

SmartGrowth Development Trends Technical Report 2023





SmartGrowth: Development Trends Technical Report 2023

**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**

2022 – 2023

Prepared by:
Environmental Planning Team
Strategy and Community Group
Western Bay of Plenty District Council

City Planning and Growth Division
Strategy, Growth and Governance Group
Tauranga City Council

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Table of Contents

Executive Summary	1
Residential Building Activity	1
Residential Subdivision Activity	2
Residential Development Capacity	4
Residential Sales and Rents	4
Dwelling Typology	4
Business Land and Activity	5
1 Introduction	6
National Policy Statement on Urban Development Monitoring	7
2 Supply and Demand	8
New Dwelling Consents Issued	8
New Lots Created	10
Comparison with SmartGrowth Projections	12
Growth Rates – Land Availability	14
Housing Capacity Assessment	16
Occupied/Unoccupied Dwelling Ratio	16
3 Dwelling Sales Price and Rent Trends	17
Dwelling Sales Price	17
Dwelling Rents	19
Dwellings Sold	20
Ratio of Dwelling Sales Prices to Rent	21
4 Housing Affordability	21
5 Residential section size	24
Tauranga City	24
Tauranga City urban growth area	24
Historical residential lot/section size	25
Western Bay of Plenty District	27
6 Dwelling density	28
Tauranga City urban growth areas	28
7 Dwelling Typology	29
Tauranga City	29
Western Bay of Plenty District	31
Number of storeys	32
Number of bedrooms	34
Floor size of dwellings	39
Historical Floor Size per Residential Building	41
Construction Value per Residential Dwelling	42
Residential Building Consents Issued by Type	44

8 Business Land Trends	46
Zoned Business Land.....	46
Business Land Capacity	51
Business Land/Population Ratio.....	52
Industrial and Commercial Building Consents Issued	52
Non-Residential Building Consents Issued by Type	53
Non-Residential Building Consents by Construction Value	55
Commercial and Industrial Buildings	56
9 Current and Future Monitoring Reports	57
Appendix 1.....	58
Explanation of MHUD/ MfE Indicators for the National Policy Statement on Urban Development .	58
Appendix 2.....	60
Change in Housing Affordability Indicators – Definitions and Data Sources	60
Appendix 3.....	61
Explanation of Development Terms	61
Subdivision Process	61
Building Consent Issue for Dwellings	62
Residential Growth Areas.....	62
Vacant Land.....	63
Appendix 4.....	65
Western Bay of Plenty District Development Map	65
Tauranga City Development Map.....	66
Appendix 5.....	67
Dwelling Occupancy by Census Area Unit – Western Bay of Plenty District and Tauranga City.....	67
Appendix 6.....	69
Western Bay of Plenty District Statistical Area 2 Map	69
Tauranga City Statistical Area 2 Map	70
Appendix 7.....	71
Tauranga City Commercial and Industry Zoned Areas.....	71
Appendix 8.....	72
Tauranga City Plan Definition of Nett Area	72
Calculation of dwelling density	72
2023 Tauranga City Density Maps	73
Appendix 8.....	80
Western Bay of Plenty District Stage 1 Areas for Urban Growth Area Sequencing	80

Executive Summary




























Every year, the SmartGrowth partners produce the joint Development Trends Report for the Western Bay of Plenty sub-region. The report contains subdivision, residential and non-residential development and population trends in Tauranga City and the Western Bay of Plenty District. It generally covers an annual period to end of June and includes longer term trends for selected indicators.




The partner Councils collect the development statistics as part of the monitoring requirements under the Resource Management Act 1991, SmartGrowth, Bay of Plenty Regional Policy Statement, and the National Policy Statement on Urban Development. It also assists both Councils in understanding the changes and patterns of development in the sub-region.

The following sections outline the development highlights for the year ending 30 June 2023.

Executive Summary – July 2022 to June 2023

Comparison with previous year

Indicator	Tauranga City	Western Bay of Plenty District
 Dwelling consents issued	 -33.1%	 -33%
 New lots created	 7.7%	 -9%
 Dwelling sales prices	 -8.5%	 -15.3%
 Dwelling rents	 8%	 28%
 Dwellings sold	 -39%	 -33%
 Mean floor size	 -22m ²	 13m ²
 2-Bedroom dwellings	 -13.4%	 -63.3%
 3-Bedroom dwellings	 -40.1%	 -13%
 Non-residential buildings	 -20.2%	 -36.8%

Legend:  Up  Same as previous  Down

Residential Building Activity

Sub-region

- New dwellings consented in the sub-region declined by 33% (575 dwelling units) in 2022/23 compared to the previous year (refer Figure 1).

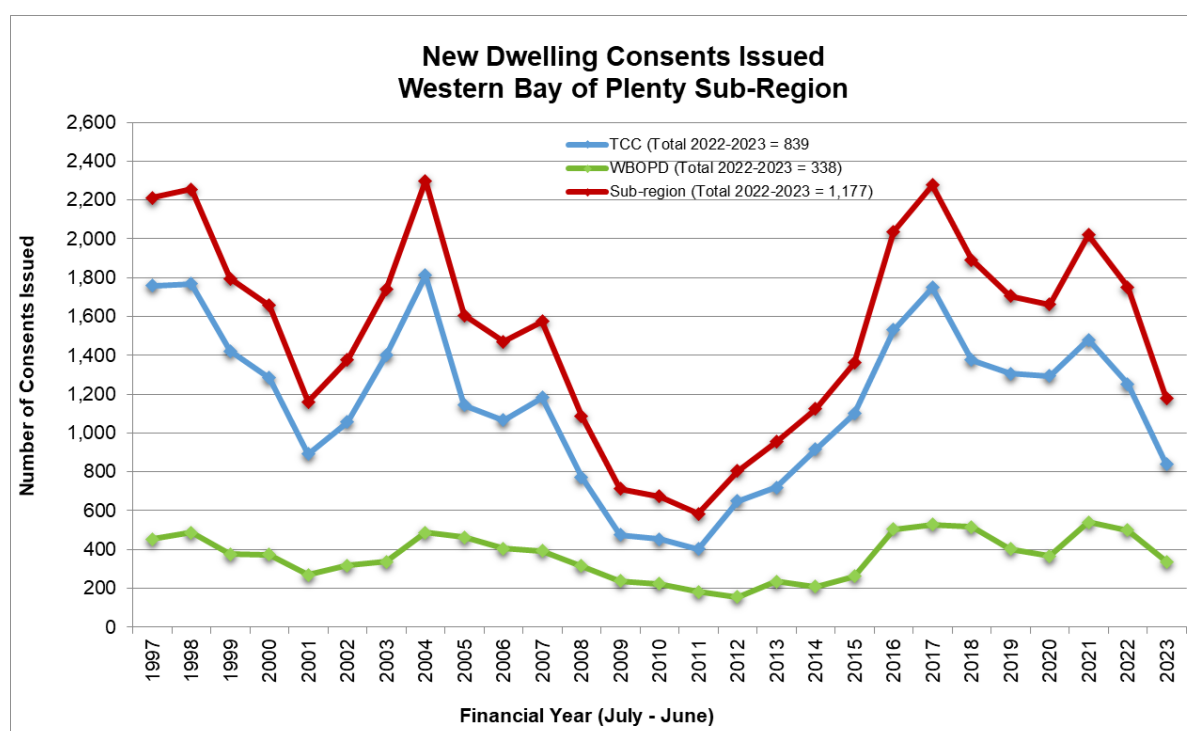
Tauranga City

- Tauranga City had a total of 839 new dwellings consented in 2022/23, a decline of 33% (413 dwellings) from the 2021/22 results.
- More than 65% (546) of the dwellings consented were located in the greenfield UGAs, 35% (290 dwellings) in the existing urban areas and less than 1% (3 dwellings) in the rural areas.
- All of the Greenfield UGAs recorded declines in dwellings consented which accounted for 48% of the previous year's result.
- The existing growth (infill/intensification) areas had 13 more dwellings consented compared to the previous year.

Western Bay of Plenty District - WBOPD

- Western Bay of Plenty District has a total of 338 new dwellings consented in 2022/23, a decline of 33% (162 dwellings) from the 2021/22 results.
- Across the UGAs, dwelling consents issued were still the highest in Ōmokoroa with 85 new dwellings, a decrease of 110 consents from the previous 2021/22 year.
- Increases to dwelling consents issued were recorded in Waihi Beach-Bowentown by 20 consents to 67 dwellings as well as Te Puke also increasing by 109% (67 dwellings). Katikati and Ōmokoroa decreased to 20 and 85 dwellings, a reduction of 76% and 67%, respectively.
- Dwelling consents issued in smaller urban settlement areas and rural areas across the Western Bay of Plenty District decreased overall by 43 consents (or 30%) for Western Bay of Plenty District (refer to Figure 1).

Figure 1 New dwelling consents issued, Western Bay of Plenty sub-region, 1997 to 2023



In the last ten years, the sub-region recorded the highest number of dwellings consented in 2016/17 at 2,277 dwelling units. With the shortage in the supply of zoned land for subdivision along with the increase in development costs, the number of dwellings consented declined in the last five years, reaching the lowest point of 1,177 dwellings in 2022/23 or a 48% decline from 2016/17. Both the Western Bay of Plenty District (WBOPD) and Tauranga City recorded declines of more than 30% or 162 and 413 dwellings, respectively from 2021/22 to 2022/23.

Residential Subdivision Activity

Sub-region

- Subdivision development in the sub-region declined by 8% from the 2021/22 results.

Tauranga City

- From 2017/18 to 2021/22 subdivision activity has declined reaching the lowest level in 2021/22 at 457 new lots created. In 2022/23 subdivision activity increased by 8% (35 lots) from 2022/23 results.
- In 2022/23 88% of the additional lots were created in the Greenfield UGAs.

Western Bay of Plenty District

- The number of new lots created at s224 stage decreased by 9% (from 303 in 2021/2022 to 277 in

2022/23). Two of the UGAs Waihi Beach – Bowentown and Te Puke had respective increases of 68% and 405% while Ōmokoroa and Katikati had decreases of 73% and 75% in comparison to 2021/2022 actuals.

- In comparison to the last year (2021/2022), six rural areas (Tahawai, Aongatete, Pahoia, Kaimai, Waiorohi and Pongakawa) increased in new lots created at s224 stage, however 7 areas (Waiau, Te Puna, Minden, Kopurereua, Kaitemako, Ottawa and Rangiuru) had no change or decreased this year (2022/2023). Overall, there was a 56% increase in new lots created at s224 stage for rural areas, compared to 2021/2022.
- More subdivision consents are expected for Ōmokoroa in the late short term (1 – 3 years) due to subdivision activity moving slower than previously anticipated (rising costs). Te Puke is assumed to have steady growth of s224 new lots created in the short term.
- Overall, for the District, new lots decreased by 9% from 2021/22 to 2022/2023 (from 303 to 277 new lots created)

Table 1 Trends Summary – Tauranga City – 2022/2023 Compared to 2021/2022

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

Table 2 Trends Summary – Western Bay of Plenty District (Total) – 2022/2023 Compared to 2021/2022

Area		Dwellings Consented	New Lots Created
Urban Growth Area	Waihi Beach	↑	↑
	Katikati	↓	↓
	Ōmokoroa	↓	↓
	Te Puke	↓	↑
	Pukehina Beach and Maketu	↑	↑
Rural Areas	Waiau, Tahawai and Aongatete	↑	↑
	Te Puna, Pahoia and Minden	↑	↓
	Kaimai, Kopurereua, Kaitemako and Waiorohi	↓	↑
	Ottawa, Rangiuru and Pongakawa	↓	↓

Note: Paengaroa is counted in Pongakawa count due to not being recognised as a Statistical Area 2 (SA2) by Statistics New Zealand

Residential Development Capacity

Sub-region

- Dwelling consents issued in the sub-region were consistent with the dwelling projections between 1 July 2018 and 30 June 2023, with 98 (0.1%) less new dwellings consented than projected.
- For each greenfield UGA in the sub-region, total dwelling capacity yield is estimated, with uptake regularly monitored in order to calculate remaining dwelling yield. Of the total estimated dwelling yield for the greenfield UGAs in the sub-region, 28% capacity remained as at 30 June 2023.

Tauranga City

- In Tauranga City, the number of dwellings consented from July 2018 to June 2023 were lower than the SmartGrowth projections by 0.3% or 183 dwellings.
- Remaining Greenfield UGA capacity was 24% as at 30 June 2023.
- Wairakei (Pāpāmoa East) Greenfield UGA has the highest percentage of capacity remaining (43%), while Pyes Pa UGA has the least (9%).
- Additional greenfield UGA dwelling yield is planned to be released in - Tauriko West from 2025/26, Ohauti South from 2028/29 and Te Tumu and Keenan Road future greenfield UGAs post 2030.

Western Bay of Plenty District

- In Western Bay of Plenty District 85 more dwellings were consented compared to the SmartGrowth dwelling projections from July 2018 to 30 June 2023.
- Ōmokoroa UGA (total) has the largest remaining capacity available with 50% (2,480 dwellings), Waihi Beach-Bowentown UGA has the lowest capacity remaining in Western Bay of Plenty District with 10% (363) dwellings).

Residential Sales and Rents¹

Tauranga City

- Average selling price (12 month rolling average) declined by 8.5% to \$903,750 in the last 12 months to 30 June 2023.
- Average dwelling rent (12 month rolling average) increased by 8% to \$631 in the last 12 months to 30 June 2023.

Western Bay of Plenty District

- Average selling price (12 month rolling average) declined by 15.3% to \$961,532 in the last 12 months to 30 June 2023.
- Average dwelling rent (12 month rolling average) increased by 28% to \$556 in last 12 months to 30 June 2023.

Dwelling Typology

Tauranga City

- The proportion of standalone dwellings decreased from 65% in 2021/22 to 45% in 2022/23. The combined proportion of duplexes, apartments and attached dwellings increased from 16% in 2021/22 to 31% in 2022/23.
- Around 65% of the dwellings consented were single level dwellings, 27% had 2 storeys and 8% had 3 to 4 storeys.

¹ Dwelling sales prices were sourced from Ministry of Housing and Urban Development (HUD). 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 (actual) market selling prices and smoothens the time series data.

- 78% of the dwellings consented had 2 and 3 bedrooms, with the remaining 22% having 1 (5%), 4 (15%), and 5+ (2%) bedrooms.
- The 1 and 2-bedroom dwellings increased from 17% in 2017/18 to 42% in 2022/23. The 3 and 4-bedroom dwellings declined from 81% in 2017/18 to 56% in 2022/23.
- Dwelling size of 101m² to 125m² were the most prevalent at 29% in 2022/23.
- Average floor size per residential building was smaller by 22m² compared to the previous year.

Western Bay of Plenty District

- In 2022/2023 most of the dwellings consented in Western Bay of Plenty District were standalone dwellings (92%), followed by minor dwellings (5%) and 2% duplex dwellings.
- 57% of the dwellings were single storey dwellings (refer to table 18).
- 42% of 2-storey dwellings were built in Ōmokoroa (out of 338 total dwellings), followed by all rural areas with 22% (17 dwellings).
- 58% of dwellings consented in Western Bay of Plenty District were 3-bedrooms followed by 4-bedrooms (26%). In Ōmokoroa 26% of the dwellings consented were 4-bedroom dwellings. Te Puke had the highest percentage of 3-bedroom dwellings at 24%.
- Katikati and Te Puke have the highest amount of dwellings built with a floor area between 126m² to 150m².
- 84% of total dwellings consented were standalone compared to the 78% in last period.

Business Land and Activity

Sub-region

- Vacant industrial zoned land is currently available at Oropi, Te Maunga, Mount Maunganui, Tauriko, Greerton, Wairakei (Pāpāmoa East), Katikati, Ōmokoroa, Te Puke, Rangiuru and Paengaroa.
- Vacant commercial land in greenfield UGAs is available at Pyes Pa West/Tauriko, Bethlehem, Pāpāmoa and Wairakei in Tauranga City and Ōmokoroa in Western Bay of Plenty District.

Tauranga City

- Tauranga City had a total of 49 industrial and commercial buildings consented in 2022/23; the same number of industrial buildings were consented compared to the previous year while 4 more commercial buildings were consented.

Western Bay of Plenty District

- There were no industrial building consents issued for the 2022/2023 period, however there were 10 commercial building consents issued in various areas.

1 Introduction

This year marks the twenty second year that Tauranga City Council and Western Bay of Plenty District Council jointly monitor and report development trends in the sub-region. Monitoring development trends assists both Councils in understanding the changing patterns of development while fulfilling their obligation to Section 35 of the Resource Management Act 1991, “to gather information, monitor and keep records”.

From 2007, the annual Development Trends Report incorporated development measures that relate to the Bay of Plenty Regional Policy Statement (RPS) and SmartGrowth² 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 District³) 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 following⁴:

- 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 five 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. The most recent Housing and Business Development Capacity Assessment was released in March 2023.

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

² SmartGrowth is a partnership that provides a unified vision, direction and voice for the future of the Western Bay of Plenty. The SmartGrowth partnership was established in the early 2000s, to deliver an integrated approach to sub-regional growth management pressures, with a collaborative cross-boundary approach. The SmartGrowth partnership includes Tangata Whenua, Tauranga City Council, Bay of Plenty Regional Council, Western Bay of Plenty District Council, Waka Kotahi (NZTA) and Te Whatu Ora (Health New Zealand). More recently, the Government has formally joined the SmartGrowth Partnership with the Minister of Housing and Minister for Local Government members of the Smart Growth Leadership Group and represented by the Ministry for Housing and Development and Kāinga Ora at the Chief Executives Advisory Group and other SmartGrowth forums.

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, Ōmokoroa and Te Puke.

⁴ Tauranga City and Western Bay of Plenty District are Tier 1 local authorities under the NPS-UD

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)⁵. 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. SmartGrowth is currently progressing a revised SmartGrowth Strategy, which incorporates FDS requirements, programmed to be completed in time to inform the 2024-34 Long Term Plan (LTP).

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/UD started in December 2017, with the quarterly monitoring results published on the Councils' websites and/or included in the annual development trends report. The Ministry of Housing and Urban Development (HUD) provided guides⁶ to support the implementation of the NPS-UD, an online dashboard that published charts and maps, and time series data on local housing markets. These were used as reference in the preparation of the monitoring reports, particularly on housing market indicators.

Table 3 outlines the indicators that are relevant to the NPS-UD 2020 monitoring requirements. Majority of the indicators have a residential focus due to the availability of residential data through the HUD dashboard and data portal, 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.41
		Prices	Average Value per Residential Dwelling Consent (Tauranga City and total WBOPD)	p.42
		Type	Building Consents by Type (Tauranga City and total WBOPD)	p.44
		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.53
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	Mortgage Affordability Index (Tauranga City and total WBOPD) Deposit Affordability Index (Tauranga City and total WBOPD)	p.21 p.22
		Rents	Rental Affordability Index (Tauranga City and total WBOPD) Proportion of average rent to household income (Tauranga City and total WBOPD)	p.22 p.23

An explanation of indicators listed in category (a) and published via the HUD/MfE dashboard is provided in Appendix 1 and referenced within the relevant section in the report. The definition/explanation and sources of data for indicators listed in category (c) are contained in Appendix 2.

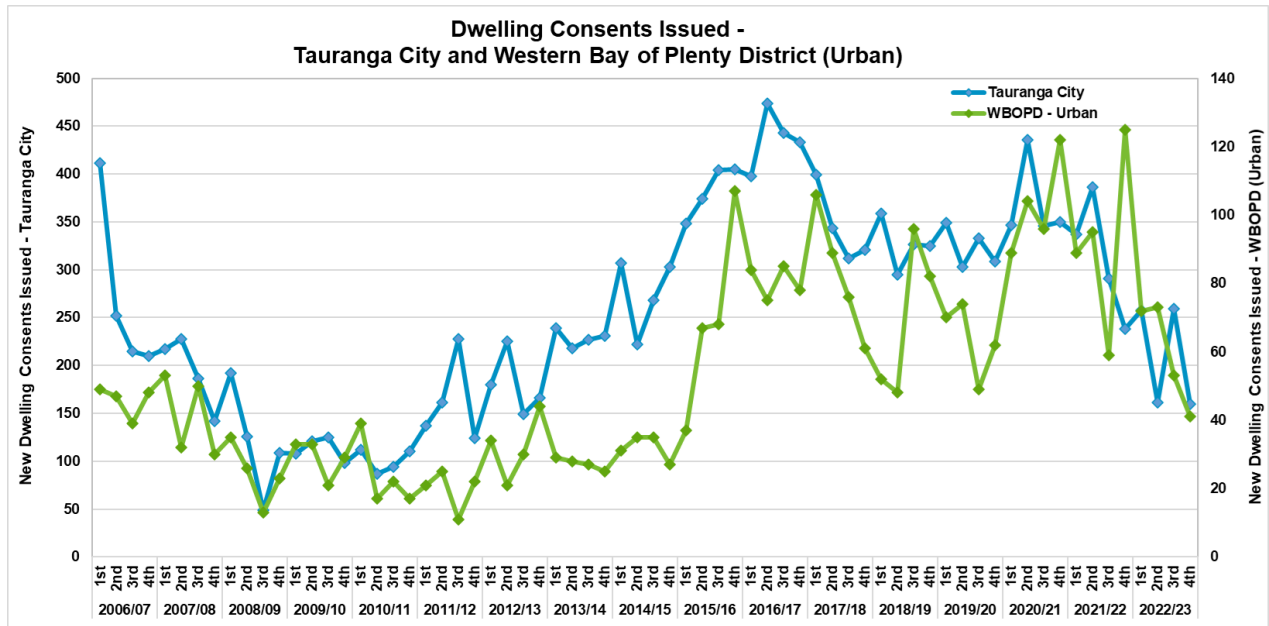
⁵ UFTI 2020 was prepared collaboratively by the SmartGrowth Partners (Western Bay of Plenty District Council, Tauranga City Council, the Bay of Plenty Regional Council, and Iwi) and Waka Kotahi NZTA. It is a programme business case which sets out an integrated land use and transport programme and delivery plan for the western Bay of Plenty sub-region i.e. 'Connected Centres programme'

⁶ 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.

2 Supply and Demand

New Dwelling Consents Issued

Figure 2 Dwelling consents issued, Tauranga City and WBOPD (urban), July 2006 to June 2023



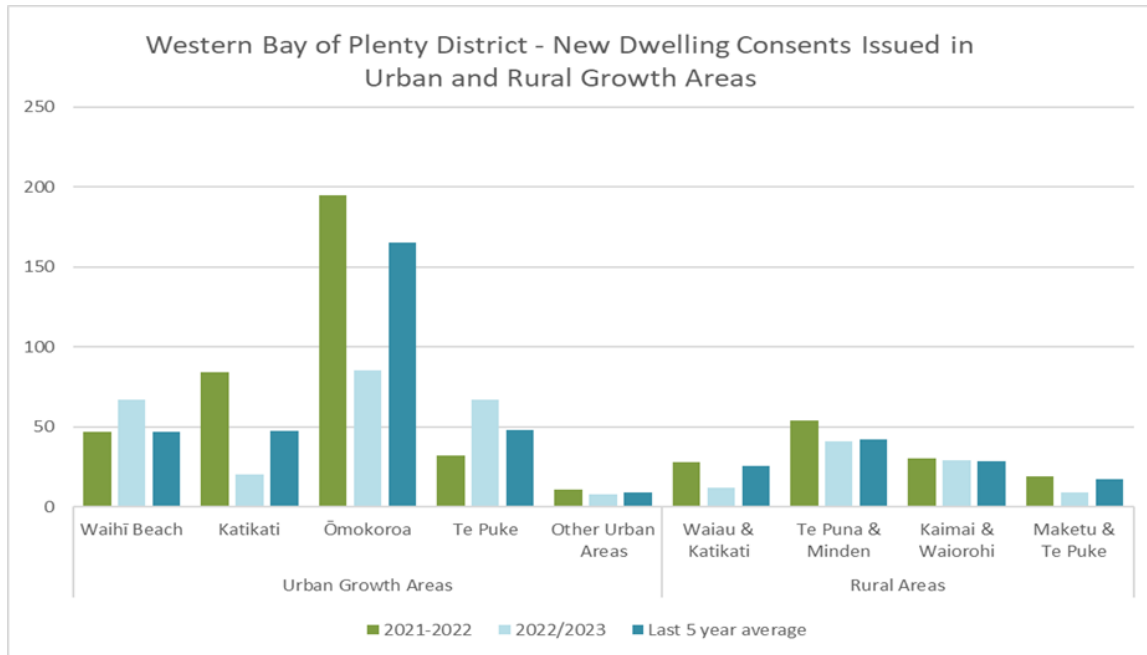
Residential building activities in the sub-region had significantly decreased by 33% in 2022/2023 compared to the previous year.

Both local authorities recorded declines of more than 30% in number of dwellings consented, a record low in the last 8 years. In the urban areas of WBOPD, 87% (215) of the dwellings were consented in Waihi Beach, Katikati, Ōmokoroa and Te Puke. Tauranga City had 32% and 35% less dwellings consented in 2022/2023 compared to the last 5 year and last 10 year results respectively.

Table 4 Dwelling consents issued in Tauranga City and WBOPD

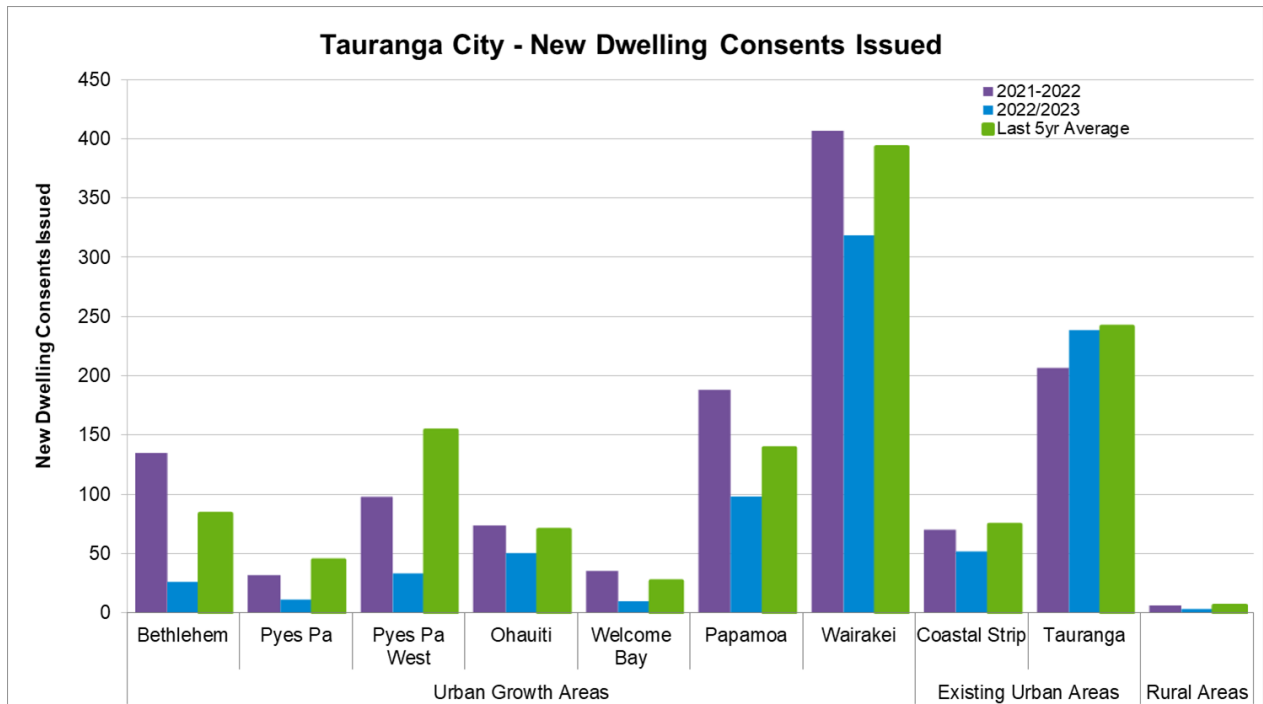
Dwelling consents		Trend	Change	% Change
<i>Tauranga City</i>				
This year	839			
Last year	1,252	↓	-414	-33.1%
Last 5 years (average)	1,234	↓	-396	-32.1%
Last 10 years (average)	1,284	↓	-446	-34.7%
<i>Western BOPD – total</i>				
This year	338			
Last year	500	↓	-162	-32.4%
Last 5 years (average)	429	↓	-91	-21.2%
Last 10 years (average)	417	↓	-79	-18.9%
<i>Western BOPD – urban</i>				
This year	239			
Last year	368	↓	-129	-35.1%
Last 5 years (average)	311	↓	-72	-23.2%
Last 10 years (average)	272	↓	-33	-12.1%

Figure 3 Dwelling consents issued by growth area, WBOPD, 2022 to 2023



Dwelling consents issued in 2022/2023 decreased by 33% in the Greenfield UGA's and 31% in the rural areas, compared to 2021/2022. The UGA's still have the highest number of dwelling consents issued, with Ōmokoroa at 85 consents and Te Puke with 67 consents issued. Dwelling consents issued in the rural areas decreased by 40 consents overall.

Figure 4 New dwelling consents issued by growth area, Tauranga City, 2021 to 2023



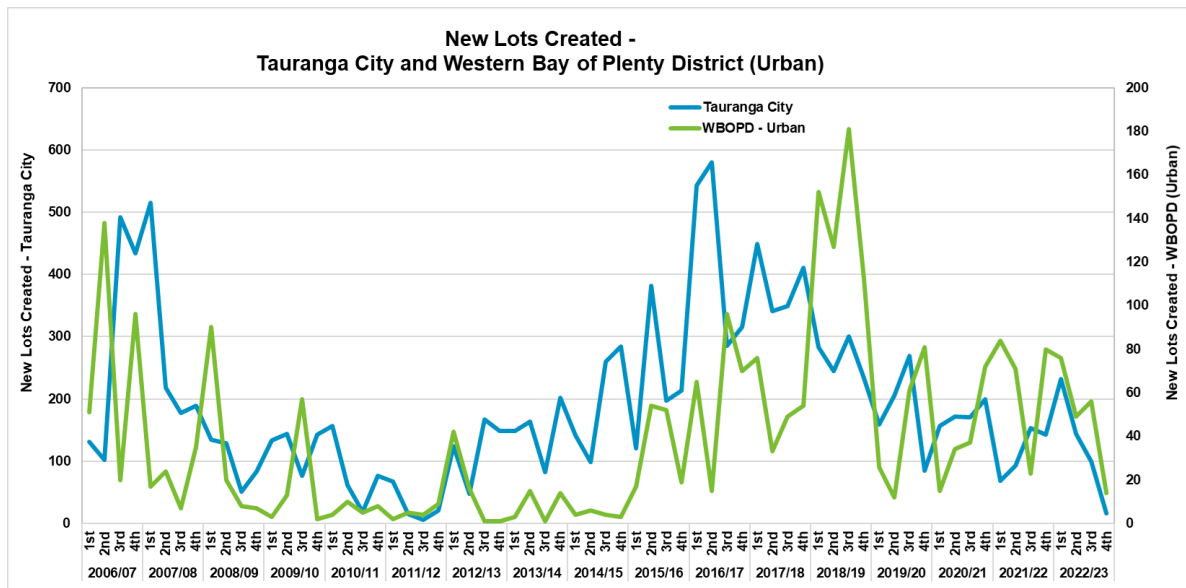
In 2022/23, Tauranga City had a total of 839 new dwellings consented. More than 65% (546) of these dwellings were located in the greenfield UGAs, 35% (290) in the existing urban areas and less than 1% (3) in the rural areas.

All of the UGAs recorded declines in dwellings consented which comprised almost half (44%) of the previous year's record while the existing growth areas had 13 more dwellings consented compared to the previous year.

In the UGAs, almost 63% (318 dwellings) of the residential development occurred in Wairakei. However, this development in Wairakei UGA was still lower by 22% and 19% than the previous year and the last 5 year average, respectively. The existing urban areas had a net 13 more dwellings consented compared to the previous year even with 18 less dwellings consented in the Coastal Strip in the same period.

New Lots Created

Figure 5. New lots created, Tauranga City and WBOPD (urban), July 2006 to June 2023



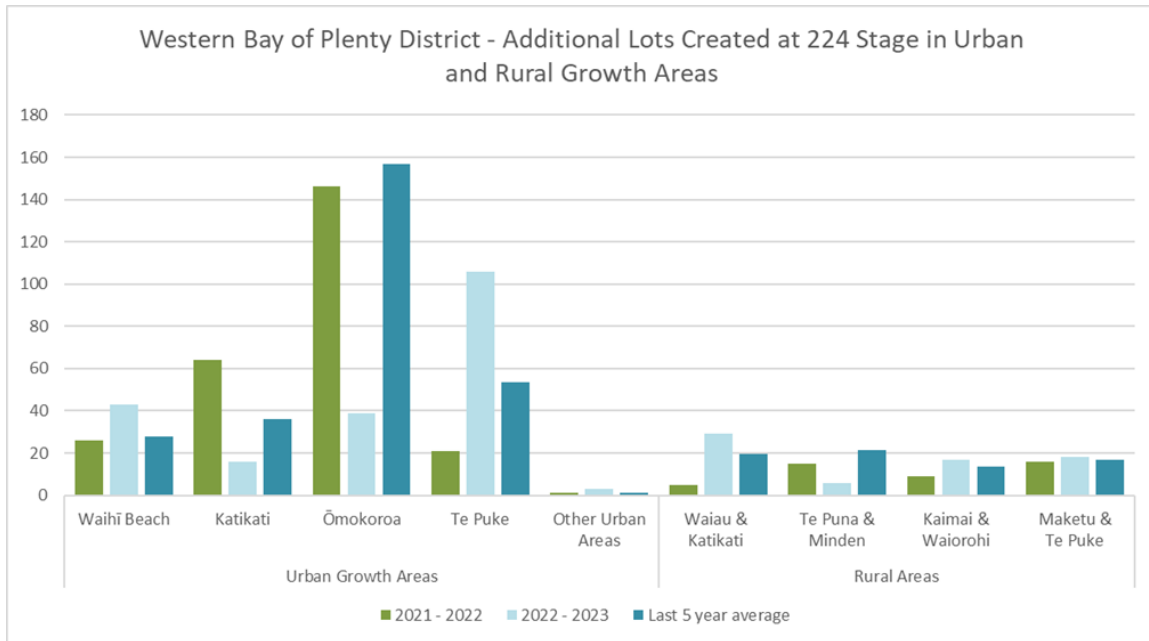
Subdivision activity in WBOPD-urban areas had a significant decline from 2018/2019 with 72% or 414 less lots created in UGAs compared to 2020/2021. New lots created in the UGAs were the lowest in 2014/2015 with an average of 4 new lots created per quarter, compared to the average of 40 new lots created in 2019/2020. In 2022/2023 new lots created decreased by 24% in UGAs, and 9% overall. All UGAs declined in s224 lots created aside from Waihi Beach – Bowentown, which increased by 68% in comparison to 2021-2022.

The shortage in the supply of land zoned for residential activity in Tauranga City was evident with a low level of new lots created in 2022/23 at 492 lots, the second lowest in the last ten years and 35 more lots than the 10-year low of 457 lots recorded in the previous year. This year also marked the lowest monthly average of 35 new lots created in the last ten years.

Table 5 New lots created, Tauranga City and WBOPD-Urban

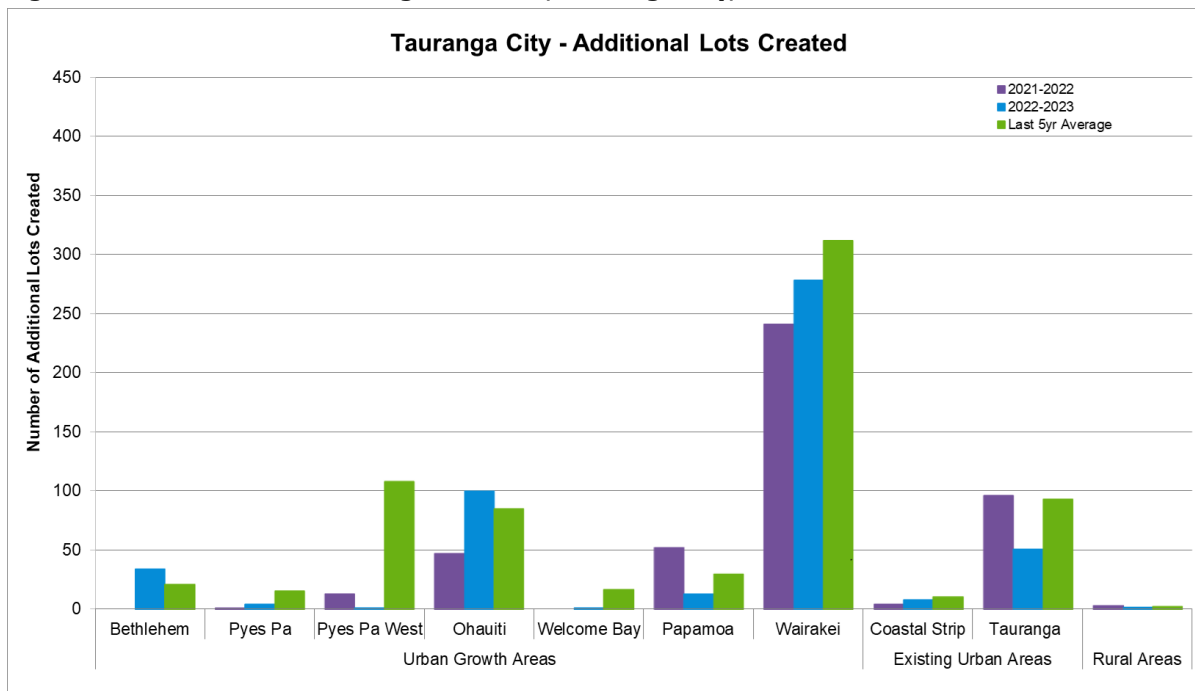
	New lots	Trend	Change	% Change
<i>Tauranga City</i>				
This year	492			
Last year	457	↑	35	7.7
Last 5 years (average)	685	↓	-193	-28.2
Last 10 years (average)	899	↓	-407	-45.3
<i>Western BOPD – Urban</i>				
This year	195			
Last year	258	↓	-63	-24.4
Last 5 years (average)	273	↓	-78	-28.6
Last 10 years (average)	201	↓	-6	-3.0

Figure 6 Additional lots created by growth area, WBOPD, 2021 to 2023



New lots created increased in two of the urban growth areas in 2022/2023, Waihi Beach – Bowentown / Athenree, Katikati, Pongakawa (Paengaroa), Maketu and Pukehina Beach except in Ōmokoroa and Katikati where there were decreases. Rural areas that increased in rural lots created in comparison to 2021/2022 included Waiau and Katikati, Kaimai and Waiorohi and Maketu and Te Puke – the only other rural areas that did not increase were Te Puna and Minden.

Figure 7 Additional lots created growth area, Tauranga City, 2021 to 2023



In 2022/23, most of the subdivision development in Tauranga City occurred in the Greenfield UGAs, with 88% or 431 of the new lots created in these areas. Most (88%) of the new lots were created in Ohauti and Wairakei UGAs, both recording respective increases of 113% (53 lots) and 15% (37 lots). The rest of the UGAs had 1 to 34 new lots created, all lower than the previous year, with the exception of Bethlehem where 34 lots were created compared to nil during the previous year.

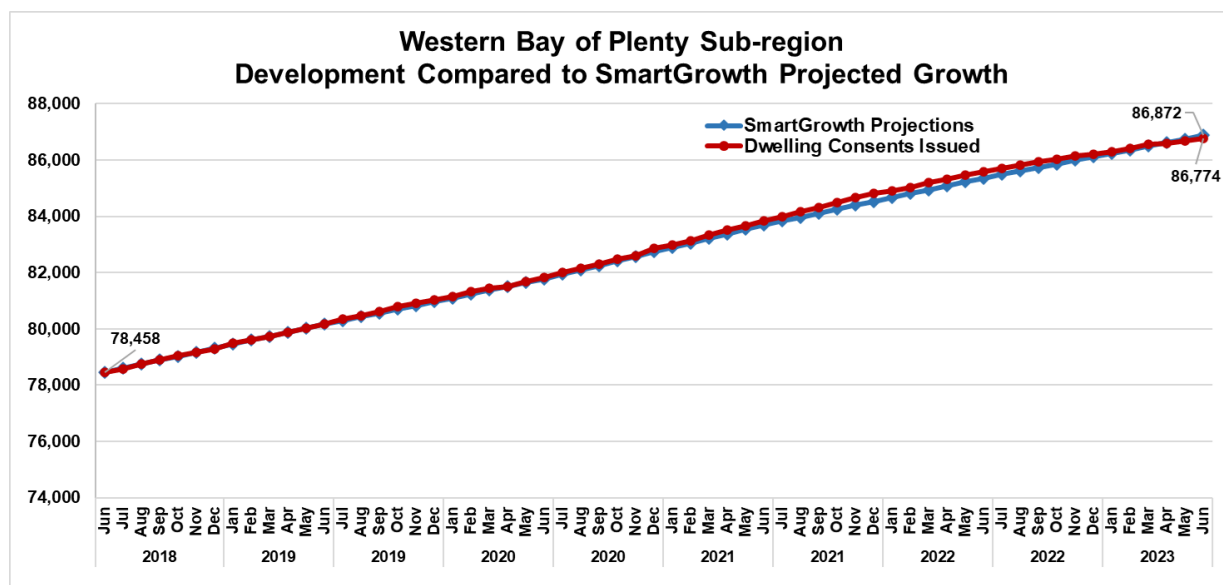
In the last five years, subdivision activity was highest at Wairakei among the Greenfield UGAs, with 45% of the total new lots created in Wairakei. The existing urban areas had 15% of the new lots created in the same period, with the majority of the lots located in the Tauranga urban area.

Comparison with SmartGrowth Projections

Detailed population and household projections have been produced for the SmartGrowth region by the National Institute of Demographic and Economic Analysis (NIDEA), University of Waikato⁷ in 2014. Since 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.

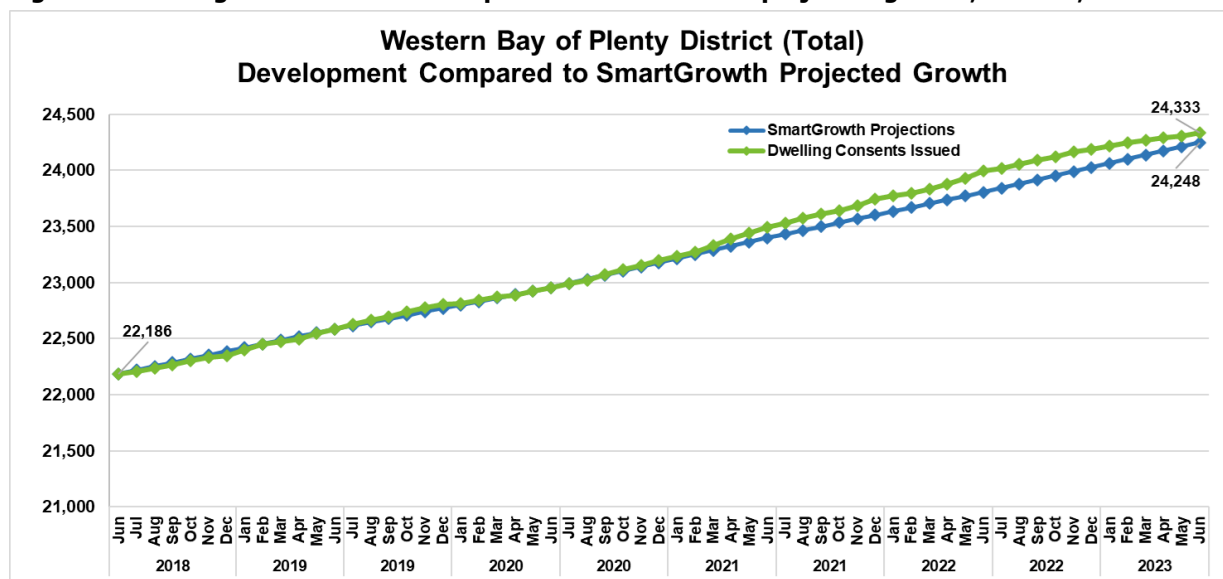
In June 2018, the population for the Western Bay of Plenty sub-region was 195,500⁸. The population of the sub-region is projected to increase to 283,139 people (+87,639 people) by 2050, while the number of dwellings is projected to increase from 78,458 to 118,370 over that period.

Figure 8 Dwelling consents issued compared to SmartGrowth projected growth, WBOP sub-region, 2018 to 2023



Between 1 July 2018 and June 2023, 98 less dwellings (1.2%) were consented in the sub-region compared to the SmartGrowth dwelling projections in the same period.

Figure 9 Dwelling consents issued compared to SmartGrowth projected growth, WBOPD, 2018 to 2023

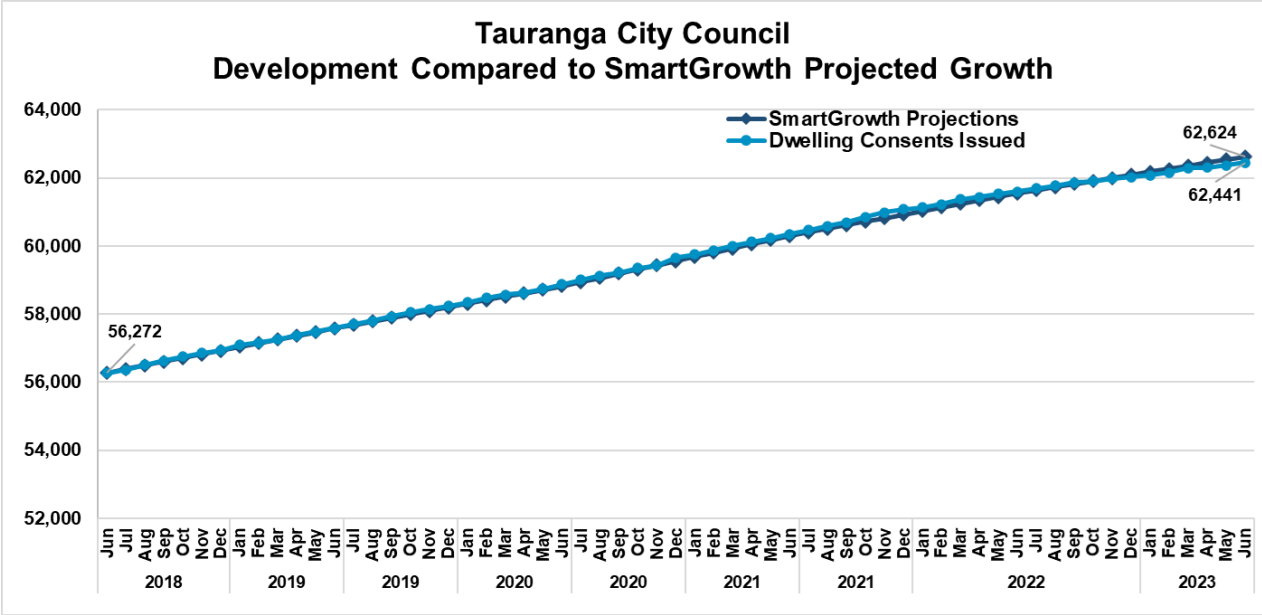


In WBOPD, 85 more dwellings (4.1%) were consented compared to SmartGrowth dwelling projections from 1 July 2018 to June 2023.

⁷ The revised projections were adopted by the SmartGrowth Committee on 28 May 2014 and updated by both Councils in 2022.

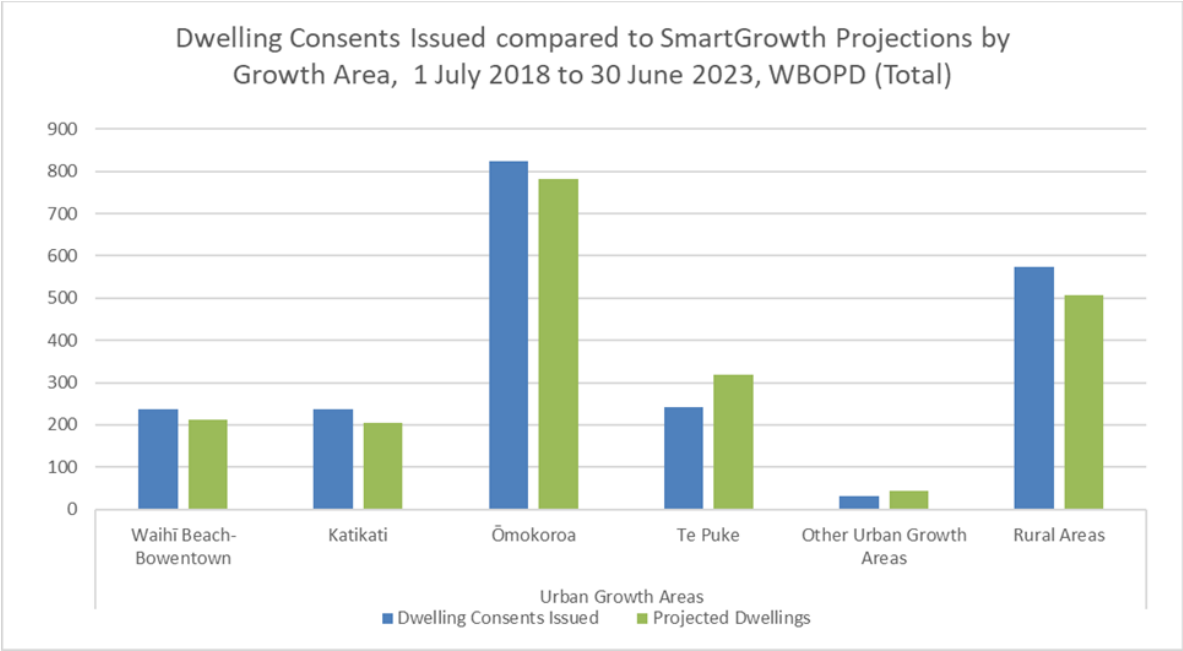
⁸ SmartGrowth population projections for Tauranga City released October 2022 and WBOPD LTP projections updated in April 2023

Figure 10 Dwelling consents issued compared to SmartGrowth projected growth, Tauranga City, 2018-2023



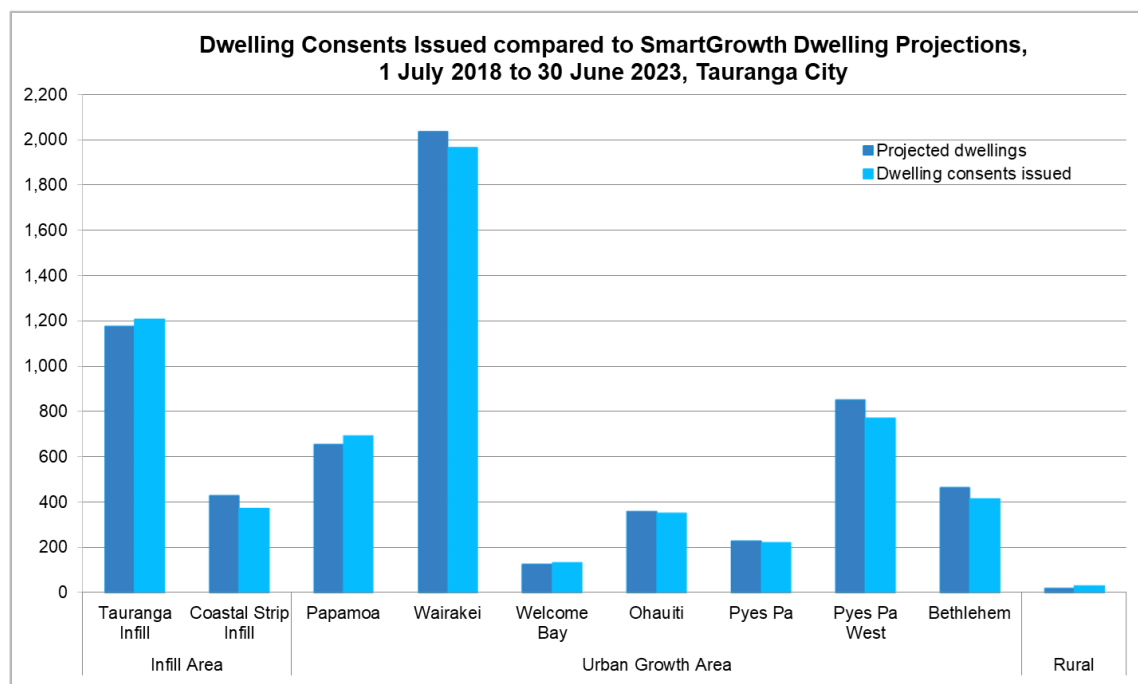
In Tauranga City, 183 (3%) less dwellings were consented compared to the SmartGrowth projections between 1 July 2018 and 30 June 2023.

Figure 11 Dwelling consents issued compared to SmartGrowth projections by growth area, WBOPD, 1 July 2018 to 30 June 2023



From July 2018 to June 2023, the actual dwelling consents issued are close to the dwelling projections, except for Ōmokoroa, Waihi Beach – Bowentown and Katikati with 98 more dwellings than projected collectively. In the rural areas, 68 additional dwellings were consented (575 consents) compared to SmartGrowth projections of 419 consents.

Figure 12 Dwelling consents issued compared to SmartGrowth projections by growth area, Tauranga City, 1 July 2018 to 30 June 2023



In the last 5 years, Tauranga City had 183 less dwellings consented than the SmartGrowth projected allocation. Among the greenfield UGAs, Pāpāmoa and Welcome Bay had respective increments of 6% (40 dwellings) and 5% (7 dwellings) in dwellings consented compared to SmartGrowth projections. On the other hand, Pyes Pa West (The Lakes) had the highest difference of 80 (9%) less dwellings consented than projected.

The existing infill areas had a net 24 less dwellings than projected although Tauranga infill areas had 32 more dwellings consented than projected. The more than 1,200 dwellings consented in Tauranga infill areas included the multi-unit/high density development/redevelopment, including Elizabeth Towers (Farmers’ townhouses and apartments), apartments/attached dwellings at 4th Avenue, Judea (Montgomery Road, Blenheim Place), Cameron Road, Avenues (Eleventh, Seventeenth, Thirteenth), Devonport Road, Cheese Factory Lane, Landview Road, Bernard Street, Church Street and Tebbs Lane.

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

For each greenfield UGA in the subregion, total dwelling capacity yield is estimated through site assessment, with uptake regularly monitored in order to calculate remaining dwelling yield. Of the operative greenfield UGAs, Pyes Pa UGA has the lowest proportion of remaining dwelling capacity (9%), and the lowest remaining dwelling capacity (277 dwellings), refer to Table 6⁹.

Pāpāmoa UGA which has the largest expected yield, has estimated potential for a further 1,128 dwellings. The high number of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block.

Wairakei UGA in Pāpāmoa East was made operative in May 2011, providing further capacity for an estimated 5,700 dwellings. At 30 June 2023 it had the largest remaining dwelling capacity (2,432 dwellings) and highest percentage of capacity remaining (43%).

⁹ Estimated Yields have been reviewed in response to Proposed Plan Change 33 (PPC 33) Enabling Housing Supply.

Tauriko West, Keenan Road, Ohauti South and Te Tumu in Pāpāmoa East future greenfield UGAs are currently being progressed. Other greenfield areas have been identified for future urban development and their suitability is currently being considered.

By June 2026 it is estimated that capacity for a further 5,220 dwellings will remain in the current operative greenfield UGAs, which is 18% of the total estimated yield of these UGAs, falling to 1,870 dwellings (or 6% of total yield) by 2033. For the future greenfield UGAs it is anticipated that a further 12,450 dwellings will be added to the yield by 2040, with 11,150 dwellings (or 90%) of this additional yield estimated to remain at June 2033.

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

Greenfield Urban Growth Area (UGA)	Estimated Yield - Total Dwellings	June 2023 total dwellings (existing and consented)	Remaining capacity as at June 2023	Short term (3 years)		Medium Term (10 years)	
				Estimated uptake July 2023 – June 2026	Estimated remaining capacity at June 2026	Estimated uptake July 2026- June 2033	Estimated remaining capacity at June 2033
Bethlehem ¹	5,730	3,872	1,858	300	1,558	1,000	558
Pyes Pa	2,960	2,683	277	60	217	120	97
Pyes Pa West ¹	2,710	2,083	627	220	407	250	157
Ohauti	2,120	1,635	485	100	385	180	205
Welcome Bay	2,160	1,947	213	40	173	100	73
Pāpāmoa	8,170	7,042	1,128	380	748	500	248
Wairakei ²	5,700	3,268	2,432	700	1,732	1,200	532
UGA (current) Sub-Total	29,550	22,530	7,020	1,800	5,220	3,350	1,870
Te Tumu ³	6,500					0	6,500
Tauriko West ⁴	3,500					1,100	2,400
Ohauti South ⁵	450					200	250
Keenan Road ³	2,000					0	2,000
UGA (future) Sub-Total	12,450					1,300	11,150
Greenfields Total	42,000	22,530	7,020	1,800	5,220	4,650	13,020

¹ The UGA yields have been increased from estimates published in the 2022 Development Trends report in response to PPC 33 and proposed developments.

² 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.

³ The release of Te Tumu and Keenan Road future UGA's are proposed to be delayed to 2040 under the Proposed 2024 Tauranga City LTP.

⁴ Structure planning has commenced. Tauriko West is currently expected to be released from 2025/26.

⁵ Currently anticipated to be released post 2030.

Western Bay of Plenty District

In WBOPD both Ōmokoroa and Te Puke UGAs have the largest dwelling capacity in the District consisting of over 4,300 dwellings in each. Waihi Beach has a large dwelling 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 2,480 dwellings with the Stage 3 future urban zone included in notified Plan Change 92 – Ōmokoroa and Te Puke Enabling Housing Supply. Both Katikati and Te Puke (Structure Plan 3) UGA's have large dwelling capacity remaining of 1,540 (Katikati) and 1,513 (Te Puke) dwellings.

There is still enough availability of land in WBOPD for the short term. When the NPS-UD competitive margins are taken into account, there is a shortfall in the medium and long-terms, starting from 2025 onwards, meaning new areas and associated servicing infrastructure need to be brought forward.

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

Urban Growth Area	Total Capacity (Dwellings) ¹	June 2023 Total dwellings (existing and consented)	Remaining capacity at June 2023	Short Term (3 years)		Medium Term (10 years)	
				Protected uptake July 2023 – June 2026	Estimated remaining capacity at June 2026	Estimated uptake July 2026 – June 2033	Estimated remaining capacity at June 2033
WB-Bowentown/Athenree	3,511	3,148	363	40	323	98	225
Katikati ²	3,975	2,435	1,540	80	1,460	285	1175
Ōmokoroa ³	4985	2,505	2,480	354	2,126	1,185	941
Te Puke	4,723	3,210	1,513	455	1,058	681	377
Greenfields (current) Sub-Total	17,194	11,298	5,896	929	4,967	2,249	2,718

¹ The estimated yields have been altered from estimates published in the 2022 Development Trends report in response to PPC 92 and proposed developments

² Katikati capacity calculation includes the Park Road dairy farm and Tetley Road orchard.

³ Ōmokoroa – Total include Stage 1, 2 and 3

Housing Capacity Assessment

Tauranga City Council, Western Bay of Plenty District Council and Bay of Plenty Regional Council are required to undertake a Housing and Business Development Capacity Assessment (HBA) as part of their response to the National Policy Statement on Urban Development 2020 (NPS-UD). The SmartGrowth partnership completed a full Housing and Business Capacity Assessment (HBA) in March 2023.

The HBA has identified a housing supply insufficiency for the Western Bay of Plenty sub-region¹⁰. In addition to this forward-looking assessment of the housing shortage, the New Zealand Institute of Economic Research (NZIER)¹¹ was engaged to assess whether the housing market is currently in equilibrium regarding supply and demand for housing, and if not quantify an existing shortage (or surplus) of housing. NZIER estimated a current housing shortage in Tauranga City to be from 4,300 to 5,300 houses, and for Western Bay of Plenty District to be 2,500 houses, as at 30 June 2022¹².

Recognition and quantification of this existing housing supply shortage exacerbates the level of housing supply insufficiency in the Western Bay of Plenty sub-region. A Future Development Strategy (FDS) required under the NPS-UD is being progressed via the revised 2023 SmartGrowth Strategy to address the identified housing and business land supply insufficiency¹³.

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 5¹⁴.

Western Bay of Plenty District

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

¹⁰ See Housing Development Capacity Assessment for Tauranga and the WBOP, July 2021, and full HBA completed in March 2023

¹¹ NZIER - Impact of a housing shortage, an update of the effects on Tauranga City, August 2022

¹² Impact of housing shortage, an update of the effects on Tauranga City, NZ Institute of Economic Research NZIER, August 2022. Estimating the housing shortfall. A report for Western Bay of Plenty District Council, NZIER, November 2022.

¹³ The FDS is programmed for completion in time to inform the 2024-34 Long Term Plan and 30 Year Infrastructure Strategy. Hearings of submissions on the revised SmartGrowth Strategy, which incorporates FDS requirements, are set for early December 2023

¹⁴ Note: Statistics NZ replaced “Census Area Units” (CAU’s) with “Statistical Area 2” (SA2’s) at 2018 Census. Although the SA2s are generally the same as CAU’s, the boundaries and names have changed to reflect changes in land use and population patterns

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

Tauranga City

For Tauranga City the coastal strip SA2's of Mount Maunganui North, Omanu, Te Maunga, Pāpāmoa 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

The downturn in the residential market in the Western Bay sub-region started in mid-2022 and still continues, with declines observed in dwelling sales prices and volume of sales.

The highest actual median price in Tauranga City was observed in the first quarter of 2022 at \$1.04 million, and declined to \$0.9 million in June 2023. In the same period, Western BOPD's highest median sales price was recorded at \$1.0 million and declined to \$758,000.

The figure and table below show that the 12-month rolling average median prices declined from June 2022 to June 2023 by a respective 9% and 15%, in Tauranga City and Western BOPD. However, the 12-month rolling average median prices in June 2023 were still higher than the actual median prices as price levels were high in the last 12 months.

Figure 13 Dwelling sales prices, Tauranga City and WBOPD, 2001/2023

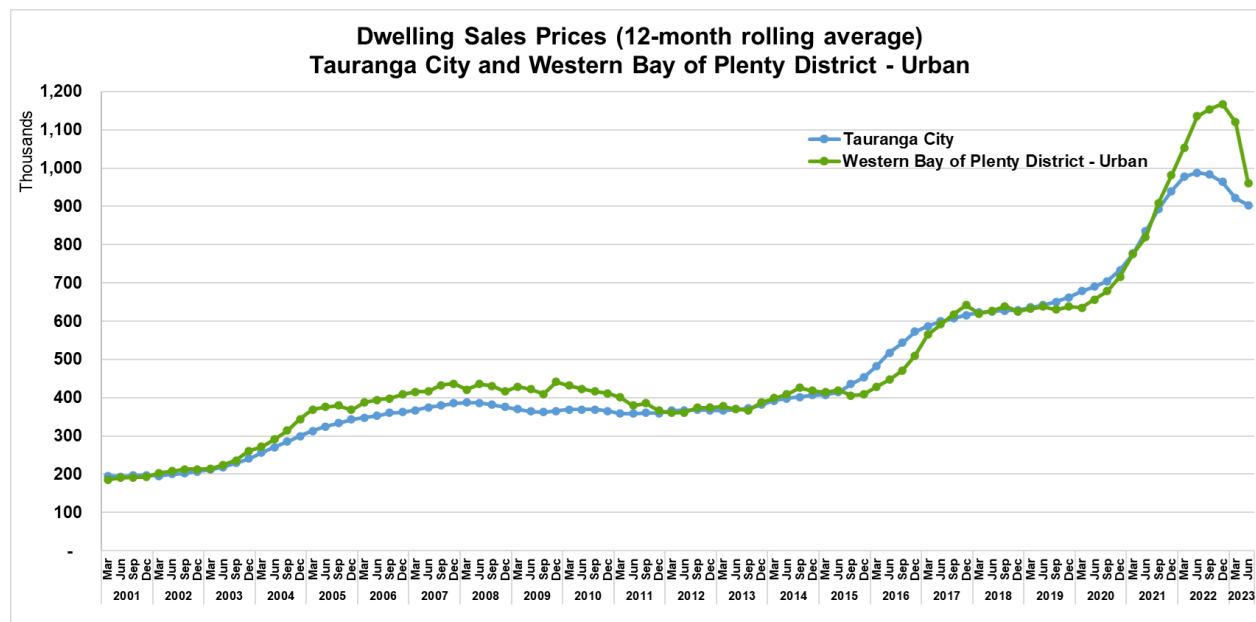


Table 8 Dwelling Sales Prices (12-month rolling average¹)

Dwelling Sales Price		Trend	Change	% Change
<i>Tauranga City</i>				
June 2023	\$903,750			
March 2023	\$921,750	↓	-\$18,000	-2.0
June 2022	\$987,750	↓	-\$84,000	-8.5
June 2019	\$642,000	↑	\$261,750	40.9
June 2014	\$397,750	↑	\$506,000	127.2
<i>Western BOPD – Urban</i>				
June 2023	\$961,532			
March 2023	\$1,120,704	↓	-\$159,172	-14.2
June 2022	\$1,135,839	↓	-\$174,307	-15.3
June 2019	\$637,927	↑	\$323,605	50.7
June 2014	\$408,777	↑	\$552,755	135.2

¹ Dwelling sales prices data were sourced from HUD. 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/actual market selling prices. The rolling average also smoothens the fluctuations in the time series prices.

In Western Bay of Plenty District, Tahawai was the only area unit that recorded an increase of 12.5% in median house price in June 2023 compared to the previous year, while the rest of the area units had declines ranging from 5% (Te Puke West) to 62% (Upper Pāpāmoa).

In the same period, Palm Beach and Pyes Pa were the only area units in Tauranga City that recorded increases in median house prices at 2% and 22%, respectively. Most of Tauranga City’s area units had actual median house prices of less than \$1 million and only 5 area units (Bethlehem, Ōtūmoetai South, Pyes Pa, Kaitemako and Ohauti-Ngapeke) had prices over \$1 million.

Figure 14 Dwelling sales prices, June 2023

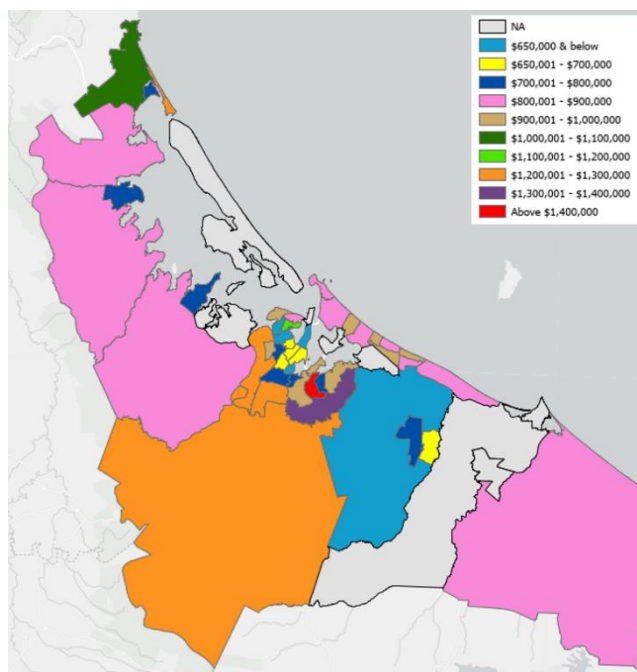
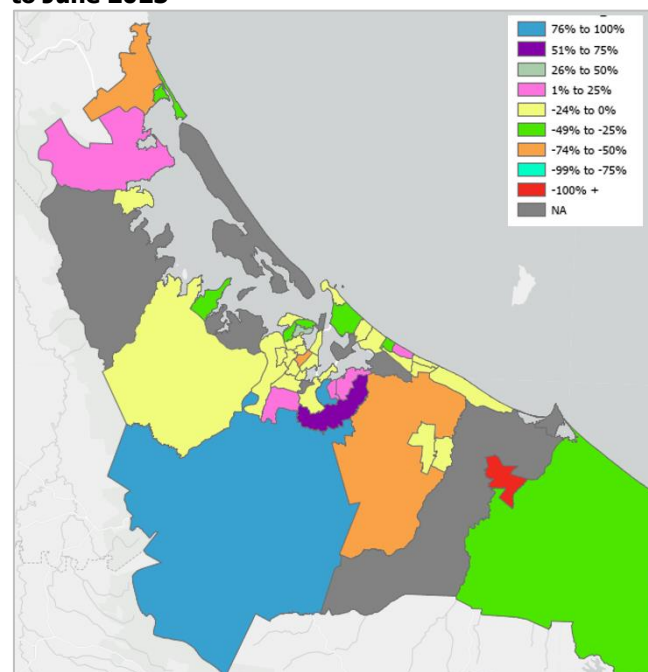


Figure 15 Change in dwelling sales prices, June 2022 to June 2023



Source of raw data: HUD NPS-UD

Dwelling Rents

Dwelling rent in Western Bay of Plenty District-urban areas are typically lower than in Tauranga City as shown in the graph and table below. This dwelling rent data reflects only the properties where bonds have been lodged in the Tenancy Services of the MBIE in the previous 6 months of the reference quarter, hence may not indicate the true residential rental situation in the sub-region.

In June 2023, the 12-month rolling average weekly rent in both Tauranga City and Western Bay of Plenty District were higher by 8% (\$46) and 28% (\$122), respectively, than the same period in the previous year and were both more than 30% higher than the 5-year levels. Refer to Appendix 1 for an explanation of this indicator.

Figure 16 Dwelling rents, Tauranga City and Western Bay of Plenty District (urban), 2001/2023

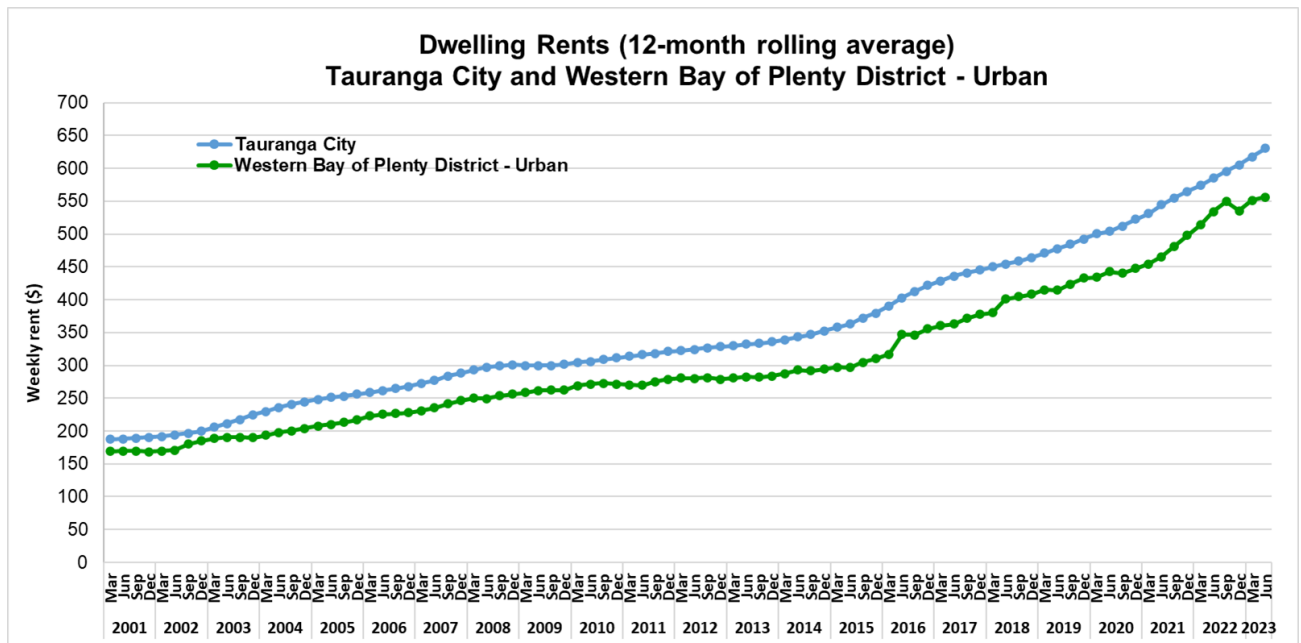
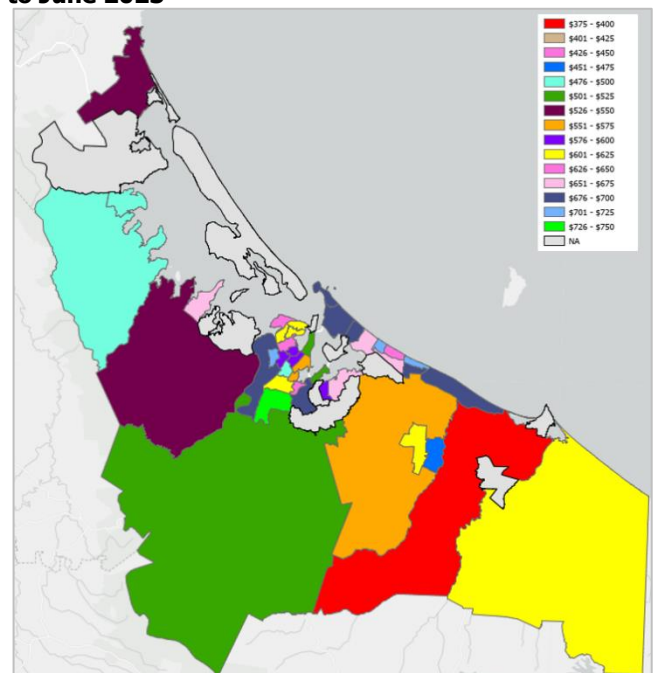


Table 9 Dwelling rents

Dwelling Rents	Trend	Change	% Change
<i>Tauranga City</i>			
June 2023	\$631		
March 2023	\$618	↑	\$13 2.1
June 2022	\$585	↑	\$46 7.9
June 2019	\$477	↑	\$153 32.0
June 2014	\$344	↑	\$287 83.4
<i>Western Bay of Plenty District – Urban</i>			
June 2023	\$556		
March 2023	\$551	↑	\$5 0.9
June 2022	\$534	↑	\$122 28.1
June 2019	\$415	↑	\$141 34.0
June 2014	\$293	↑	\$263 89.8

Source of raw data: HUD NPS-UD

Figure 17 Weekly dwellings rents by area unit, Tauranga City and Western Bay of Plenty District, to June 2023



Dwellings Sold

The figure below shows the continuous downturn in the sub-region's residential market in the last two years, with the lowest volume of sales in the last 30 years recorded last year (2022/23). A number of factors including uncertainty in respect to inflation, mortgage rates, and credit conditions are expected to be influencing this trend.

Tauranga City and Western Bay of Plenty District had significant declines of more than 39% and 33%, respectively (equivalent to a total of 1,223 dwellings) in the volume of sales from July 2022 to June 2023 compared to the previous year. Refer Appendix 1 for an explanation of this indicator.

Figure 18 Dwellings sold, Tauranga City and Western Bay of Plenty District, July 1993 to June 2023

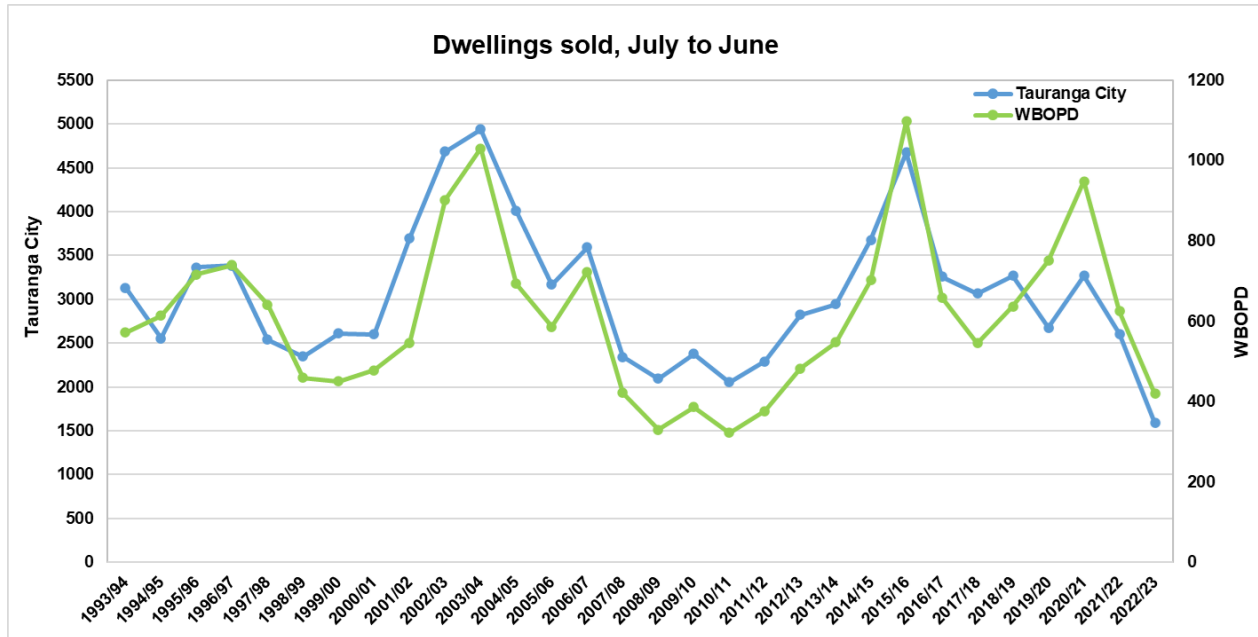
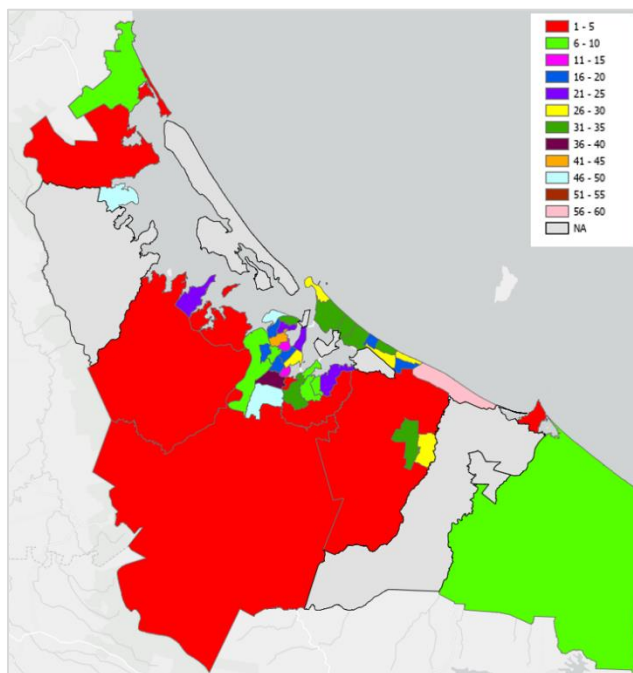
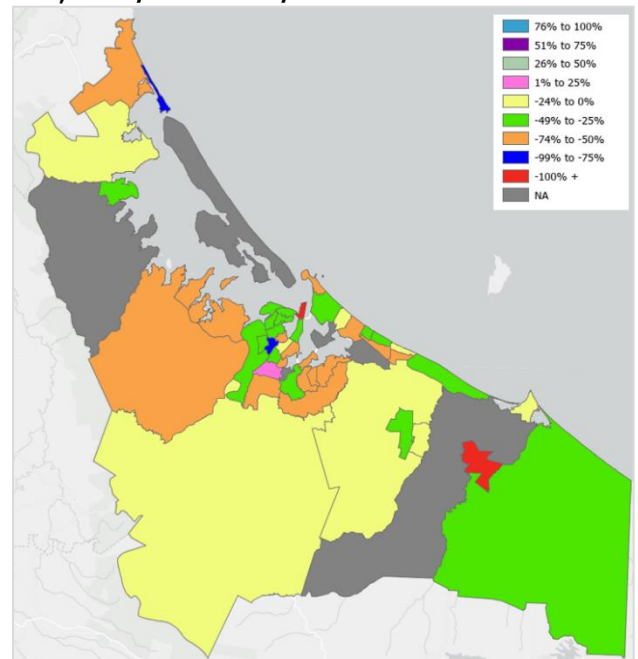


Figure 19 Dwellings sold, July 2022 to June 2023



Source of raw data: MHUD NPS-UD

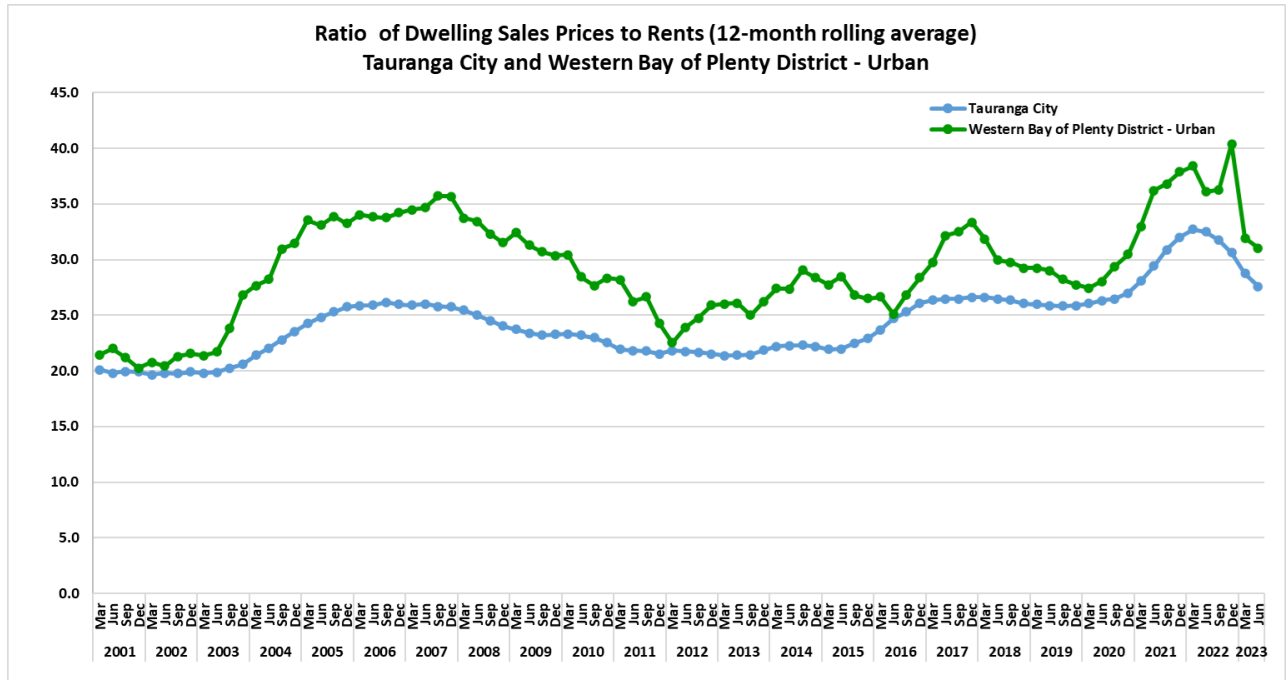
Figure 20 Percentage change in annual dwellings sold, 2021/22 to 2022/23



Ratio of Dwelling Sales Prices to Rent

In the last two decades the sub-region’s ratio of house prices to mean annual rent increased reaching the highest level in 2022 as shown in the figure below. The downturn in the housing market is pushing the ratios downward, with the actual levels recorded at 26.3 in Tauranga City and 25.4 in Western Bay of Plenty District in June 2023. This level is still high and indicates that it’s 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 Western Bay of Plenty District (urban), 2001 to 2023



4 Housing Affordability

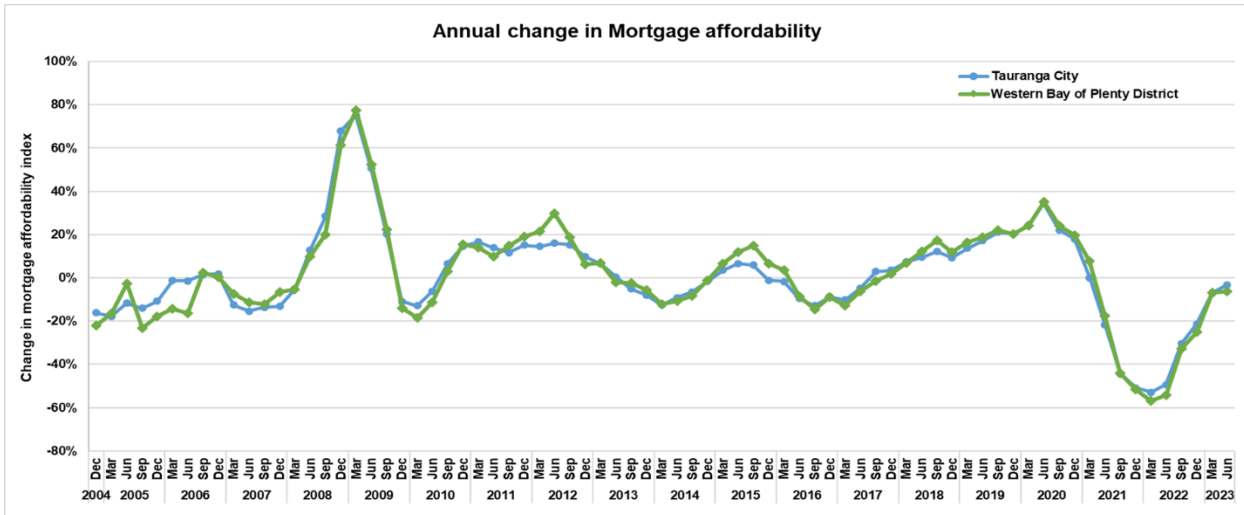
This year’s edition of the Development Trends Report uses the Change in Housing Affordability Indicators (CHAI) for housing affordability introduced by the Ministry of Housing and Urban Development in November 2022. The indicators include changes in mortgage affordability, deposit affordability and rental affordability. A positive change in these indicators indicates improving affordability and negative change indicates declining affordability. Please see Appendix 2 for definition/explanation of, and sources of data for these indicators.

Change in mortgage affordability index

The change in mortgage serviceability compares changes in the purchasing power of mortgage interest payments for new home loans with the growth in median household disposable (after tax) income.

The figure below shows that although mortgage serviceability had slightly improved in the last few months to June 2023 the index change is still below zero and therefore it is still unaffordable to own a home in the sub-region.

Figure 22 Annual change in mortgage affordability index



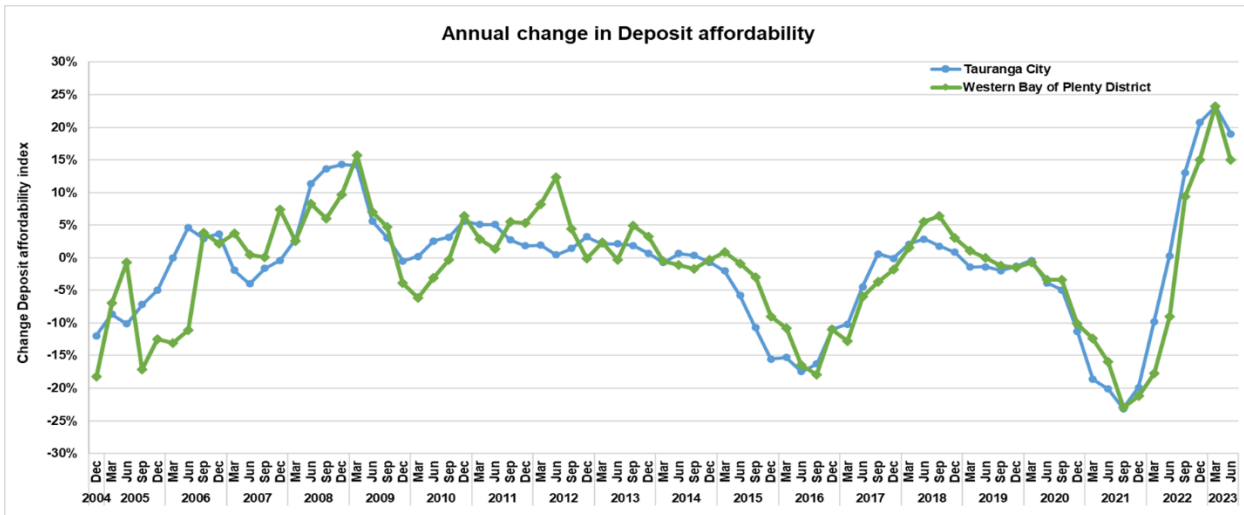
Source of raw data: HUD

Change in deposit affordability index

The change in deposit affordability indicator compares changes in house prices with the growth in median household disposable (after tax) income.

Figure 23 shows that saving for a deposit has improved since December 2021 to the highest point in March 2023 at 23% but declined in June 2023 at 19% and 15% in Tauranga City and Western Bay of Plenty District, respectively. However, servicing a mortgage is still unaffordable as shown in the figure above.

Figure 23 Annual change in deposit affordability index



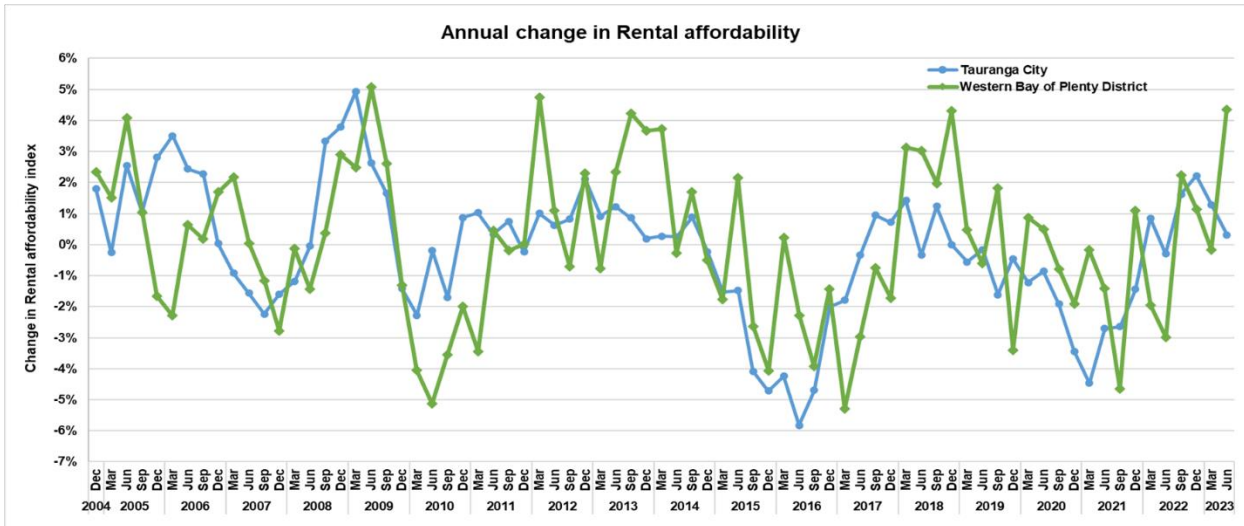
Source of raw data: HUD

Change in rental affordability index

The change in rental affordability compares changes in rental prices for new tenancies with the growth in median household disposable (after tax) income.

Figure 24 shows that rental affordability was fluctuating but had improved in the last twelve months. The annual increase in household disposable income during this period was greater than the increase in rent prices, except in March 2023 for Western Bay of Plenty District where the change was below 0. The positive changes were still very low (0 to 4.3%) indicating low home affordability.

Figure 24 Annual change in rental affordability index



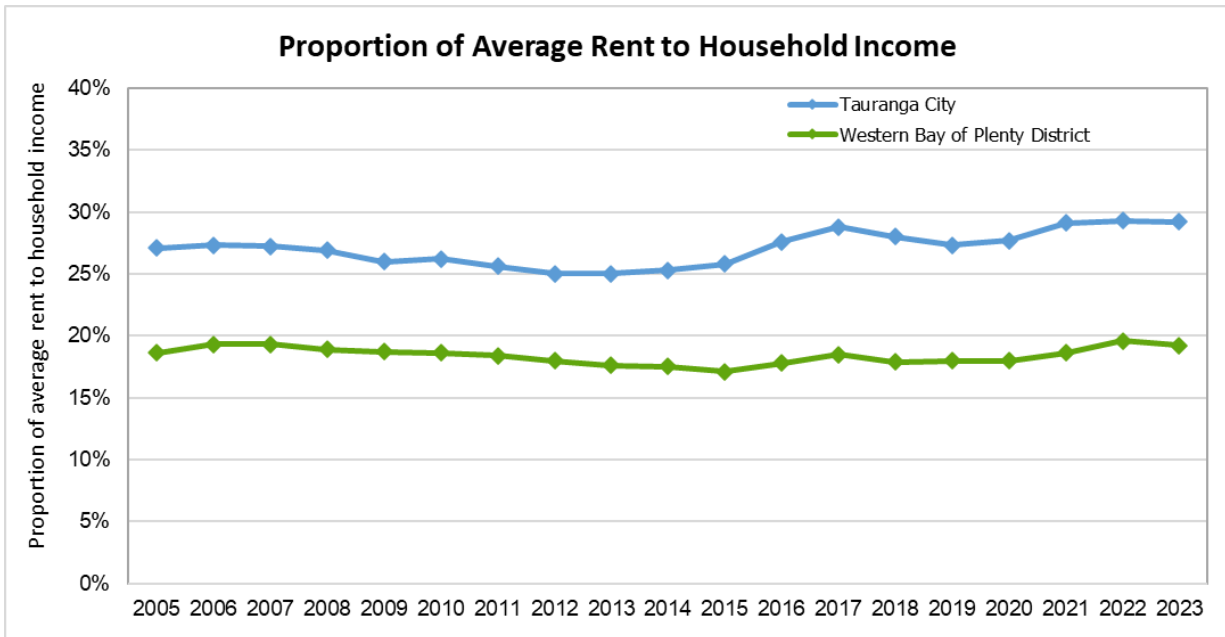
Source of raw data: HUD

Proportion of average rent to household income

The proportion of average annual rent to average household income indicates rental affordability. A higher proportion suggests that average rents cost a greater multiple of typical incomes, which indicates lower rental affordability.

The proportion of average annual rent to household income in the sub-region had increased in the last three years but still lower than 30%¹⁵. This, in addition to other measures indicating housing unaffordability as discussed in the previous section, show that it is still more affordable to rent than to buy a house in the sub-region.

Figure 25 Proportion of average rent to household income, 2005 to 2023



Source of raw data: Infometrics

¹⁵ 30% of income is the ideal maximum limit that should be spent on rent

5 Residential section size

Tauranga City

Although residential subdivision activity had increased slightly by 8% from 2021/22 to 2022/2023, residential section size had been smaller. This is evident in the increase in proportions of sections with size smaller than 175m² from 5% to 10% and the next bigger size of 176m² to 325m² from 48% to 50%. The latter was the most prevalent new lot size in 2022/23. On the other hand, new lots measuring 326m² to 500m² decreased in proportion from 35% in 2021/22 to 20% in 2022/23.

It is expected that the new lots bigger than 750m² particularly those in the suburban & Wairakei residential zones will be further subdivided in the future.

Table 10 Residential lot/section size for additional lots created in Tauranga City, July 2019 to June 2023

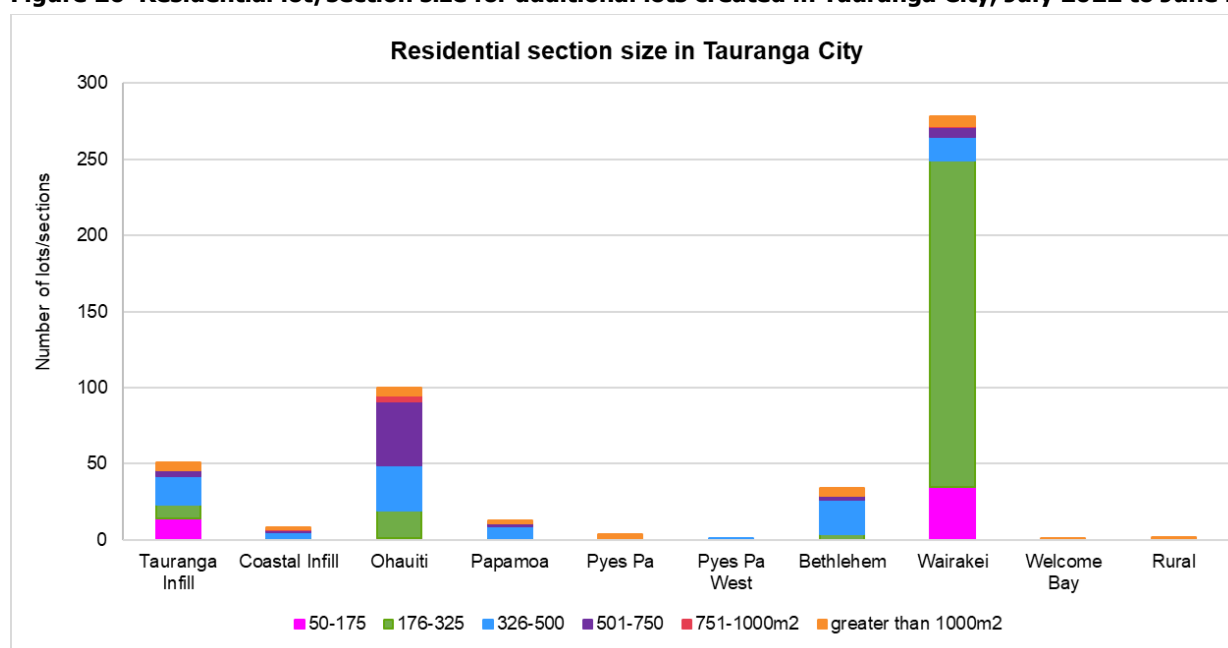
Residential lot/section size (m ²)	Dwelling yield per ha	2020/21		2021/22		2022/23	
		Number of lots	Percent of total	Number of lots	Percent of total	Number of lots	Percent of total
175 and below	40 & above	35	5	22	5	50	10
176-325	21-39	217	31	218	48	247	50
326-500	14-21	223	32	160	35	100	21
501-750	9-14	177	25	25	5	58	12
751-1000	7-9	16	2	6	1	6	1
Above 1000	Below 7	30	4	26	6	31	6
Total		698	100	457	100	492	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

Majority (88%) of the new lots created from July 2022 to June 2023 were located in the Greenfield UGAs, with 81% of these lots measuring 500m² and smaller. Among the Greenfield UGAs Wairakei had biggest proportion of 65% of the new lots created, where more than three-quarters (77%) measured 176m² to 325m². Ohauiti had 100 lots comprising 23% of the new lots created in the Greenfield UGAs during the year. Both Pyes Pa West and Welcome Bay had only 1 new lot created as both UGAs are nearing capacity.

Figure 26 Residential lot/section size for additional lots created in Tauranga City, July 2022 to June 2023



Historical residential lot/section size

Residential subdivision activity in Tauranga City has been declining in the last 7 years, with the number of new lots created below 500 m² in the last two years. Residential section size was also getting smaller, with the shift in the most prevalent lot size. The 326m² to 500m² lot size was the most prevalent for 7 years, from 2014/15 to 2020/21. As section sizes become smaller, the 176m² to 325m² lot size was the most prevalent in the last two years at 48% and 50%.

The proportion of lot sizes smaller than 326m² increased from 13% in 2016/17 to 60% in 2022/23, while the proportion of the next bigger lot size of 326m² to 500m² decreased from 50% to 20% in the same periods. The assessment of resource consents for residential subdivisions that are in the development pipeline indicate that the proportion of smaller lots will continue to increase.

Figure 27 Residential section size for new lots created in Tauranga City, 2005/06 to 2022/23

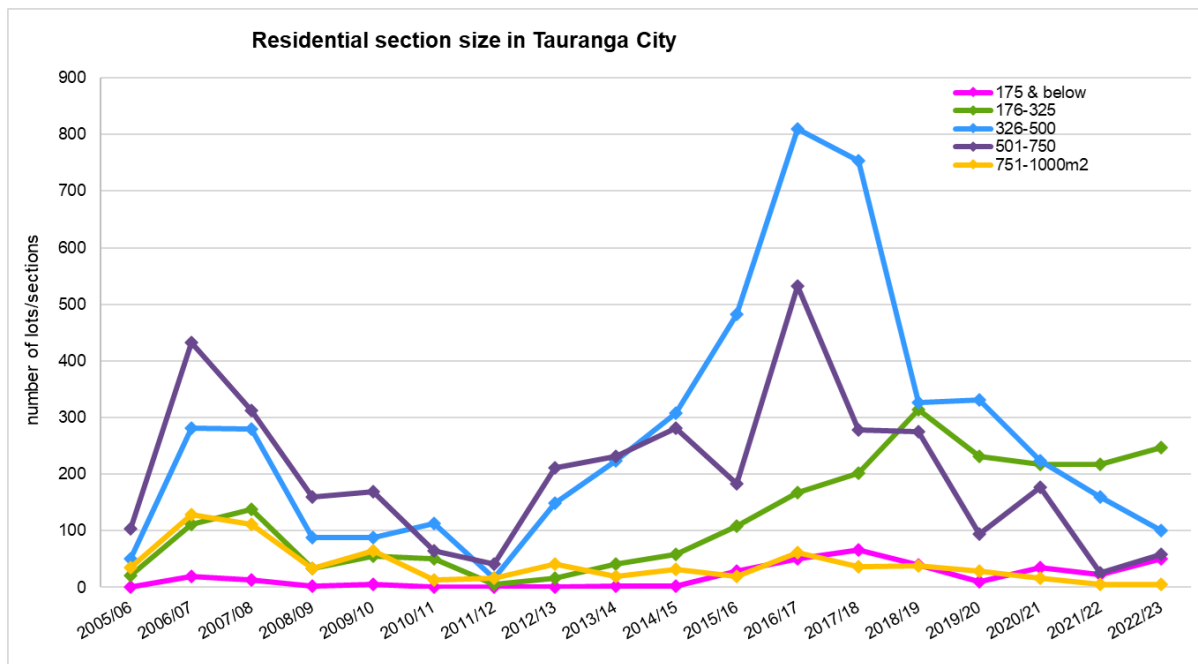


Figure 28 Residential section size for new lots created in Tauranga City, 2005/06 to 2022/23

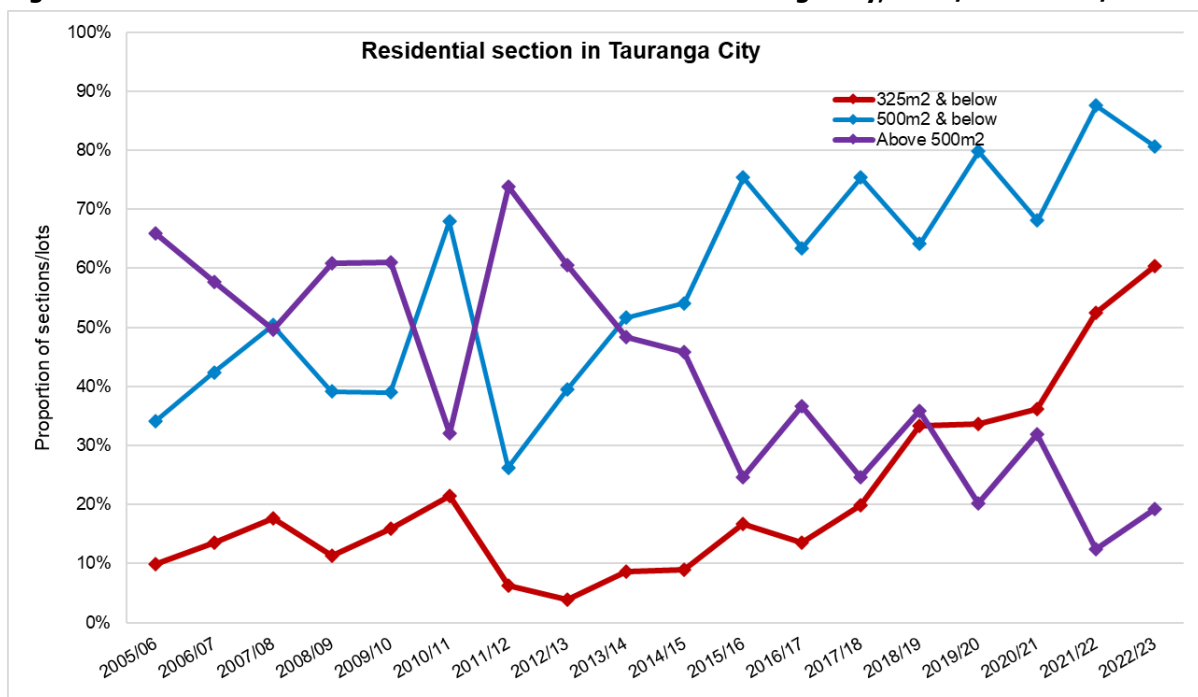
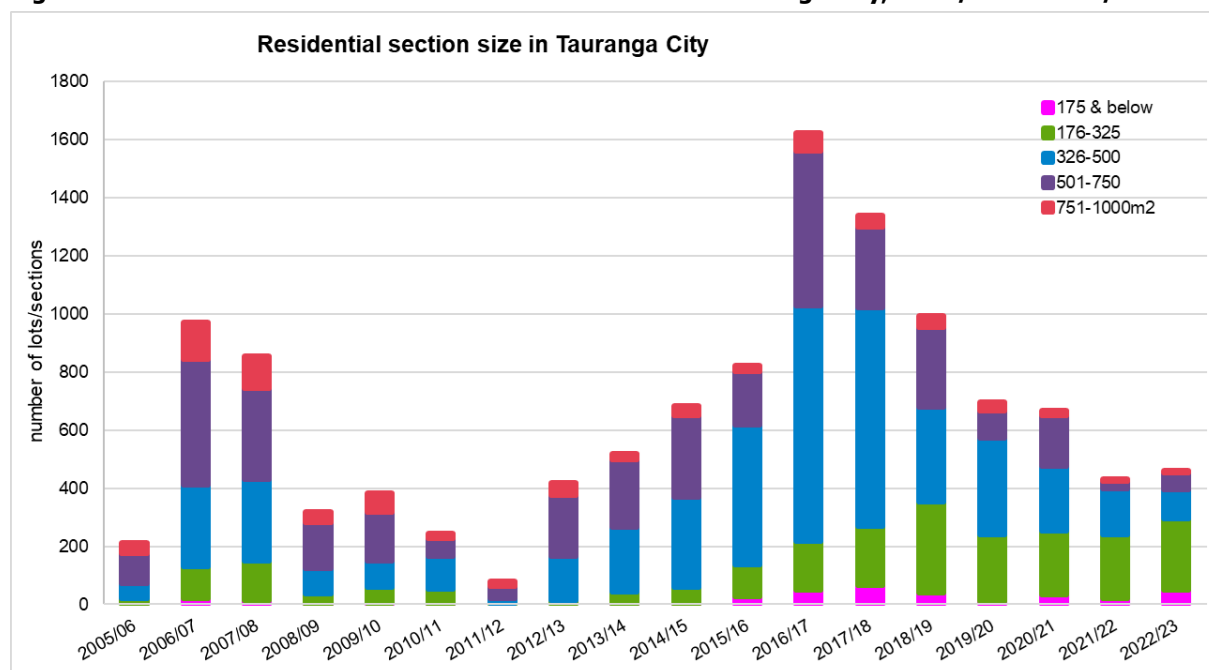


Figure 29 Residential section size for new lots created in Tauranga City, 2005/06 to 2022/23



The table below shows that as at end of June 2023, Tauranga City has a total of 46,914 lots in four residential zones including high density urban residential, city living – residential and mixed use, suburban residential and Wairakei residential zones. The majority or 98% of these lots are in the suburban (91%) and Wairakei (7%) residential zones. More than two thirds (69%) of the lots were greater than 500m² and future subdivision is expected to occur in these lot sizes.

Table 11 Number of lots/sections, by City Plan residential zone and section and section size, June 2023

City Plan zone ¹	Section size	Number of lots	Per cent
High density urban residential	< 325m ²	342	0.7
	325m ² – 500m ²	72	0.2
	> 500m ²	294	0.6
City Living – residential & mixed use	< 325m ²	32	0.1
	325m ² – 500m ²	46	0.1
	> 500m ²	266	0.6
Sub-urban residential	< 325m ²	2,176	4.6
	325m ² – 500m ²	9,396	20.0
	> 500m ²	31,073	66.2
Wairakei residential	< 325m ²	1,132	2.4
	325m ² – 500m ²	1,412	3.0
	> 500m ²	673	1.4
Total		46,914	100%

¹ Excludes other zones where residential development have occurred and/or expected to occur: Future urban, Neighbourhood Centre (Wairakei), Ngāti Kahu Papakainga, Residential Large lot and Rural Residential. The number of lots in these zones are not expected to change much over time except in the >500m²

Western Bay of Plenty District

Most of the dwellings in the Urban Growth Areas were built on smaller section sizes in 2022/2023 compared to 2021/2022, with 26% of the dwellings built on a section size of 326-500m², followed by 23% dwellings built on a 501-750m² section size (in 2022/2023).

In 2022/2023 most of the dwellings consented in Ōmokoroa were on a section size of 501-750m² (33 dwellings) followed by a section size of 326-500m² (22 dwellings). In Te Puke, more dwellings were consented on a section size of 176-325m² and 326-500m² with 31 and 22 dwellings for 2022/2023, and 9 dwellings were consented on a section size of 1,000m² or more.

Figure 30 Residential section size in Western Bay of Plenty District, July 2021 to June 2023

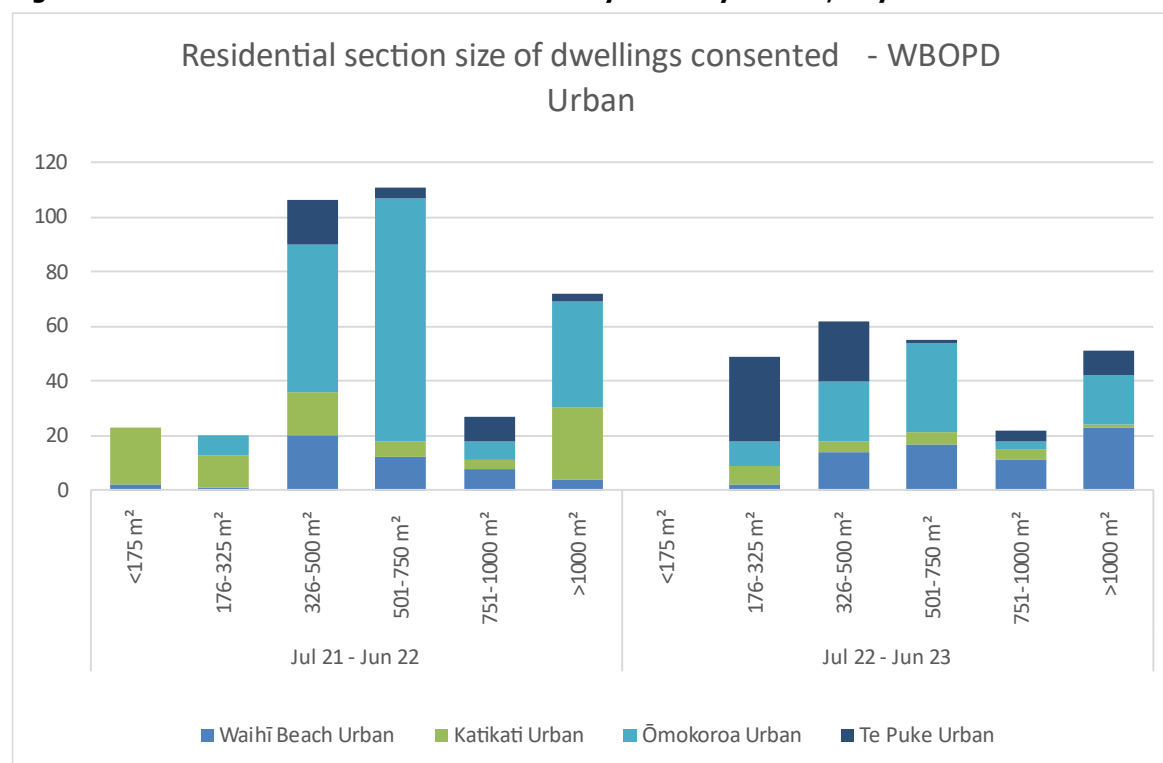


Table 12 Residential lot/section size for dwellings consented in Western Bay of Plenty District, July 2019 to June 2022

Residential lot/section size (m ²)	Dwelling yield per ha	2020/2021		2021/2022		2022/2023	
		Number of lots	Percent of total	Number of lots	Percent of total	Number of lots	Percent of total
175 and below	40 & above	8	1.9	23	6.4	0	0.0
176-325	21-39	12	2.9	20	5.6	49	20.5
326-500	14-21	150	36.5	106	29.5	62	25.9
501-750	9-14	158	38.4	111	30.9	55	23.0
751-1000	7-9	68	16.5	27	7.5	22	9.2
Above 1000	Below 7	15	3.6	72	20.1	51	21.3
Total		411	100	359	100	239	100

6 Dwelling density

Tauranga City urban growth areas

Table 13 shows that among the urban growth areas, Wairakei is currently achieving the highest nett area dwelling density of 17.4 dwellings per ha in the developed areas and 31.0 dwellings per ha proposed in currently undeveloped areas, which together deliver an overall nett area dwelling density of 20.3 dwellings per ha. Pyes Pa West (the Lakes) and Pāpāmoa have overall nett area dwelling densities of 13.7 and 13.8 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 12.3, Pyes Pa East 12.2, Ohauti 11.6 and Welcome Bay 10.8. Refer to Appendix 7 for more details on density figures and maps for the UGAs.¹⁶

Table 13 Residential dwelling density by urban growth areas, Tauranga City, December 2022

Residential Development	Growth Area	Dwelling density (dwellings per ha)		
		Gross area ¹	Nett area ²	Nett site area ³
Developed	Bethlehem	11.98	12.12	15.09
	Pyes Pa West	13.24	13.57	19.57
	Pyes Pa East	12.03	12.20	15.73
	Ohauti	11.39	11.60	14.65
	Welcome Bay	10.51	10.64	13.82
	Pāpāmoa	13.26	13.44	17.88
	Wairakei	17.28	17.35	26.09
Proposed	Bethlehem	15.19	19.19	29.12
	Pyes Pa West	15.74	15.74	18.75
	Pyes Pa East	14.01	14.01	17.73
	Ohauti	10.88	10.88	12.34
	Welcome Bay	16.52	16.52	22.68
	Pāpāmoa	29.74	29.74	36.48
	Wairakei	31.22	31.22	51.12
Total	Bethlehem	12.13	12.27	15.54
	Pyes Pa West	13.40	13.71	19.50
	Pyes Pa East	12.04	12.21	15.75
	Ohauti	11.38	11.58	14.58
	Welcome Bay	10.63	10.75	13.99
	Pāpāmoa	13.57	13.75	18.25
	Wairakei	20.27	20.33	31.12

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.

¹⁶ Future density assessment areas will be expanded to include the established infill/ intensification parts of the city.

Table 14 Area, yield and residential density in urban growth areas, Tauranga City, December 2023

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	277.59	3,134	271	3,405	12.27
Pyes Pa West	182.44	2,229	273	2,502	13.71
Pyes Pa East	181.71	2,185	34	2,219	12.21
Ohauiti	145.70	1,568	119	1,687	11.58
Welcome Bay	141.43	1,440	81	1,521	10.75
Pāpāmoa	766.58	10,007	532	10,539	13.75
Wairakei	261.44	3,231	2,084	5,315	20.33

¹ Includes both developed and proposed dwellings and sections

7 Dwelling Typology

Tauranga City

The figures below show that stand-alone dwellings were the most prevalent type of dwelling¹⁷ consented in Tauranga City in the last few years. However, its proportion had declined from 63% to 45% of all the dwellings consented from 2017/18 to 2022/23. Conversely, the combined proportion of duplexes, apartments and attached dwellings significantly increased from 7% to 31% in the same period. The retirement village unit also recorded a similar increasing trend from 8% in 2017/18 to 23% in 2022/23.

Of the stand-alone or detached dwellings consented in 2022/23, 43% (164 dwellings) were located in Wairakei, the remaining 57% were spread across the other growth areas, ranging from 2% (8 dwellings in Welcome Bay) to 15% (57 dwellings in Tauranga infill areas).

Tauranga infill areas had the largest share of the combined duplexes, apartments & attached dwellings at 69%, followed by Wairakei at 19%.

For retirement village units, Wairakei had the largest share of 56%, followed by Pāpāmoa at 28%, operated by Summerset and Mangatawa Pacific Lakes, respectively. Around two-thirds of these dwellings were 3 or more dwellings with attached external walls or garages and the remaining one third were duplexes.

Thirteen (1.5%) of the dwellings consented during the year are secondary or minor dwellings. These dwellings were composed of granny flats, converted garages, basements or offices, sleep outs and additions or alterations to main dwelling resulting to an additional independent dwelling unit.

¹⁷ TCC classifies the dwellings into the following types: stand-alone 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 stand-alone, duplex, and attached dwellings.

Apartments are 3 or more dwelling units joined horizontally, whether purely residential or mixed residential and commercial use. Attached dwellings are 3 or more dwelling units attached vertically.

Figure 31 Type of dwellings consented in Tauranga City, July 2022 to June 2023

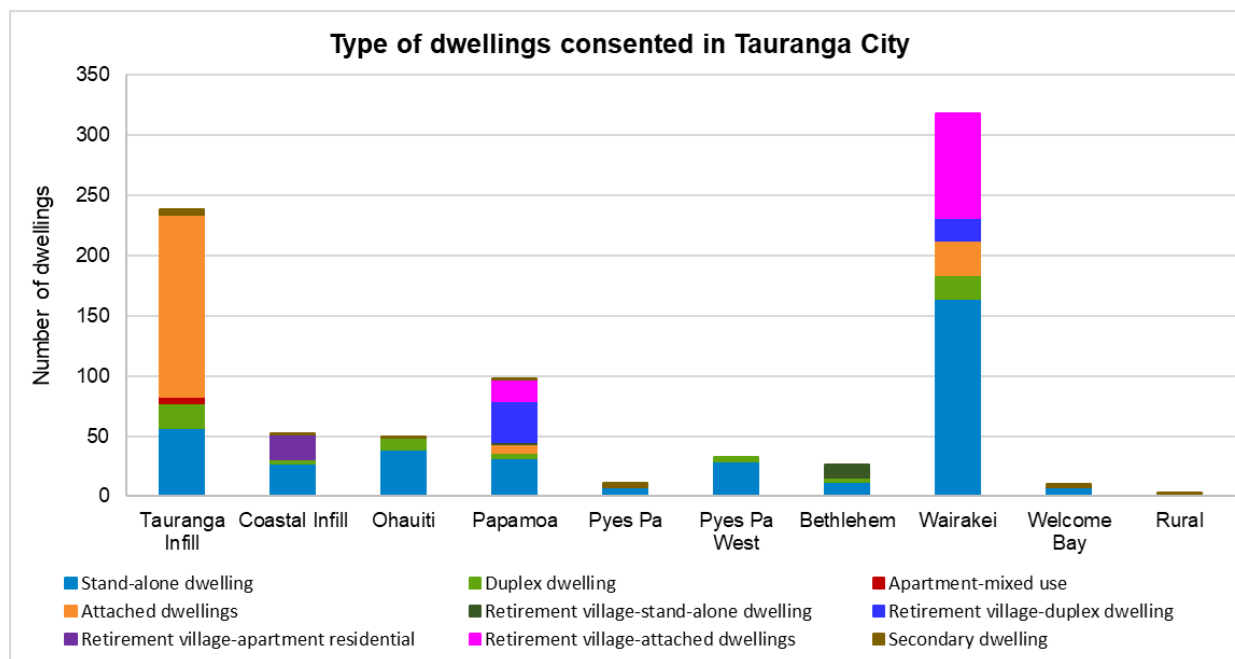
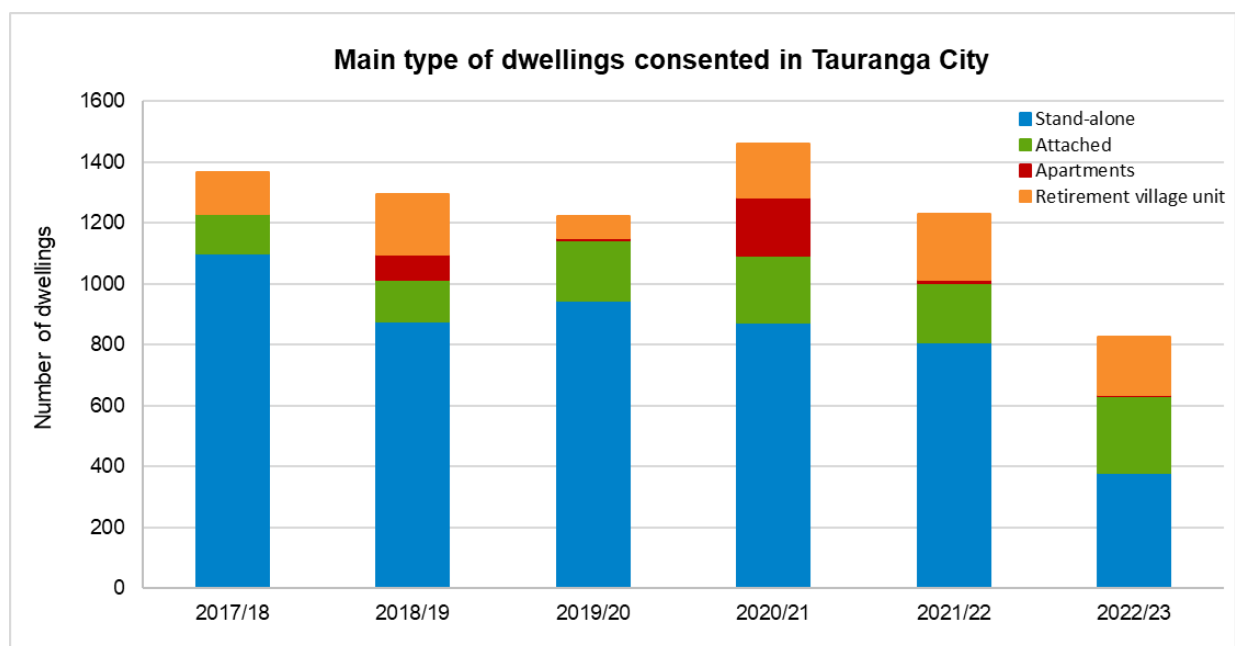


Figure 32 Main type of dwellings consented in Tauranga City, July 2017 to June 2023



In 2022/23, 35% and 65% of the dwellings consented in Tauranga City were located in the infill and greenfield UGAs, respectively.

In both infill and UGAs, majority of the dwellings were in the residential zones (suburban residential, Wairakei residential), at 78% and 89%, respectively. Around 18% of the dwellings in the infill areas were in the commercial zone.

In the residential zones in the infill areas, more than half (51%) of the dwellings consented were attached while 38% were stand-alone dwellings. In the UGAs, 46% of the dwellings consented in the residential zones were stand-alone, 16% were attached and 33% were retirement village units.

Figure 33 Type of dwellings consented in Tauranga City, by City Plan zone and growth area, July 2022 to June 2023

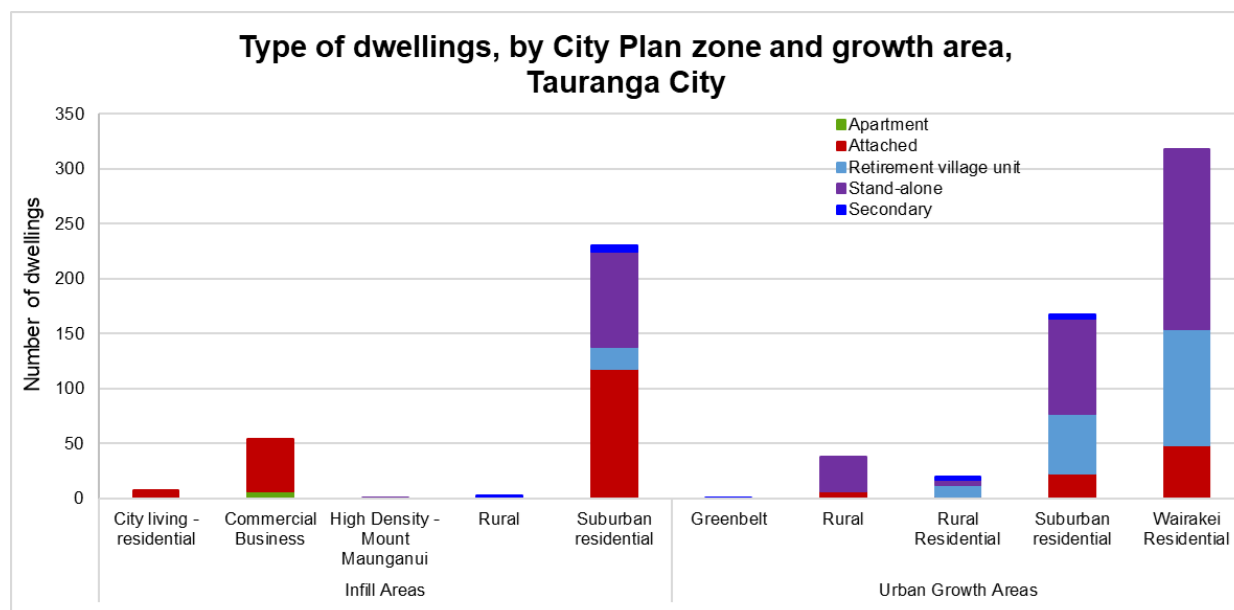


Table 15 Type of dwellings consented in Tauranga City, July 2020 to June 2023

Dwelling Typology	2020/21		2021/22		2022/2023	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Stand-alone dwelling	893	60.4	809	64.6	378	45.1
Duplex	152	10.3	112	8.9	66	7.9
Attached dwellings	63	4.3	84	6.7	186	22.2
Secondary/minor dwelling	18	1.2	23	1.8	13	1.5
Apartments – residential	76	5.1	5	0.4	-	-
Apartments – mixed use	101	6.8	4	0.3	6	0.7
Subtotal	1,303	88.1	1,037	82.8	649	77.4
Retirement village unit – stand-alone dwelling	34	2.3	71	5.7	12	1.4
Retirement village unit – duplex	97	6.6	112	8.9	53	6.3
Retirement village unit – attached dwellings	44	3.0	32	2.6	105	12.5
Retirement village unit – apartment	1	less than 1	-	-	20	2.4
Subtotal	176	11.9	215	17.2	190	22.6
Total	1,479	100	1,252	100	839	100

Western Bay of Plenty District

Over 84% of the dwellings consented in Western Bay of Plenty District are stand-alone dwellings for the 2022/2023 year. In 2022/2023 less variety of dwellings were built which included duplex dwellings (5%), minor dwellings (4%) and terraced dwellings (previously referred to as 'multiunit's') (2%). Stand-alone dwellings decreased by 27% compared to the previous year (2021/2022), duplex dwellings are expected to become more popular due to changing demographics and population in areas such as Ōmokoroa and Te Puke.

Figure 34 Type of dwellings consented in Western Bay of Plenty District, July 2021 to June 2023

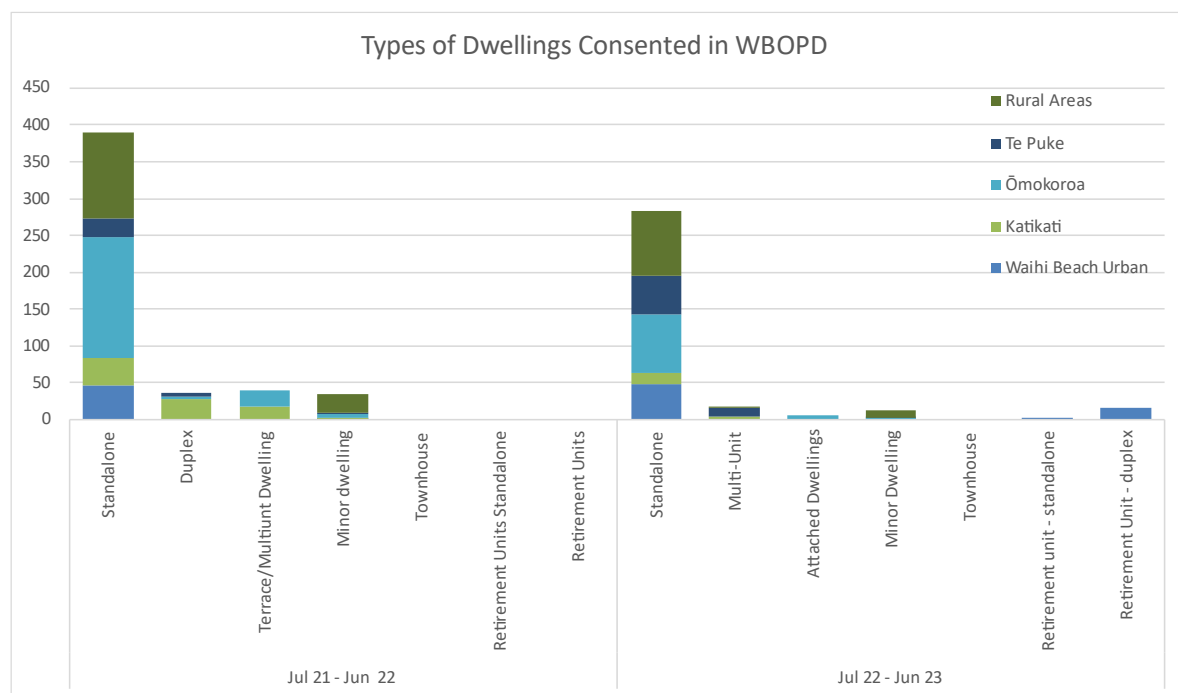


Table 16 Type of dwellings consented in Western Bay of Plenty District, July 2020 to June 2023

Dwelling Typology	2020/2021		2021/2022		2022/2023	
	Number of dwellings	Per cent to Total	Number of dwellings	Per cent to Total	Number of dwellings	Per cent to Total
Stand-alone Dwelling	495	91.7	389	77.8	284	84
Duplex Dwelling	4	0.7	37	7.4	18	5
Terrace Dwelling	0	0.0	39	7.8	6	2
Minor Dwelling	29	5.4	35	7.0	12	4
Townhouse	7	1.3	0	0.0	0	0
Retirement village unit – stand-alone dwelling	0	0.0	0	0.0	2	1
Retirement village unit – attached dwellings	5	0.9	0	0.0	16	5
Total	540	100.0	500	100.0	338	100.0

Number of storeys

Tauranga City

In Tauranga City, more than 64% of the dwellings consented in 2022/23 were single level dwellings, 27% had 2 storeys and 8% had 3 to 4 storeys.

Among the infill and growth areas, Wairakei had 47% of the single level dwellings, followed by Tauranga infill areas at 21%. The opposite was observed for double storey dwellings, with Tauranga infill areas having the biggest share of 35%, followed by Wairakei at 29%.

The 3-storey dwellings were located in Tauranga and infill areas only, and included the attached dwellings in Cameron Road and Bernard Street and the apartments at Chadwick Road.

Figure 35 Number of storeys for dwellings consented in Tauranga City, July 2022 to June 2023

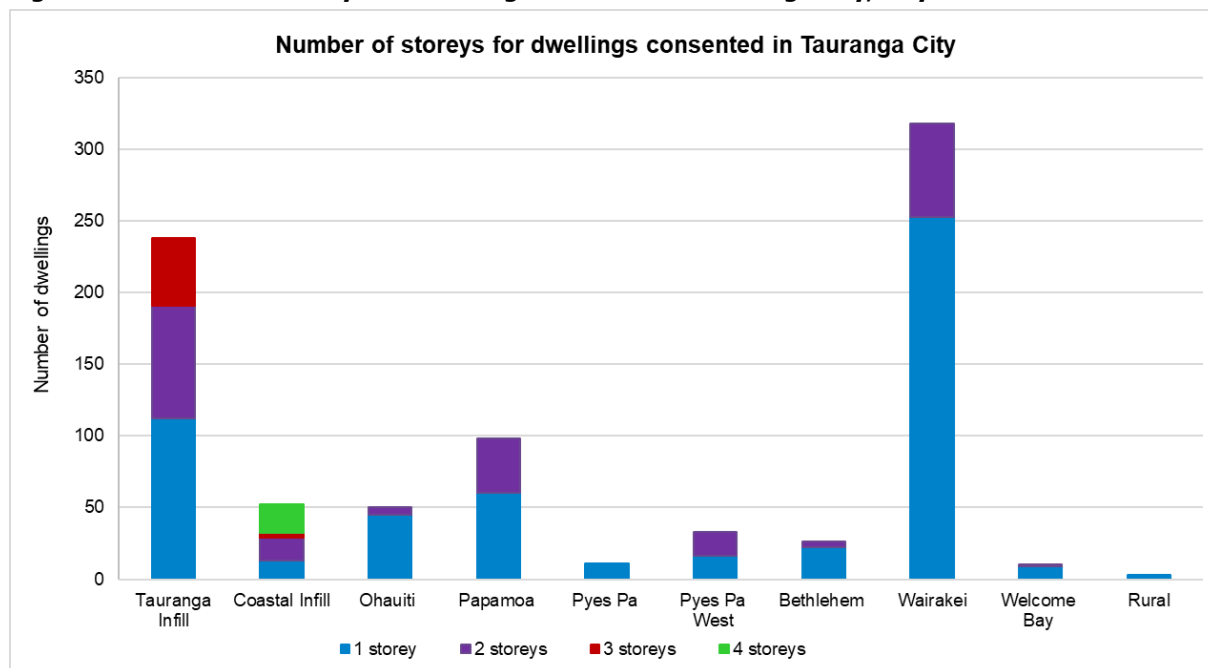


Table 17 Number of storeys for dwellings consented in Tauranga City, July 2020 to June 2023

Number of storeys	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	1,117	75.5	884	70.6	544	64.8
2	161	10.9	291	23.2	225	26.8
3	71	4.8	76	6.1	50	6.0
4			1	0.1	20	2.4
7	32	2.2				
15	98	6.6				
Total	1,479	100	1,252	100	839	100

Western Bay of Plenty District

The majority (84%) of dwellings consented from July 2022 to June 2023 in Western Bay of Plenty District, were single level dwellings. Ōmokoroa has the most 2-storey dwellings (42%) followed by 32% in Waihi Beach-Bowentown. Four 3-storey dwellings were consented each in Waihi Beach-Bowentown, Ōmokoroa, Waiorahi and Pukehina Beach.

Figure 36 Number of storeys for dwellings consented in Western Bay of Plenty District, July 2021 to June 2023

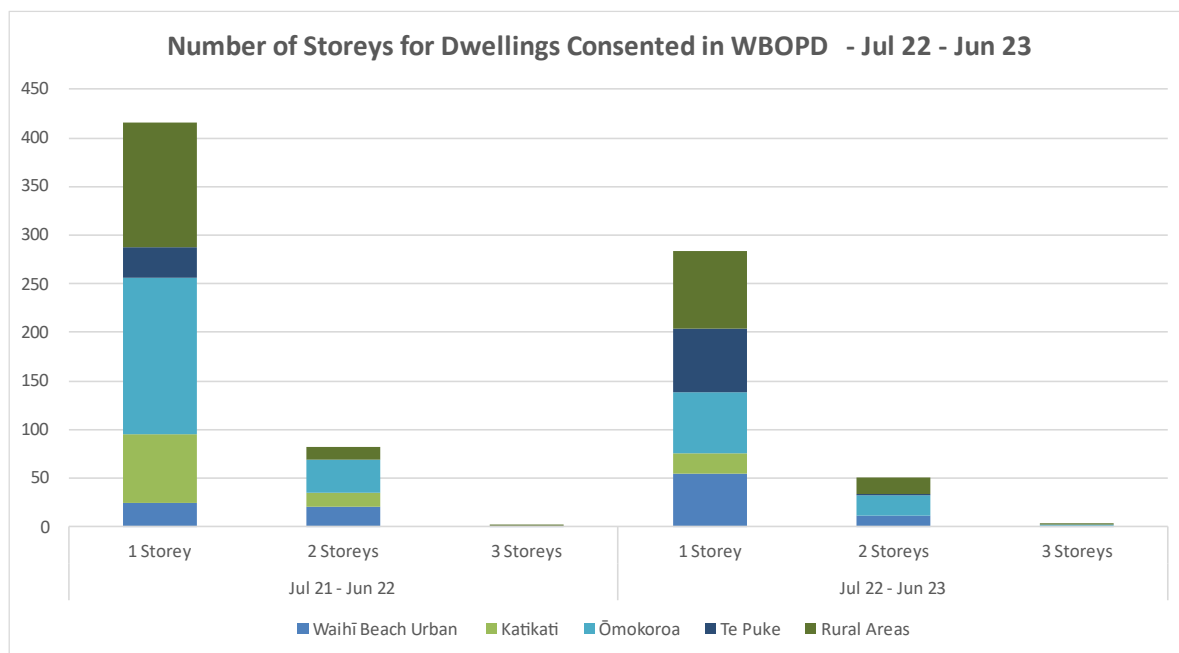


Table 18 Number of storeys for dwellings consented in Western Bay of Plenty District, July 2020 to June 2023

Number of storeys	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	496	91.9	416	83.2	284	57
2	44	8.1	82	16.4	50	10
3	0	0.0	2	0.4	4	1
Total	540	100.0	500	100.0	338	100

Number of bedrooms

More than three quarters (78%) of the dwellings consented in Tauranga City had 2 and 3 bedrooms, with the remaining quarter having 1 (5%), 4 (15%), and 5 + (2%) bedrooms.

In Western Bay of Plenty District most of the dwellings consented were 3-bedroom (58%) and 4-bedrooms (26%) from July 2021 to June 2022.

Number of bedrooms by growth area

Tauranga City

Almost three-fourths (74%) of the 1-bedroom dwellings consented in the City were located in the established (infill) areas. The Tauranga infill areas also had the biggest proportion of 2-bedroom dwellings consented at 44%, followed by Wairakei at 26%. Conversely, for the 3-bedroom dwellings, Wairakei had the biggest share of 56%, followed by Tauranga infill areas at 18%.

More than 35% (43 dwellings) of the 4-bedroom dwellings were located in Wairakei and the remaining 65% were spread across all the growth and infill areas, with the number of dwellings ranging from 3 to 16.

The 2% (or 16 dwellings) 5+ bedroom dwellings consented during the year were located in Bethlehem (3 dwellings), Coastal infill areas (2 dwellings), Pāpāmoa (8 dwellings) and Pyes Pa West (3 dwellings).

Figure 37 Number of bedrooms of dwellings consented in Tauranga City, July 2022 to June 2023

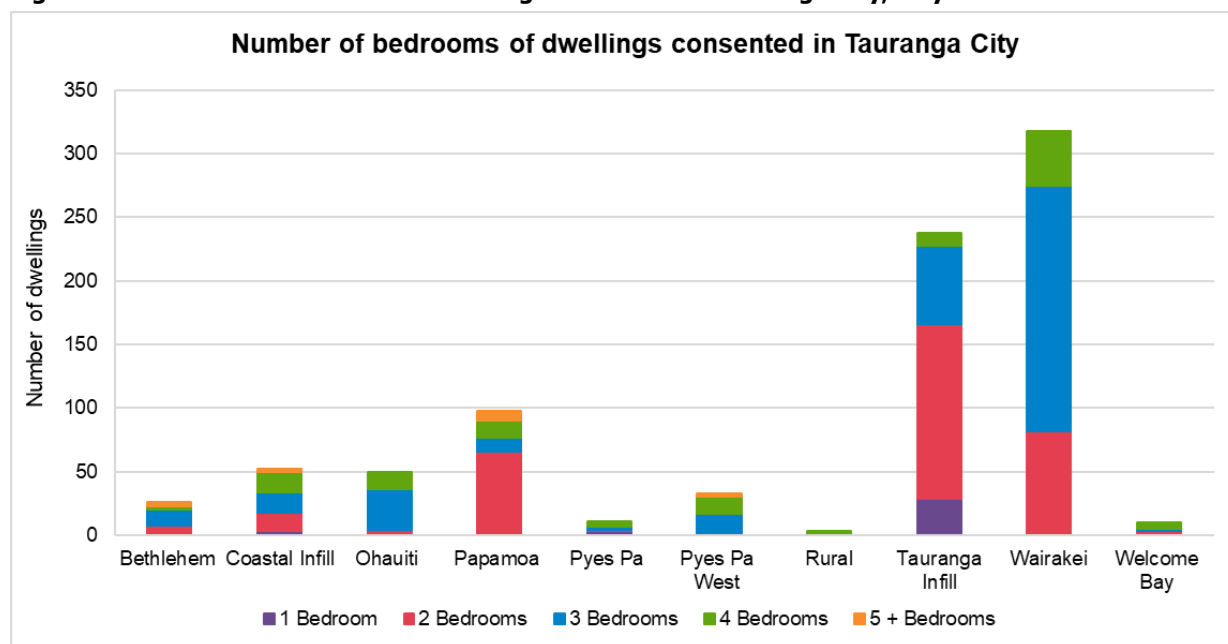
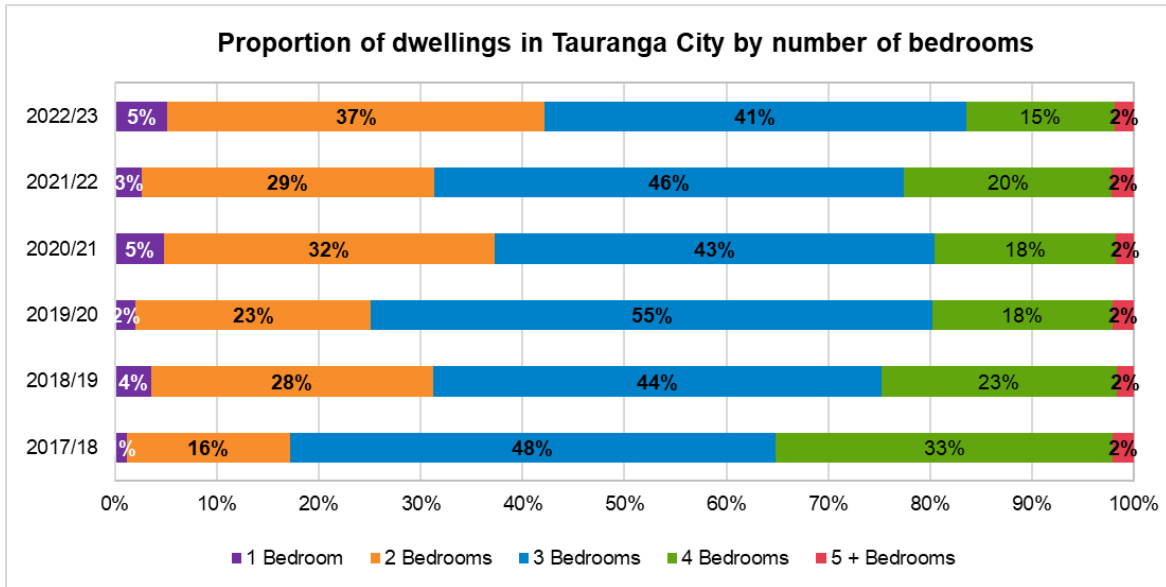


Table 19 Number of bedrooms of dwellings consented in Tauranga City, July 2020 to June 2023

Number of bedrooms	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	71	4.8	33	2.6	43	5.1
2	481	32.5	359	28.7	311	37.1
3	638	43.2	579	46.2	347	41.4
4	263	17.8	254	20.3	122	14.5
5 and above	26	1.8	27	2.2	16	1.9
Total	1,479	100	1,252	100	839	100

From 2017/18 to 2022/23, there was a significant shift in dwelling typology in terms of the number of bedrooms of the dwellings consented in Tauranga City. The 1 and 2-bedroom dwellings increased in proportion from 17% to 42% in 2022/23. Conversely, the combined proportion of 3 and 4-bedroom dwellings declined from 81% in 2017/18 to 56% in 2022/23.

Figure 38 Number of bedrooms of dwellings consented in Tauranga City, 2017/18 to 2022/23



Western Bay of Plenty District

In Western Bay of Plenty District-urban, more 3-bedroom dwellings are consented (129%) followed by 105% 4-bedroom dwellings for the 2022/23 period.

In Ōmokoroa there is a 10.5 percentage point difference between the number of 3-bedroom and 4-bedroom dwellings consented with 52% and 44%. Katikati's majority of dwellings consist of 2-bedrooms for the 2021/2022 period (45%), compared to the previous year with 2-bedroom dwellings only making up 10% of Katikati's 2-bedroom dwelling count. In rural areas, more five plus bedroom dwellings (57%) were consented followed by 1-bedroom dwellings consisting of 50% of dwellings consented.

Figure 39 Number of bedrooms of dwellings consented in Western Bay of Plenty District, July 2022 to June 2023

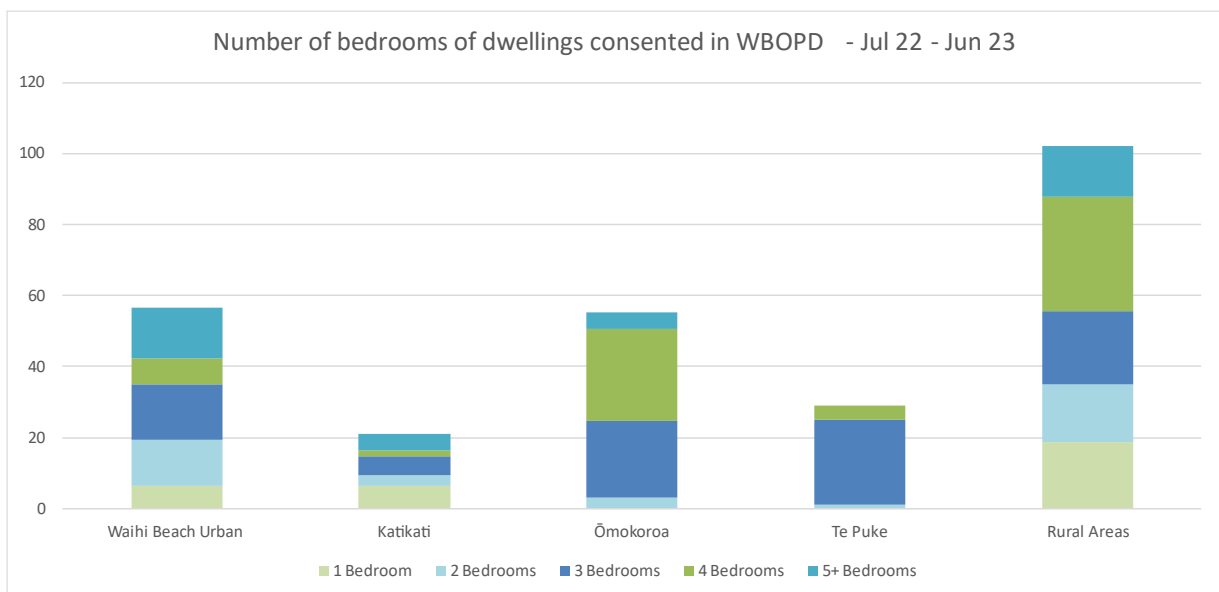


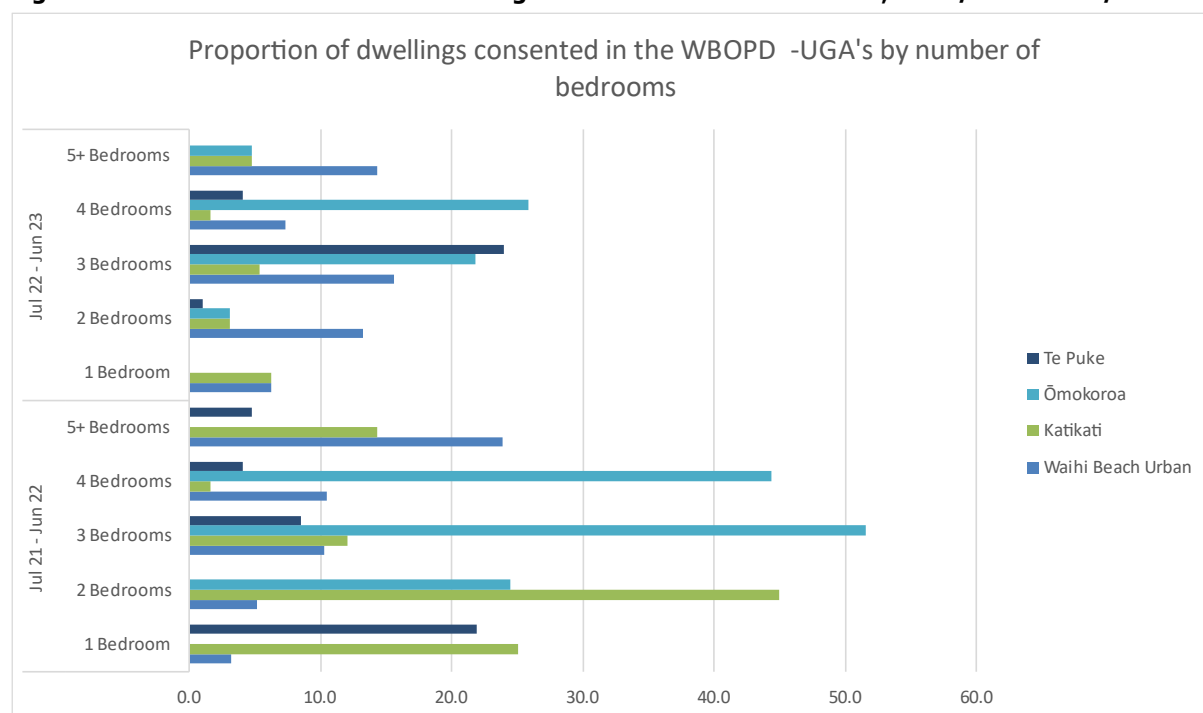
Table 20 Number of bedrooms for dwellings consented in Western Bay of Plenty District, July 2020 to June 2023

Number of bedrooms	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	20	3.7	32	6.4	10	3.0
2	49	9.1	98	19.6	36	10.7
3	298	55.2	225	45.0	196	58.0
4	163	30.2	124	24.8	88	26.0
5 and above	10	1.9	21	4.2	8	2.4
Total	540	100.0	500	100.0	338	100.0

In 2022/2023 more 3-bedroom dwellings (58%) were consented in all areas compared to 2021/2022 with 45%. More 3-bedroom dwellings were built in Te Puke with 24% and in the rural areas with 20%.

In 2022/2023, 3-bedrooms and 4-bedrooms were less prominent in Ōmokoroa compared to the previous year, whereas 2 and 3-bedroom dwellings were more prominent in Waihi Beach – Bowentown. Katikati’s most prominent bedroom were 1-bedroom dwellings. Rural dwellings had the top percentage of 4-bedroom dwellings consented at 32% in comparison to all other areas for the 2022/2023 year.

Figure 40 Number of bedrooms of dwellings consented in WBOPD-UGA’s, 2021/22 to 2022/23



Number of bedrooms by dwelling typology

Tauranga City

Tauranga City has 45% stand-alone dwellings consented from July 2022 to June 2023, with more than half (58%) having 3-bedrooms, 30% had 4-bedrooms. The remaining 12% was comprised of the 1, 2 and 5+ bedroom dwellings.

The majority (79%) of the duplexes had 2- (18%) and 3- (61%) bedrooms, while 9% had 1-bedroom and 12% had 4-bedrooms. The 9 mixed-use apartment units located at Chadwick Road had-2 bedrooms.

Around 23% (190) of the dwellings consented were located in the retirement villages consisting of Pacific Lakes, Parewaitai, Summerset, The Vines and redevelopment of MetLifeCare retirement villages. Around 74% of these retirement village units had 2-bedrooms and the remaining 25% had 3-bedrooms. Majority (86%) of the 2-bedroom retirement village units were duplexes and attached dwellings while 68% of the 3-bedroom retirement village units were attached dwellings.

The 9 out of 13 secondary/minor dwellings had 1-bedroom and the other 4 dwellings had 2-bedrooms.

Figure 41 Number of dwellings consented in Tauranga City, by type and number of bedrooms, July 2022 to June 2023

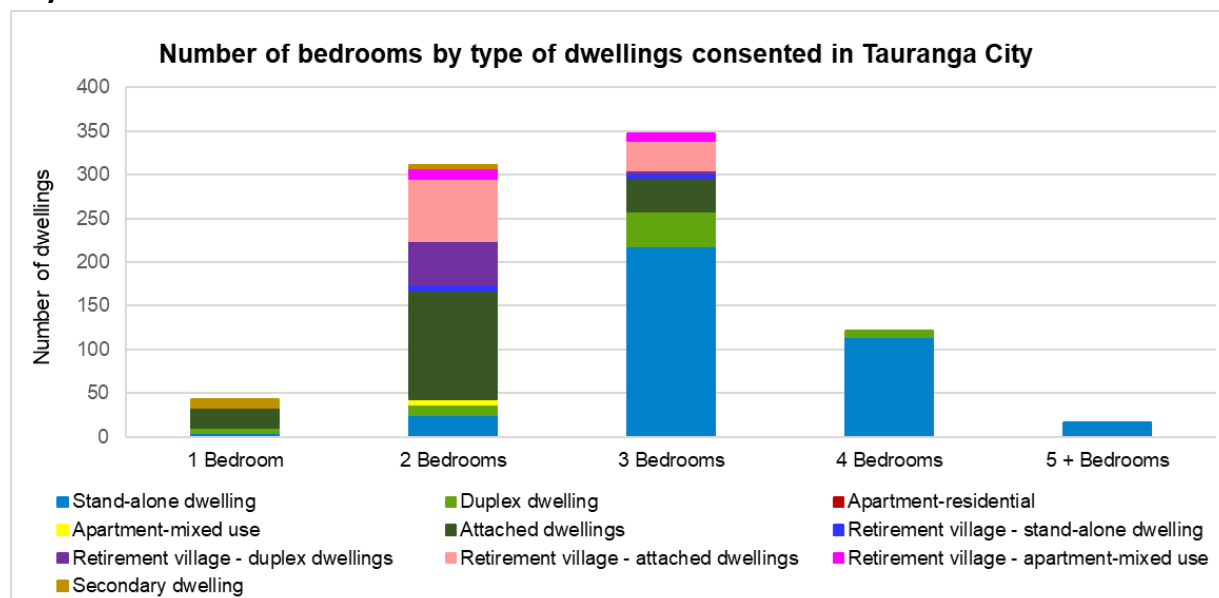


Table 21 Number of bedrooms by type of dwelling for dwellings consented in Tauranga City, July 2022 to June 2023

Type of dwelling	Number of bedrooms					Total
	1	2	3	4	5	
Stand-alone dwelling	5	26	218	114	16	379
Duplex dwelling	6	12	40	8		66
Attached dwellings	23	124	39			186
Secondary/minor dwelling	9	4				13
Apartments – residential						
Apartments – mixed use		6				6
Sub-total	43	172	297	122	16	650
Retirement village unit – stand-alone dwelling		7	4			11
Retirement village unit – duplex		49	4			53
Retirement village unit – attached dwellings		71	34			105
Retirement village unit– apartment -mixed use		12	8			20
Subtotal	-	139	50	-	-	189
Total	43	311	347	122	16	839

Floor size of dwellings

Tauranga City

Dwellings in Tauranga City had become smaller in the last six years. Dwellings having floor areas of 100m² and smaller increased in proportion from 15% to 26%, while those having floor areas bigger than 125m² declined from 58% to 38%.

For four years since 2018/19, the most prevalent dwelling size in Tauranga City was 126m² to 150m² with a proportion that ranged from 21% to 23%. In 2022/23 the next smaller dwellings with floor size measuring 101m² to 125m² was the most prevalent having a proportion of 29%.

Figure 42 Floor size of dwellings consented in Tauranga City, July 2022 to June 2023

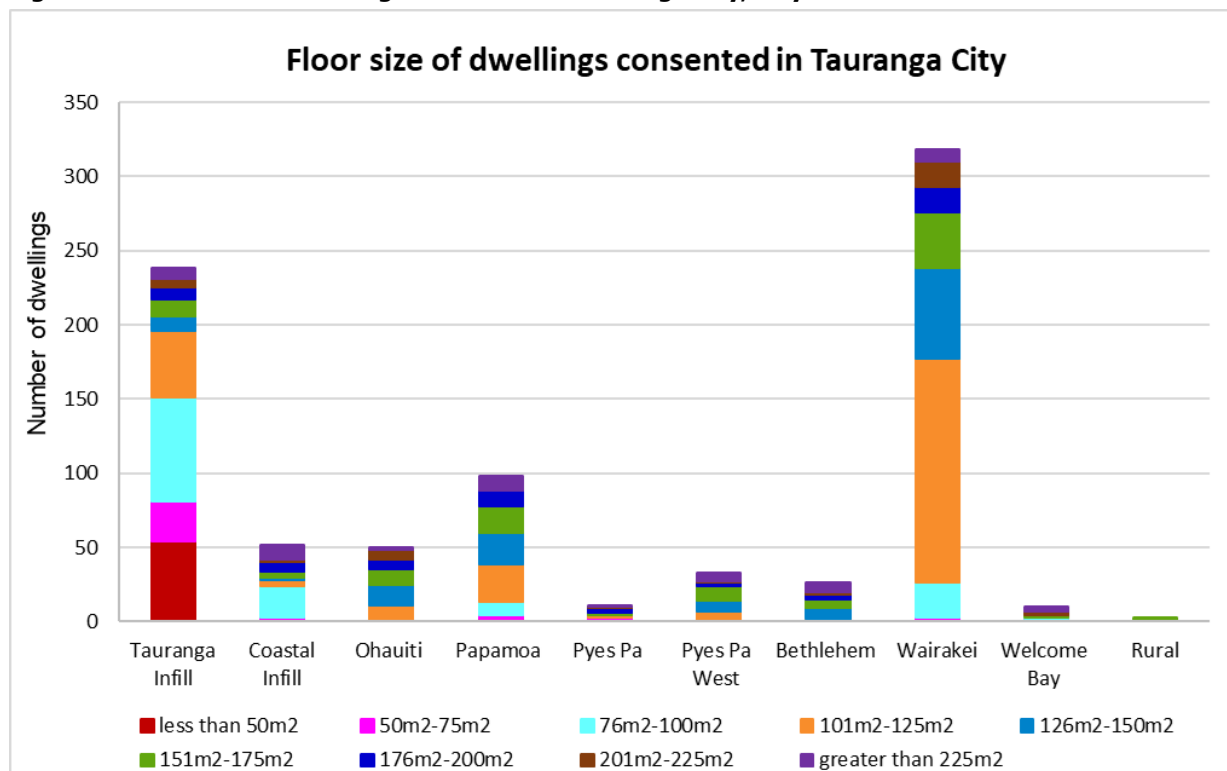
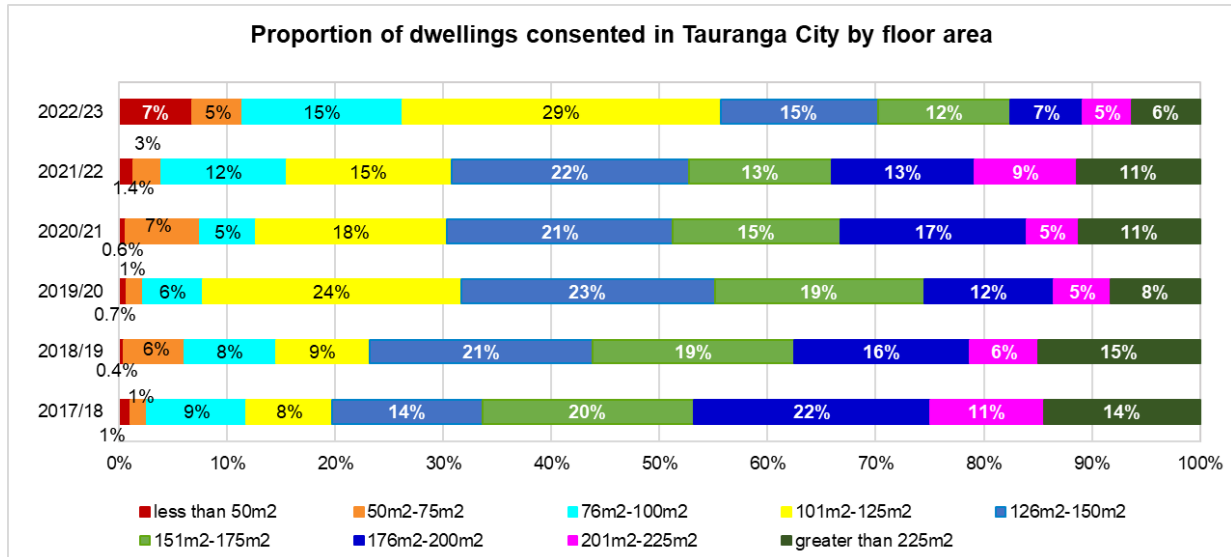


Table 22 Floor size for dwellings consented in Tauranga City, July 2020 to June 2023

Floor size (m ²)	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m ²	9	less than 1%	17	1.4	57	6.8
50m ² – 75m ²	102	6.9	32	2.6	39	4.6
76m ² – 100m ²	76	5.1	145	11.6	124	14.8
101m ² – 125m ²	262	17.7	191	15.3	247	29.4
126m ² – 150m ²	309	20.9	275	22.0	122	14.5
151m ² – 175m ²	229	15.5	166	13.3	103	12.3
176m ² – 200m ²	255	17.2	165	13.2	56	6.7
201m ² – 225m ²	71	4.8	118	9.4	38	4.5
Greater than 225m ²	166	11.2	143	11.4	53	6.3
Total	1,479	100	1,252	100	839	100

Figure 43 Proportion of dwellings consented in Tauranga City by floor area, 2017/18 to 2022/23



Western Bay of Plenty District

In 2022/2023, 20% of the consented dwellings in the UGAs of Western Bay of Plenty District have a floor area between 101-125m², followed by a floor area between 126-150m² and 151-175m² both making up 16%. In rural areas, larger dwellings were more common where 44% of the total rural zoned dwellings consented have a floor area of 250m² or more.

Figure 44 Floor size of dwellings consented in Western Bay of Plenty District, July 2021 to June 2023

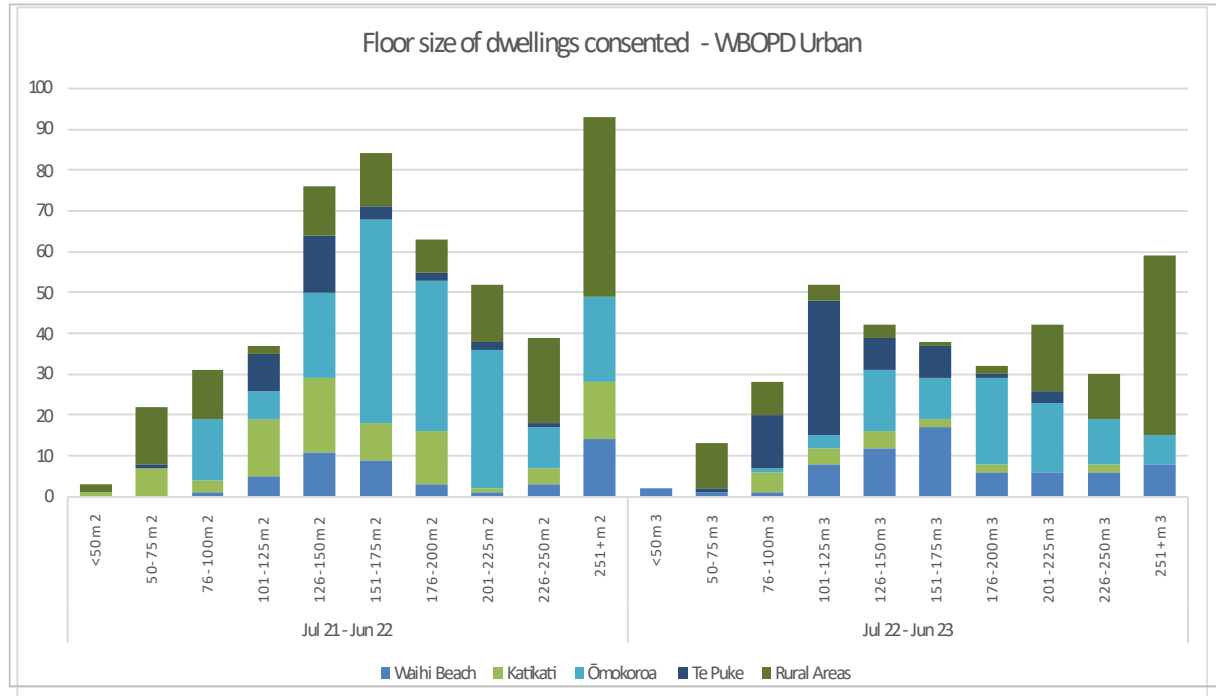


Table 23 Floor size for dwellings consented in Western Bay of Plenty District, July 2020 to June 2023

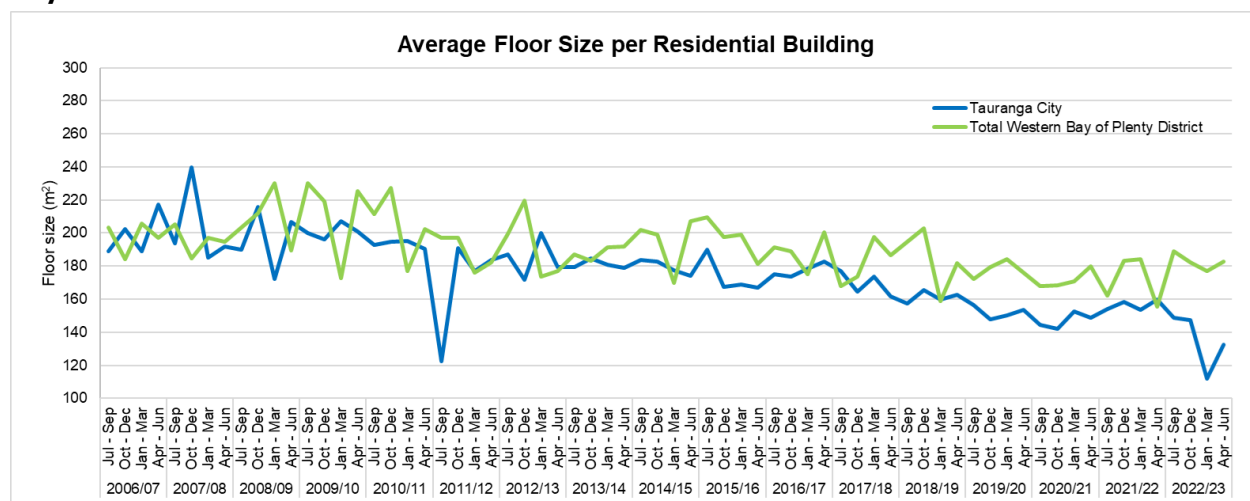
Floor size (m ²)	2020/21		2021/22		2022/23	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m ²	0	0.0	3	0.6	2	0.6
50m ² – 75m ²	35	6.5	22	4.4	13	3.8
76m ² – 100m ²	10	1.9	31	6.2	28	8.3
101m ² – 125m ²	44	8.1	37	7.4	52	15.4
126m ² – 150m ²	86	15.9	76	15.2	42	12.4
151m ² – 175m ²	124	23.0	84	16.8	38	11.2
176m ² – 200m ²	111	20.6	63	12.6	32	9.5
201m ² – 225m ²	42	7.8	52	10.4	42	12.4
Greater than 225m ²	88	16.3	132	26.4	89	26.3
Total	540	100.00	500	100.00	338	100.0

Historical Floor Size per Residential Building

The figure below shows that residential buildings in the sub-region had become smaller in the last 17 years. Although Tauranga City and Western Bay of Plenty District had the same residential building size of 197m² in 2006/07, the average floor size for Tauranga City had become smaller at 134m² in 2022/23. The same trend was recorded for Western Bay of Plenty District although its average floor size for new residential buildings was bigger than Tauranga City's at 183m² in the same period.

In 2022/23, average floor size per residential building in Tauranga City was 22m² smaller compared to the previous year, while average floor size in Western Bay of Plenty District was the same as it was 10 years ago and bigger by 13m² than in the previous year. A number of multi-unit developments with smaller dwelling units had contributed to Tauranga City's smaller floor area of residential buildings and this trend can be expected to continue as more similar redevelopments are proposed and consented.

Figure 45 Average floor size per residential building, Tauranga City and Western Bay of Plenty District, July 2006 to June 2023



Source: Stats NZ Infoshare

Table 24 Average floor size, Tauranga City and Western Bay of Plenty District

Average floor size (in m ²)	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-22	-14.1
Last 5 years (average)	↓	-16	-10.7
Last 10 years (average)	↓	-29	-17.8
<i>Western Bay of Plenty District</i>			
This year			
Last year	↑	13	7.6
Last 5 years (average)	↑	6	3.4
Last 10 years (average)	▬	-	-

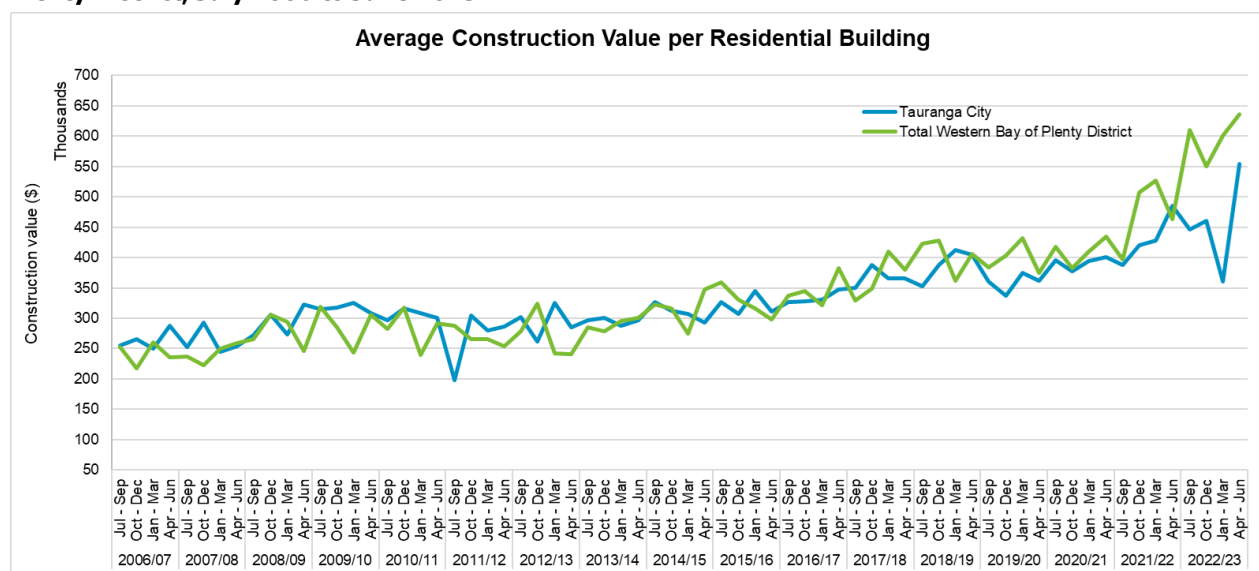
Construction Value per Residential Dwelling

As residential buildings in Tauranga City were smaller in size than Western Bay of Plenty District, the increase in Tauranga City’s construction value from 2021/22 to 2022/23 was relatively lower at 4.9% compared to WBOPD’s at 26%.

In the last 5 and 10 years, the average construction value per residential building in Tauranga City increased by 11% and 23%, respectively. Conversely, WBOPD recorded increases of 31% and 52% in average construction values in the same time periods.

Although average construction values in Tauranga City were lower than in WBOPD in all time periods, average construction cost per square metre in Tauranga City was still higher due to smaller floor areas. Construction costs in both local authorities were recorded at more than \$3,000 per square metre in 2022/23.

Figure 46 Average construction value per residential building, Tauranga City and Western Bay of Plenty District, July 2006 to June 2023

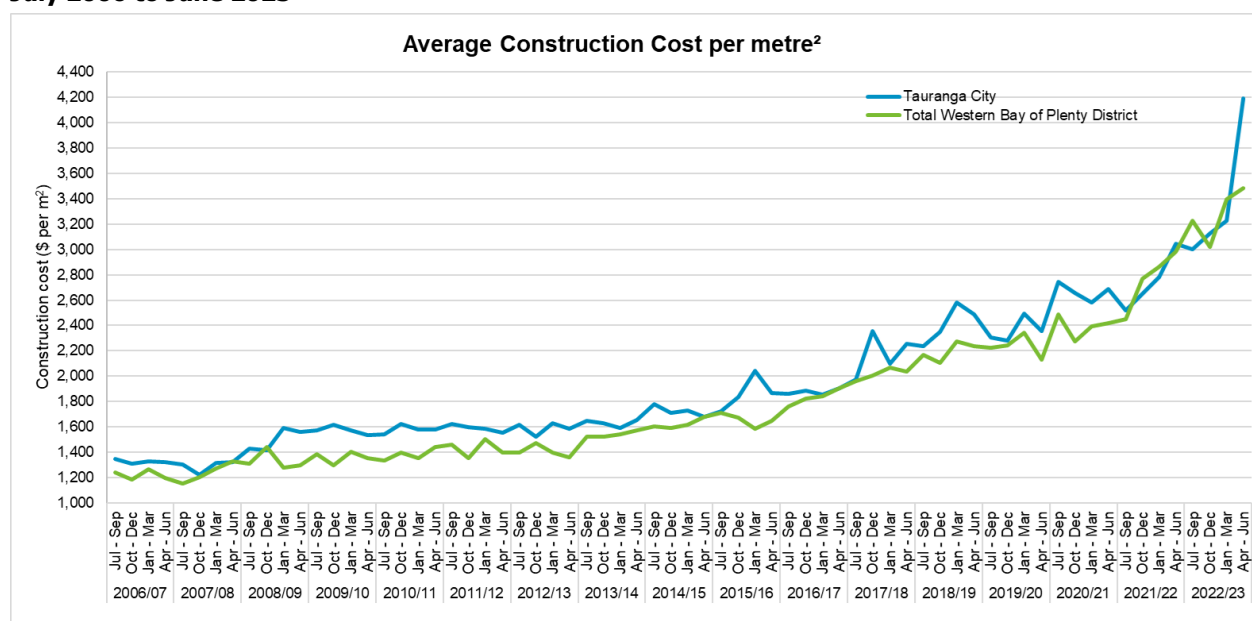


Source: Stats NZ Infoshare

Table 25 Average construction value, Tauranga City and Western Bay of Plenty District

Average construction value	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↑	\$21,038	4.9
Last 5 years (average)	↑	\$45,214	11.2
Last 10 years (average)	↑	\$84,071	23.1
<i>Western Bay of Plenty District</i>			
This year			
Last year	↑	\$122,731	26.1
Last 5 years (average)	↑	\$138,854	30.6
Last 10 years (average)	↑	\$202,527	51.9

Figure 47 Average construction cost per metre², Tauranga City and Western Bay of Plenty District, July 2006 to June 2023



Source: Stats NZ Infoshare

Table 26 Average construction cost per square metre, Tauranga City and Western Bay of Plenty District

Average construction cost per m ²	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↑	\$613	22.5
Last 5 years (average)	↑	\$641	23.7
Last 10 years	↑	\$1,067	46.9
<i>Western Bay of Plenty District</i>			
This year			
Last year	↑	\$465	16.8
Last 5 years (average)	↑	\$671	26.1
Last 10 years	↑	\$1,089	50.7

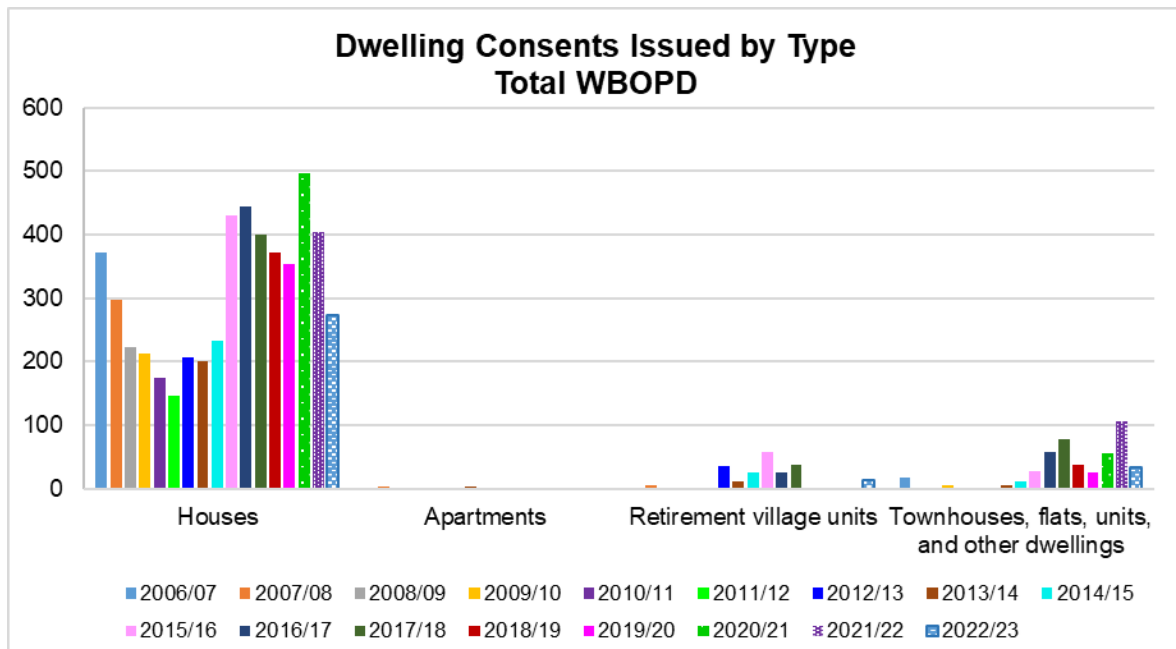
Residential Building Consents Issued by Type

Statistics New Zealand classifies residential buildings into houses, apartments, retirement village units and townhouses, flats, units and other dwellings¹⁸. By this classification, stand-alone houses were the main type of dwelling consented in the sub-region in the last 17 years.

Due to shift in housing typology, Tauranga City’s proportion of stand-alone houses has significantly declined in the last 10 years, from 85% in 2013/14 to 45% in 2022/23. On the other hand, the proportion of other typologies has increased from 1% to 6% for apartments, 10% to 20% for retirement village units and 4% to 29% for townhouses, flats, units and other dwellings in the same period.

A slight shift in housing typology was also observed in Western Bay of Plenty District, with the proportion of standalone houses declining from 91% to 85% in the last 10 years. While there has been nil apartments built, the proportion of townhouses, flats, units and other dwellings increased from 3% to 10% in the same period. Retirement village units comprised 4% (14 units) of all residential buildings consented in 2022/23, after 4 years of having no record for this typology. It must also be noted that retirement village units were built at a higher rate in the earlier 5 years (2013 to 2018) at 5% to 7% of all residential buildings prior to the lull period.

Figure 48 Dwelling consents issued by type, Western Bay of Plenty District, July 2006 to June 2023



¹⁸ Residential statistics from Statistics New Zealand were included in addition to Figures 29 and 30 to provide time-series data from 2006.

Figure 49 Dwelling consents issued by type, Tauranga City, July 2006 to June 2023

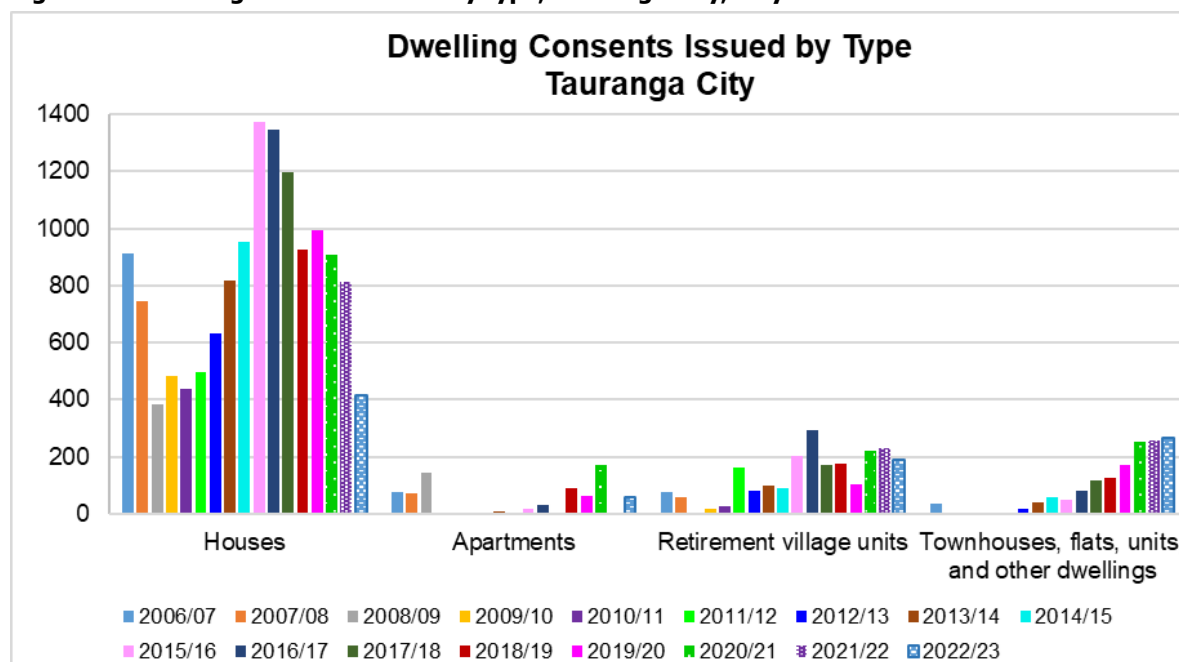


Table 27 All residential buildings, Tauranga City and Western Bay of Plenty District

All residential buildings	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-380	-29.0
Last 5 years (average)	↓	-358	-27.8
Last 10 years (average)	↓	-410	-30.6
<i>Western Bay of Plenty District</i>			
This year			
Last year	↓	-190	-37.3
Last 5 years (average)	↓	-114	-26.3
Last 10 years (average)	↓	-102	-24.2

Table 28 Dwelling Type, Tauranga City and Western Bay of Plenty District

Period	Territorial Authority	Houses	Apartments	Retirement village units	Townhouses, flats, units, and other dwellings
Last 12 months	Tauranga City	44.7%	6.2%	20.2%	28.9%
	Western Bay of Plenty District	85.3%	-	4.4%	10.3%
Last 5 Years	Tauranga City	63.1%	6.0%	14.2%	16.7%
	Western Bay of Plenty District	87.5%	-	0.6%	11.9%

Table 29 Stand alone dwellings, Tauranga City and Western Bay of Plenty District

Stand-alone dwellings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	415			
Last year	814	↓	-399	-49.0
Last 5 years (average)	812	↓	-397	-48.9
Last 10 years (average)	975	↓	-560	-57.4
<i>Western Bay of Plenty District</i>				
This year	273			
Last year	404	↓	-131	-32.4
Last 5 years (average)	380	↓	-107	-28.2
Last 10 years (average)	361	↓	-88	-24.4

8 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 August 2023. The two Parton Road commercial areas in Pāpāmoa 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 30. 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 Pāpāmoa East. Te Tumu is proposed to be released for both business and residential development in the latter part of the 2028-2033 planning period. A map of Commercial zoned areas is provided in Appendix 7.

Table 30 Operative and Future Commercial Zoned Land in Tauranga City

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

¹ The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 33 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, Pāpāmoa (Palm Beach and Parton Road) and Papamoa East (Wairakei) commercial zoned areas, refer to Table 31.

Table 31 Uptake of Commercial Zoned Land in Tauranga City

Urban Growth Area Commercial Centres ¹	Commercial Zoned land (ha)	Vacant Commercial Zoned Land (ha)	Percentage (%) Vacant
Bethlehem	12.57	0.38	3
Papamoa - Palm Beach	8.55	1.07	12
Papamoa - Parton Road ²	39.28	3.40	9
Pyes Pa West - Tauriko	13.51	0	0
Papamoa East - Wairakei	33.60	33.60	100
Total	107.51	38.45	38

¹ Areas of remaining vacant land in the commercial zoned areas were identified and estimated using GIS mapping tool based on the aerial photographs taken in March 2023.

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 had been approved and are currently under construction in this area.

Western Bay of Plenty District

In Western Bay of Plenty District, Te Puke has the largest commercial zoned land with 10.10 ha, followed by Katikati and Waihi Beach with 9.31 ha and 7.39 ha respectively (refer to Table 32). The 7.39 ha of commercial land in Waihi Beach, largely consists of the Wilson Road shopping centre and an additional 1.54 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 32 Operative and Future Commercial Zoned Land in the Western Bay of Plenty District

Location	Commercial Land (ha)	
	Operative	Transitional ¹
Waihi Beach	7.39	1.54
Athenree	0.40	
Island View-Pios Beach	0.12	
Katikati	9.31	1.47
Omokoroa ²	9.95	0.8
Pahoia ⁴	1.06	
Minden	2.21	
Te Puna ³	7.82	
Te Puke	10.10	
Pukehina	0.43	
Maketu	0.87	
Paengaroa	2.15	
Total	51.81	3.01

¹ Corrected area in Katikati

² PC92 notified in Omokoroa

³ Includes Te Puna Springs private plan change

⁴ Whakamarama falls under Pahoia area

⁵ Corrected area in Te Puke

Availability and Uptake of Industrial Zoned Land

Tauranga City

In Tauranga City, the largest area of industrial zoning is at Mount Maunganui, while the smallest area is at Sulphur Point, refer to Table 33 and Appendix 6.

In May 2011 rezoning of 101.1 hectares of land for industrial purposes (Pāpāmoa East Employment zone) was made operative at Wairakei in Pāpāmoa 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 Pāpāmoa 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 33 Operative and Future Industrial Zoned Land in Tauranga City

Location	Industrial Land (Ha)	
	Operative	Future
Judea	23.7	
Mt Maunganui	268.1	
Greerton	12.2	
Oropi (Maleme St)	49.5	
Owens Place	6.1	
Sulphur Point	3.0	
Port Industrial	190.8	
Te Maunga	174.2	
Tauriko	237.0	
Wairakei	41.2	
Te Tumu ¹		60.3
Tauriko Extension ²		91.8
Total	1,005.8	152.1

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

² Element IMF - Developers of Tauriko Business Estate has advised that the proposed extension south of Belk Road in Tauriko is expected to yield approximately 91.8 ha of net industrial land.

The table below shows the uptake of industrial zoned land in Tauranga City as at August 2023, in the general industrial zoned land and the port industry zone. Around 20% (or 163.1 hectares) of the 812 hectares of zoned general industrial land in Tauranga City was vacant, with 45% (or 74.0 hectares) located at Tauriko industrial area.

In the Port Industry zone 1% (or 2.03 hectares) of the 190.3 hectares of Port Industry zoned land was vacant as at August 2023.

Table 34 Uptake of Industrial Zoned Land in Tauranga City (as at August 2023)

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	6.12	11.59	17.71	0.74	0.00	249.63	250.37	268.08
Oropi	0.89	0.00	0.89	0.59	5.28	42.72	48.59	49.48
Greerton	0.33	0.25	0.57	0.00	0.00	11.63	11.63	12.20
Sulphur Point	0.00	0.00	0.00	0.07	0.00	2.97	3.04	3.04
Te Maunga	38.23	1.70	39.93	8.42	25.33	100.51	134.26	174.19
Owens Place	0.00	0.00	0.00	0.00	0.00	6.13	6.13	6.13
Tauriko	64.86	9.12	73.97	33.22	0.00	126.72	159.94	233.91
Wairakei ⁴	30.02	0	30.02	11.2	0	0	11.20	41.22
Total	140.44	22.66	163.10	54.24	33.87	560.76	648.87	811.97
Port Industry Zone ³								
Within Port Security Fence	0.58	0	0.58	0	0	156.55	156.55	157.13
Outside Port Security Fence	0.3	1.15	1.45	0	0	31.75	31.75	33.21
Total	0.88	1.15	2.03	0	0	188.30	188.30	190.33

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, or construction is on-going at the time of the survey.

² General Industrial zoned land includes land zoned Tauriko Industry, Industry, and Pāpāmoa 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 Pāpāmoa East Interchange and classified "vacant but not available".

While there was 133.1 hectares identified as vacant industrial land, it is estimated that this will decrease as new areas are developed for industrial activity (e.g. as industrial zoned land is used for road corridors and stormwater reserves, and steep or low-lying undevelopable land is deducted) – see Table 35.

The 2023 industrial land survey estimated 36.7 hectares of zoned industrial land in Tauriko would be lost to escarpments, and future roads and stormwater ponds leaving approximately 70 hectares of vacant land in Tauriko industrial area. The survey also noted the on-going subdivision in the area where a subsequent certificate of title is expected to be issued. Of the 70 hectares of vacant land, approximately 41.2 hectares was ready to be occupied for industrial activity (subdivided, earthworked, services in place), however, this land has been sold by the developer, Element IMF. A few parcels have current or lapsed building consents for business or commercial purposes. A few more opportunities to purchase or lease land from new owners compared to the previous year’s survey (October 2022) was observed during the August 2023 survey with 13 properties with buildings and 16 vacant sites available for purchase or lease in Tauriko.

Table 35 Status of vacant industrial zoned land

General Industrial Zone	Gross (all vacant land)	Nett (estimate)¹	Ready to go land²
Judea	0.00	0	0
Mt Maunganui	17.71	17.71	17.71
Oropi	0.89	0.89	0.89
Greerton	0.57	0.57	0.57
Sulphur Point	0.00	0	0
Te Maunga	39.93	27.98	6.89
Owens Place	0.00	0	0
Tauriko ³	73.97	70.3	41.19
Wairakei	30.02	22.52	0
subtotal	163.10	139.94	67.26
Port Industry subtotal	2.03	2.03	2.03
Total	165.14	141.98	69.29

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.

Overall industrial areas in Tauranga City as at August 2023, 67.3 hectares of industrial land was assessed to be ready to be occupied for industrial activity, and 23 properties with buildings and 17 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 79.31 ha zoned, while an additional 88.28 ha of industrial land is zoned to meet future needs. Katikati also contains a large area of industrial land with 27.81 ha zoned at present. In Ōmokoroa 16.04 is zoned for future use.

In the western end of the District the Te Puna Rural Business Zone contains 30.58 ha for future use, while Rangioru in the eastern end contains 179.63 ha of Industrial land zoned in preparation for the Rangioru Business Park.

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

Location	Industrial Land (ha)	
	Operative	Future
Waihi Beach		25.57
Katikati	27.70	35.90
Te Puna		30.58
Ōmokoroa	11.51	23.78
Te Puke	82.66	85.35
Rangiuru	40.12	176.54
Paengaroa	8.57	
Total	170.56	409.80

¹ Ōmokoroa land is Plan Change 92 notified

² Land in Maketu is reserve

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, 202 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 District the largest uptake of industrial land is in Ōmokoroa with 40.96 ha occupied followed by Katikati with 23.90 ha.

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

Industrial Zoned Land 2023								
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	0	26	0	25.58	0.00	0		25.58
Katikati	19.19	16.99	3.31	39.50	0.00	23.90	2.59	65.98
Te Puna	0	0	31	30.58	0.00	0		30.58
Ōmokoroa	13.41	3.35	0.53	17.29	0.00	1.86		19.16
Te Puke	6.80	69.46	41.55	117.81	0.00	40.96	15.98	174.75
Rangiuru ¹	86.86	87.11	116.00	289.97	0.00	6.18		296.15
Paengaroa	1.17	0.00	0.00	1.17	0.00	8.39		9.56
Maketu	0.00	0.00	0	0.00	0.00	0	0	0.11
TOTAL	127.43	202.49	191.98	521.90	0.00	81.29	18.68	621.87
Percentage	20.49%	32.56%	30.87%	83.92%	-	13.07%	3.00%	100.00%

¹ Include AFFCO as part of Total Occupied

Business Land Capacity

SmartGrowth has completed the full 2022 Housing and Business Capacity Assessment (HBA) as required by NPS-UD in March 2023. The HBA will inform the preparation of the 2024 long-term plan (LTP).

The key findings of the 2022 HBA on business land capacity include:

- The sub-region has a total demand of 690 ha nett developable areas. An additional 20% is required to account for the land needed for roads, reserves and infrastructure corridors, in addition to the lot areas to be built upon.
- Tauranga City needs at least 320 ha of new greenfield industrial land to meet the demand requirements of employment, allowing for nett developable area and the required competitive margins.

- Western Bay of Plenty District has sufficient planned business land to meet demand which includes additional land at Rangiuuru, Waihi Beach (including Athenree and Bowentown), Te Puke, Te Puna and Katikati.
- The industrial business land demand requirements are not able to be met within Tauranga City, which does not have suitable greenfield or brownfield land available. Sites within the Western Bay of Plenty District will need to be considered and confirmed through the SmartGrowth Strategy Update 2023 to meet the demand from Year 10 onwards for the wider sub-region.
- The subregion has a latent demand for industrial land. There is no currently available industrial zoned sites in Tauranga. Tauriko Business Estate Stage 3 was sold out in 2020. A lead-in time of 7-10 years is needed to rezone suitable industrial land, provide the necessary infrastructure and make the land available to build and use.
- The business land demand requirements are driven by the economic model prepared by Market Economics for SmartGrowth based on employment. The SmartGrowth partnership recognises the need to scale-up these demand requirements to provide sufficient land over the 30-year period and recognise current industrial land availability constraints.
- The business land requirements assume no existing industrial land resource is lost as a result of important matters such as reverse sensitivity, climate change or urban regeneration. New business land may be required for existing areas that may possibly need to relocate due to, for example, sea level rise etc. over the next 50-100. This is outside the 30 year window of the HBA.
- Critically, where business land is located is important for the subregion. Industrial land need is within or close to Tauranga as the sub-regional hub, and can't easily be found with new business land areas further afield in the wider Western Bay of Plenty subregion. The Rangiuuru Business Park and Tauriko Business Estate serve both local and subregional needs, however demand is dependent on location, with coolstores an example of needing to locate in close proximity to horticultural areas and businesses servicing the Auckland and Waikato markets needing to locate in proximity to the key transport corridors to those regions.

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. The sub-region land zoned industrial is considerably higher in total to that zoned commercial resulting in more industrial land per resident, reflecting the more expansive nature of this type of business activity.

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

Territorial Authority	2023 Estimated Resident Population	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
Tauranga City	161,800	1157.9	0.0072	283	0.0017
Western Bay of Plenty District	60,800	621.87	0.0102	54.82	0.0009
Total	222,600	1,779.77	0.0080	337.82	0.0015

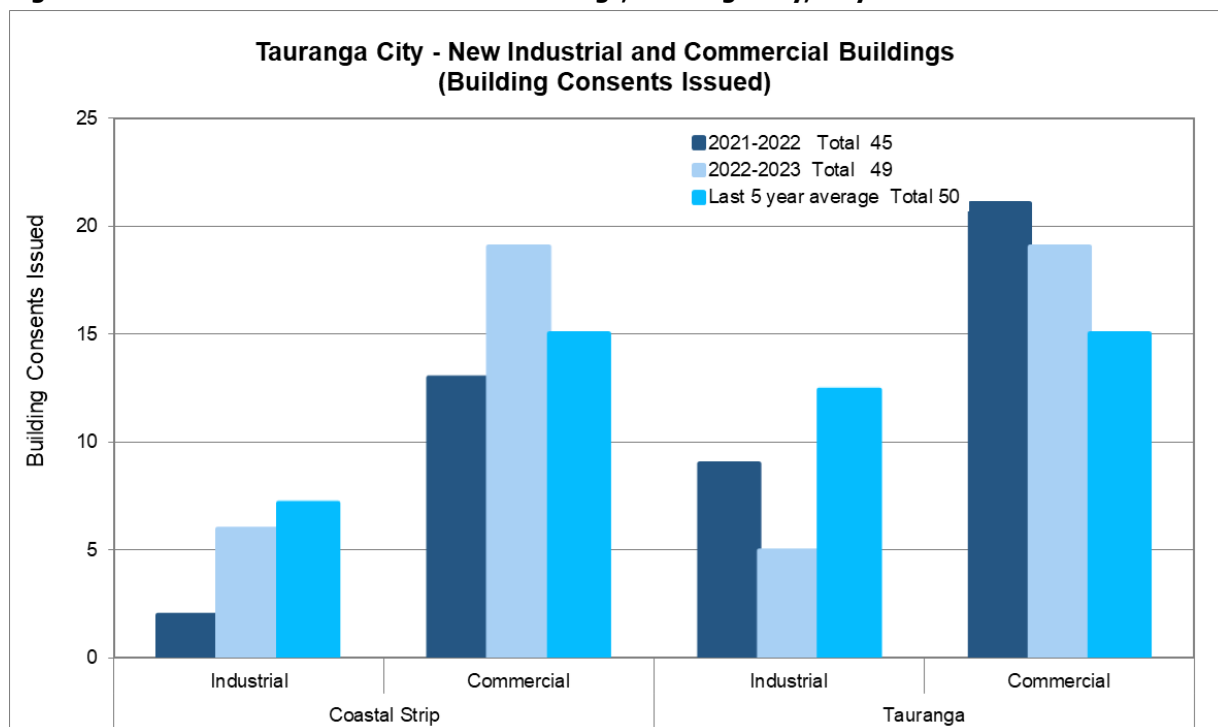
Industrial and Commercial Building Consents Issued

Tauranga City

Tauranga City had the same number (11) of industrial buildings consented for each year in the last two years. In 2022/23, 4 more commercial buildings were consented compared to the previous year, with a total of 72 commercial buildings in the last two years.

Of the total 49 buildings consented in 2022/23, 25 were located in the Coastal Strip and 24 were located in the Tauranga area.

Figure 50 New industrial and commercial buildings, Tauranga City, July 2021 to June 2023



Western Bay of Plenty District

Commercial building consents decreased from 8 consents issued from 2018/2019 to 3 consents per year from 2019/20 to 2021/22 while one more workshop per year was built in the industrial area of Te Puke from 2019/20 to 2020/21. In 2022/23 10 consents were issued for commercial buildings.

Table 39 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
1/7/2021 - 30/6/2022	0	3
01/7/2022 - 30/6/2023	0	10
5 Year Average	0.4	5.4

Non-Residential Building Consents Issued by Type

In the sub-region, the type of non-residential buildings consented vary between the two local authorities. Western Bay of Plenty District 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.

In 2022/23, the sub-region had 149 non-residential buildings consented, where Tauranga City shared 75 and Western Bay of Plenty District had 74 buildings. In total, the sub-region had 62 less non-residential buildings consented compared to the previous year.

Of the 75 non-residential buildings consented during the year in Tauranga City, 52 or 70% were commercial and factories, industrial and storage buildings, while 55 or 74% of Western Bay of Plenty’s non-residential buildings were farm buildings.

Figure 51 Non-residential building consents, Western Bay of Plenty District (total), 2006 to 2023

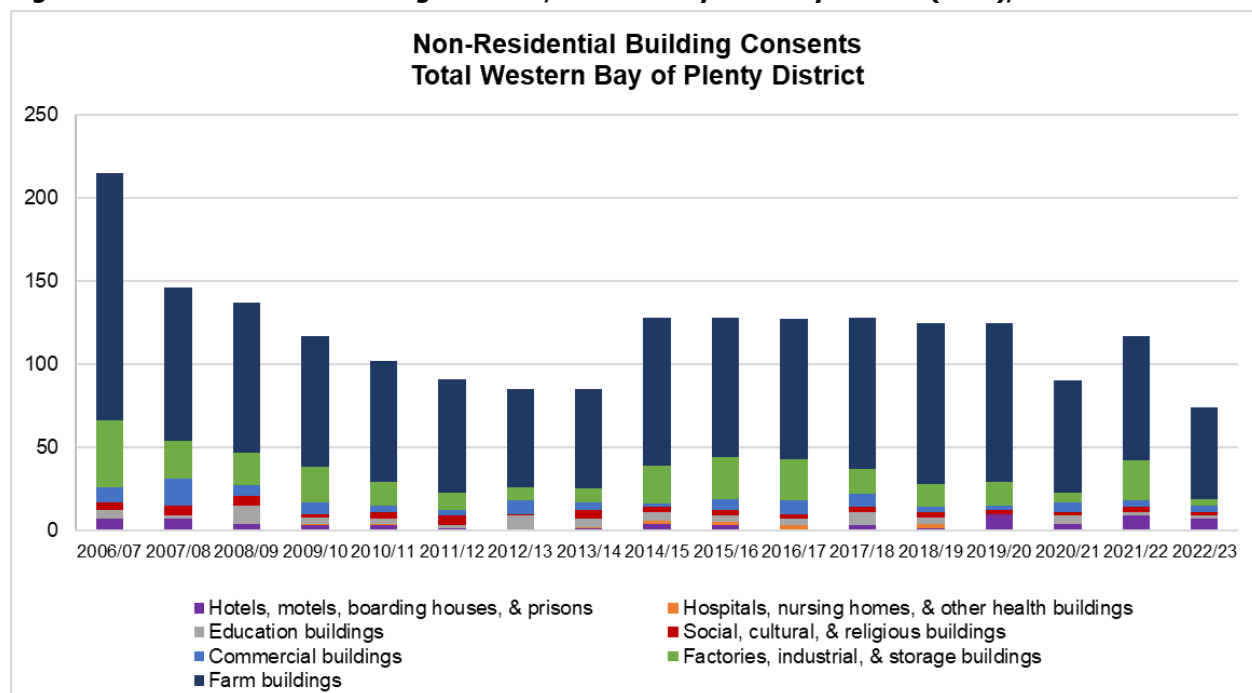
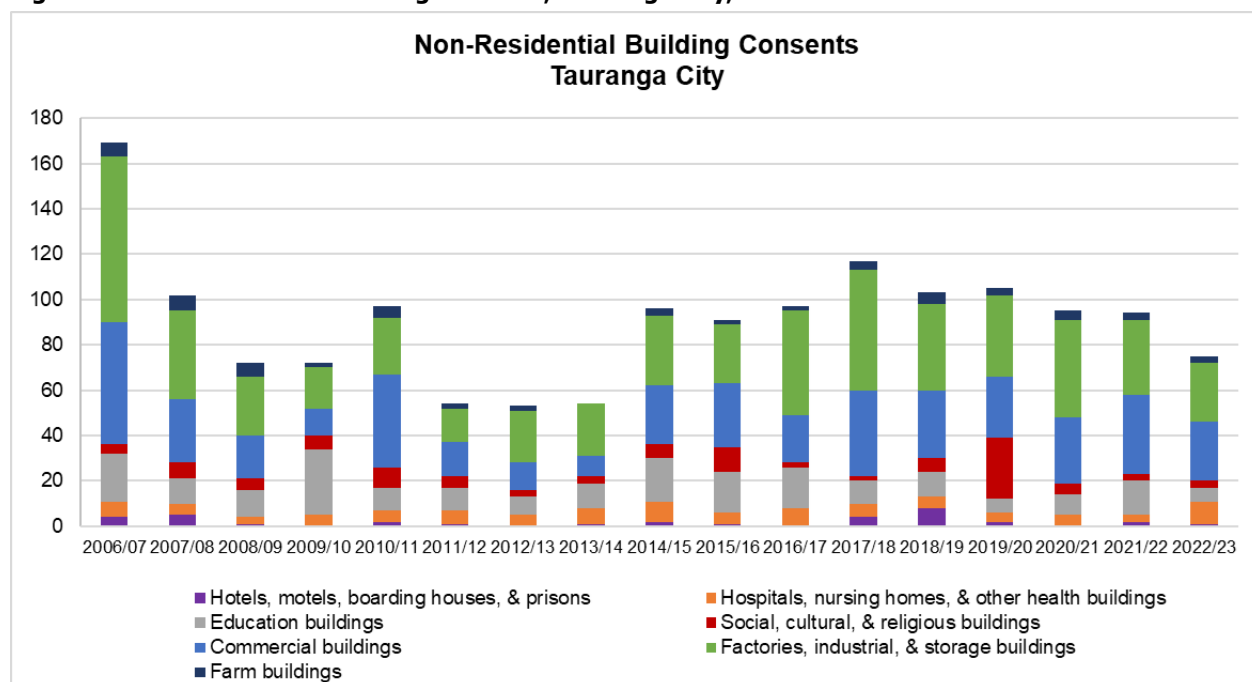


Figure 52 Non-residential building consents, Tauranga City, 2006 to 2023



Source: Statistics NZ Infoshare

Table 40 All non-residential buildings, Tauranga City and Western Bay of Plenty District

All non-residential buildings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	75			
Last year	94	↓	-19	-20.2
Last 5 years (average)	94	↓	-19	-20.2
Last 10 years (average)	93	↓	-18	-19.4
<i>Western Bay of Plenty District – Urban</i>				
This year	74			
Last year	117	↓	-43	-36.8
Last 5 years (average)	106	↓	-32	-30.2
Last 10 years (average)	113	↓	-39	-34.5

Non-Residential Building Consents by Construction Value

In 2022/23, the number of non-residential buildings consented in Tauranga City and Western Bay of Plenty District, declined by 37% and 20%, respectively compared to the previous year. The total value of consents declined by 32% in Western Bay of Plenty District and increased by 4% in Tauranga City. When combined, the total value of non-residential building consents for the sub-region had a net decline of 3%.

Figure 53 Non-residential building consents and average construction value, Western Bay of Plenty District, 2006 to 2023

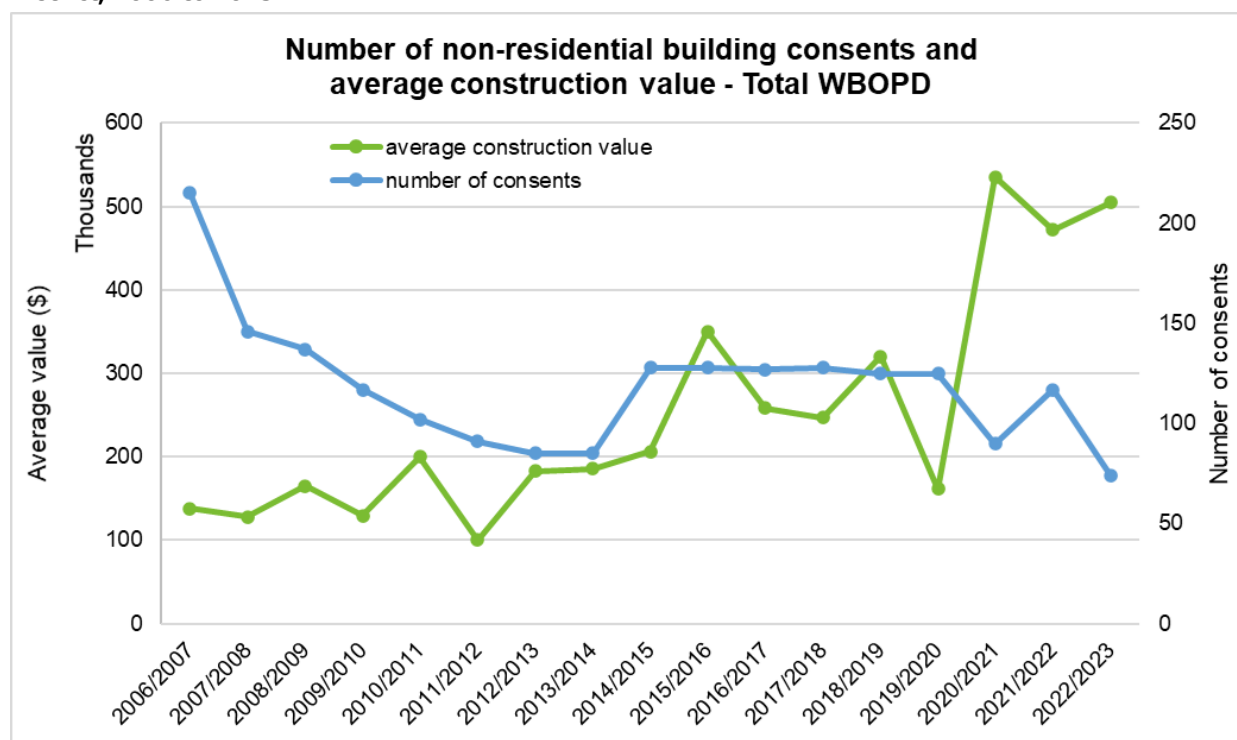
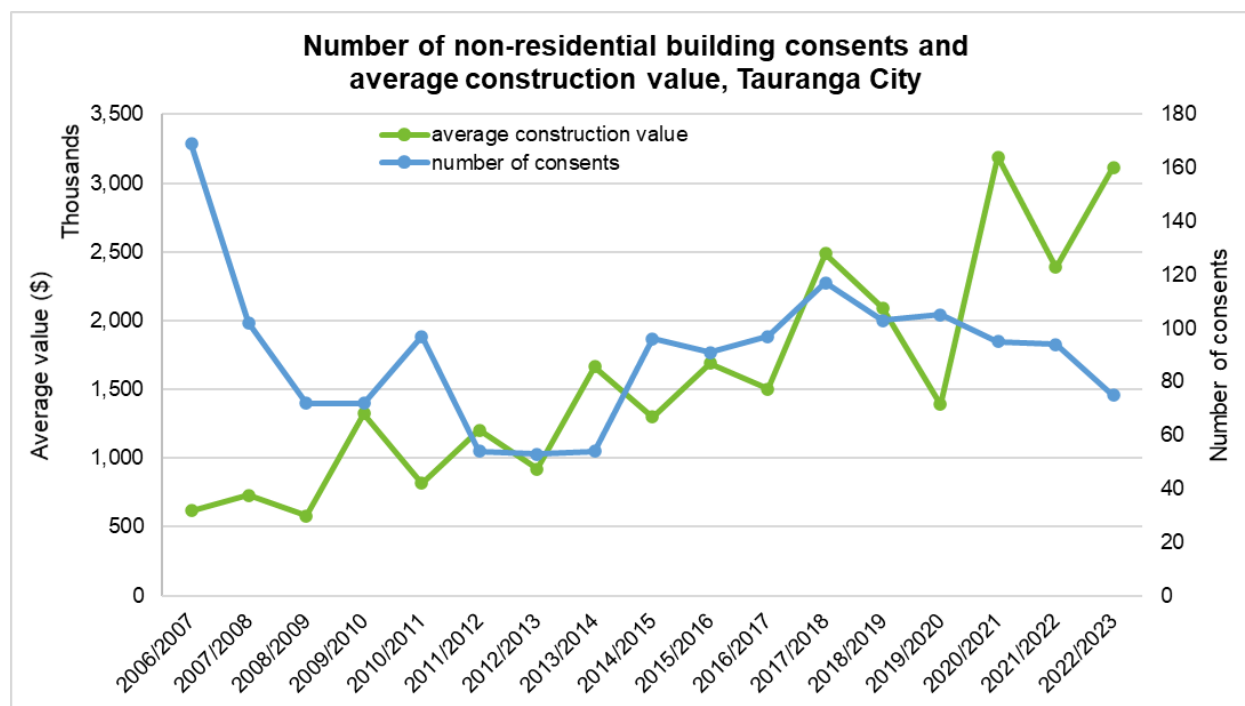


Figure 54 Non-residential building consents and average construction value, Tauranga City, 2006 to 2023



Commercial and Industrial Buildings

In 2022/23, the total value of all new non-residential buildings consented in Tauranga City was \$233.6 million, higher by 4% from the previous year’s value of \$224.4 million. The new commercial and industrial (factories, industrial and storage) buildings were valued at nearly \$163 million, which accounted for almost 70% of the total value of all non-residential buildings consented during the year. This was \$35.5 million and 28% higher than the value of commercial and industrial buildings consented in the previous year (\$127.4 million).

Table 41 Value and proportion of new commercial and industrial buildings to all new non-residential buildings consented, Tauranga City, 2006/07 to 2022/23

Year	Commercial buildings		Factories, industrial, and storage buildings	
	Value of consents (million \$)	proportion to total value of non-residential building consents	Value of consents (million \$)	proportion to total value of non-residential building consents
2006/2007	40.7	39.0	46.7	44.7
2007/2008	24.7	33.1	33.7	45.2
2008/2009	5.7	13.6	23.7	57.0
2009/2010	8.5	8.9	8.9	9.3
2010/2011	40.5	51.2	19.0	24.0
2011/2012	36.0	55.6	7.9	12.2
2012/2013	8.5	17.5	22.4	45.9
2013/2014	15.0	16.7	37.9	42.2
2014/2015	48.8	39.1	47.8	38.3
2015/2016	69.2	45.1	42.1	27.4
2016/2017	28.9	19.8	46.8	32.1
2017/2018	161.4	55.5	74.4	25.6
2018/2019	62.8	29.1	94.6	43.9
2019/2020	50.0	34.26	58.0	39.7
2020/2021	27.0	8.9	229.2	75.6
2021/2022	38.6	17.2	88.8	39.6
2022/2023	101.0	43.2	62.0	26.5

In the last 17 years, Western Bay of Plenty District recorded the highest value of all non-residential buildings consented in 2021/22 at \$55.3 million. It declined to \$37.3 million in 2022/23. The combined value of new commercial and industrial (factories, industrial and storage) buildings was also at the highest level in 2021/22 at \$40.9 million comprising 74% of the value of all non-residential buildings consented in the District. However, it declined by more than half to \$19.1 million in 2022/23, accounting for just over half of the value of all non-residential buildings consented during the year.

Table 42 Value and proportion of new commercial and industrial buildings to all new non-residential buildings consented, Western Bay of Plenty District, 2006/07 to 2022/23

Year	Commercial buildings		Factories, industrial, and storage buildings	
	Value of consents (million \$)	proportion to total value of non-residential building consents	Value of consents (million \$)	proportion to total value of non-residential building consents
2006/2007	1.6	5.3	18.0	60.4
2007/2008	5.5	29.2	5.7	30.4
2008/2009	0.8	3.5	14.0	61.8
2009/2010	2.9	19.1	6.0	39.2
2010/2011	6.8	33.3	6.4	31.6
2011/2012	0.8	9.3	1.9	21.3
2012/2013	6.8	43.6	1.2	7.5
2013/2014	3.5	21.9	2.4	14.9
2014/2015	1.1	4.1	12.6	47.6
2015/2016	5.7	12.8	19.3	43.0
2016/2017	5.3	16.0	17.5	53.1
2017/2018	2.3	7.4	14.8	46.8
2018/2019	0.7	1.7	11.6	29.0
2019/2020	0.8	4.1	8.4	41.8
2020/2021	5.5	11.5	32.7	67.8
2021/2022	3.9	6.9	37.0	67.0
2022/2023	11.4	30.5	7.8	20.8

9 Current and Future Monitoring Reports

As indicated in Section 2, SmartGrowth continues to report on key SmartGrowth, RPS and NPS-UD indicators on an annual basis. Monitoring results, including housing and business indicators, are recorded either monthly or quarterly, depending on the frequency of release or availability of data from providers/sources. With the NPS-UD 2020 minimum requirement of annual publication, the quarterly monitoring results were published annually and/or incorporated in the SmartGrowth Development Trends Report (DTR).

This year's report also includes information that aligns with the full 2022 Housing and Business Capacity Assessment produced to inform the 2024-2034 Long Term Plans (LTPs).

Both Councils started monitoring and reporting on residential section size, dwelling typology and number of bedrooms for dwellings consented five years ago, with results published in the DTR.

Since 2019, Tauranga City Council has been monitoring and reporting dwelling densities in the UGAs. This will be continuously undertaken and will be expanded in the future to include density in the established/infill parts of the City. Density work in Western Bay of Plenty District is currently in progress and results will also be included in future development reports.

Appendix 1

Explanation of MHUD/ MfE Indicators for the National Policy Statement on Urban Development¹⁹

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 centre has a high proportion of one bedroom apartments while other suburbs are dominated by three-bedroom

¹⁹ 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

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.'

Appendix 2

Change in Housing Affordability Indicators – Definitions and Data Sources

Rental Affordability Index

The Rental Affordability Index is a summary measure of changes in rental prices compared with changes in income. Positive changes in affordability index imply greater affordability as incomes are increasing faster than rent prices; negative changes imply declining affordability as rent prices are rising faster than incomes.

Deposit Affordability Index

The Deposit Affordability Index is a summary measure of changes in house sales prices compared with changes in income. Positive changes in the affordability index imply greater affordability as incomes are increasing faster than house sales prices; negative changes imply declining affordability as house sales prices are rising faster than incomes. The index does not account for any temporal changes in bank lending practices, such as those resulting from changes in macro-prudential policy.

Mortgage Affordability Index

The Mortgage Affordability Index is a summary measure of changes in the purchasing power of mortgage interest payments (an interest price index) compared with changes in income. Positive changes in the affordability index imply greater affordability as incomes are increasing faster than the interest price index; negative changes imply declining affordability as interest price index is rising faster than incomes.

Data Sources

Quarterly affordability indices (mortgage, deposit and rent) were sourced from the Ministry of Housing and Urban Development and published at www.data.govt.nz.

Changes in rental prices

Rental prices are sourced from Tenancy Bonds data relating to private sector rentals. These are representative of the rental costs of new tenancies (a “flow” concept). Summary statistics are created by Te Tūāpapa Kura Kāinga - Ministry of Housing and Urban Development (MHUD), where these are not already published by Stats NZ. Timeseries use a quality-adjusted rental price index which controls for changes in the ‘quality mix’ of properties newly rented over time. The index methodology (a property fixed-effects regression estimator) is an internationally recognised approach and consistent with that used for the New Zealand Consumers Price Index, and Rental Price Index released by Stats NZ.

Changes in house sales prices

House sales data is supplied by CoreLogic. Timeseries use a quality-adjusted house price index which controls for changes in the ‘quality-mix’ of properties sold over time. The index methodology (a *Sales Price Appraisal Ratio*) is an internationally recognised approach widely used in New Zealand

Interest price index

Mortgage rates are sourced from the Reserve Bank of New Zealand (RBNZ). The 2-year special rate series was used, a balance between short-term rates commonly adopted and market expectation of future rate changes. An interest price index, designed to reflect changes in the purchasing power of mortgage interest payments, is calculated as the combined (multiplicative) effect of changes in mortgage rates and house sales prices.

Income

Income data series are sourced from Stats NZ. Regional timeseries of *annual household disposable (after tax) income* are created by the HUD. Tax data, originated from Inland Revenue, is used to interpolate and extrapolate Household Economic Survey (HES)-calibrated Census estimates of household income.

For more details visit: <https://www.hud.govt.nz/stats-and-insights/change-in-housing-affordability-indicators/about-the-indicators/>

Appendix 3

Explanation of Development Terms

"Urban" refers to subdivisions or dwelling consents in:

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

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

"Rural" refers to subdivisions or dwelling consents in:

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

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

Other terms used:

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

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

Greenfield UGA – Greenfield Urban Growth Area.

SP – Structure Plan.

Subdivision Process

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

Stage 1 Subdivision Plan

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

Stage 2 Survey Plan

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

Stage 3 Final Approval

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

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

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

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

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

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

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

Building Consent Issue for Dwellings

Western Bay of Plenty District

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

Tauranga City

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

Residential Growth Areas

Western Bay of Plenty District

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

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

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

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

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

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

Tauranga City

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

The other significant areas of urban development is infill development in established residential areas, and residential intensification (currently limited to the Mount Maunganui High Density Residential zoned area northwest of Banks and Salisbury avenues, and the City Living zoned areas surrounding the Tauranga CBD) within established residential areas of Tauranga. Proposed Plan Change 33: Enabling Housing Choice to the Tauranga City Plan, while not operative has effect, enabling higher density in key residential and commercial areas across the City.

Vacant Land

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

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

Western Bay of Plenty District

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

Residential infill

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

Residential greenfield

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

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

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

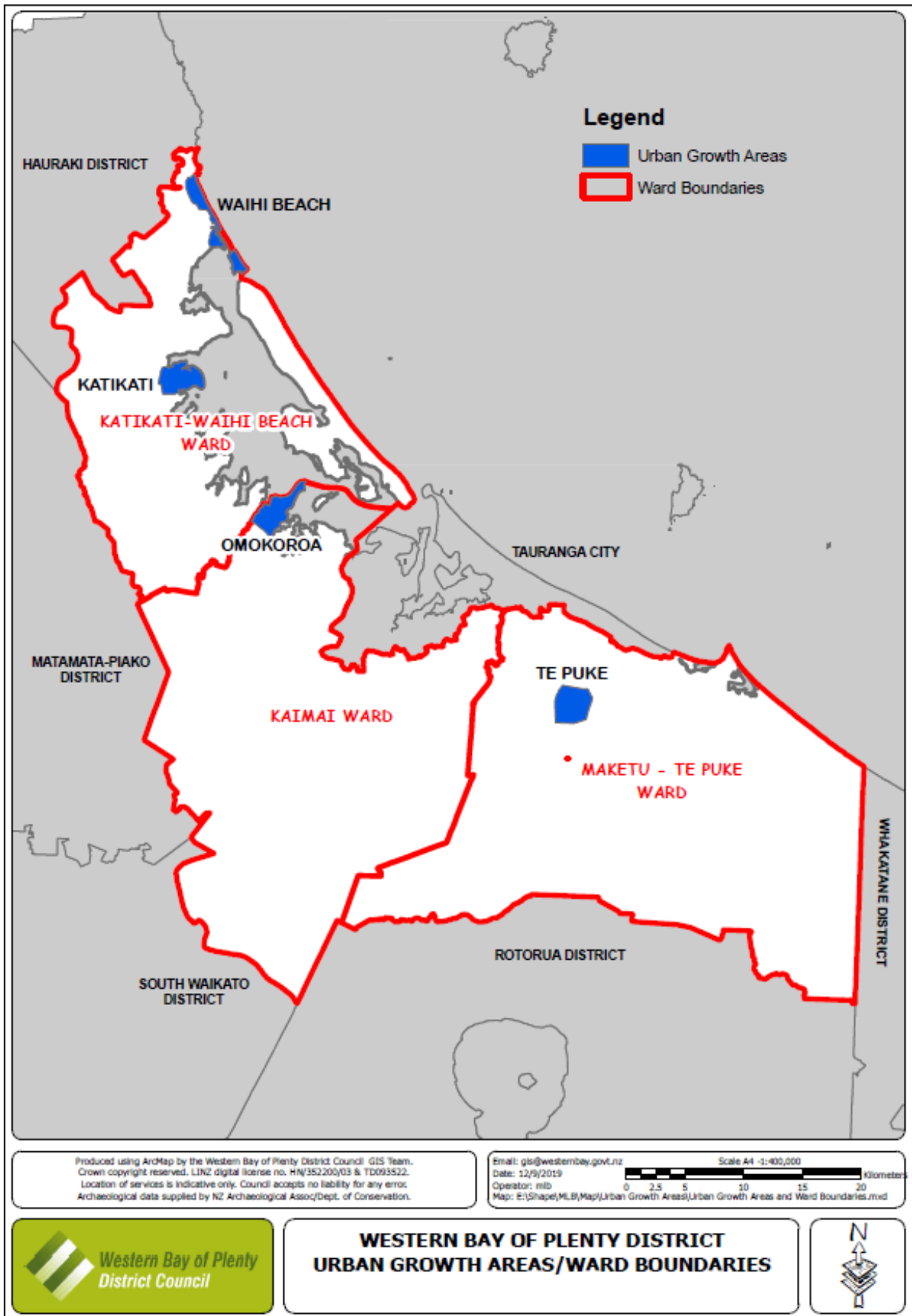
Tauranga City

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

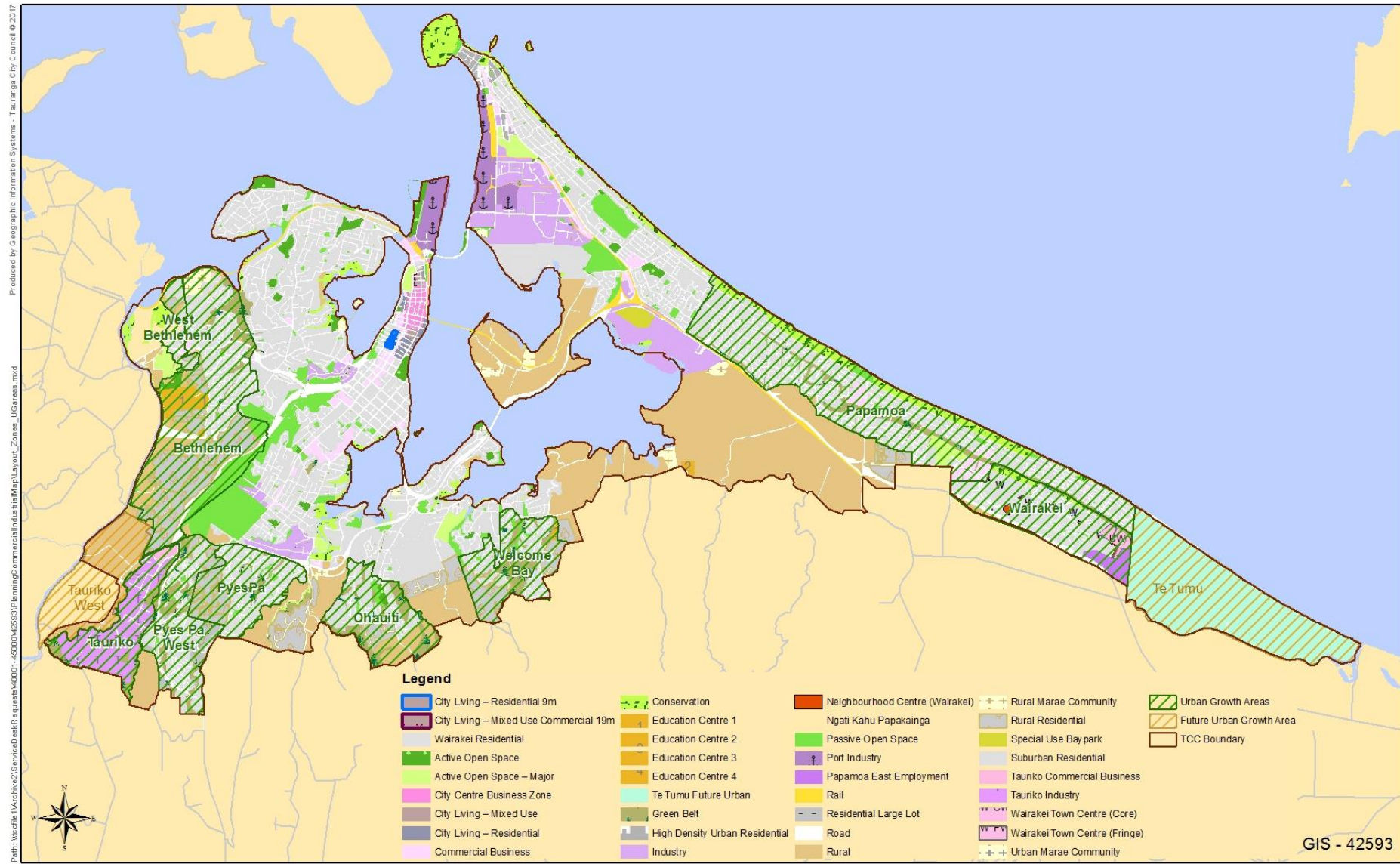
<i>Residential Intensification Areas</i>	currently this classification is applied to development within the High Density Residential zoned area in Mount Maunganui North, and City Living and City Centre zoned areas where greater density is permitted.
<i>Residential infill/ Intensification</i>	existing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

Appendix 4

Western Bay of Plenty District Development Map

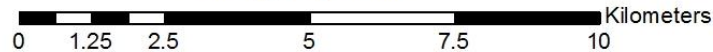


Tauranga City Development Map



PLANNING ZONES AND URBAN GROWTH AREAS

- Tauranga City Council -



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Appendix 5

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)

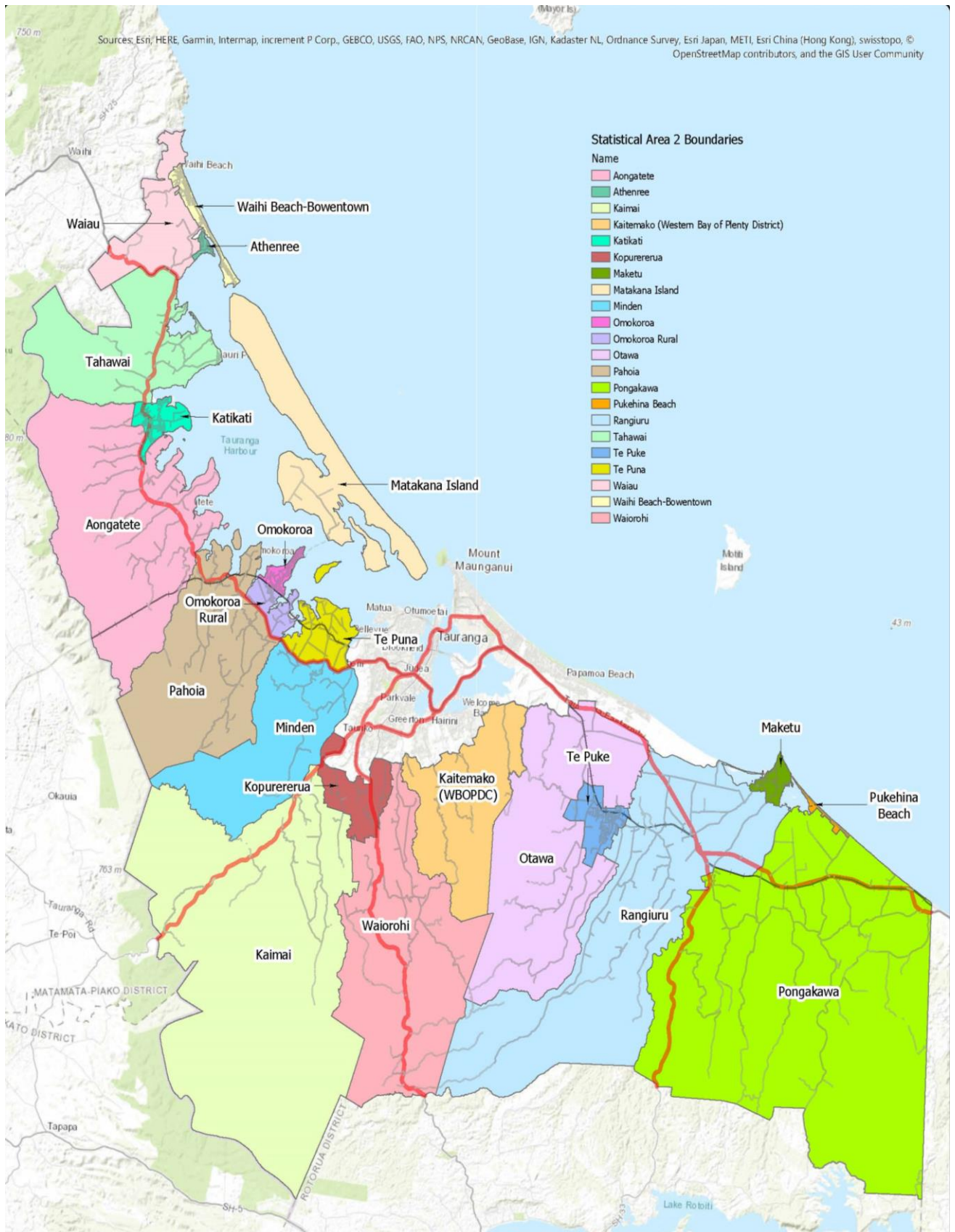
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Waihi Beach-Bowentown	2,484	1,071	1,410	2,481	57
Athenree	804	297	117	414	28
Waiau	333	123	45	168	27
Tahawai	1,833	744	87	831	10
Aongatete	3,279	1,305	108	1,413	8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

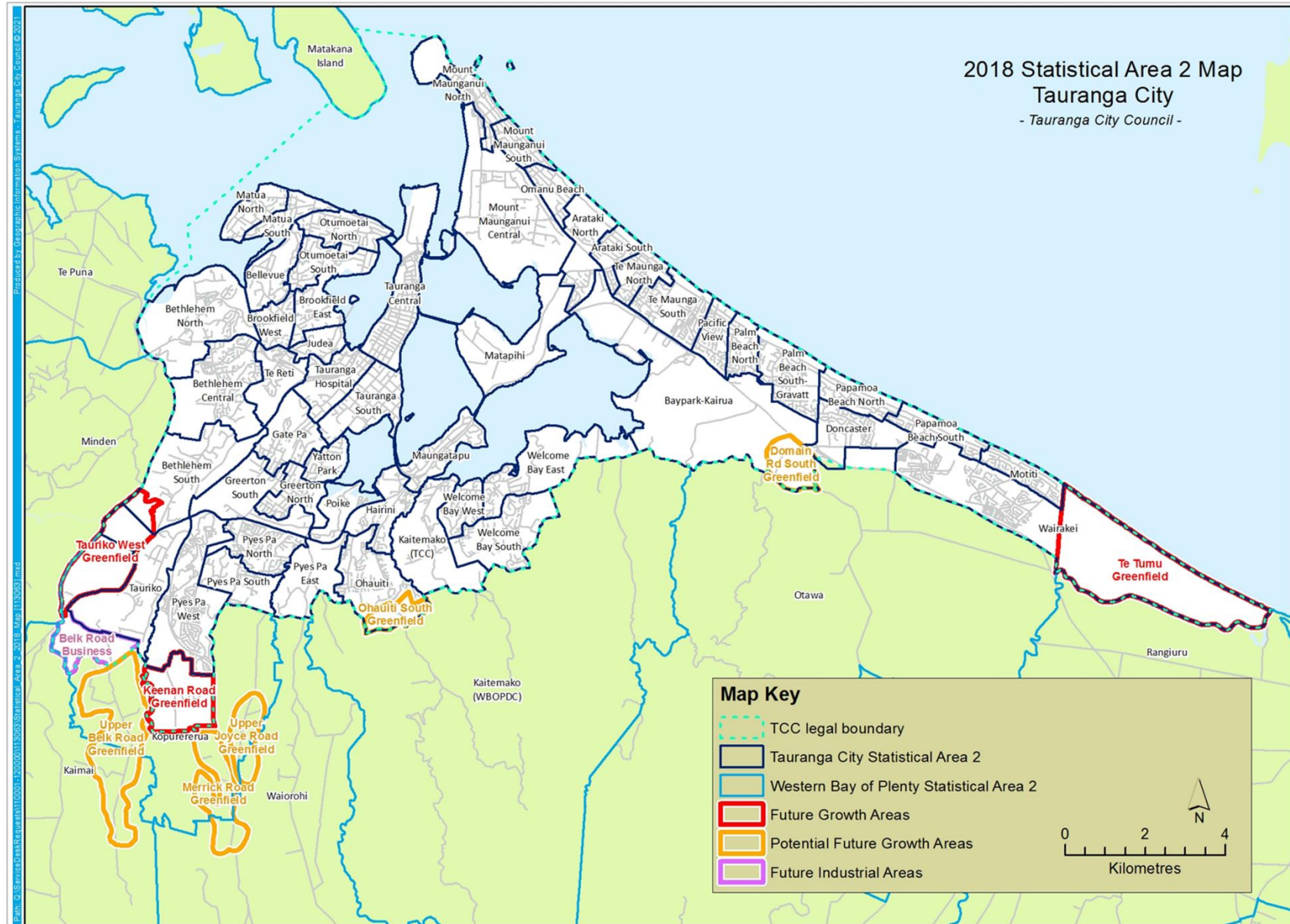
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Matua North	2,844	1,134	81	1,215	7
Mount Maunganui North	3,720	1,575	897	2,472	36
Matua South	2,523	939	63	1,002	6
Bethlehem North	3,387	1,329	99	1,428	7
Bellevue	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
Ohauti	3,243	1,224	45	1,269	4
Baypark-Kairua	642	168	24	192	13
Welcome Bay West	2,778	915	66	981	7
Welcome Bay East	2,508	852	48	900	5
Pacific View	3,036	1,074	66	1,140	6
Welcome Bay South	3,441	1,113	48	1,161	4
Palm Beach North	3,159	1,089	81	1,170	7
Palm Beach South-Gravatt	3,834	1,470	129	1,599	8
Papamoa Beach North	2,766	975	114	1,089	10
Doncaster	3,123	1,077	66	1,143	6
Papamoa Beach South	2,688	1,014	138	1,152	12
Motiti	3,321	1,152	174	1,326	13
Wairakei	3,351	1,236	99	1,335	7
TOTAL	137,784	50,907	4,920	55,827	9

Appendix 6

Western Bay of Plenty District Statistical Area 2 Map

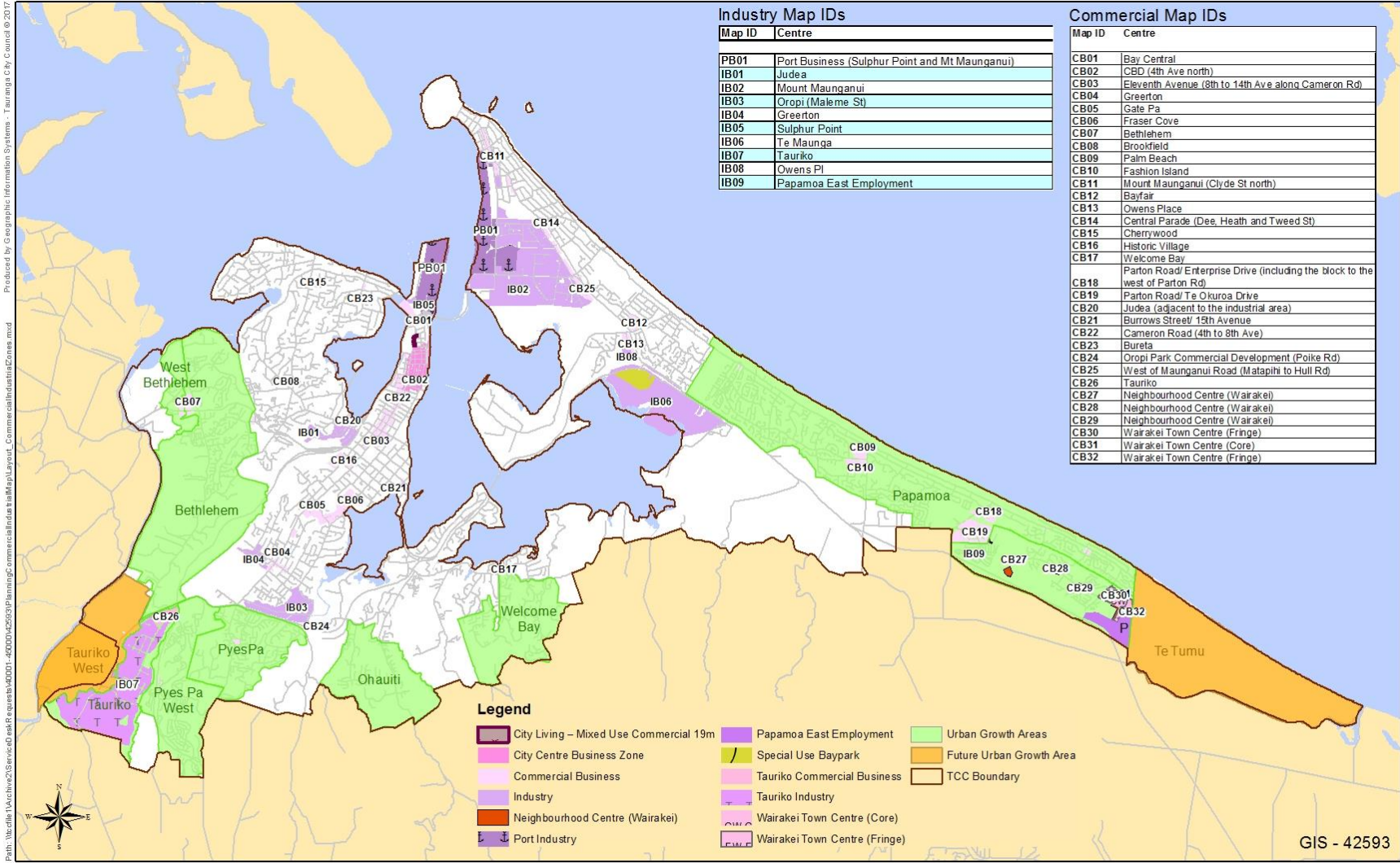


Tauranga City Statistical Area 2 Map



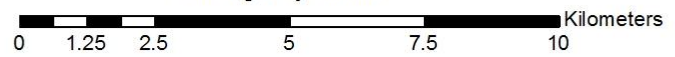
Appendix 7

Tauranga City Commercial and Industry Zoned Areas



COMMERCIAL AND INDUSTRIAL AREAS

- Tauranga City Council -



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Appendix 8

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

$$\text{Dwelling density} = \frac{\sum_{i=1}^n X_i + Y_i}{\sum_{i=1}^n Z_i}$$

where:

X = number of dwellings in developed areas

Y = number of vacant sections (in both developed areas and proposed development)

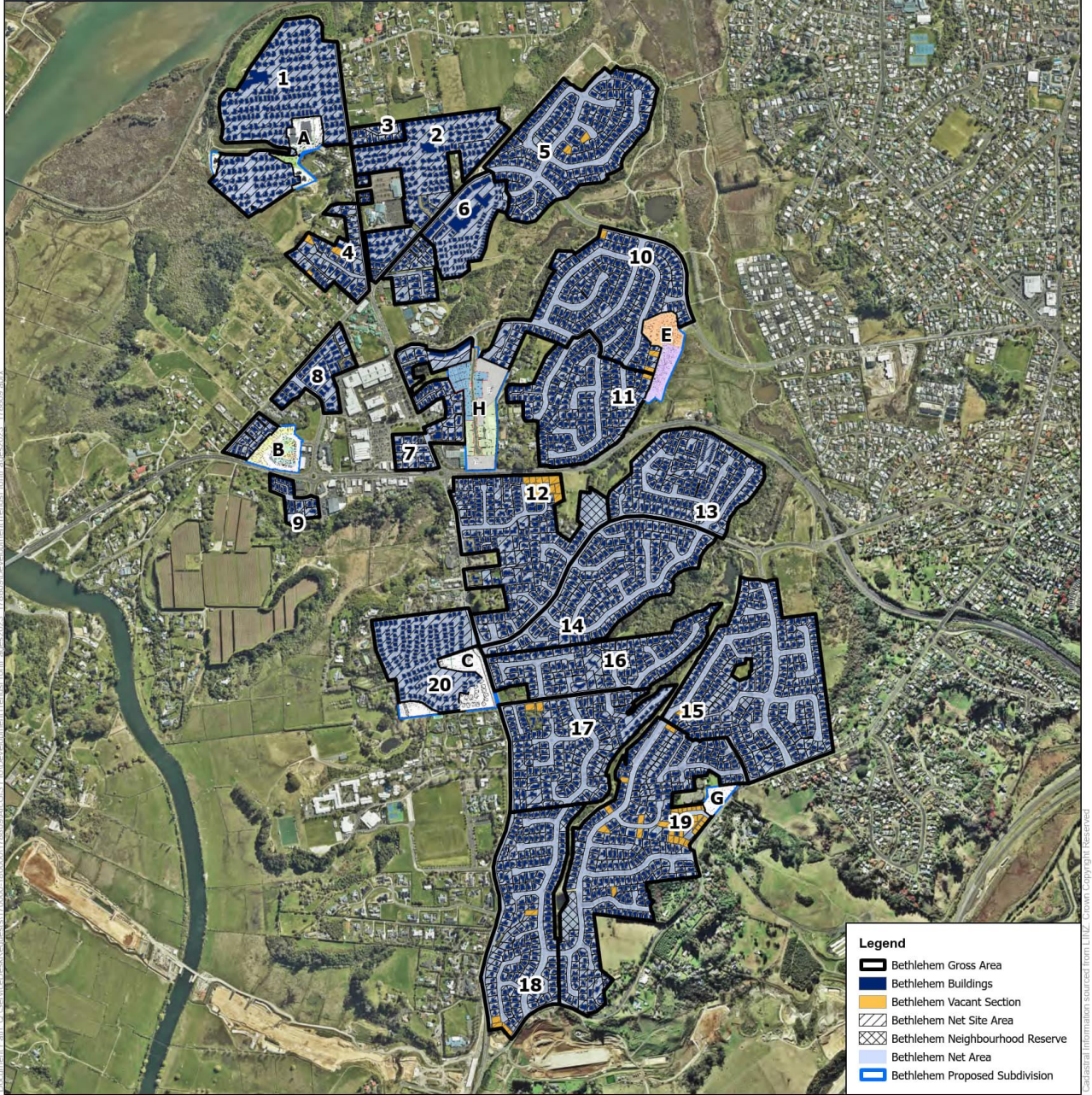
Z = area in hectares

Change the divisor (Area) to get dwelling density for gross area or nett site area.

2023 Tauranga City Density Maps

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

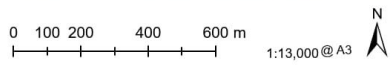
Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	248	0	248	18.45	13.44	18.09	13.71	18.45	13.44
2	172	0	172	12.52	13.74	11.66	14.75	12.16	14.15
3	19	0	19	1.69	11.27	1.55	12.25	1.69	11.27
4	35	4	39	4.98	7.83	4.35	8.96	4.94	7.90
5	175	2	177	17.65	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	90	0	90	9.44	9.54	7.41	12.15	8.49	10.60
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	197	3	200	19.44	10.29	14.62	13.68	19.42	10.30
11	157	1	158	13.79	11.46	10.79	14.64	13.77	11.48
12	166	14	180	18.40	9.78	13.35	13.48	17.60	10.23
13	173	0	173	13.27	13.03	10.73	16.12	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	12.13	9.65	9.53	12.28	12.13	9.65
17	181	2	183	16.08	11.38	12.52	14.61	15.71	11.65
18	168	4	172	17.19	10.01	12.12	14.19	17.06	10.08
19	279	32	311	28.07	11.08	20.61	15.09	28.00	11.11
20	163	0	163	9.64	16.92	9.44	17.27	9.64	16.92
Total	3134	65	3199	267.12	11.98	211.98	15.09	264.02	12.12
Proposed									
A	0	3	3	1.77	1.70	0.34	8.88	1.77	1.70
B	0	100	100	1.86	53.83	1.29	77.35	1.86	53.83
C	0	12	12	2.35	5.10	0.68	17.64	2.35	5.10
E	0	31	31	2.30	13.49	1.80	17.24	2.30	13.49
G	0	14	14	0.59	23.83	0.59	23.83	0.59	23.83
H	0	46	46	4.70	9.78	2.38	19.36	4.70	9.78
Proposed Total	0	206	206	13.57	15.19	7.07	29.12	13.57	15.19
Total Incl Proposed	3134	271	3405	280.69	12.13	219.06	15.54	277.59	12.27



Legend

- Bethlehem Gross Area
- Bethlehem Buildings
- Bethlehem Vacant Section
- Bethlehem Net Site Area
- Bethlehem Neighbourhood Reserve
- Bethlehem Net Area
- Bethlehem Proposed Subdivision

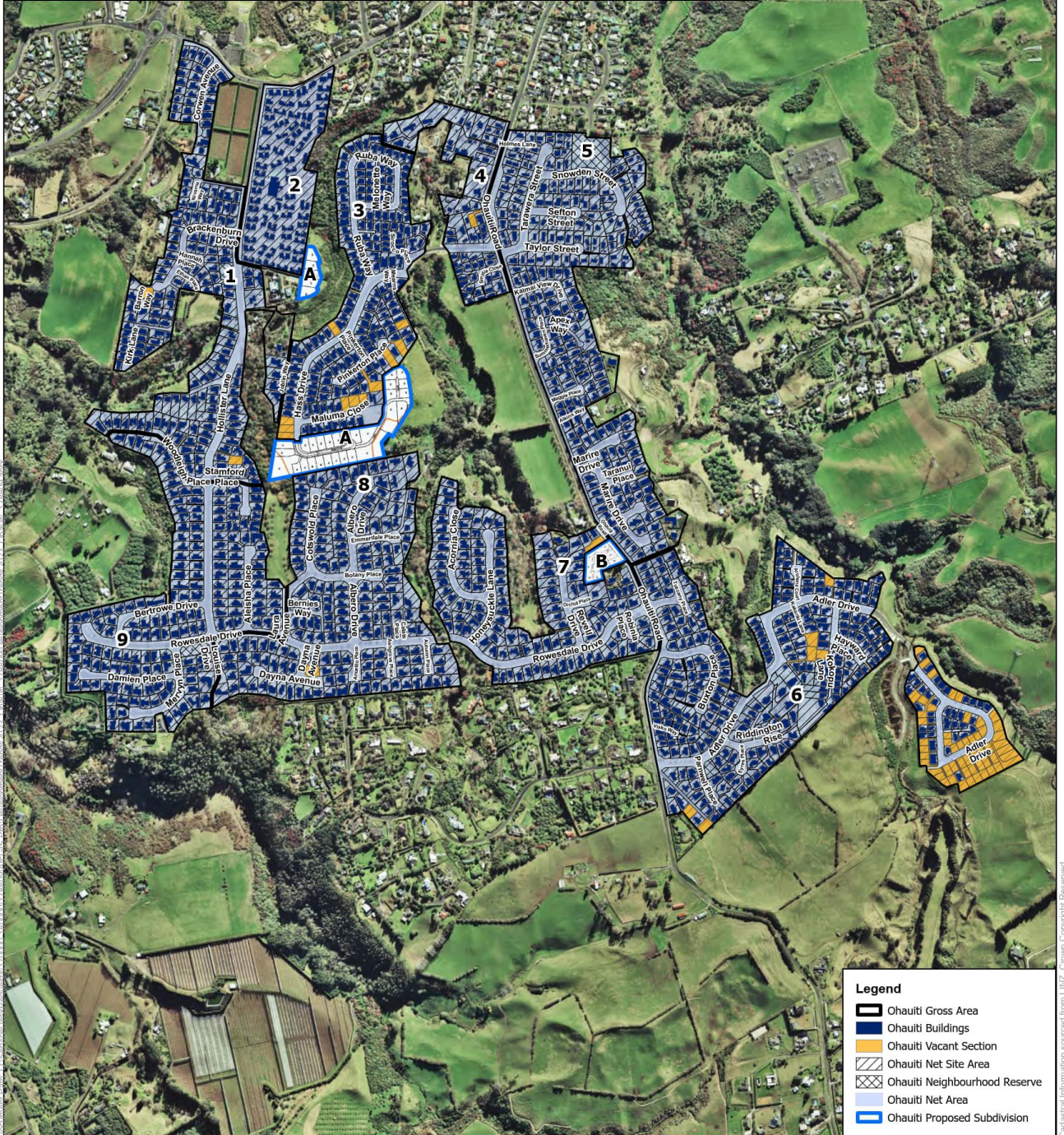
Bethlehem Dwelling Density 2023



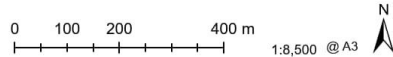
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	181	2	183	17.84	10.26	13.57	13.48	17.05	10.74
2	139	0	139	6.95	20.01	6.36	21.86	6.93	20.07
3	172	11	183	13.43	13.63	10.45	17.52	13.38	13.67
4	55	1	56	5.82	9.62	4.95	11.31	5.75	9.74
5	248	0	248	21.85	11.35	15.74	15.76	21.04	11.79
6	290	60	350	26.62	13.15	21.24	16.48	26.26	13.33
7	124	1	125	14.28	8.75	10.74	11.64	13.89	9.00
8	182	1	183	19.63	9.32	15.32	11.95	19.58	9.35
9	177	0	177	17.89	9.89	13.87	12.76	17.88	9.90
Total	1,568	76	1,644	144.31	11.39	112.24	14.65	141.75	11.60
Proposed									
A	0	35	35	3.40	10.31	3.03	11.54	3.40	10.31
B	0	8	8	0.56	14.33	0.45	17.75	0.56	14.33
Proposed Total	0	43	43	3.95	10.88	3.48	12.34	3.95	10.88
Total Incl Proposed	1,568	119	1,687	148.26	11.38	115.72	14.58	145.70	11.58



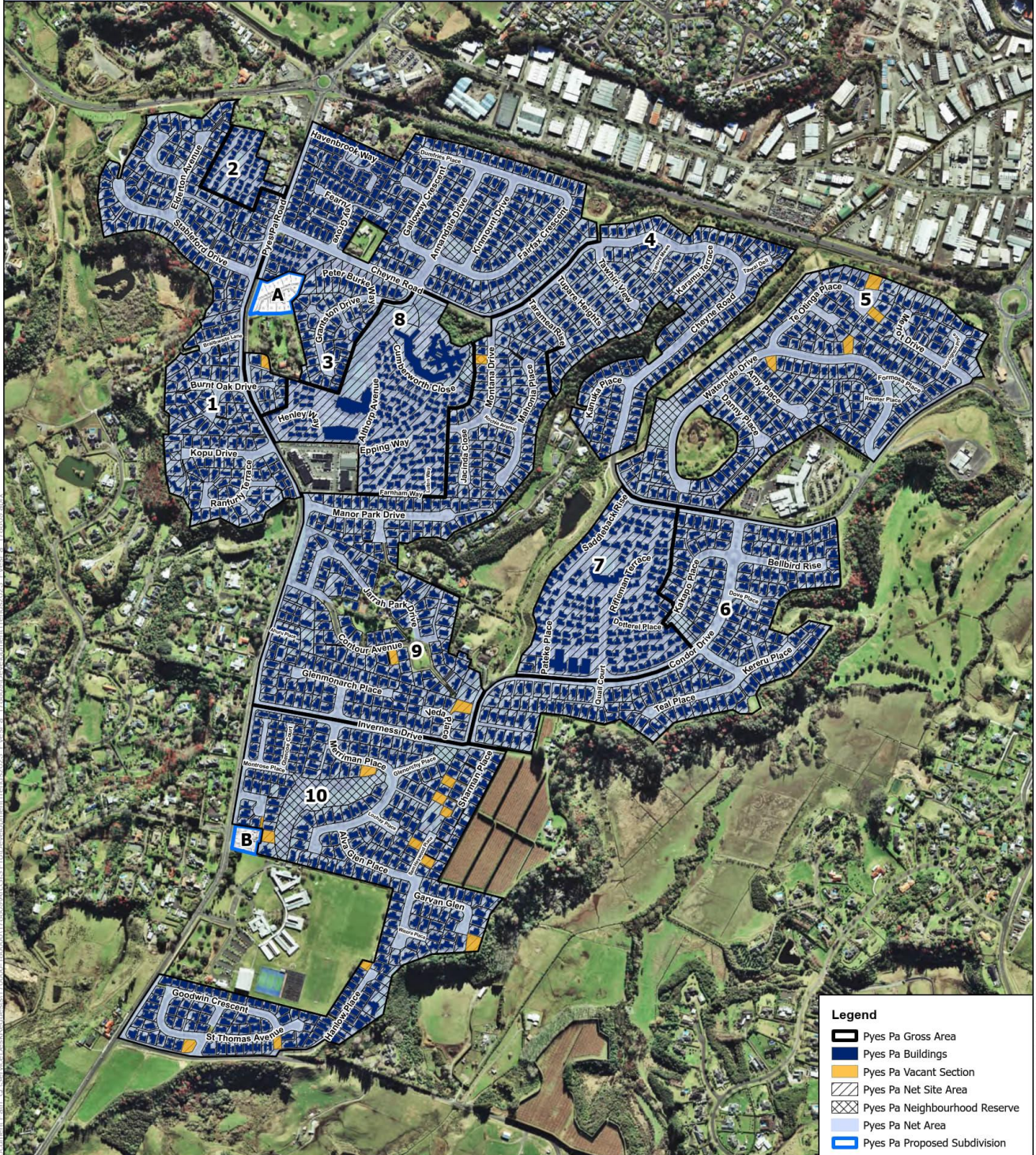
Ohauti Dwelling Density 2023



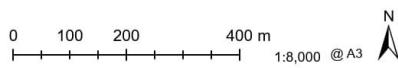
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	228	0	228	19.44	11.73	15.33	14.87	19.43	11.73
2	59	0	59	1.92	30.68	1.90	31.09	1.92	30.68
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	221	4	225	22.14	10.16	16.44	13.69	22.08	10.19
6	193	0	193	18.60	10.38	13.79	14.00	18.44	10.47
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	302	11	313	28.78	10.88	20.03	15.62	28.66	10.92
Total	2,185	19	2,204	183.20	12.03	140.08	15.73	180.64	12.20
Proposed									
A	0	11	11	0.75	14.58	0.56	19.51	0.75	14.58
B	0	4	4	0.32	12.65	0.28	14.17	0.32	12.65
Proposed Total	0	15	15	1.07	14.01	0.85	17.73	1.07	14.01
Total Incl Proposed	2,185	34	2,219	184.27	12.04	140.93	15.75	181.71	12.21



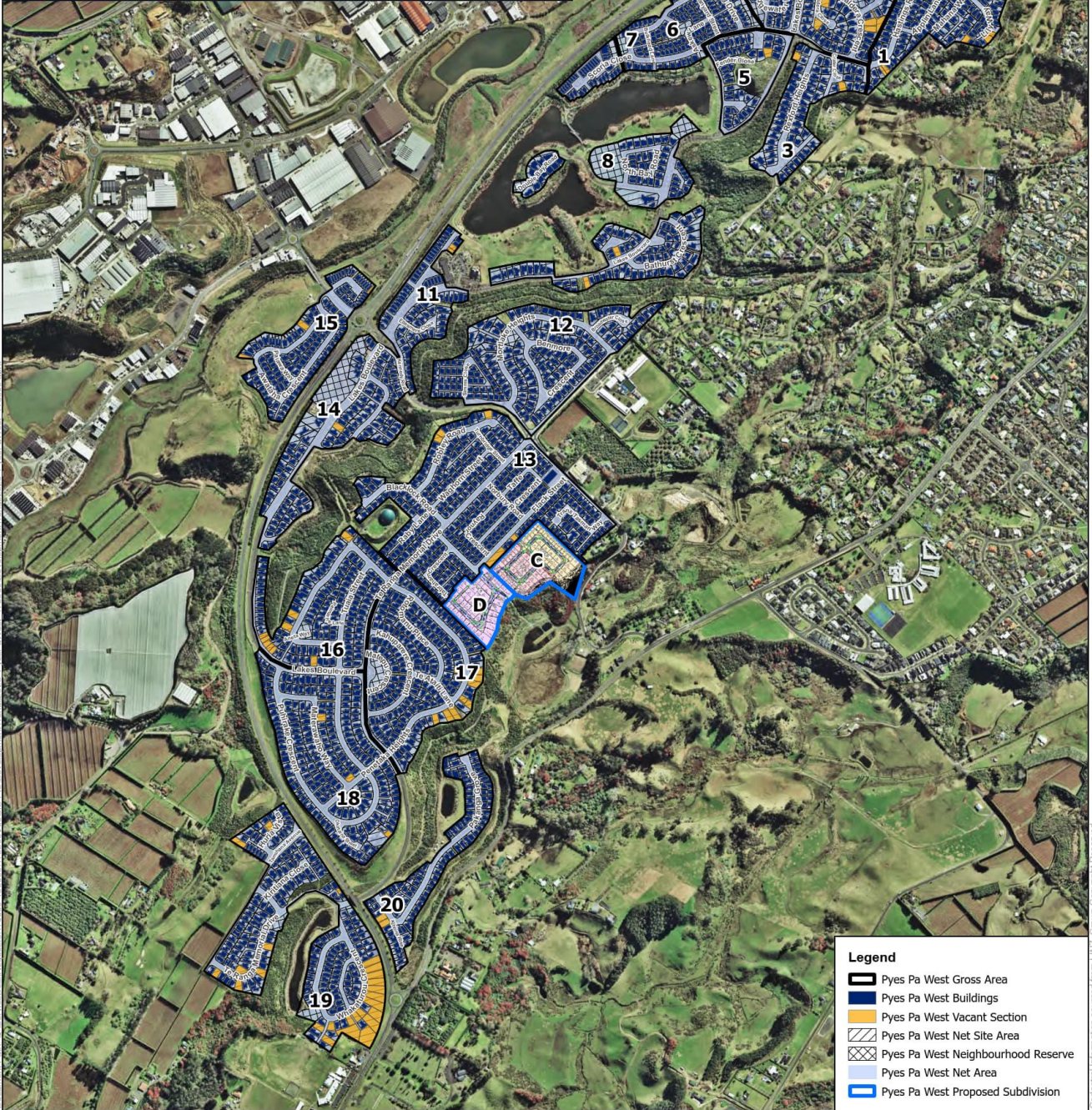
Pyes Pa Dwelling Density 2023



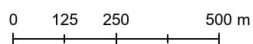
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	139	7	146	9.86	14.81	7.62	19.16	9.84	14.83
2	70	8	78	7.31	10.67	5.03	15.51	7.27	10.73
3	56	2	58	5.85	9.91	4.32	13.43	5.85	9.91
4	53	0	53	4.33	12.25	1.86	28.45	3.04	17.45
5	43	1	44	4.78	9.21	2.23	19.71	3.64	12.10
6	118	0	118	7.11	16.59	3.84	30.74	6.92	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	70	2	72	6.66	10.81	4.80	14.99	6.54	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	339	5	344	21.44	16.04	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	127	3	130	7.18	18.11	5.13	25.37	7.14	18.20
16	133	9	142	10.59	13.41	7.55	18.81	10.57	13.44
17	171	9	180	13.42	13.41	9.34	19.27	13.29	13.55
18	206	3	209	15.43	13.54	11.02	18.97	15.40	13.57
19	183	25	208	17.00	12.24	12.11	17.17	16.55	12.57
20	94	3	97	6.19	15.66	4.75	20.43	6.17	15.72
Total	2,229	80	2,309	174.40	13.24	117.98	19.57	170.18	13.57
Proposed									
A	0	58	58	4.54	12.78	3.89	14.92	4.54	12.78
B	0	11	11	0.57	19.16	0.57	19.16	0.57	19.16
C	0	63	63	3.61	17.43	2.84	22.16	3.61	17.43
D	0	43	43	2.57	16.72	2.11	20.37	2.57	16.72
E	0	10	10	0.71	14.06	0.63	15.95	0.71	14.06
F	0	8	8	0.25	31.51	0.25	31.51	0.25	31.51
Proposed Total	0	193	193	12.26	15.74	10.30	18.75	12.26	15.74
Total Incl Proposed	2,229	273	2,502	186.66	13.40	128.28	19.50	182.44	13.71

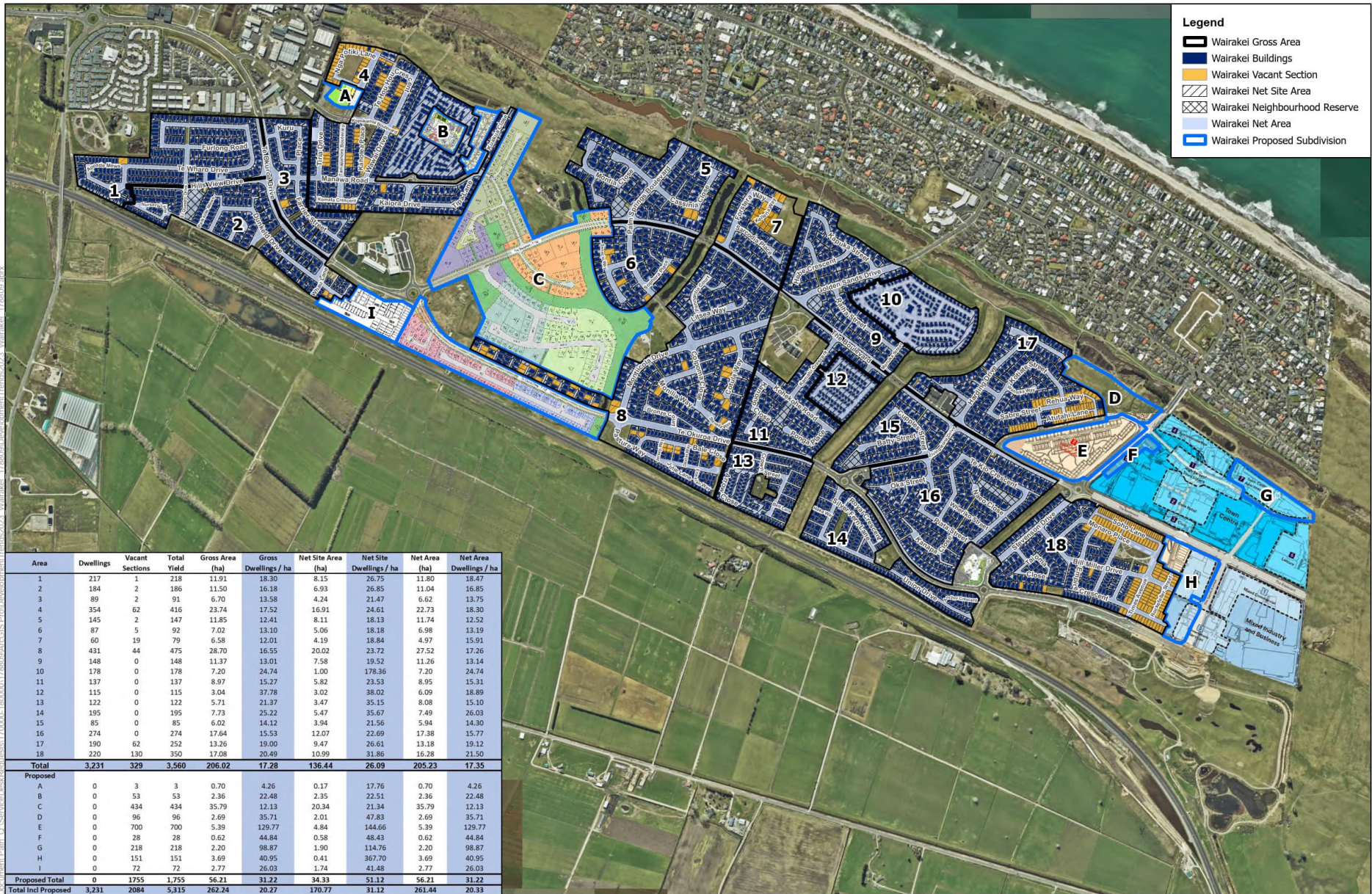


Pyes Pa West Dwelling Density 2023

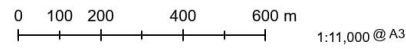


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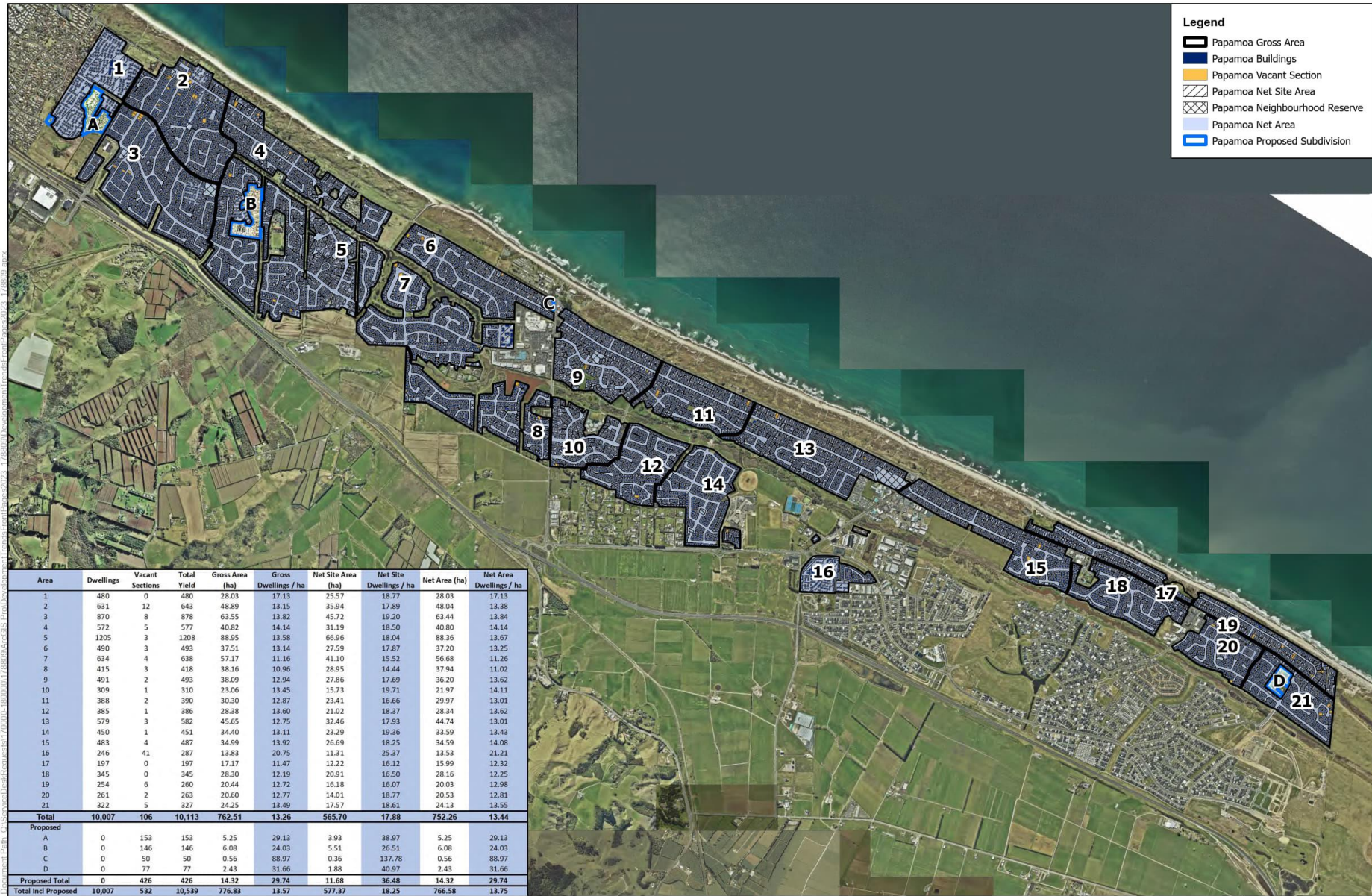




Wairakei Dwelling Density 2023



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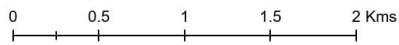


Aerial Photography From August 2022

Cadastral Information sourced from LINZ. Crown Copyright Reserved

Papamoa Dwelling Density 2023

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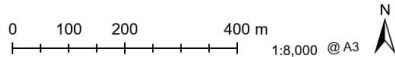
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	234	1	235	19.35	12.14	14.96	15.71	19.22	12.23
2	169	4	173	17.28	10.01	12.95	13.35	17.23	10.04
3	319	2	321	31.48	10.20	22.66	14.17	31.16	10.30
4	173	1	174	14.17	12.28	10.72	16.23	14.10	12.34
5	68	2	70	7.29	9.60	5.63	12.44	7.27	9.63
6	207	14	221	23.54	9.39	18.62	11.87	23.18	9.53
7	270	10	280	27.17	10.31	21.14	13.24	26.42	10.60
Total	1,440	34	1,474	140.28	10.51	106.68	13.82	138.58	10.64
Proposed									
A	0	47	47	2.85	16.52	2.07	22.68	2.85	16.52
Proposed Total	0	47	47	2.85	16.52	2.07	22.68	2.85	16.52
Total Incl Proposed	1,440	81	1,521	143.13	10.63	108.75	13.99	141.43	10.75



Welcome Bay Dwelling Density 2023



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.

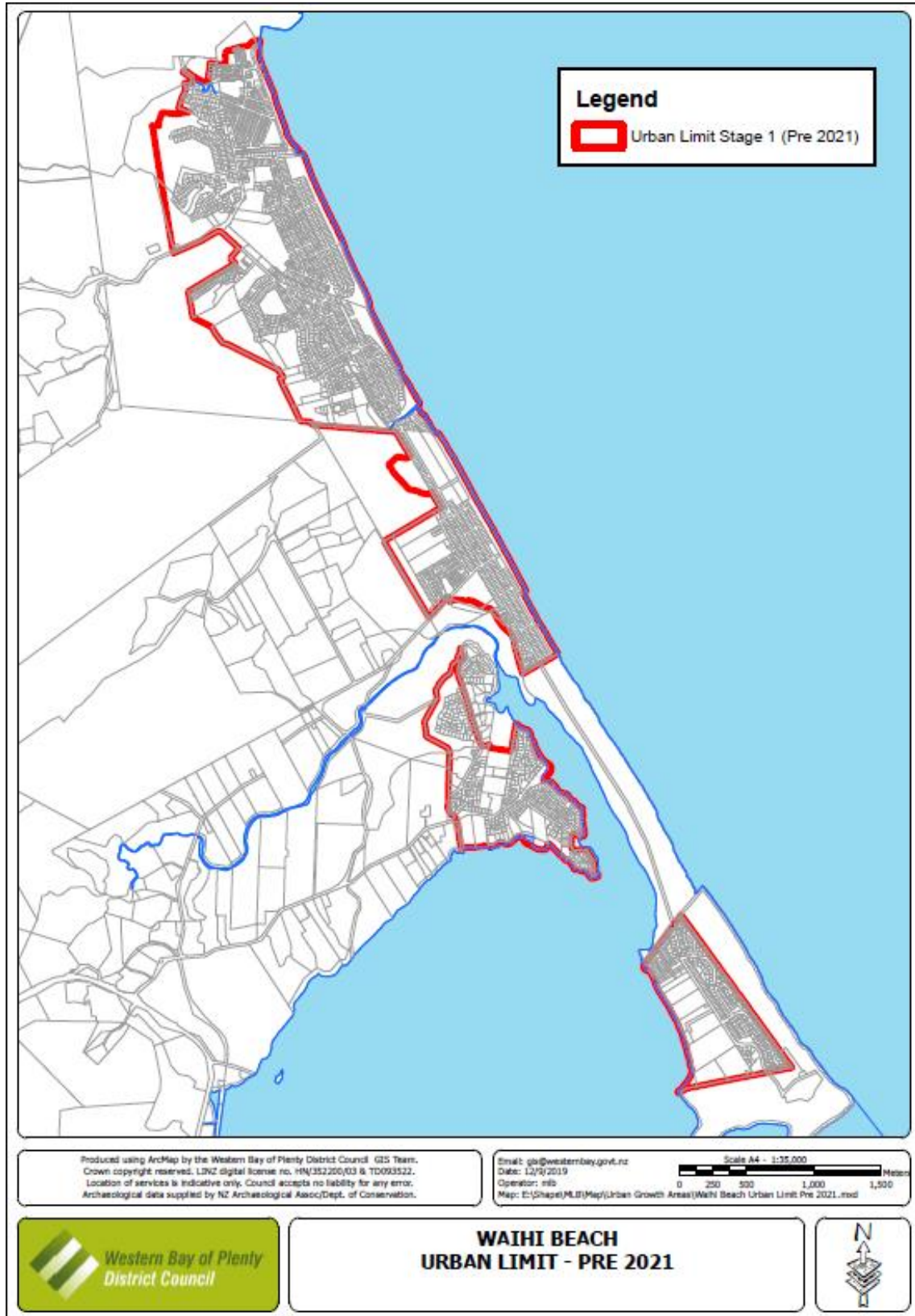


Aerial Photography From September 2023
Document Path: O:\ServiceDesk\Projects\170000_180000\178609_AccGIS\Dev\Development\Tranche2023_WelcomeBay_178609.aprx
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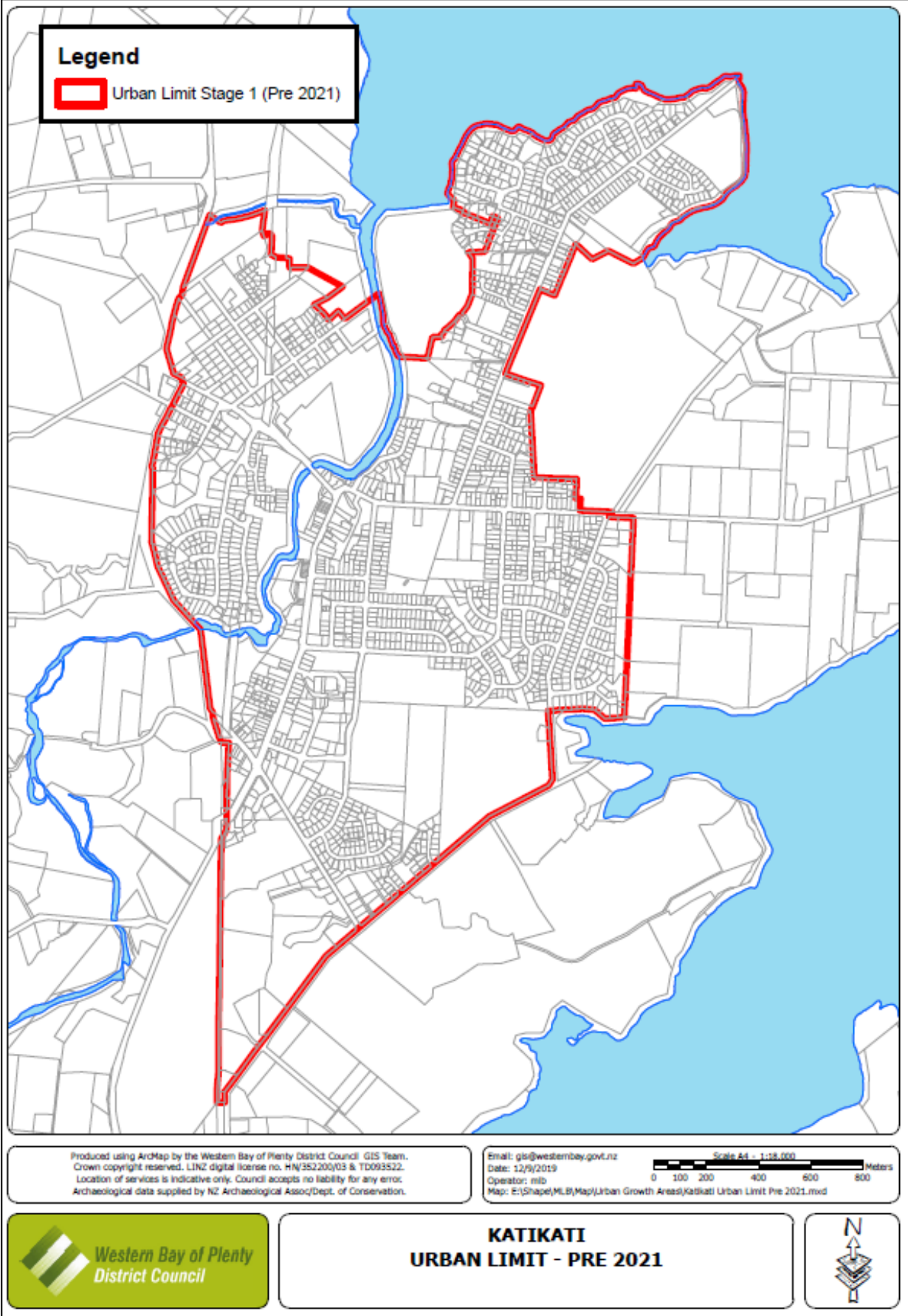
Appendix 8

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

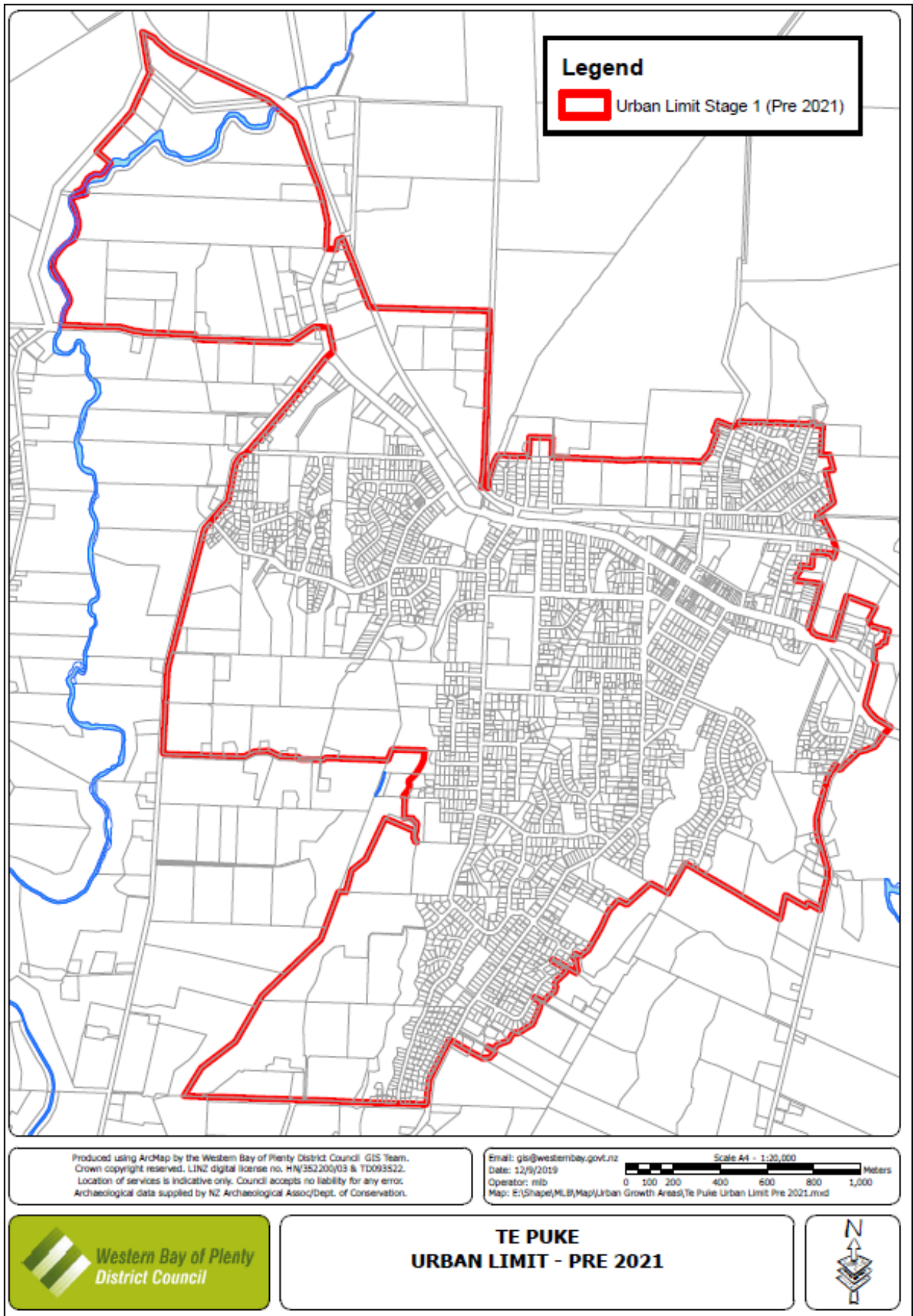
Waihi Beach



Katikati



Te Puke



Omokoroa

