1 (Pre 2021)
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Location of services is indicative only. Council accepts no liability for any error.
Archaeological data supplied by NZ Archaeological Assoc/Dept. of Conservation.
Email: gis@westernbay.govt.nz
Date: 12/9/2019
Operator: mtd
Map: E:\Shape\MLS\Map\Urban Growth Areas\Omokoroa Urban Limit Pre 2021.mxd
Scale A4 - 1:20,000
0 100 200 400 600 800 1,000
Meters
Western Bay of Plenty District Council
OMOKOROA
URBAN LIMIT - PRE 2021
N

Tauranga City

Western Bay of Plenty District Council

BAY OF PLENTY REGIONAL COUNCIL TOI MOANA

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