

# SmartGrowth Development Trends Technical Report 2022





# SmartGrowth: Development Trends Technical Report 2022

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

2021 – 2022

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# Executive Summary

The SmartGrowth partners produce the joint Development Trends Report for the Western Bay of Plenty sub-region annually. The report contains subdivision, residential and non-residential development and population trends within 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 2022.

## Executive Summary – July 2021 to June 2022

*Comparison with previous year*

Indicator	Tauranga City	Western Bay of Plenty District
 Dwelling consents issued	 -15.3%	 -7.4%
 New lots created	 -34.5%	 33%
 Dwelling sales prices	 17.5%	 33.6%
 Dwelling rents	 7.7%	 27.1%
 Dwellings sold	 -34.1%	 -50%
 Mean floor size	 9m <sup>2</sup>	 -2m <sup>2</sup>
 2-Bedroom dwellings	 -3.8%	 10.5%
 3-Bedroom dwellings	 3%	 -10.2%
 Non-residential buildings	 -1.1%	 30%

Legend:  Up  Same as previous  Down

## Residential Building Activity

### Sub-region

- New dwellings consented in the sub-region declined by 13% (267 dwelling units) in 2021/22 compared to the previous year (refer Figure 1).

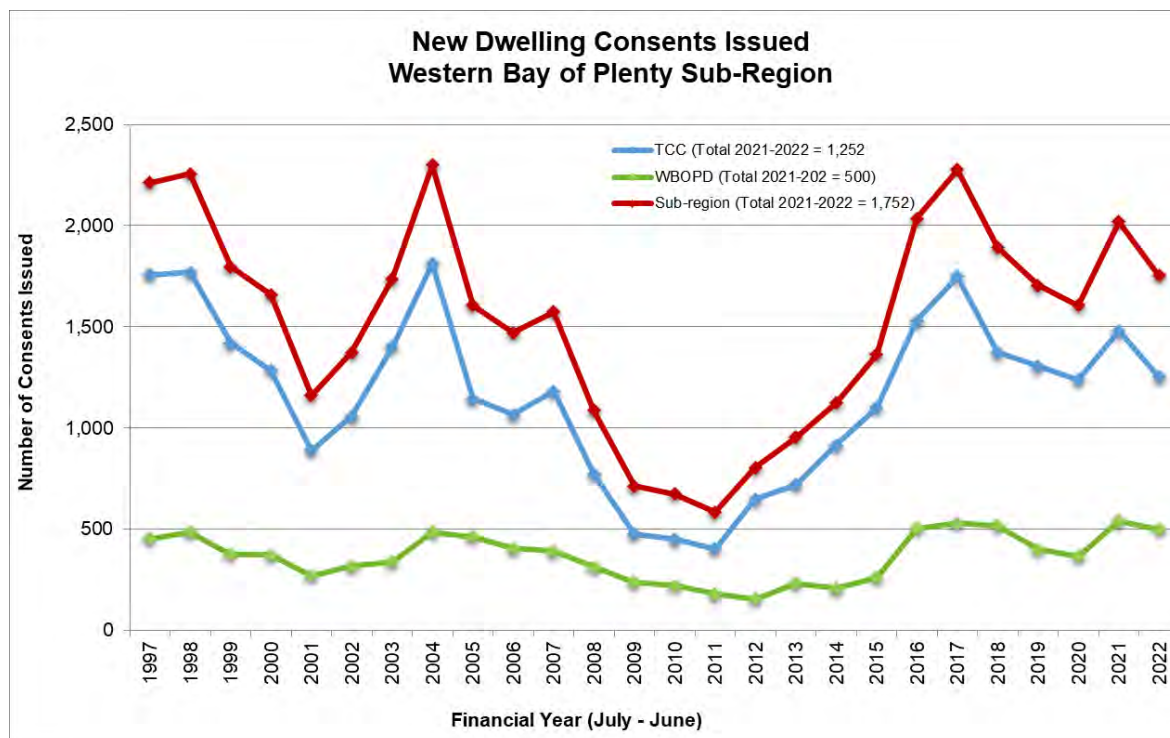
### Tauranga City

- Tauranga City had a total of 1,252 new dwellings consented in 2021/22, a decline of 15% (227 dwellings) from the 2020/21 results.
- More than three quarters (77.5%) of the dwellings consented were located in the Greenfield urban growth areas (UGAs), 22% in the existing urban areas and less than 1% (5 dwellings) in the rural areas. Both the urban and existing growth areas recorded declines of 5% (51 dwellings) and 39% (179 dwellings from the previous year).
- Bethlehem, Welcome Bay, Papamoa and Wairakei Greenfield UGAs had increases of 17-23 new dwellings consented from 2020/21 to 2021/22, while Pyes Pa, Pyes Pa West (The Lakes) and Ohauti UGAs had declines of 13 to 79 new dwellings consented in the same period.

## Western Bay of Plenty District - WBOPD

- In the UGA's, dwelling consents issued (DCI's) is still the highest for Ōmokoroa with 195, a decrease of 79 consents from 2020/21 to 2021/22.
- Dwelling consents issued decreased in Waihi Beach-Bowentown by 4 consents as well as Ōmokoroa and Te Puke also decreasing by 29% and 26%, while Katikati increased by 95% in 2021/22 compared to the previous year.
- Dwelling consents issued decreased overall by 40 consents (or 7%) for Western Bay of Plenty District (refer to Figure 1).

Figure 1 New dwelling consents issued, Western Bay of Plenty sub-region, 1997 to 2022



In the last five years, new dwelling consents issued in the sub-region were lowest in 2019/20. From that point, dwelling consents issued increased by 9%, or 146 dwellings in 2021/22. Both Western Bay of Plenty District (WBOPD) and Tauranga City recorded declines of 7% (40 dwellings) 15% (227 dwellings), respectively from 2020/21 to 2021/22.

## Residential Subdivision Activity

### Sub-region

- Subdivision development in the sub-region declined by 11% from the 2020/21 results.

### Tauranga City

- Since 2017/18 subdivision activity has declined and reached the lowest level in 2021/22 at 457 new lots created. It declined by 35% (241 lots) compared to the previous year.
- In 2021/22 77% of the additional lots were created in the Greenfield UGAs.
- No subdivision activity was recorded for three consecutive months, from November 2021 to January 2022.

## Western Bay of Plenty District

- The number of new lots created at 224 stage increased by 62% (from 159 in 2020/21 to 303 in **2021/22**) in most of the urban growth areas (UGA's). Waihi Beach – Bowentown and Katikati had respective increases of 79% and 220% while Te Puke had a decline of 19% in new lots created from 2020/21 to 2021/22.
- All rural areas recorded declines in additional lots created at 224 stage (by 34%) compared to 2020/21 except Maketu and Te Puke which had the same amount of additional lots (16) created in the last two years.
- More subdivision consents are expected for **Ōmokoroa** and Te Puke at the end of 2022 due to the staging of subdivision by the developers.
- Overall for the District, new lots increased by 33% from 2020/21 to 2021/22 (from 227 to 303 new lots created)

Table 1 Trends Summary – Tauranga City – 2020/2021 Compared to 2021/2022

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

Table 2 Trends Summary - WBOPD (Total) – 2020/2021 Compared to 2021/2022

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

# Residential Development Capacity

## Sub-region

- Dwelling consents issued in the sub-region were higher than the dwelling projections between 1 July 2018 and 30 June 2021, with 350 (7%) more new dwelling consents issued than projected.
- For each Greenfield UGA in the subregion, 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 UGA's in the sub-region, 29% capacity remained as at 30 June 2022.

## Tauranga City

- In Tauranga City, the number of dwellings consented during the year to June 2022 were higher than the SmartGrowth projections by 23.6% or 283 dwellings.
- Remaining Greenfield UGA capacity was 25% as at 30 June 2022.
- Wairakei (Papamoa East) Greenfield UGA has the highest percentage of capacity remaining (50%), while Pyes Pa UGA has the least (10%).
- Additional Greenfield UGA dwelling yield is planned to be released in - Tauriko West from 2025/26 and Te Tumu, Keenan Road and Ohauti South future Greenfield UGAs post 2030.

## Western Bay of Plenty District

- In Western Bay of Plenty District 189 more dwelling consents were issued than projected compared to the SmartGrowth dwelling projection as at 30 June 2022.
- Ōmokoroa UGA (total) has the largest remaining capacity available with 55% (2,965 dwellings), Waihi Beach-Bowentown UGA has the lowest capacity remaining in Western Bay of Plenty District with 13% (472 dwellings).

# Residential Sales and Rents<sup>1</sup>

## Tauranga City

- Average selling price (12 month rolling average) increased by 17.5% to \$981,250 in the last 12 months to 30 June 2022.
- Average dwelling rent (12 month rolling average) increased by 7.7% to \$585 in the last 12 months to 30 June 2022.

## Western Bay of Plenty District

- Average selling price (12 month rolling average) increased by 33.6% from \$833,875 in June 2021 to \$1,114,423 in June 2022.
- Average dwelling rent (12 month rolling average) increased by 27.1% to \$541 in last 12 months to 30 June 2022.

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<sup>1</sup> Dwelling sales prices data was sourced from Ministry of Housing and Urban Development (MHUD). 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.



# Dwelling Typology

## Tauranga City

- The proportion of standalone dwellings increased from 60% in 2020/21 to 65% in 2021/22. The combined proportion of duplexes, apartments and attached dwellings declined from 36% in 2020/21 to 27% in 2021/22.
- More than 70% of the dwellings consented were single level dwellings, 23% had 2 storeys and 6% had 3 to 4 storeys.
- 75% of the dwellings consented had 2 and 3 bedrooms, with the remaining 25% having 1 (3%), 4 (20%), and 5+ (2%) bedrooms.
- The 1 and 2-bedroom dwellings had increased from 17% in 2017/18 to 32% in 2021/22. The combined proportion of 3 and 4-bedroom dwellings have declined from 81% in 2017/18 to 67% in 2021/22.
- Dwelling size of 101m<sup>2</sup> to 150m<sup>2</sup> were the most prevalent at 37% in 2021/22.
- Average floor size per residential building increased by 9m<sup>2</sup> compared to the previous year.

## Western Bay of Plenty District

- In 2021/2022 most of the dwellings consented in WBOPD were standalone dwellings (78%), followed by terrace dwellings (8%) and 7% minor dwellings with 80% of the dwellings being single storey dwellings (refer to table 17 & 19).
- 41% of 2-storey dwellings were built in **Ōmokoroa** (out of 500 total dwellings), followed by **Waihi** Beach-Bowentown with 26% (21 dwellings).
- 45% of dwellings consented in WBOPD were 3-bedrooms followed by 4- bedrooms (25%). In **Ōmokoroa** 52% of the dwellings consented were 3-bedroom dwellings.
- In Katikati and Te Puke the highest percentage of dwellings built has a floor area between 126-150m<sup>2</sup> (40% and 42% respectively), followed by a floor area in **Ōmokoroa** between 151-175m<sup>2</sup> (table 23).
- Standalone, duplex, terrace/multiunit and minor dwellings were the only typologies consented. 77% of total dwellings consented were standalone, whereas compared to the last period 91.7% of total dwellings consented were standalone.

# Business Land and Activity

## Sub-region

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

## Tauranga City

- **Tauranga City had a total of 45 industrial and commercial buildings consented in 2021/22, 13 less new industrial and 9 more commercial buildings consented compared to the previous year.**

## Western Bay of Plenty District

- There were no industrial building consents issued for the 2021/2022 period, however there were three commercial building consents issued.

# 1 Introduction

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

This year marks the twenty first year that Tauranga City Council and Western Bay of Plenty District Council jointly monitor and report development trends in the sub-region. From 2007, the annual Development Trends Report incorporated development measures that relate to the Bay of Plenty Regional Policy Statement (RPS) and SmartGrowth<sup>2</sup> Strategy requirements.

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

The National Policy Statement on Urban Development Capacity (NPS-UDC), came into effect on 1 December 2016. It classified Tauranga Urban Area (which relates to both Tauranga City and Western Bay of Plenty District<sup>3</sup>) as a high growth urban area. The National Policy Statement on Urban Development (NPS-UD) superseded NPS-UDC effective 20 August 2020 and classified the Tauranga urban area as tier 1 urban environment.

The NPS-UD **requires under Section 3.9 “Monitoring Requirements”** that every tier 1, 2, and 3 local authority must monitor, quarterly, the following<sup>4</sup>:

- 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 four 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.

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<sup>2</sup> SmartGrowth is a partnership that provides a unified vision, direction and voice for the future of the Western Bay of Plenty to make the sub-region a great place to live, learn, work and play. The Strategy identifies opportunities for building the community taking into account a range of environmental, social, economic and cultural matters. 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.**

<sup>3</sup> Western Bay of Plenty District (WBOPD) indicators are displayed for total WBOPD (urban and rural) or only the urban growth areas which include Waihi Beach, Katikati, Omokoroa and Te Puke.

<sup>4</sup> Tauranga City and Western BOP District are Tier 1 local authorities under the NPS-UD

The NPS-UD also requires Tier 1 and Tier 2 local authorities to prepare a Housing and Business Development Capacity Assessment (HBA) every 3 years. In 2018, SmartGrowth completed the first HBA<sup>5</sup> that includes information about the range of business uses and dwelling types, and provides evidence-based estimates of demand and feasible capacity. As required under the NPS-UD, an updated Housing Development Capacity Assessment was completed in July 2021 and sets out the housing component required for the Tauranga Tier 1 urban environment covering the urban areas of Tauranga City and the Western Bay of Plenty District. The preparation of a full Housing and Business Development Capacity Assessment is underway and will be completed in early 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 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)<sup>6</sup>. 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<sup>7</sup>. SmartGrowth has recently commenced work on the preparation of an FDS 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 (MHUD) provided guides<sup>8</sup> 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. The majority of indicators have a residential focus due to the availability of residential data through the HUD dashboard, and Council records.

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<sup>5</sup> SmartGrowth Housing and Business Development Capacity Assessment for Tauranga City and WBOPD-Urban areas

<sup>6</sup> 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'

<sup>7</sup> A full HBA (both Housing and Business assessment) and FDS are required to be completed in time to inform 2024-2034 Long Term Plans.

<sup>8</sup> 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.

Table 3 NPS-UD Indicators Monitored

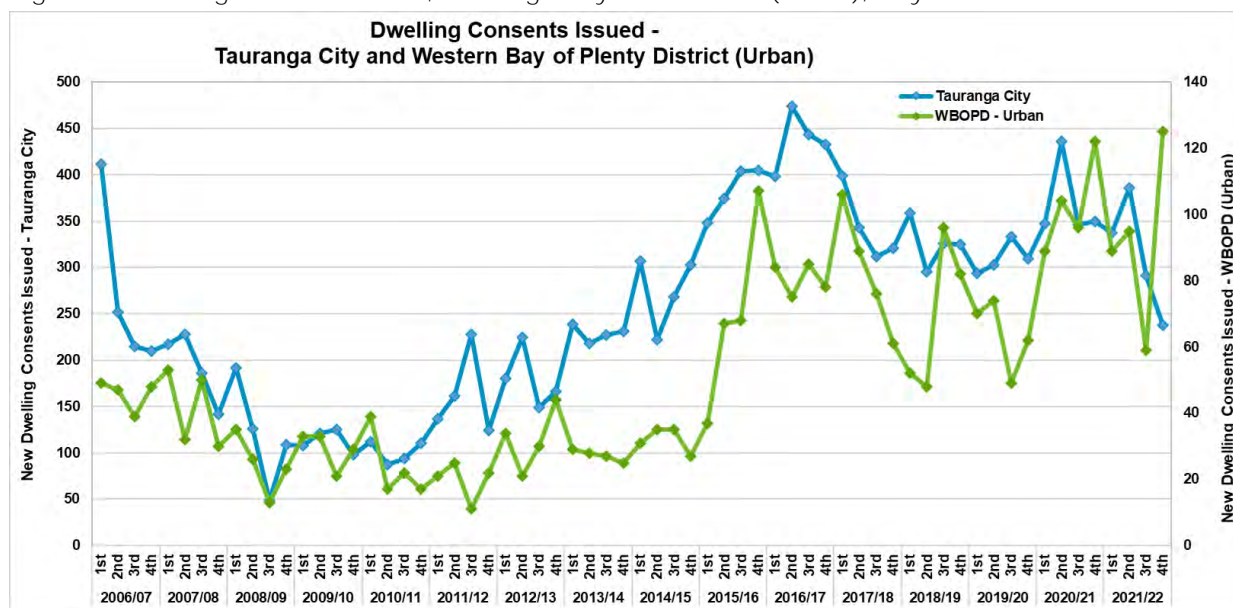
NPS-UD category	Type	Topic	Indicator	Ref
a) Prices of, and rents for, dwellings	Residential	Prices	Dwelling Sales Price (Tauranga City and WBOPD's Urban Areas)	p.18
		Prices	Dwellings Sold (Tauranga City and WBOPD's Urban Areas)	p.21
		Rents	Nominal Rents Dwelling (Tauranga City and WBOPD's Urban Areas)	p.20
		Prices/ Rents	Ratio of Dwelling Sales Prices to Rent (Tauranga City and WBOPD's Urban Areas)	p.22
		Floor size	Average Floor Size per Residential Building (Tauranga City and total WBOPD)	p.38
		Prices	Average Value per Residential Dwelling Consent (Tauranga City and total WBOPD)	p.41
		Type	Building Consents by Type (Tauranga City and total WBOPD)	p.43
		Rents	Detailed Geographic Data on Dwelling Rents (Tauranga City and total WBOPD)	p.20
	Prices	Detailed Geographic Data on Dwelling Sale Prices (Tauranga City and total WBOPD)	p.19	
	Business	Type	Building Consents by Type – Non-Residential (Tauranga City and total WBOPD)	p.53
b) Supply of dwellings	Residential	New Lots	New Lots Created (Tauranga City and WBOPD's Urban Areas)	p.11
		Dwelling Consents	New Dwelling Consents Issued (Tauranga City and WBOPD's Urban Areas)	p.8
		Dwelling Consents	New Dwelling Consents Compared to Dwelling Projections (Tauranga City and WBOPD's Urban Areas)	p.13
c) Housing affordability	Residential	Prices	Housing Affordability - Ratio of house value to income (Tauranga City and total WBOPD)	p.22
		Rents	Housing Affordability – Proportion of average rent to household income (Tauranga City and total WBOPD)	p.23

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

## 2 Supply and Demand

### New Dwelling Consents Issued

Figure 2 Dwelling consents issued, Tauranga City and WBOPD (urban), July 2006 to June 2022

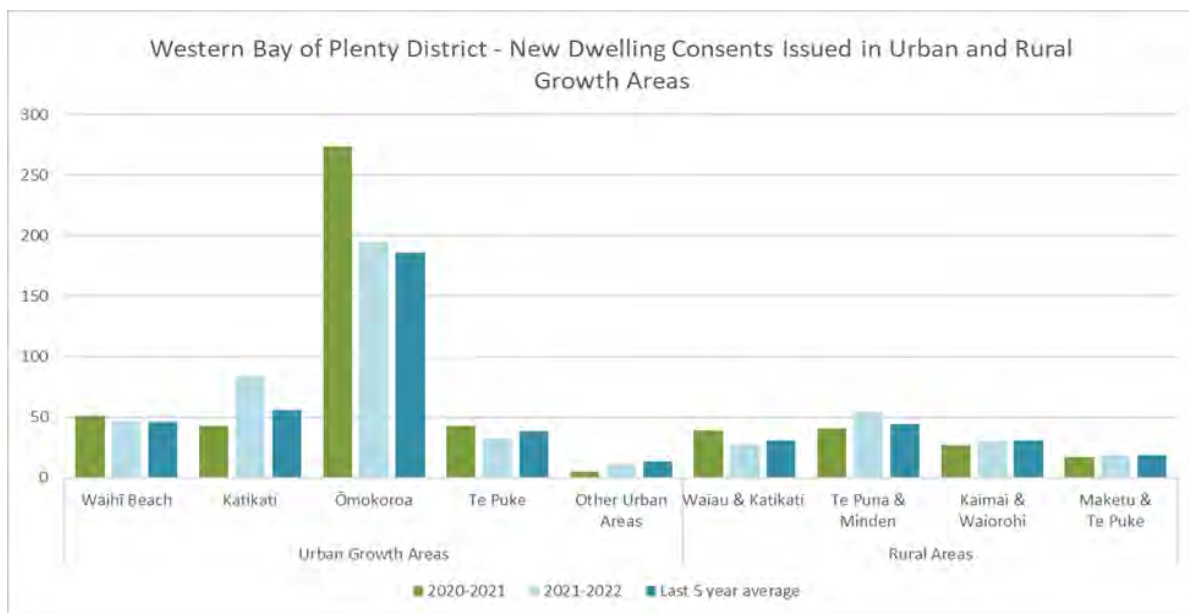


Residential building activities in the sub-region had decreased by 13% in 2021/2022 compared to the previous year. For both local authorities, dwelling consents issued declined by a respective 7.4% (40 dwellings) and 15.3% (227 dwellings), for total WBOPD and Tauranga City, respectively. In the urban areas of WBOPD, more than half (53%) of the dwellings were consented in Ōmōkoroa with 195 dwellings. In Tauranga City, dwellings consented in 2021/2022 were also lower compared to the last 5 years and last 10 years' level.

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

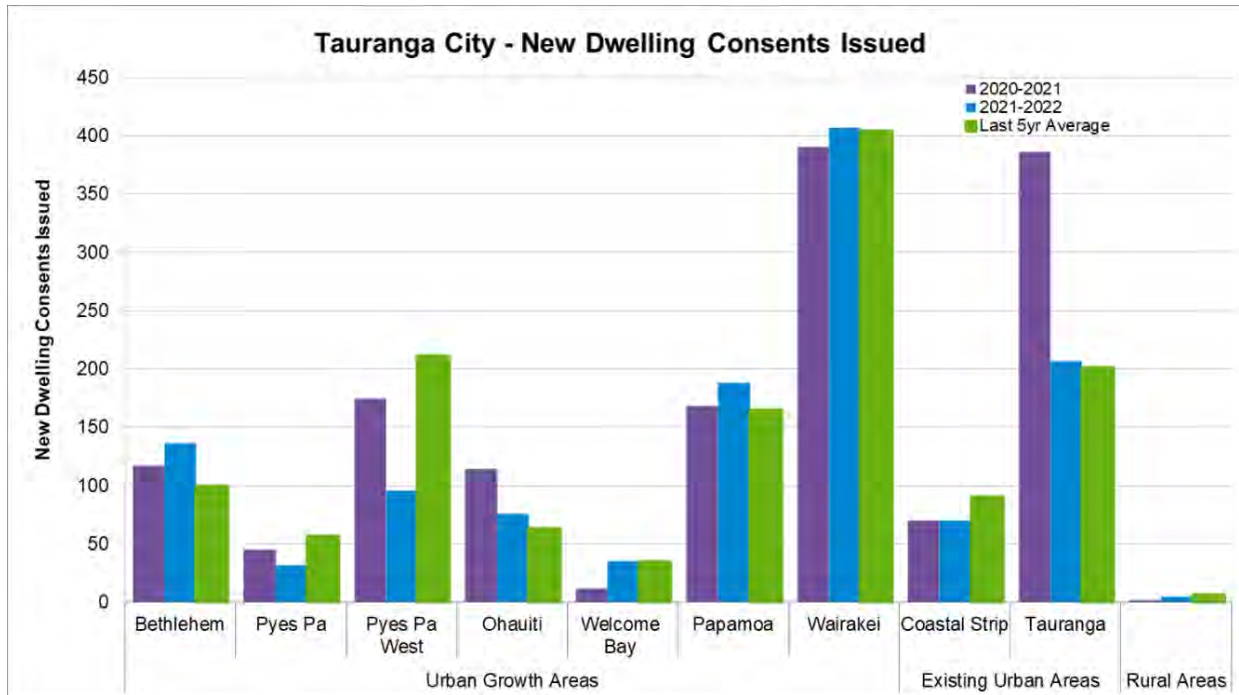
Dwelling consents		Trend	Change	% Change
<i>Tauranga City</i>				
This year	1,252			
Last year	1,479	↓	-227	-15.3%
Last 5 years (average)	1,330	↓	-78	-5.9%
Last 10 years (average)	1,266	↓	-14	-1.1%
<i>Western BOPD – total</i>				
This year	500			
Last year	540	↓	-40	-7.4%
Last 5 years (average)	465	↑	35	7.5%
Last 10 years (average)	406	↑	94	23.2%
<i>Western BOPD – urban</i>				
This year	368			
Last year	411	↓	-43	-10.5%
Last 5 years (average)	329	↑	39	11.9%
Last 10 years (average)	261	↑	107	41.0%

Figure 3 Dwelling consents issued by growth area, WBOPD, 2020 to 2022



Dwelling consents issued in 2021/2022 decreased by 12.9% in the Greenfield UGA's and 19% in the rural areas, compared to 2020/2021. The UGA's still have the highest number of dwelling consents issued, with Ōmokoroa increasing by 195 consents and Katikati with 47 consents issued. Dwelling consents issued in the rural areas increased by 7 consents overall.

Figure 4 New dwelling consents issued by growth area, Tauranga City, 2020 to 2022

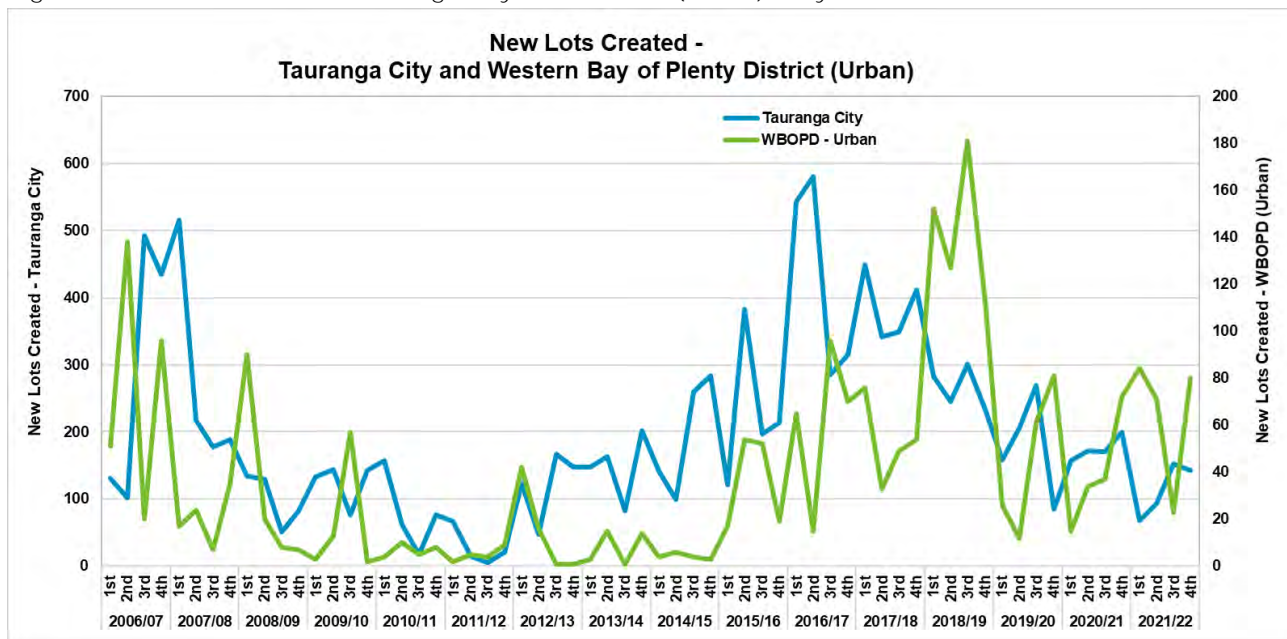


Tauranga City had a total of 1,252 new dwellings consented in 2021/2022. More than three quarters (77.5%) of these dwellings were located in the Greenfield UGAs, 22% in the existing urban areas and less than 1% (5 dwellings) in the rural areas. Both the urban and existing growth areas recorded declines of 5% (51 dwellings) and 39% (179 dwellings) from the previous year.

Among the urban growth areas, Bethlehem, Welcome Bay, Papamoa and Wairakei had increases of 17 to 23 dwellings consented from 2020/21 to 2021/22, with Welcome Bay recording the highest increase. Conversely, Pyes Pa, Pyes Pa West (The Lakes) and Ohaiti had declines of 13 to 79 dwellings, with Pyes Pa West recording the biggest decline as the area is nearing capacity.

# New Lots Created

Figure 5. New lots created, Tauranga City and WBOPD (urban), July 2006 to June 2022



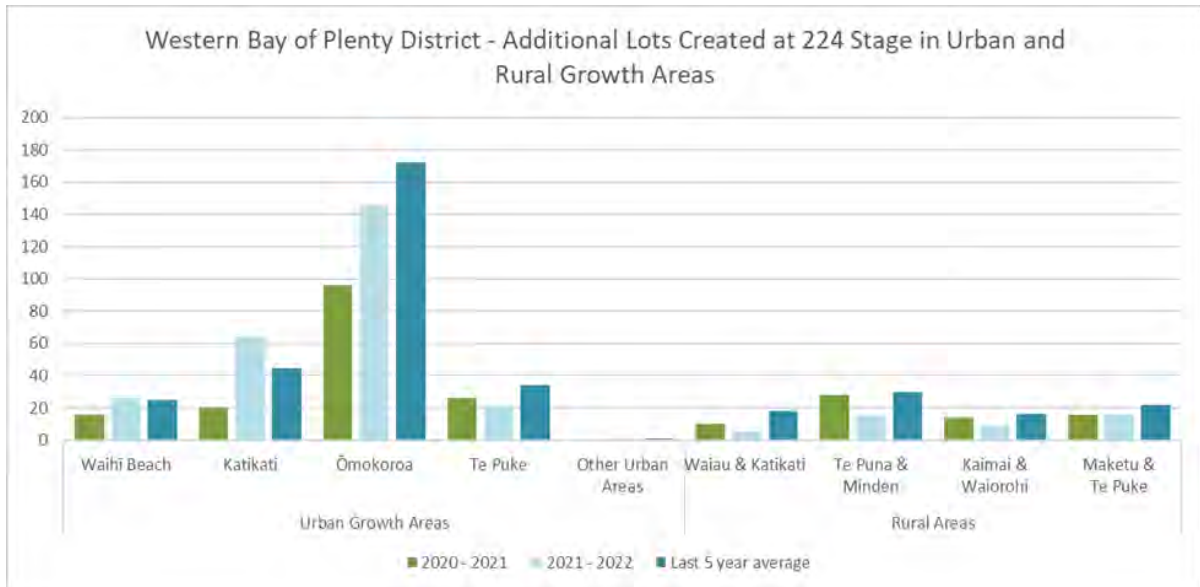
Subdivision activity in WBOPD-urban areas had a significant decline from 2018/2019 with 72% or 414 less lots created in UGAs compared to 2020/2021. New lots created in the UGA's were the lowest in 2014/2015 with an average of 4 new lots created per quarter, compared to the average of 40 new lots created in 2019/2020. In 2021/2022 new lots increased by 33% compared to the 2020/2021 period, with an average of 13 lots each month.

Tauranga City has a continuous shortage in the supply of zoned land for subdivision. Subdivision activity was at its lowest level in 2021/2022 with 457 new lots created, 73% lower than the highest level in 2016/2017 at 1,723 new lots. Furthermore, no subdivision activity was recorded for three consecutive months, from November 2021 to January 2022. On a monthly basis, new lots created declined from an average of 144 in 2016/17 to 51 in 2021/2022.

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

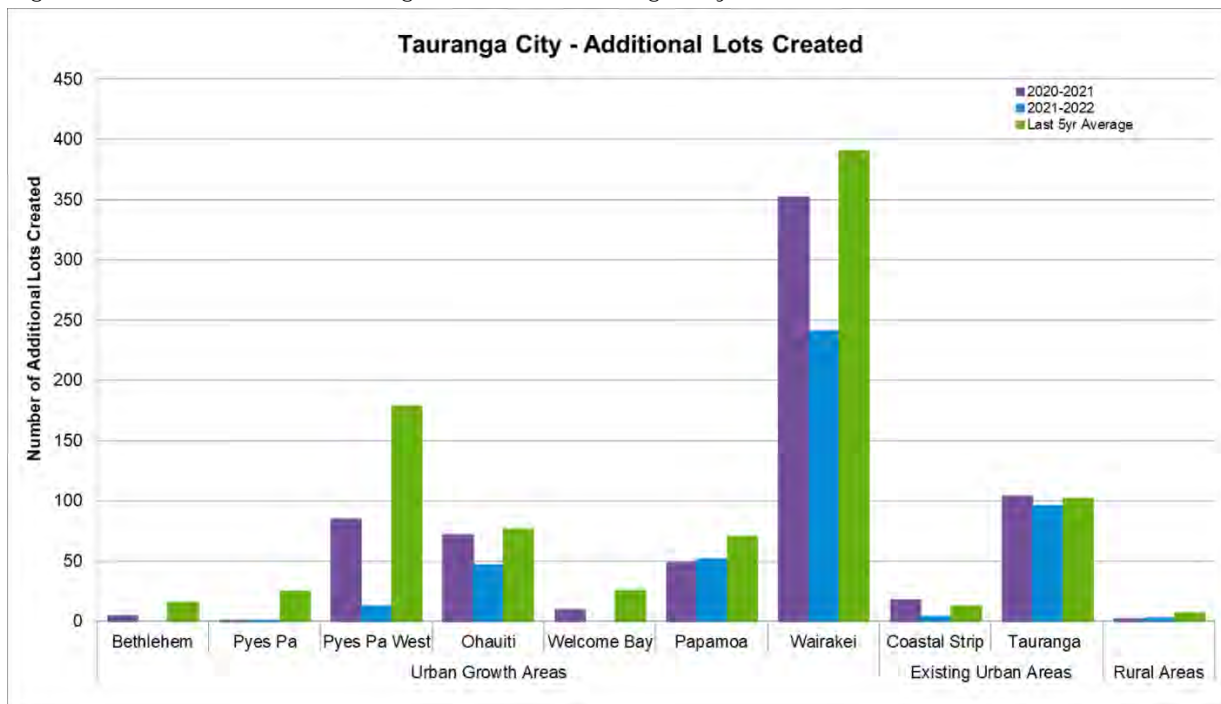
New lots		Trend	Change	% Change
<i>Tauranga City</i>				
This year	457			
Last year	698	↓	-241	-34.5
Last 5 years (average)	897	↓	-440	-49.1
Last 10 years (average)	899	↓	-442	-49.2
<i>Western BOPD – Urban</i>				
This year	258			
Last year	158	↑	100	63.3
Last 5 years (average)	276	↓	-18	-6.5
Last 10 years (average)	188	↑	70	37.2

Figure 6 Additional lots created by growth area, WBOPD, 2020 to 2022



New lots created increased in all the urban growth areas in 2021/2022, except in Te Puke with 5 less new lots created, whereas no new lots were created in the rural areas. New lots created in Ōmokoroa increased with 146 additional lots at 224 stage, while the rural areas with the highest new lots created was Maketu and Te Puke (Otago, Rangiora and Pongakawa) with 16 new lots (same as the previous period). Ōmokoroa and Te Puke will fluctuate with new lots created due to the timing of the stages by developers.

Figure 7 Additional lots created growth area, Tauranga City, 2020 to 2022



In 2021/22, of the 457 new lots created in Tauranga City more than three quarters (77.5%) were located in the Greenfield UGAs and 22% in existing urban areas. There were no new lots created in Bethlehem and Welcome Bay during the year. Subdivision development also declined in the other Greenfield UGAs, with the exception of Papamoa where there was a small increase of 3 lots or 6%.

In the last five years, subdivision activity was highest at Wairakei among the Greenfield UGAs, with 44% of the total new lots created in the whole city. The existing urban areas had 13% of the new lots created in the same period, with the majority of the lots located in the Tauranga urban area.

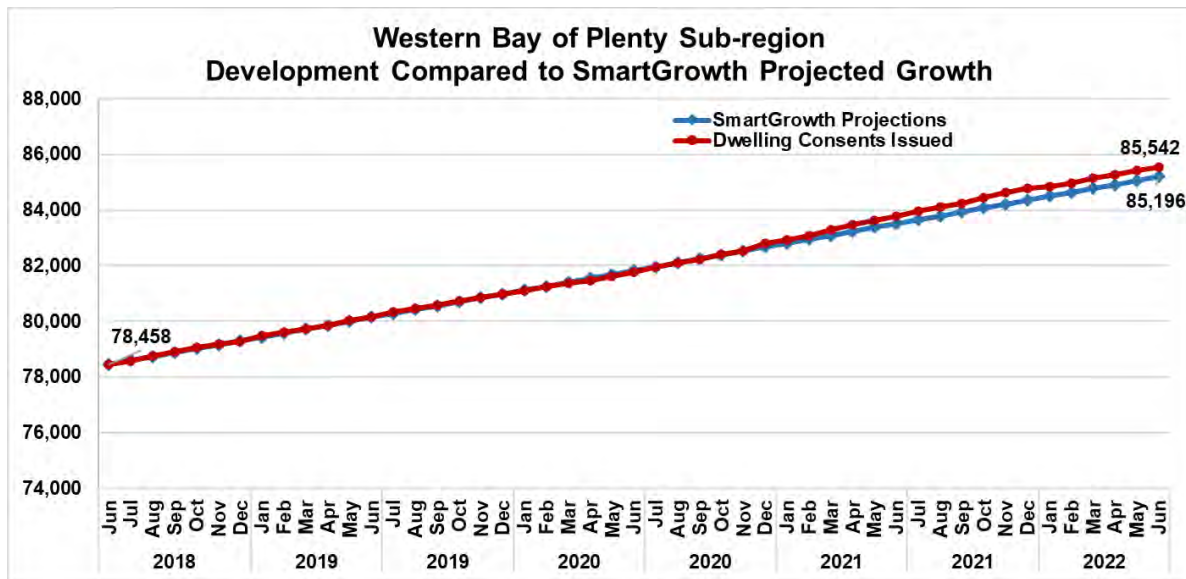


## Comparison with SmartGrowth Projections

Detailed population and household projections have been produced for the SmartGrowth region by the National Institute of Demographic and Economic Analysis (NIDEA), University of Waikato<sup>9</sup> in 2014. Since the release of the 2018 Census results, the NIDEA projections were re-aligned to accommodate the higher population increase as per Census and the population estimates that Statistics New Zealand releases annually.

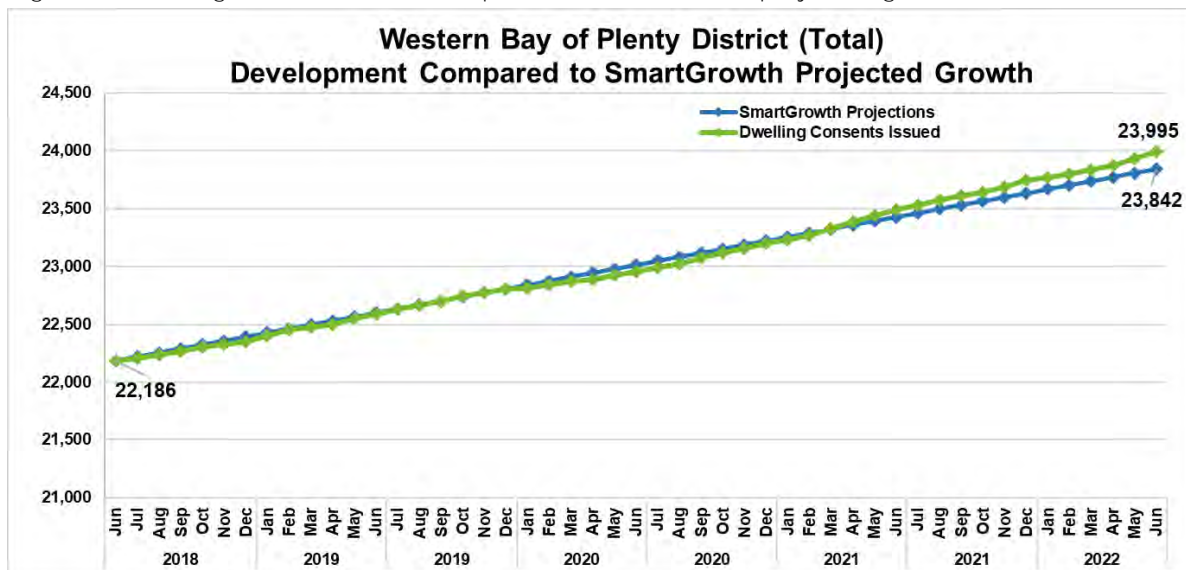
At June 2018, the population for the Western Bay of Plenty sub-region was 195,500<sup>10</sup>. The population of the sub-region is projected to increase to 281,689 people (+86,189 people) by 2050, while the number of dwellings is projected to increase from 78,458 to 118,370 over that period.

Figure 8 Dwelling consents issued compared to SmartGrowth projected growth, WBOP sub-region, 2018 to 2022



Between 1 July 2018 and June 2022, 346 more dwellings (5.1%) were consented compared to the SmartGrowth dwelling projections in the same period.

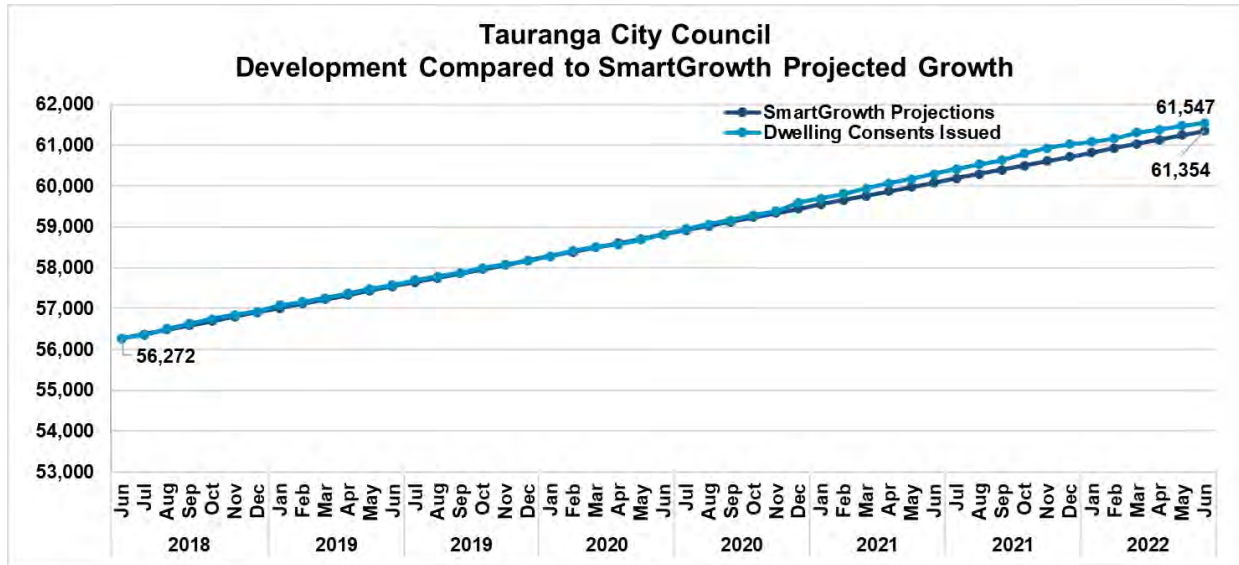
Figure 9 Dwelling consents issued compared to SmartGrowth projected growth, WBOPD, 2018 to 2022



In WBOPD, 153 more dwellings were consented compared to SmartGrowth dwelling projections from 1 July 2018 to June 2022.

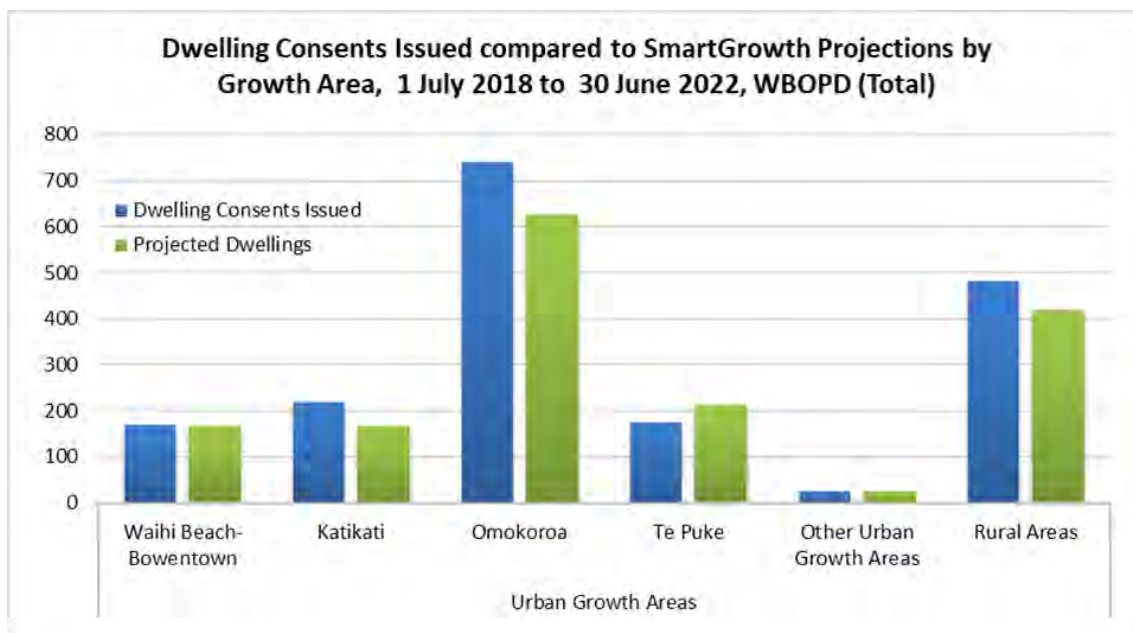
<sup>10</sup> SmartGrowth population projections released October 2022 have been rebased to Statistics New Zealand Estimated Resident Population (ERPs) released 22 October 2020

Figure 10 Dwelling consents issued compared to SmartGrowth projected growth, Tauranga City, 2018-2022



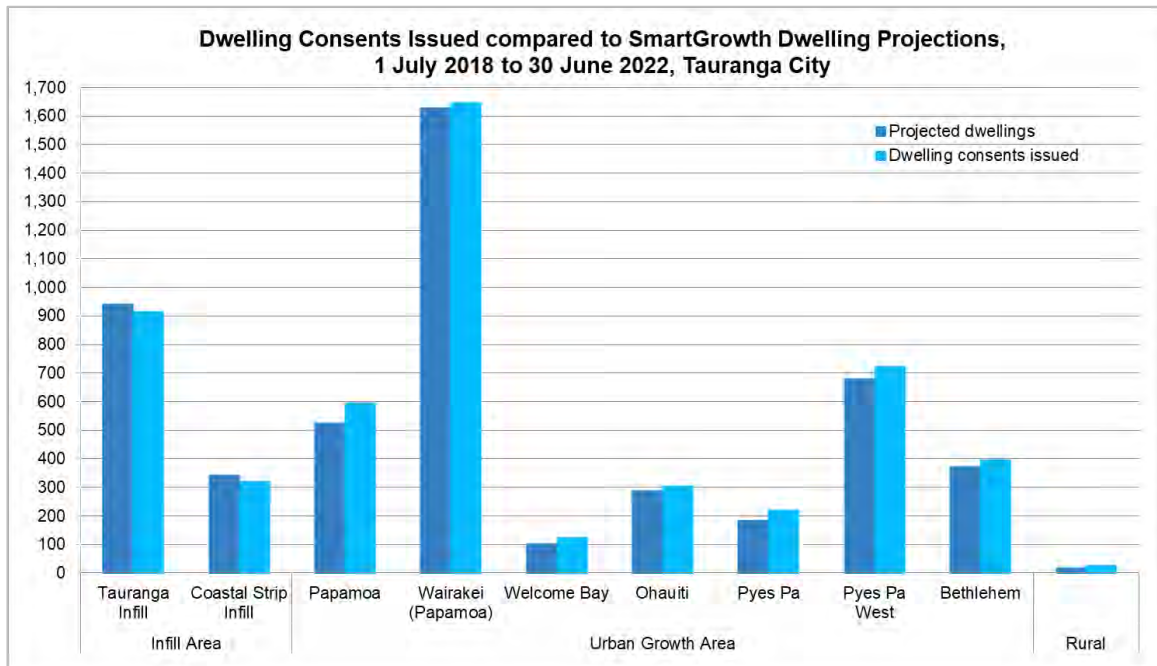
In Tauranga City, 193 (3.8%) more dwellings were consented compared to the SmartGrowth projections between 1 July 2018 and 30 June 2022.

Figure 11 Dwelling consents issued compared to SmartGrowth projections by growth area, WBOPD, 1 July 2018 to 30 June 2022



From July 2018 to June 2022, the actual dwelling consents issued are close to the dwelling projections, except for Ōmokoroa with 113 more dwellings than projected. In the rural areas, 63 additional dwellings were consented (482 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 2022



From July 2018 to June 2022, Tauranga City had 193 (4%) more dwellings consented than the SmartGrowth projected allocation, with more than three fourths of this increment located in the Greenfield UGAs. Among the UGAs, Papamoa had the highest increment of 31% (73 dwellings) compared to projected dwellings. The rest of the UGAs had 17 to 42 more dwellings than projected in the same period.

Conversely, the infill areas (Tauranga and Coastal Strip) had 48 less dwellings than projected in the last four years. The actual number of dwellings consented in Tauranga infill area included the multi-unit/high density development/redevelopment, including Elizabeth Towers (Farmers' townhouses and apartments), apartments/attached dwellings at 4<sup>th</sup> Avenue, Judea (Montgomery Road, Blenheim Place), Cameron Road, Eleventh Avenue, Devonport Road, and Cheese Factory 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 UGA's, Pyes Pa UGA has the lowest** proportion of remaining dwelling capacity (10%), and the lowest remaining dwelling capacity (298 dwellings), refer to Table 6<sup>11</sup>.

Papamoa UGA which has the largest expected yield, has estimated potential for a further 1,219 dwellings. The high number of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block.

Wairakei UGA in Papamoa East was made operative in May 2011, providing further capacity for an estimated 5,700 dwellings. At 30 June 2022 it had the largest remaining dwelling capacity (2,825 dwellings) and highest percentage of capacity remaining (50%).

Other Greenfield areas have been identified for future urban development and their suitability is currently being considered. Tauriko West and Te Tumu in Papamoa East future Greenfield UGA areas are currently being progressed through structure planning with release for development anticipated from 2025 and

<sup>11</sup> Estimated Yields have been reviewed in response to Proposed Plan Change 33 Enabling Housing Supply.

2030 respectively. Keenan Road and Ohauti South future Greenfield UGA areas are expected to be the next areas to be structure planned for release post 2030.

By June 2025 it is estimated that capacity for a further 5,107 dwellings will remain in the current operative **Greenfield UGA's, which is 18% of the total estimated yield of these UGA's, falling to 1,528 dwellings (or 5% of total yield) by 2032. For the future Greenfield UGA's it is anticipated that a further 12,700 dwellings will be added to the yield by 2032, with capacity for a further 11,200 dwellings (or 88%) of this additional yield estimated to remain at June 2032<sup>12</sup>.**

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 2022 total dwellings (existing and consented)	Remaining capacity as at June 2022	Short term (3 years)		Medium Term (10 years)	
				Estimated uptake June 2022 – June 2025	Estimated remaining capacity at June 2025	Estimated uptake June 2025-June 2032	Estimated remaining capacity at June 2032
Bethlehem	5,280	3,826	1,454	272	1,182	787	395
Pyes Pa	2,960	2,662	298	57	241	133	108
Pyes Pa West	2,610	2,045	565	221	344	232	112
Ohauti	2,120	1,568	552	133	419	235	184
Welcome Bay	2,160	1,932	228	43	185	125	60
Papamoa	8,170	6,951	1,219	384	835	598	237
Wairakei <sup>1</sup>	5,700	2,875	2,825	924	1,901	1,469	432
UGA (current) Sub-Total	29,000	21,859	7,141	2,034	5,107	3,579	1,528
Te Tumu <sup>2</sup>	6,500					350	6,150
Tauriko West <sup>2</sup>	3,500					965	2,535
Ohauti South <sup>3</sup>	700					77	623
Keenan Road <sup>3</sup>	2,000					100	1,900
UGA (future) Sub-Total	12,700					1,492	11,208
Greenfields Total	41,700	21,859	7141	2,034	5,107	5,071	12,736

<sup>1</sup> 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.

<sup>2</sup> Structure planning has commenced. Tauriko West is currently expected to be released from 2025/26, Te Tumu from 2030/31.

<sup>3</sup> Currently anticipated to be released post 2030.

## Western Bay of Plenty District

**In WBOPD both Ōmokoroa and Te Puke UGA's have** the largest design capacity in the District consisting of over 4,300 dwellings. Waihi Beach has a large design capacity, but it has the lowest remaining capacity available due to coastal inundation areas.

**Ōmokoroa UGA has the largest dwelling capacity remaining in the District with 2,565 dwellings with Stage 3 Structure Plan becoming operative at end of 2021. Both Katikati and Te Puke (Structure Plan 3) UGA's have large dwelling capacity remaining of 1,560 (Katikati) and 1,580 (Te Puke) dwellings.**

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

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

Urban Growth Area	Total Capacity (Dwellings)	June 2022 Total dwellings (existing and consented)	Remaining capacity at June 2022	Short Term - 3 years		Medium Term - 10 years	
				Protected uptake July 2022 – June 2025	Estimated remaining capacity at June 2025	Protected uptake July 2025 – June 2032	Estimated remaining capacity at June 2032
WB-Bowentown/Athenree	3,553	3,081	430	71	359	79	280
Katikati*	3,988	2,415	1,560	100	1,460	270	1,190
Ōmokoroa**	5,385	2,420	2,565	495	2,070	1,170	900
Te Puke	4,387	3,143	1,580	315	1,265	735	530
Greenfields (current) Sub-Total	17,313	11,059	6,135	981	5,154	2,254	2,900

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

\*\*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). A Housing Capacity Assessment (HA) was completed in July 2021 and an updated full HBA is currently being finalised by the SmartGrowth partnership.

Both the HA and draft HBA has identified a housing supply insufficiency for the Western Bay of Plenty sub-region<sup>13</sup>. In addition to this forward-looking assessment of the housing shortage, the New Zealand Institute of Economic Research (NZIER)<sup>14</sup> 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 BOP District to be 2,500 houses, as at 30 June 2022<sup>15</sup>.

Recognition and quantification of this existing housing supply shortage exacerbates the level of housing supply insufficiency in the Western BOP Sub-region. A Future Development Strategy (FDS) required under the NPS-UD is being prepared to address the identified housing supply insufficiency<sup>16</sup>.

## Occupied/Unoccupied Dwelling Ratio

**SmartGrowth requires that "permanent" vs. "holiday residences" be monitored. A comparison of Census night occupied dwelling with unoccupied dwelling counts provides one indication of this. A table outlining occupied and unoccupied dwelling ratios based on 2018 Census is provided in Appendix 4 and a Statistical Area 2 (SA2) map is provided in Appendix 5<sup>17</sup>.**

## Western Bay of Plenty District

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

<sup>13</sup> See Housing Development Capacity Assessment for Tauranga and the WBOP, July 2021, and full HBA once available (expected to be finalised by April 2023).

<sup>14</sup> NZIER - Impact of a housing shortage, an update of the effects on Tauranga City, August 2022

<sup>15</sup> 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.

<sup>16</sup> The FDS is programmed for completion in 2023 in time to inform the 2024-34 Long Term Plan and 30 Year Infrastructure Strategy.

<sup>17</sup> **Note: Statistics NZ replaced "Census Area Units" (CAU's) with "Statistical Area 2" (SA2's) at 2018 Census. Although the SA2s are generally the same as CAU's, the boundaries and names have changed to reflect changes in land use and population patterns**

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

### Tauranga City

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

## 3 Dwelling Sales Price and Rent Trends

### Dwelling Sales Price

A downturn in the sub-region's housing market was experienced in 2022 for median dwelling sales prices. From the highest level of \$1.035 million in March 2022, the actual median dwelling sales prices in Tauranga City declined to less than \$1 million (\$0.95 million) in June 2022. Although the 12-month rolling averages of the median sales prices was still increasing, the increase from March to June was below 1% (\$5,000). Similarly, WBOPD-urban areas recorded the highest actual median dwelling sales prices of nearly \$1.2 million in March 2022 that declined to \$1.1 million in June 2022.

Tauranga City's average dwelling sales prices (12-month rolling average) increased by 17.5% (\$146,000) from June 2021 to June 2022 while WBOPD had an increase of 33.6% (\$280,548). House prices increased exponentially in the last five and ten years in both local authorities.

Figure 13 Dwelling sales prices, Tauranga City and WBOPD, 2001/2022

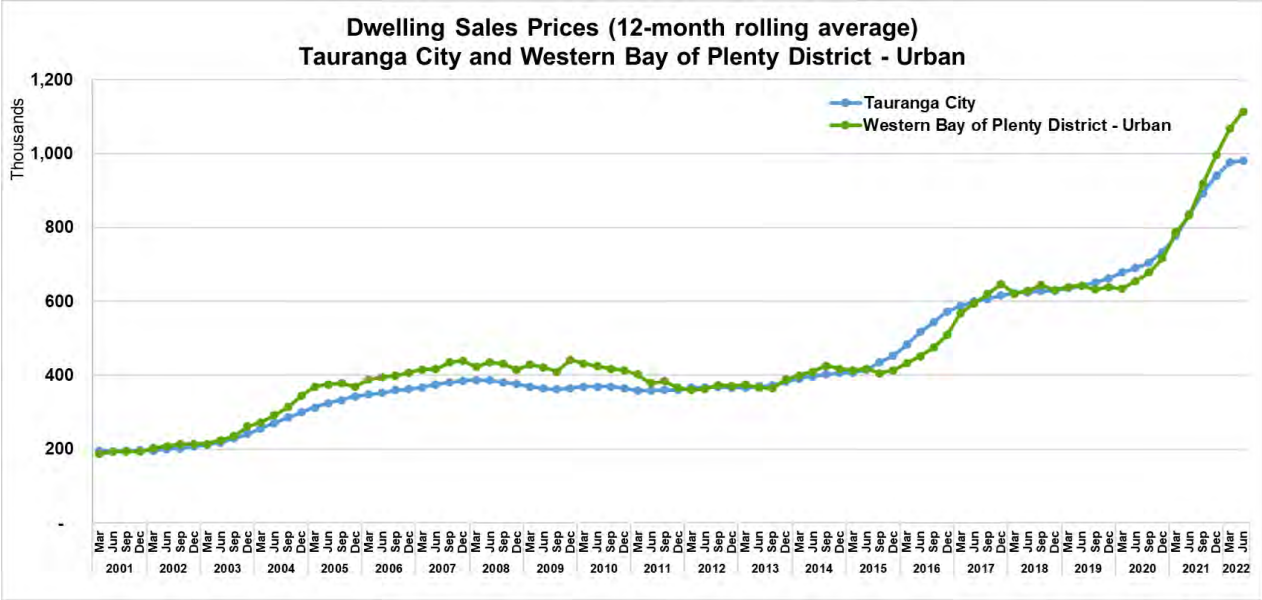


Table 8 Dwelling Sales Prices (12-month rolling average<sup>1</sup>)

Dwelling Sales Price		Trend	Change	% Change
<i>Tauranga City</i>				
June 2022	\$981,250			
March 2022	\$976,250	↑	\$5,000	0.5
June 2021	\$835,000	↑	\$146,000	17.5
June 2018	\$625,250	↑	\$356,000	56.9
June 2012	\$366,750	↑	\$614,750	167.6
<i>Western BOPD – Urban</i>				
June 2022	\$1,114,423			
March 2022	\$1,067,131	↑	\$47,292	4.1
June 2021	\$833,875	↑	\$280,548	33.6
June 2018	\$629,143	↑	\$485,280	77.1
June 2012	\$362,783	↑	\$751,640	207.2

<sup>1</sup> Dwelling sales prices data were sourced from MHUD. 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

Among the WBOPD area units, Athenree recorded the highest increase in median house price as at June 2022 compared to the same month in the previous year at 109%, followed by Maketu Community and Te Puke East at 50% and 47%, respectively.

A number of area units of Tauranga City recorded median house prices of more than \$1 million in June 2022, including Mt Maunganui North, Omanu, Arataki, Matua, Otumoetai South, Pyes Pa, Maungatapu and Tauranga Hospital. Although Bellevue had a median price lower than \$1 million (\$885,000) in June 2022, it recorded the highest increase of 84% compared to the June 2021 price levels among the Tauranga City area units.

Figure 14 Dwelling sales prices, June 2022

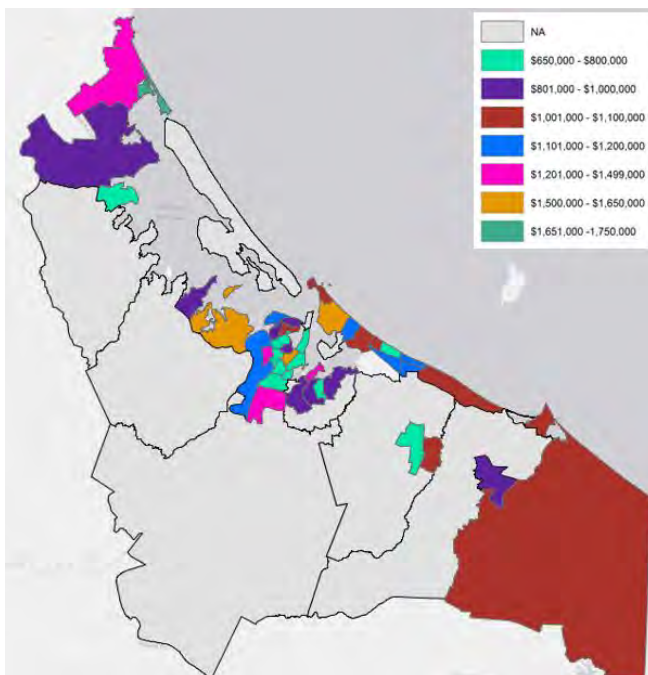
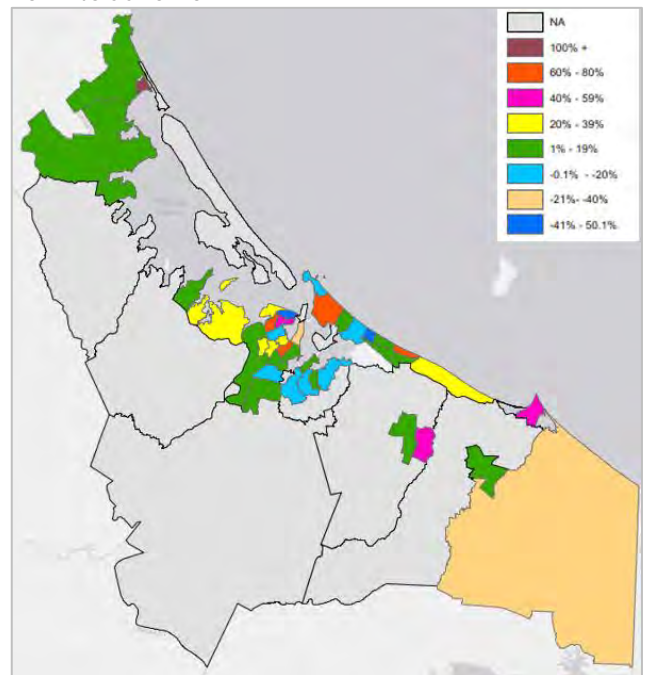


Figure 15 Change in dwelling sales prices, June 2021 to June 2022



Source of raw data: HUD NPS-UD

## Dwelling Rents

The figure below shows that while dwelling rents in WBOPD have been relatively lower than in Tauranga City, fluctuations were observed from 2018 to 2020 and increased to above \$500 from March 2022. However, these results must be used with caution as may not be a true indication of the current rental market<sup>18</sup> as they only reflect properties where bonds have been lodged in the previous 6 months of the reference quarter. Refer to Appendix 1 for an explanation of this indicator.

Figure 16 Dwelling rents, Tauranga City and WBOPD (urban), 2001/2022

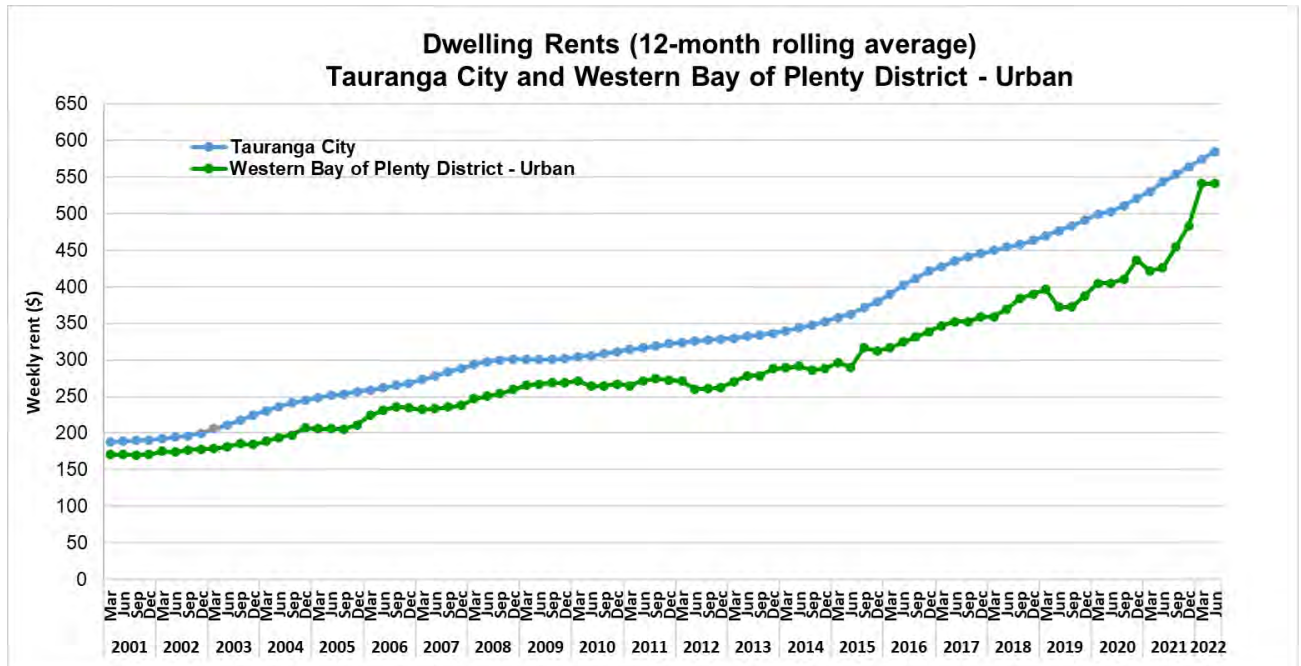
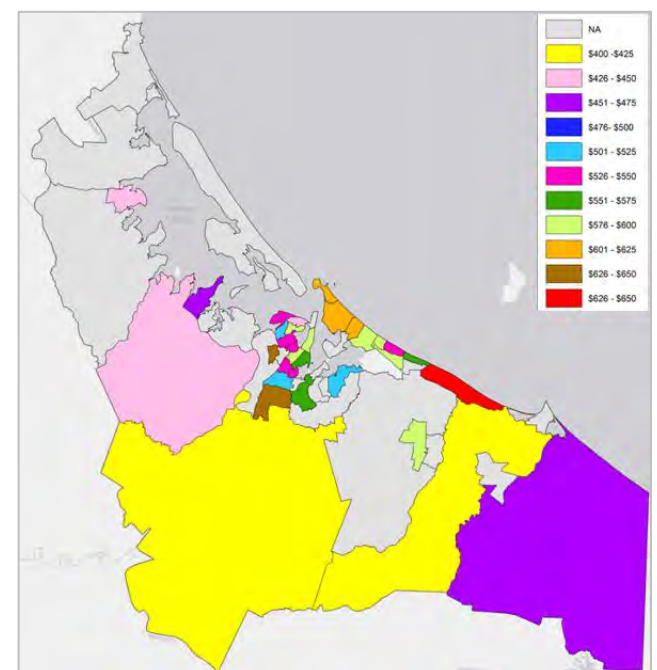


Table 9 Dwelling rents

Dwelling Rents	Trend	Change	% Change
<i>Tauranga City</i>			
June 2022	\$585		
March 2022	\$574	↑	\$11 1.9
June 2021	\$543	↑	\$42 7.7
June 2018	\$454	↑	\$131 28.9
June 2012	\$326	↑	\$259 79.4
<i>Western BOPD – Urban</i>			
June 2022	\$541		
March 2022	\$541	▬	- -
June 2021	\$426	↑	115 27.1
June 2018	\$369	↑	\$172 46.6
June 2012	\$260	↑	\$281 108.2

Source of raw data: HUD NPS-UD

Figure 17 Weekly dwellings rents by area unit, Tauranga and WBOPD, to June 2022



<sup>18</sup> The market rent information released by the Ministry of Housing and Urban Development comes from bond data lodged at Tenancy Services.



## Dwellings Sold

In the last twelve months, a downturn in the sub-region's housing market was experienced as shown in the figure below, with sales volume declining from June 2021. A number of factors including uncertainty in respect to inflation, mortgage rates, and credit conditions are expected to be influencing this trend.

Tauranga City had a significant decrease of 34% (equivalent to 1,118 dwellings) in the volume of sales from July 2021 to June 2022 compared to the previous year. Similarly, WBOPD had a 50% decrease (equivalent to 449 dwellings) in the number of dwellings sold in the same period. Refer Appendix 1 for an explanation of this indicator.

Figure 18 Dwellings sold, Tauranga City and WBOPD, 2001 to 2022

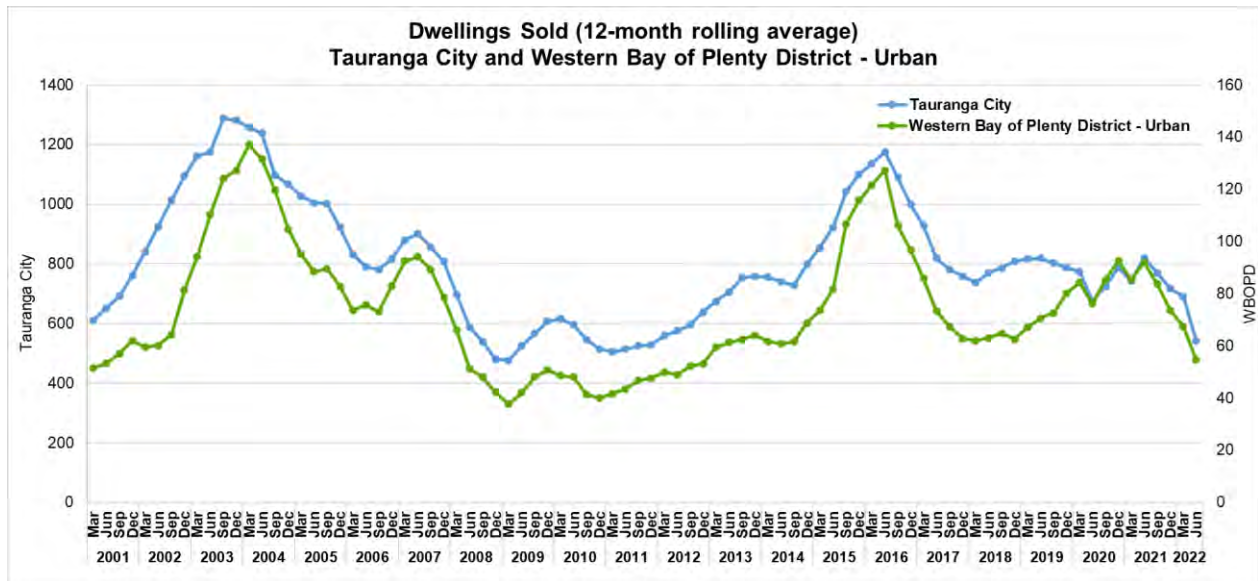


Figure 19 Dwellings sold, July 2021 to June 2022

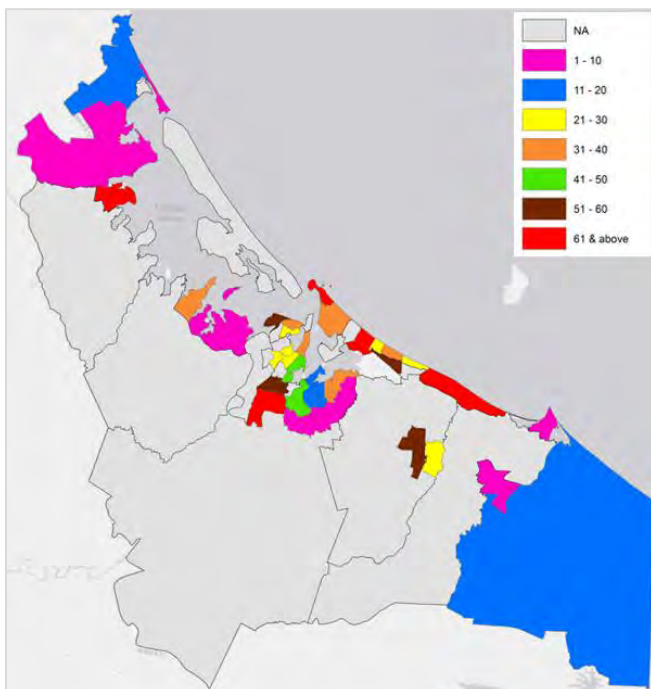
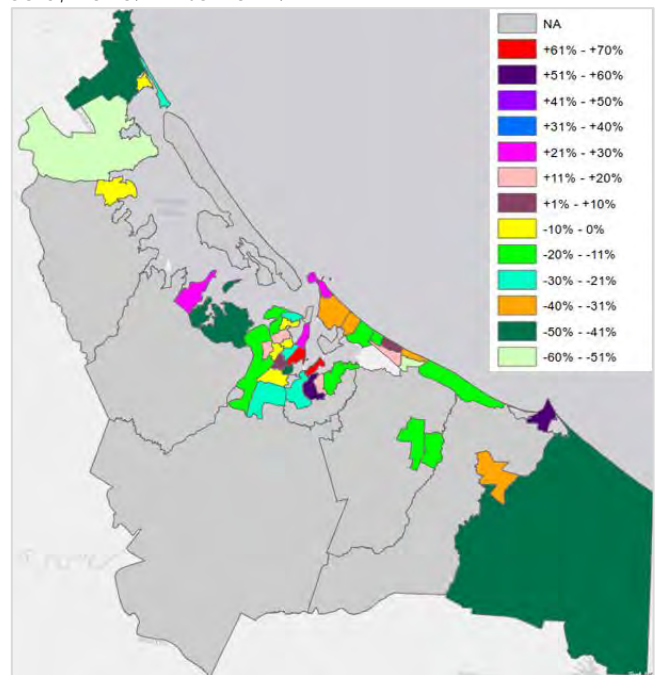


Figure 20 Percentage change in annual dwellings sold, 2020/21 to 2021/22

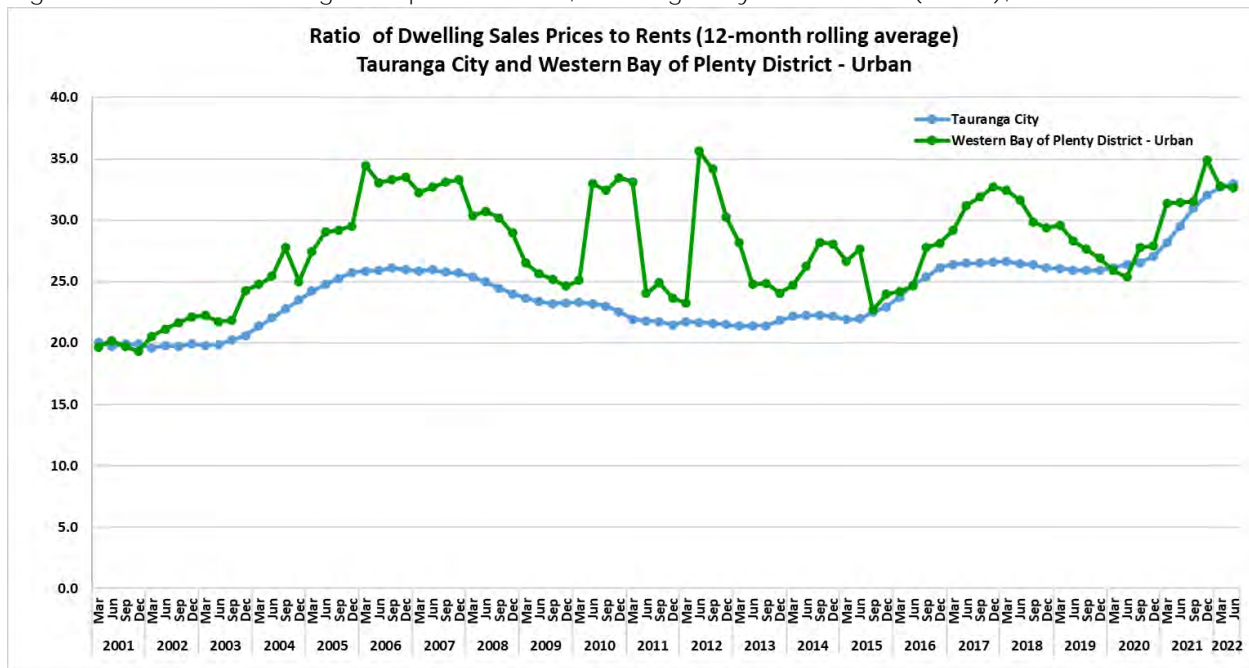


Source of raw data: HUD NPS-UD

## 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 as shown in the figure below. Both Tauranga City and WBOPD recorded an actual ratio of 33 in June 2022 which signals that it's becoming more affordable to rent than to purchase a house in the sub-region during these times. Refer to Appendix 1 for an explanation of this indicator.

Figure 21 Ratio of dwelling sales price to rents, Tauranga City and WBOPD (urban), 2001 to 2022



## Housing Affordability

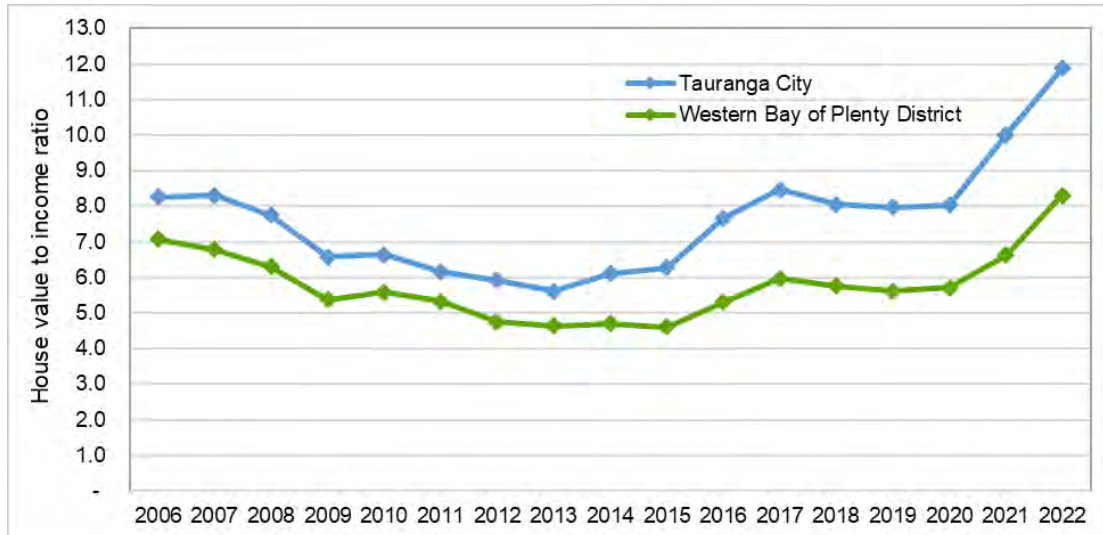
### Ratio of house value to income

This report uses the ratio of the average house value to average household income to indicate housing affordability. A higher ratio suggests that average houses cost a greater multiple of incomes, which indicates lower housing affordability.

With house prices increasing exponentially in the last few years it is becoming less affordable to buy a house as shown by increasing house value to income ratio (see Figure 22). In the year to March 2022, Tauranga City and WBOPD have respective ratios of 11.9 and 8.3, both are several points higher than 5.1 which is considered by Demographia<sup>19</sup> as a severely unaffordable level.

<sup>19</sup> Demographia conducts an annual International Housing Affordability survey and uses the "median multiple" to rate middle-income housing affordability. Median multiple is a price-to-income ratio, which is the median house price divided by the gross median household income (pre-tax)

Figure 22 Average house value to household income ratio, 2006 to 2022



Source of raw data: Infometrics

*Demographia Housing Affordability Rating*

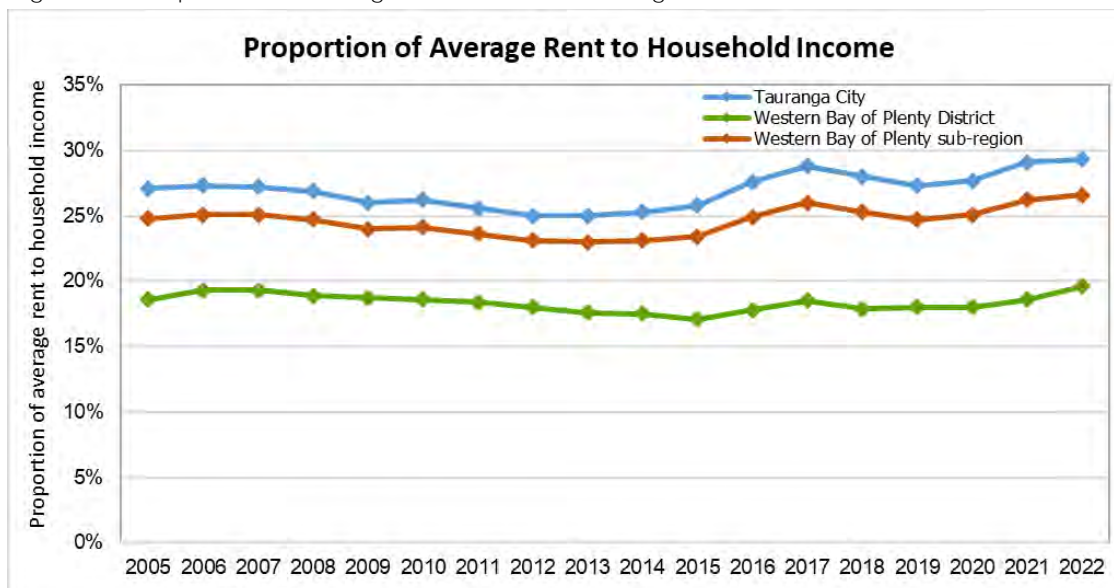
3.0 & below	Affordable
3.1 to 4.0	Moderately unaffordable
4.1 to 5.0	Seriously unaffordable
5.1 & above	Severely unaffordable

## Proportion of average rent to average 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%<sup>20</sup>. This, in addition to the ratio of house value to household income indicating severe unaffordability as discussed in the previous section, shows that it is still more affordable to rent than to buy a house in the sub-region.

Figure 23 Proportion of average annual rent to average household income, 2005 to 2022



Source of raw data: Infometrics

<sup>20</sup> 30% of income is the ideal limit that must be spent on rent

## 4 Residential section size

### Tauranga City

The table below shows the declining residential subdivision activity in Tauranga City. For new residential sections created, size also fell. The 176m<sup>2</sup> to 325m<sup>2</sup> lot size was the most prevalent at 48% of the total new lots created from July 2021 to June 2022, while the next larger lot size (326m<sup>2</sup> to 500m<sup>2</sup>) was the most prevalent in the previous 2 years to June 2021. The total number of lots smaller than 501m<sup>2</sup> comprised the majority (88%) of new lots created in 2021/22. The new lots bigger than 750m<sup>2</sup> particularly those in the suburban & Wairakei residential zones may further be subdivided in the future.

Table 10 Residential lot/section size for additional lots created in Tauranga City, July 2019 to June 2022

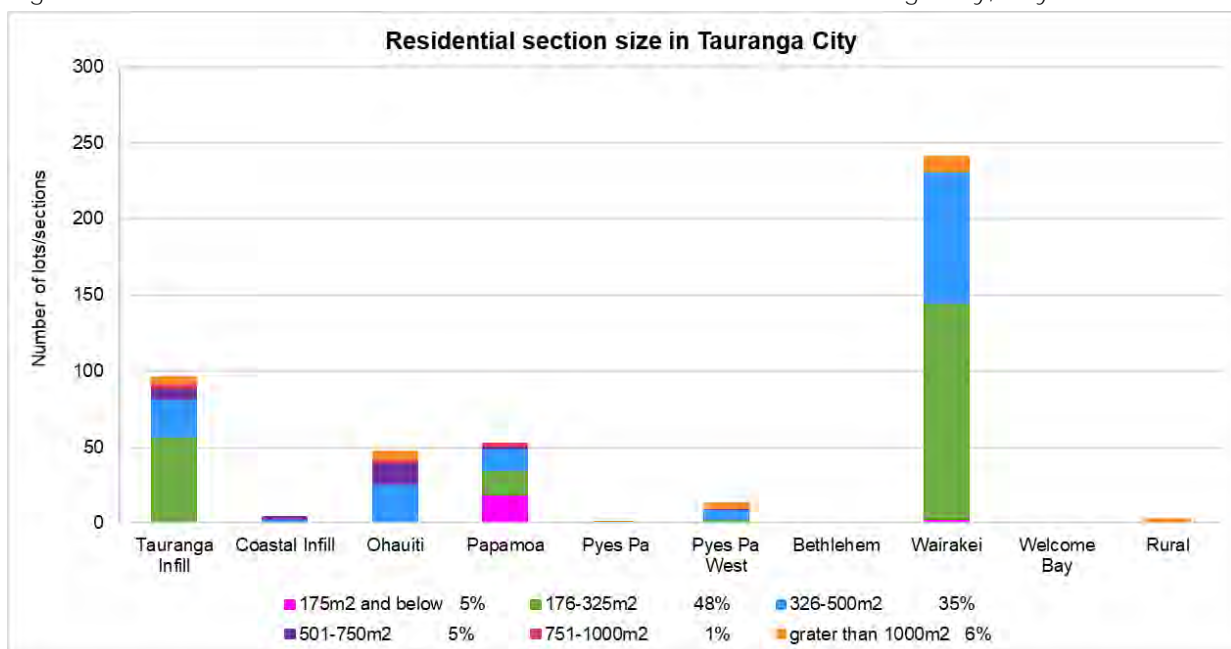
Residential lot/section size (m <sup>2</sup> )	Dwelling yield per ha	2019/20		2020/21		2021/22	
		Number of lots	Percent of total	Number of lots	Percent of total	Number of lots	Percent of total
175 and below	40 & above	10	2	35	5	22	5
176-325	21-39	232	32	217	31	218	48
326-500	14-21	331	46	223	32	160	35
501-750	9-14	94	13	177	25	25	5
751-1000	7-9	29	4	16	2	6	1
Above 1000	Below 7	22	3	30	4	26	6
Total		718	100	698	100	457	100

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

### Tauranga City urban growth area

More than three fourths (77.5%) of the new lots created from July 2021 to June 2022 were located in the Greenfield UGAs, with 83% of these lots measuring 176m<sup>2</sup> to 500m<sup>2</sup>. Among the Greenfield UGAs Wairakei had highest proportion of new lots created, where more than half (59%) measured 176m<sup>2</sup> to 325m<sup>2</sup> and more than one third (36%) were 326m<sup>2</sup> to 500 m<sup>2</sup> in size. Bethlehem and Welcome Bay had no additional lots created during the year, while Pyes Pa West had a low number of lots created (13) as the UGA is nearing capacity.

Figure 24 Residential lot/section size for additional lots created in Tauranga City, July 2020 to June 2022



## Historical residential lot/section size

Residential subdivision activity in Tauranga City was at its peak five years ago (in 2016/17) but has been declining due to reduced availability of zoned land, with the number of lots being at its lowest level of 457 lots in 2021/22.

Residential section size in Tauranga City is getting smaller. The proportion of new lots with area smaller than 325m<sup>2</sup> increased from 13% in 2016/17 to 53% in 2021/22, while that of new lots smaller than 500m<sup>2</sup> increased from 63% to 88% in the same period. Correspondingly, the proportion of new lots with area larger than 500m<sup>2</sup> declined from 37% in 2016/17 to 12% in 2021/22.

The 325m<sup>2</sup> to 500m<sup>2</sup> lot size was the most prevalent for a number of years since July 2014 to June 2021. With section size getting smaller, the 176m<sup>2</sup> to 325m<sup>2</sup> was the most prevalent at 48% in July 2021 to June 2022. It is expected that the proportion of smaller lots will continue to increase with the assessment of resource consents for residential subdivisions that are in the development pipeline indicating smaller section sizes.

Figure 25 Residential section size in Tauranga City, 2005/06 to 2021/22

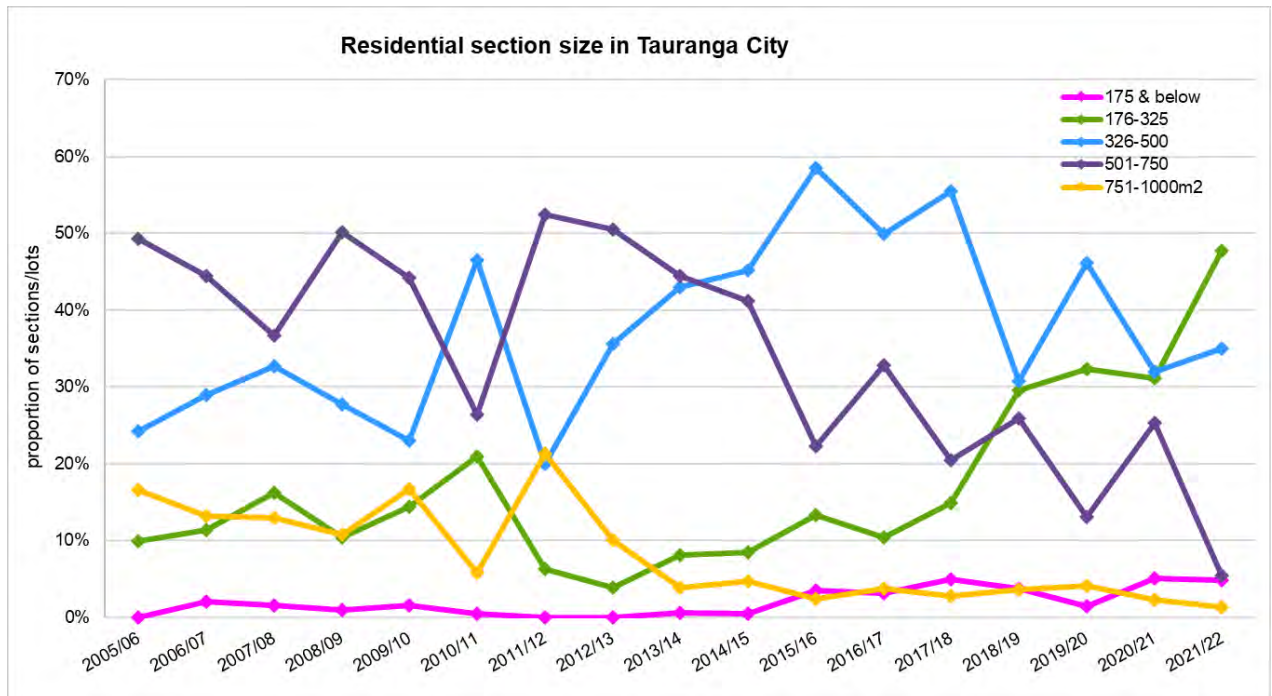


Figure 26 Residential section size in Tauranga City, 2005/06 to 2021/22

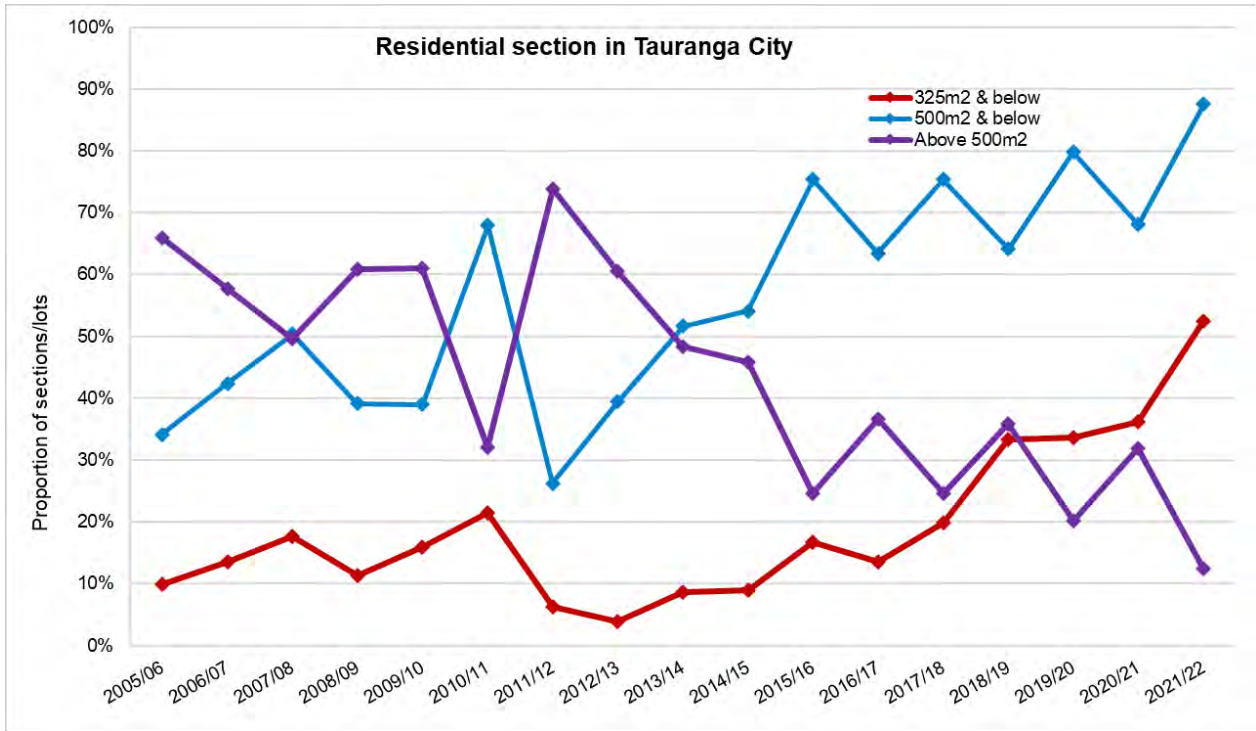
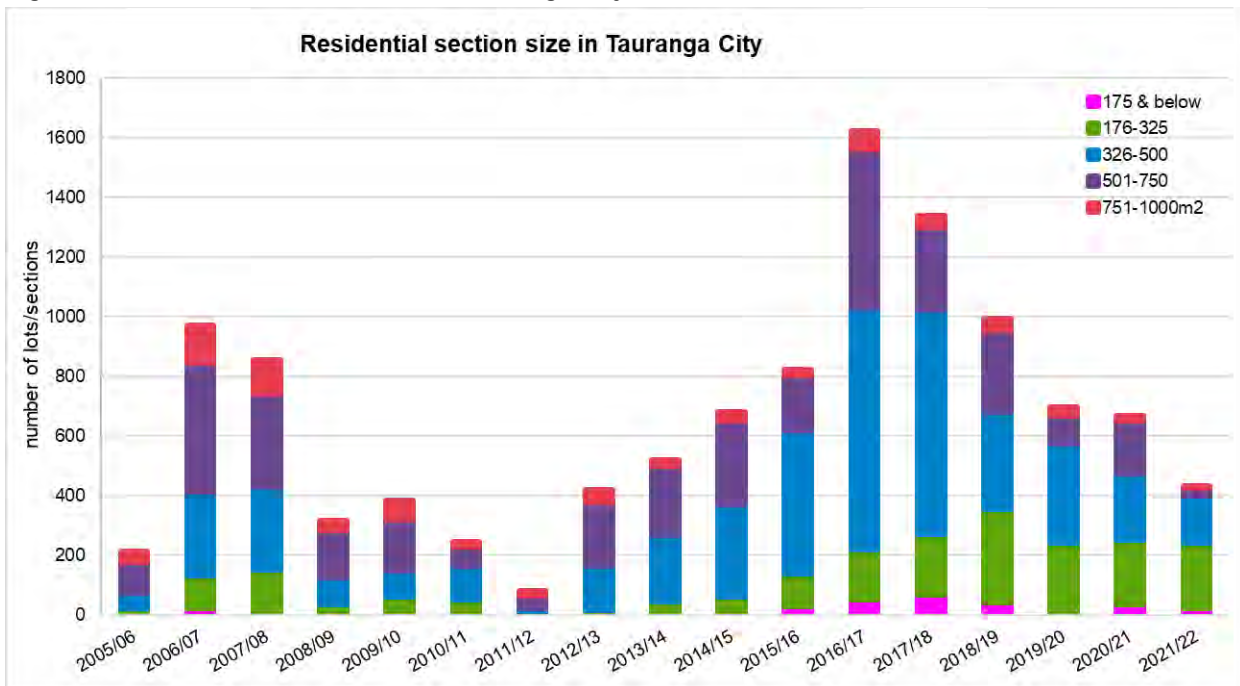


Figure 27 Residential section size in Tauranga City, 2005/06 to 2021/22



The table below shows that as at February 2023, the City has a total of 46,875 lots in four residential zones including high density urban residential, city living – residential and mixed use, sub-urban residential and Wairakei residential zones. Majority or 98% of these lots are in the sub-urban (91%) and Wairakei (7%) residential zones. More than two thirds (69%) of the lots were greater than 500m<sup>2</sup> and future subdivision is expected to occur in this lot size.

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

City Plan zone <sup>1</sup>	Section size	Number of lots	Per cent
High density urban residential	< 325m <sup>2</sup>	342	0.7
	325m <sup>2</sup> – 500m <sup>2</sup>	72	0.2
	> 500m <sup>2</sup>	294	0.6
City Living – residential & mixed use	< 325m <sup>2</sup>	32	0.1
	325m <sup>2</sup> – 500m <sup>2</sup>	46	0.1
	> 500m <sup>2</sup>	266	0.6
Sub-urban residential	< 325m <sup>2</sup>	2,162	4.6
	325m <sup>2</sup> – 500m <sup>2</sup>	9,382	20.0
	> 500m <sup>2</sup>	31,062	66.3
Wairakei residential	< 325m <sup>2</sup>	1,132	2.4
	325m <sup>2</sup> – 500m <sup>2</sup>	1,412	3.0
	> 500m <sup>2</sup>	673	1.4
<b>Total</b>		<b>46,875</b>	<b>100%</b>

<sup>1</sup> Excludes other zones where residential development have occurred and/or expected to occur: Future urban, Neighbourhood Centre (Wairakei), Ngati 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 >500m<sup>2</sup>

## Western Bay of Plenty District

Most of the dwellings in the Urban Growth Areas were built on smaller section sizes in 2021/2022 compared to 2020/2021, with 30% of the dwellings built on a section size of 501-750m<sup>2</sup>, followed by 29.5% dwellings built on a 326-500m<sup>2</sup> section size (in 2021/2022).

**In 2021/2022 most of the dwellings consented in Ōmokoroa were on a section size of 501-750m<sup>2</sup> (89 dwellings) followed by a section size of 326-500m<sup>2</sup> (54 dwellings). In Katikati more dwellings were consented in 2020/2021 on a section size of 326-500m<sup>2</sup> with 22 dwellings, while in 2021/2022 26 dwellings were consented on a section size of 1000m<sup>2</sup> or more.**

Figure 28 Residential section size in WBOPD, July 2020 to June 2022

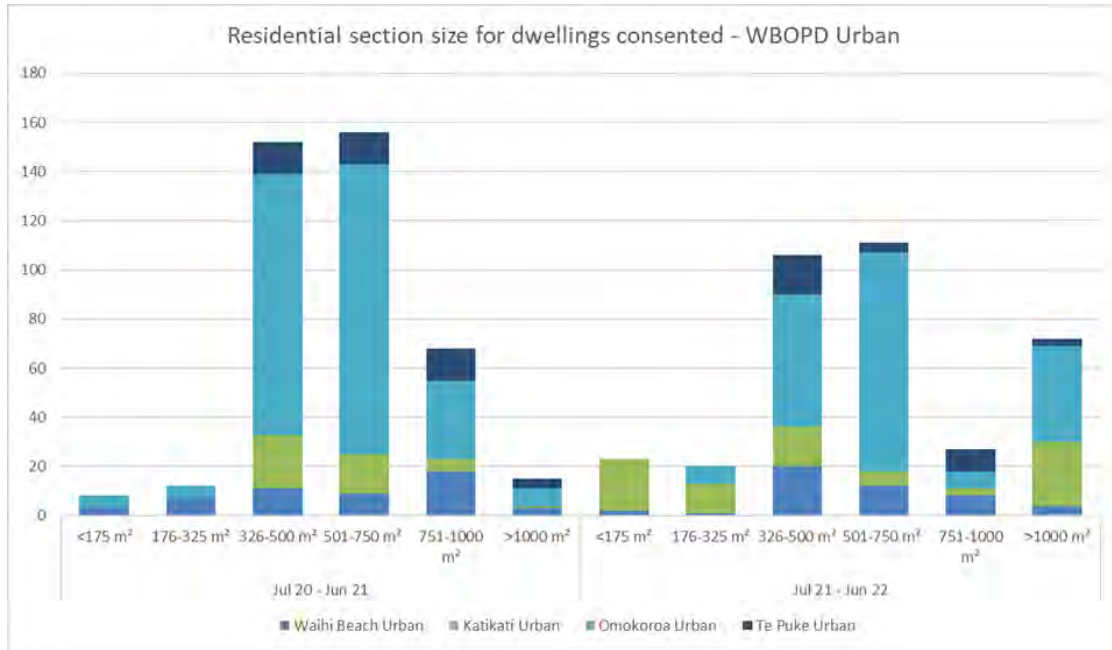


Table 12 Residential lot/section size for dwellings consented in WBOPD, July 2019 to June 2022

Residential lot/section size (m <sup>2</sup> )	Dwelling yield per ha	2019/20		2020/21		2021/22	
		Number of lots	Percent of total	Number of lots	Percent of total	Number of lots	Percent of total
175 and below	40 & above	0	0.0	8	1.9	23	6.4
176-325	21-39	7	2.8	12	2.9	20	5.6
326-500	14-21	109	42.9	150	36.5	106	29.5
501-750	9-14	92	36.2	158	38.4	111	30.9
751-1000	7-9	22	8.7	68	16.5	27	7.5
Above 1000	Below 7	24	9.4	15	3.6	72	20.1
Total		254	100	411	100	359	100

## 5 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 20.8 dwellings per ha. Pyes Pa West (the Lakes) and Papamoa have overall nett area dwelling densities of 13.8 and 13.6 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, and Ohauti 11.6 and Welcome Bay 10.8. Refer to Appendix 7 for more details on density figures and maps for the UGAs.<sup>21</sup>

<sup>21</sup> Density assessment will be expanded in the 2022/23 report to include density in the established infill/ intensification parts of the city.



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

Residential Development	Growth Area	Dwelling density (dwellings per ha)		
		Gross area <sup>1</sup>	Nett area <sup>2</sup>	Nett site area <sup>3</sup>
Developed	Bethlehem	12.00	12.15	15.19
	Pyes Pa West	13.22	13.55	19.54
	Pyes Pa East	12.03	12.20	15.74
	Ohauti	11.19	11.43	14.44
	Welcome Bay	10.51	10.64	13.81
	Papamoa	13.19	13.38	17.73
	Wairakei	17.39	17.41	24.93
Proposed	Bethlehem	14.06	14.06	24.22
	Pyes Pa West	17.32	17.32	20.71
	Pyes Pa East	14.01	14.01	17.73
	Ohauti	15.03	15.03	17.15
	Welcome Bay	16.52	16.52	22.68
	Papamoa	27.28	27.28	32.56
	Wairakei	30.96	30.96	47.70
Total	Bethlehem	12.15	12.29	15.67
	Pyes Pa West	13.49	13.80	19.64
	Pyes Pa East	12.04	12.21	15.75
	Ohauti	11.36	11.59	14.58
	Welcome Bay	10.63	10.75	13.98
	Papamoa	13.43	13.62	18.00
	Wairakei	20.73	20.75	30.24

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

<sup>2</sup> **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

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

Table 14 Area, yield and residential density in urban growth areas, Tauranga City, November 2022

Growth area	Nett Area (ha)	Dwellings	Vacant sections + proposed sections/ lots or dwellings	Total Yield (Vacant & proposed sections & dwellings)	Residential density (dwellings per ha) <sup>1</sup>
Bethlehem	278.55	3,094	328	3,422	12.29
Pyes Pa West	182.19	2,202	312	2,514	13.80
Pyes Pa East	181.71	2,177	41	2,218	12.21
Ohauti	145.25	1,515	169	1,684	11.59
Welcome Bay	141.43	1,426	95	1,521	10.75
Papamoa	765.20	9,923	549	10,472	13.69
Wairakei	259.56	3,022	2,365	5,387	20.75

<sup>1</sup> includes both developed and proposed dwellings and sections

## 6 Dwelling Typology Tauranga City

Figures 29 and 30 show that "stand alone" dwellings were the most prevalent type of dwelling<sup>22</sup> consented in Tauranga City in the last few years. The proportion of stand alone dwellings increased from 60% in 2020/21 to 65% in 2021/22. Conversely, the combined proportion of duplexes, apartments and attached dwellings declined from 27% in 2020/21 to 16% in 2021/22. Around 17% of the dwellings (stand alone, duplex & attached dwellings) were consented in the retirement villages.

<sup>22</sup> TCC classifies the dwellings into the following types: standalone dwellings, duplex, attached dwellings, apartments (residential and mixed use), retirement village units and secondary/minor dwelling.

TCC further classifies dwellings in the retirement village units into standalone, duplex, and attached dwellings.

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

Wairakei had the largest share of dwellings (33% or 407) consented during the year, where more than three fourths of the dwellings were stand alone or detached. Of the standalone dwellings (809) consented in Tauranga City, 39% (or 313 dwellings) were located in Wairakei, which is also equivalent to a quarter of all the dwellings (1,252) consented in the City during the year.

Figure 29 Type of dwellings consented in Tauranga City, July 2021 to June 2022

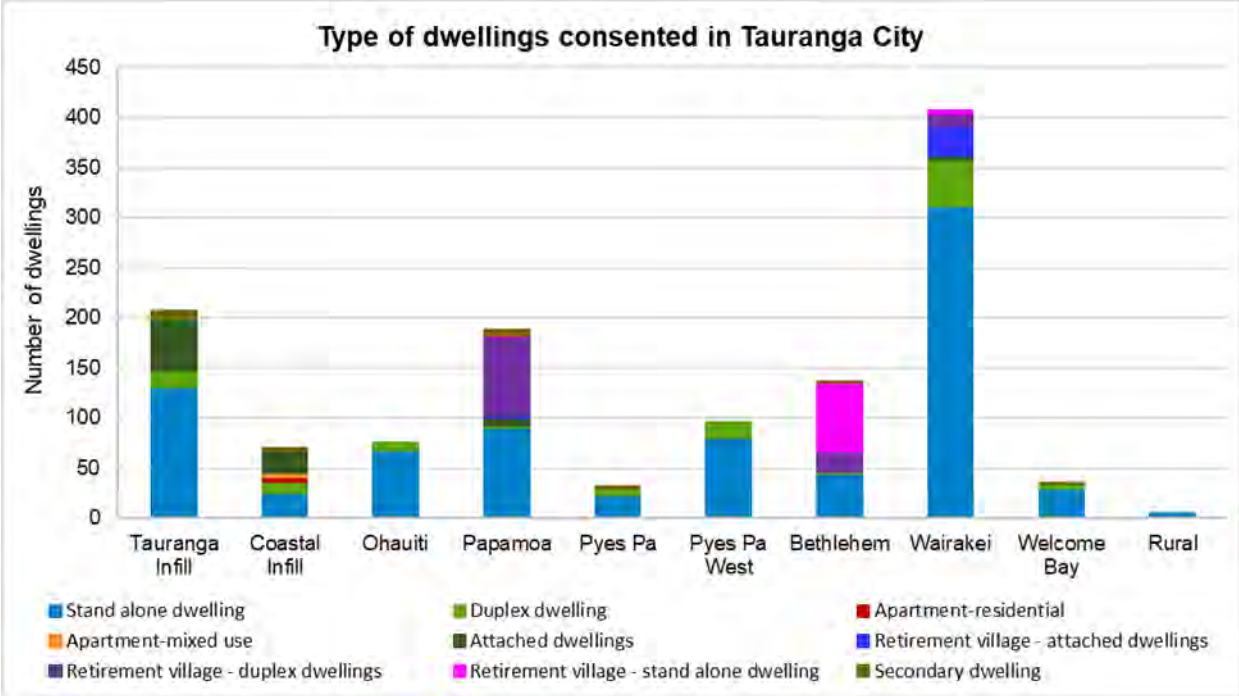


Figure 30 Main type of dwellings consented in Tauranga City, July 2017 to June 2022

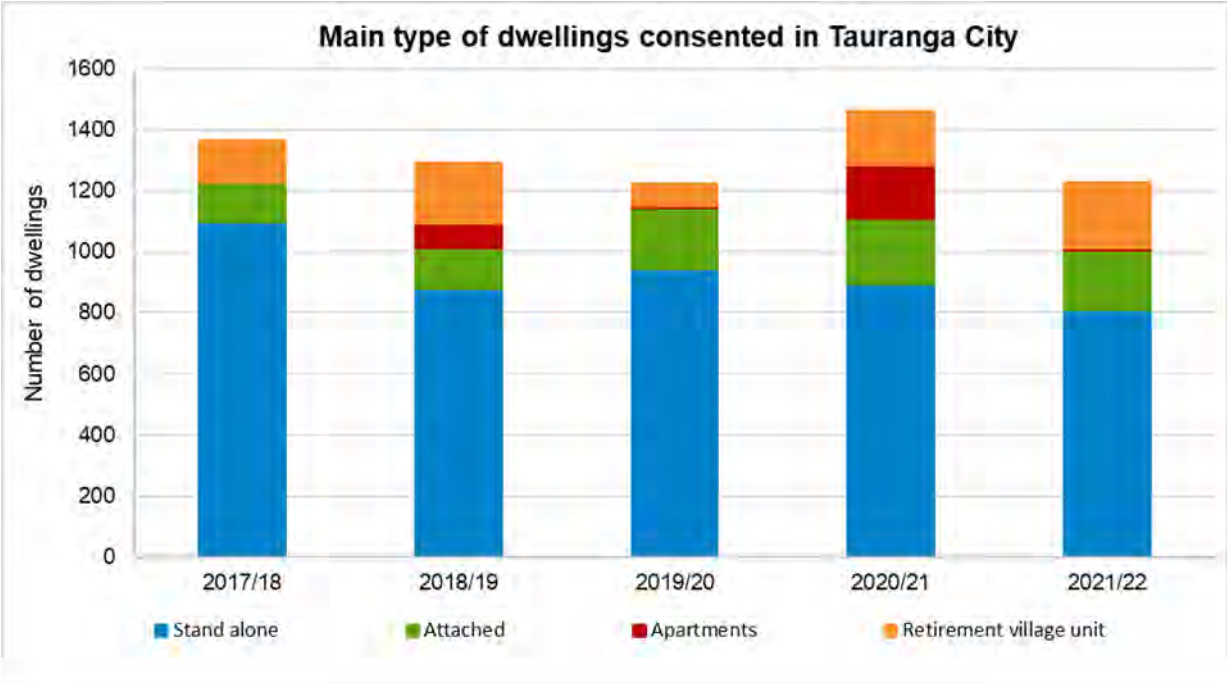


Figure 31 shows the type of dwellings consented in Tauranga City infill areas and greenfield UGAs by City Plan zone from July 2021 to June 2022. In both infill and Greenfield urban growth areas, the majority of the dwellings consented were located in the residential zones (suburban residential, Wairakei residential and rural residential), at 93% and 98%, respectively.

Of the dwellings consented in the residential zones in the infill areas, 65% were stand alone and 33% were attached dwellings. Conversely, 67% of the dwellings consented in the residential zones in the UGAs were stand alone, 11% are attached dwellings and 23% were retirement village units.

Figure 31 Type of dwellings consented in Tauranga City, by City Plan zone and growth area, July 2021 to June 2022

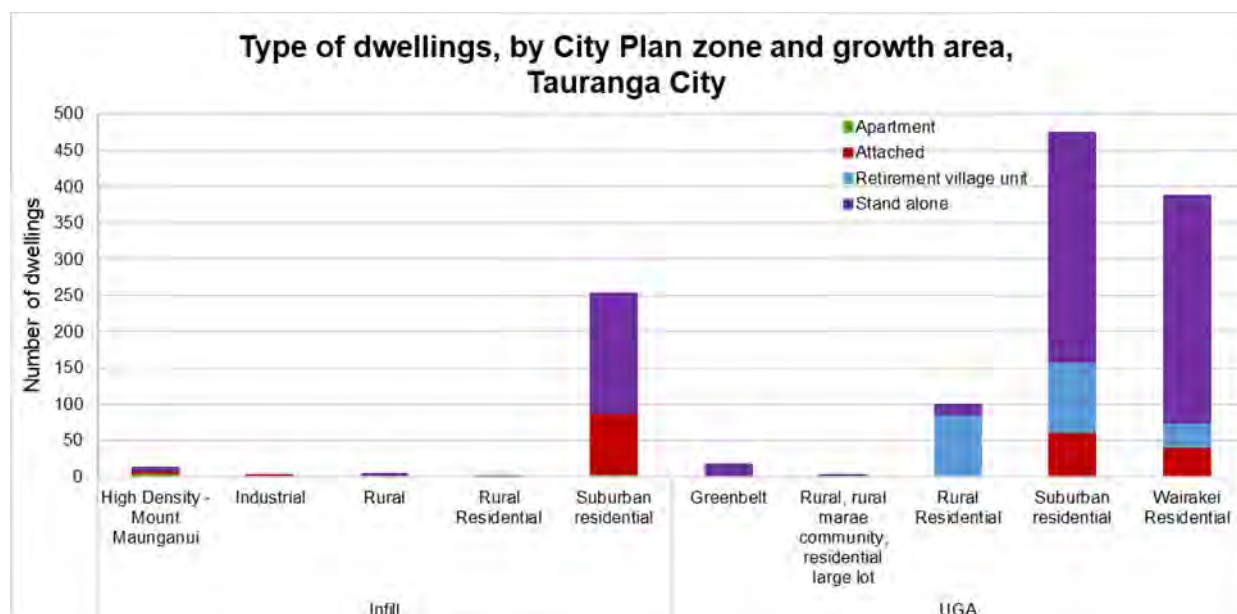


Table 15 Type of dwellings consented in Tauranga City, July 2019 to June 2022

Dwelling Typology	2019/20		2020/21		2021/2022	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Standalone dwelling	945	76.3	893	60.4	809	64.6
Duplex	166	13.4	152	10.3	112	8.9
Attached dwellings	33	2.7	63	4.3	84	6.7
Secondary/minor dwelling	16	1.3	18	1.2	23	1.8
Apartments – residential	6	less than 1	76	5.1	5	0.4
Apartments – mixed use			101	6.8	4	0.3
Subtotal	1,166	94.1	1,303	88.1	1,037	82.8
Retirement village unit – standalone dwelling	26	2.1	34	2.3	71	5.7
Retirement village unit – duplex	32	2.6	97	6.6	112	8.9
Retirement village unit – attached dwellings	15	1.2	44	3.0	32	2.6
Retirement village unit – apartment			1	less than 1		
Subtotal	73	5.9	176	11.9	215	17.2
Total	1,239	100	1,479	100	1,252	100

## Western Bay of Plenty District

Over 90% of the dwellings consented in WBOPD are standalone dwellings for both 2020/2021 and 2021/2022. In 2021/2022 more variety of dwellings were built which included duplex dwellings (7.4%) and terraced dwelling (previously referred to as 'multiunit's') (7.8%). Standalone dwellings decreased by 21% compared to the previous year (2020/2021), a wider variety of dwellings are expected for the coming years (like duplexes/townhouses/terraced dwellings) due to changing demographics and population in areas such as Ōmokoroa and Te Puke.

Figure 32 Type of dwellings consented in WBOPD, July 2020 to June 2022

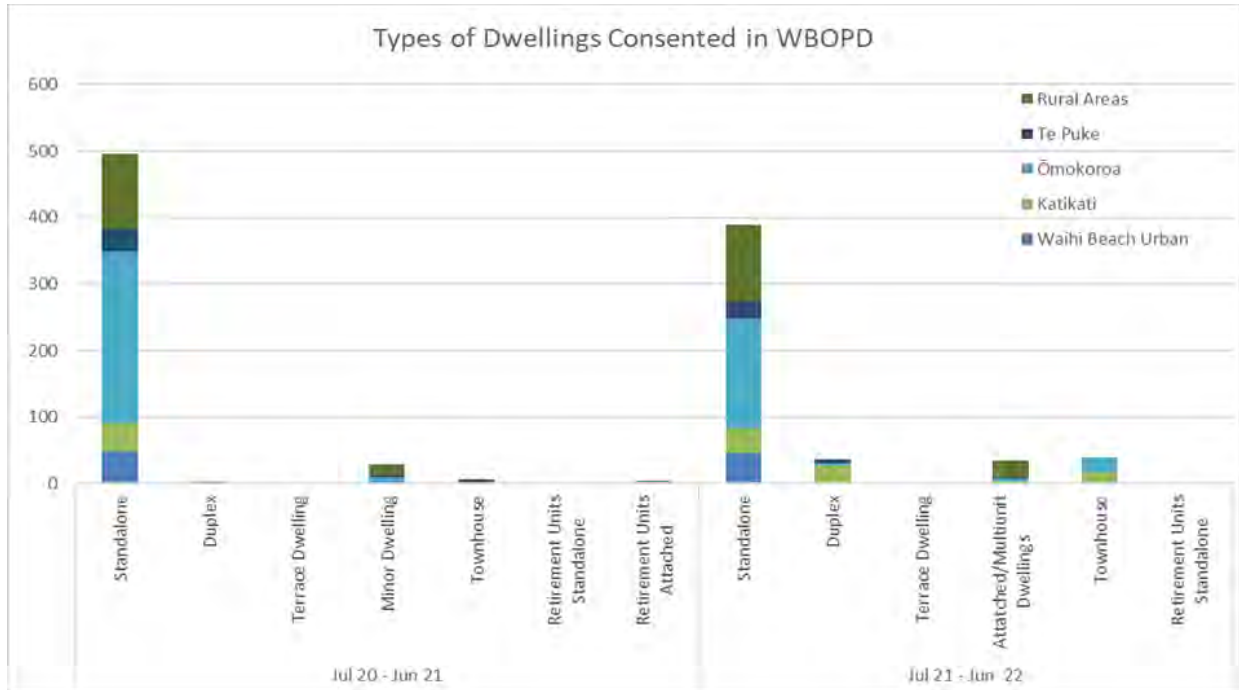


Table 16 Type of dwellings consented in WBOPDC, July 2019 to June 2022

Dwelling Typology	2019/2020		2020/2021		2021/2022	
	Number of dwellings	Per cent to Total	Number of dwellings	Per cent to Total	Number of dwellings	Per cent to Total
Standalone Dwelling	347	94.6	495	91.7	389	77.8
Duplex Dwelling	-	-	4	0.7	37	7.4
Terrace Dwelling	-	-	-	-	39	7.8
Minor Dwelling	20	5.4	29	5.4	35	7.0
Townhouse	-	-	7	1.3	-	-
Retirement village unit – standalone dwelling	-	-	-	-	-	-
Retirement village unit – attached dwellings	-	-	5	0.9	-	-
Total	367	100.0	540	100.0	500	100.00

## Number of storeys

### Tauranga City

From July 2021 to June 2022, more than 70% of the dwellings consented in Tauranga City were single level dwellings, 23% had 2 storeys and 6% had 3 to 4 storeys.

Of the 884 single storey dwellings, around 43% were located in Wairakei while 13% were in the Tauranga infill areas and 18% were in Papamoa. For both the 2 and 3 storey dwellings, Bethlehem had the highest proportion of 35% and 43%, respectively.

The 98 apartment units consented in July 2020 to June 2021 were part of the 15-storey Farmers' redevelopment which is currently under construction. The 7-storey mixed use commercial building located on Fourth Avenue has 32 apartment units and construction was completed this year.

Figure 33 Number of storeys for dwellings consented in Tauranga City, July 2021 to June 2022

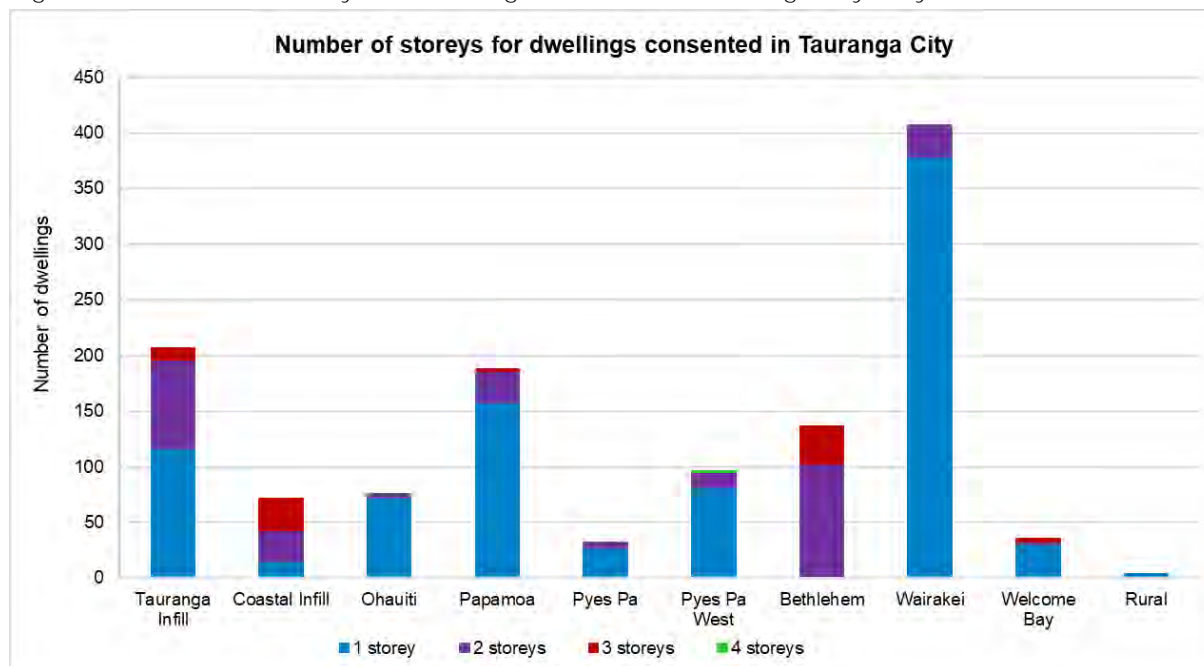


Table 17 Number of storeys for dwellings consented in Tauranga City, July 2019 to June 2022

Number of storeys	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	1,081	87.3	1,117	75.5	884	70.6
2	133	10.7	161	10.9	291	23.2
3	25	2.0	71	4.8	76	6.1
4					1	0.1
7			32	2.2		
15			98	6.6		
Total	1,239	100	1,479	100	1,252	100

### Western Bay of Plenty District

The majority (83%) of dwellings consented from July 2021 to June 2022 in the WBOPD, were single level dwellings. Ōmokoroa has the most 2-storey dwellings (39%) followed by 32% in Waihi Beach-Bowentown.

Figure 34 Number of storeys for dwellings consented in WBOPD, July 2020 to June 2022

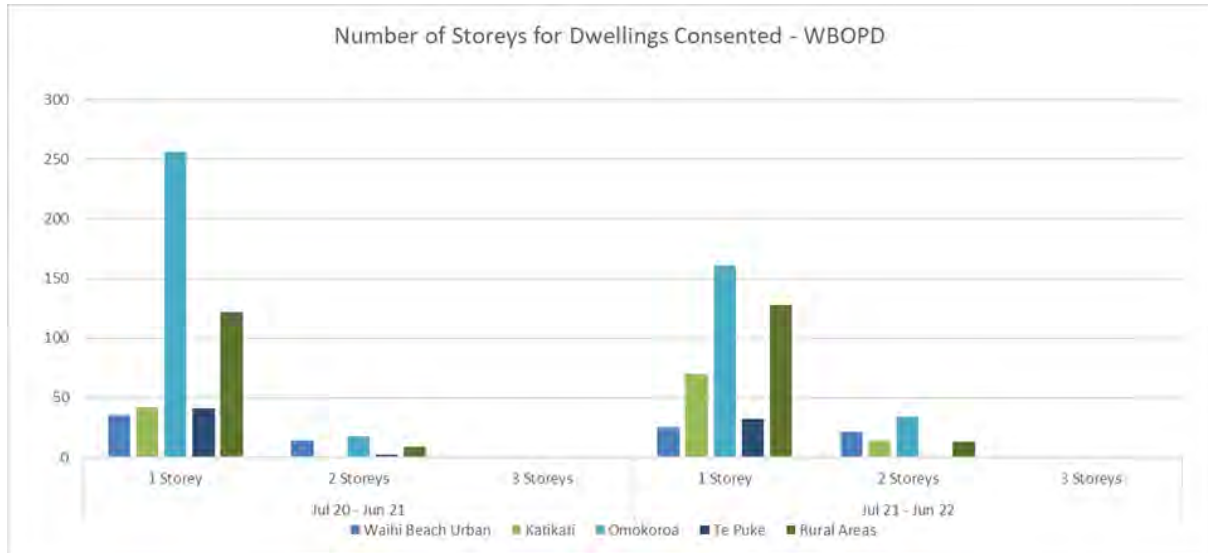


Table 18 Number of storeys for dwellings consented in WBOPD, July 2019 to June 2022

Number of storeys	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	322	87.7	496	91.9	416	83.2
2	41	11.2	44	8.1	82	16.4
3	4	1.1	0	0.0	2	0.4
Total	367	100.0	540	100.0	500	100.0

## Number of bedrooms

Three quarters (75%) of the dwellings consented in Tauranga City had 2 and 3 bedrooms, with the remaining quarter having 1 (3%), 4 (20%), and 5 + (2%) bedrooms.

In WBOPD most of the dwellings consented were 3-bedroom (45%) and 4-bedrooms (24.8%) from July 2021 to June 2022.

## Number of bedrooms by growth area

### Tauranga City

Among the growth areas, Papamoa had the biggest proportion (29%) of the 2-bedroom dwellings consented in Tauranga City while Wairakei had the biggest proportion (37%) of the 3-bedroom dwellings consented during the year. Around 28% of the 3-bedroom dwellings were consented in the established parts (infill) of Tauranga and Coastal areas.

The 4-bedroom dwellings comprised 20% of all the dwellings consented in the City, of which, 38% were located in Wairakei urban growth area and 51% in the other UGAs. The remaining 11% of the 4-bedroom dwellings were consented in the existing (Tauranga and Coastal infill) growth areas.

Figure 35 Number of bedrooms of dwellings consented in Tauranga City, July 2021 to June 2022

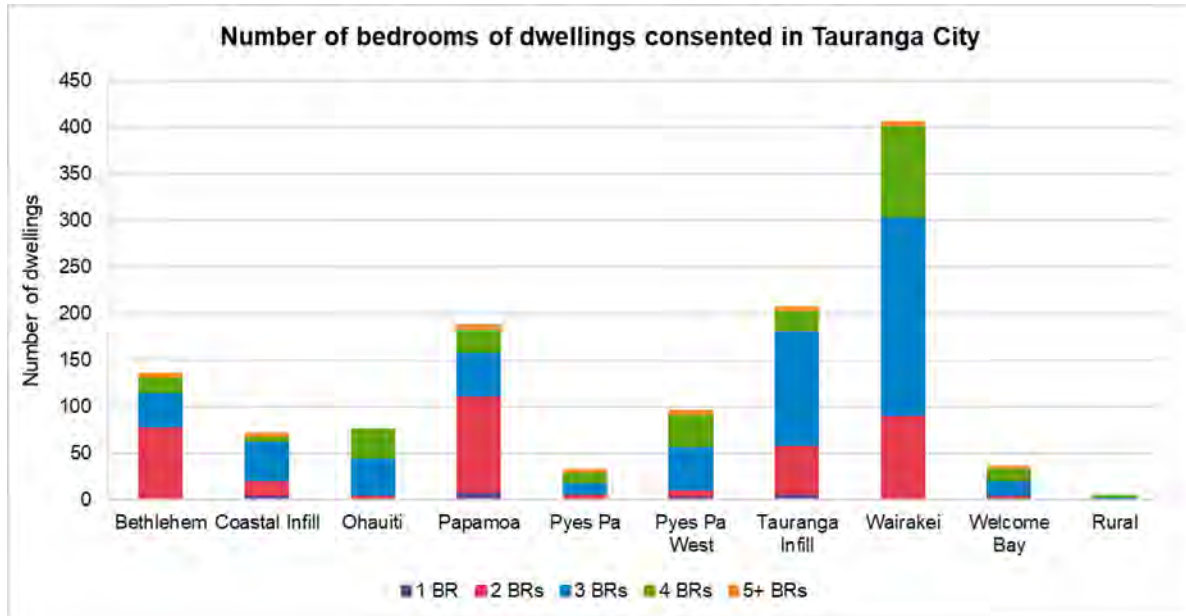
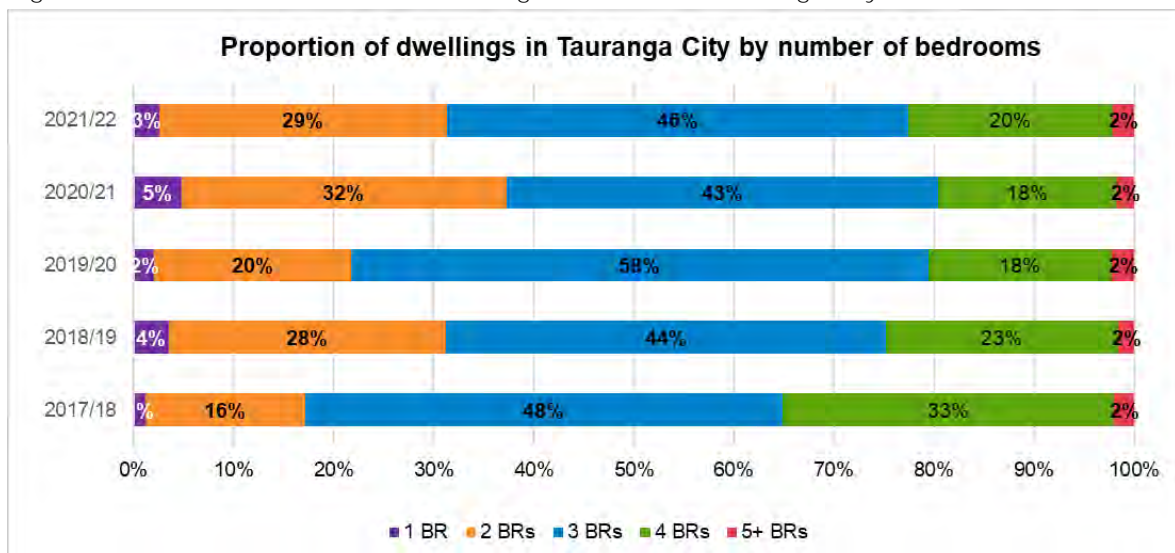


Table 19 Number of bedrooms of dwellings consented in Tauranga City, July 2019 to June 2022

Number of bedrooms	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	24	1.9	71	4.8	33	2.6
2	244	19.7	480	32.5	359	28.7
3	716	57.8	639	43.2	579	46.2
4	228	18.4	263	17.8	254	20.3
5 and above	27	2.2	26	1.8	27	2.2
Total	1,239	100	1,479	100	1,252	100

In the last five years, 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% in 2017/18 to 32% in 2021/22. Conversely, the combined proportion of 3 and 4-bedroom dwellings declined from 81% in 2017/18 to 66% in 2021/22.

Figure 36 Number of bedrooms of dwellings consented in Tauranga City, 2017/18 to 2021/22



## Western Bay of Plenty District

In WBOPD-urban, more 3-bedroom dwellings are consented (82%) followed by 61% 4-bedroom dwellings from July 2021 to June 2022.

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 one bedroom dwellings consisting of 50% of dwellings consented.

Figure 37 Number of bedrooms of dwellings consented in WBOPD, July 2021 to June 2022

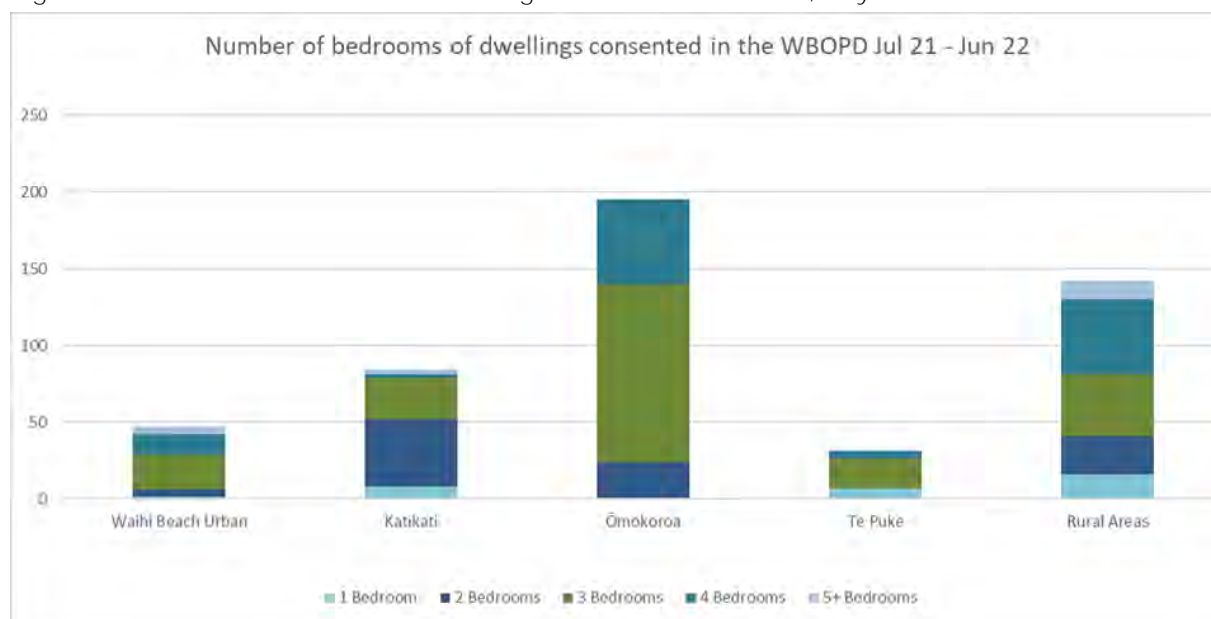


Table 20 Number of bedrooms for dwellings consented in WBOPD, July 2019 to June 2022

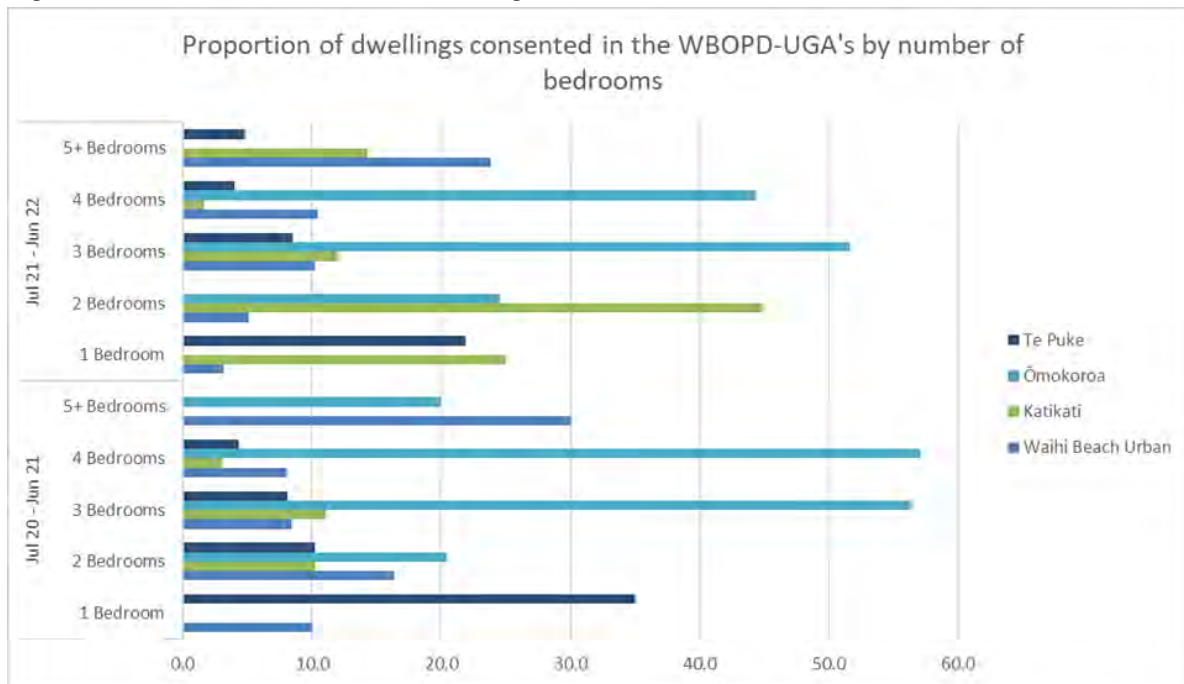
Number of bedrooms	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
1	11	3.0	20	3.7	32	6.4
2	43	11.7	49	9.1	98	19.6
3	193	52.6	298	55.2	225	45.0
4	106	28.6	163	30.2	124	24.8
5 and above	14	3.8	10	1.9	21	4.2
Total	367	100	540	100.0	500	100.0

In 2021/2022 more 3-bedroom dwellings (45%) were consented in all the urban areas compared to 2020/2021 with 55.2%. More 5-bedroom dwellings were built in Waihi Beach-Bowentown with 24% and in the rural areas with 57%.

In 2021/2022, 3-bedrooms and 4-bedrooms were more prominent in **Ōmokoroa**, whereas two and four bedroom dwellings were more prominent in **Waihi Beach – Bowentown**. Te Puke did not have any two bedroom dwellings consented in the 2021/2022 year, but one bedroom dwellings were the most common (22%). Following on from the previous year in rural areas, five bedroom dwellings were still most common (57%).



Figure 38 Number of bedrooms of dwellings consented in WBOPD-UGA's, 2020/21 to 2021/22



## Number of bedrooms by dwelling typology

### Tauranga City

From July 2021 to June 2022, more than 64% of the dwellings in Tauranga City are stand alone, with more than half having 3 bedrooms.

The majority (83%) of the duplexes had 2 (32%) and 3 (51%) bedrooms, while 9% had 1 bedroom and 8% had 4 bedrooms. There were only 9 apartment units (residential and mixed use) consented during the year which were 2 and 3-bedroom dwellings.

Around 17% (215) of the dwellings consented were located in the retirement villages consisting of Pacific Lakes, Parewaitai, Summerset and The Vines villages. More than half (52%) of these retirement village units were 2-bedroom duplexes. Stand alone dwellings comprised 33% of the dwellings in the retirement villages, with 68% having 2 bedrooms and the remaining 32% have 3 and 4 bedrooms.

The number of secondary dwellings consented increased with the highest recorded in 2021/22 at a total of 23 dwellings. These dwellings were comprised of granny flats, converted garages, sleep outs, basements or offices, and additions/alterations to existing dwellings to create additional independent dwelling unit. Around 70% (16 dwellings) of the secondary or minor dwellings were 1-bedroom dwellings while the remaining 30% (7 dwellings) had 2 bedrooms.

Figure 39 Number of dwellings consented in Tauranga City, by type and number of bedrooms, July 2021 to June 2022

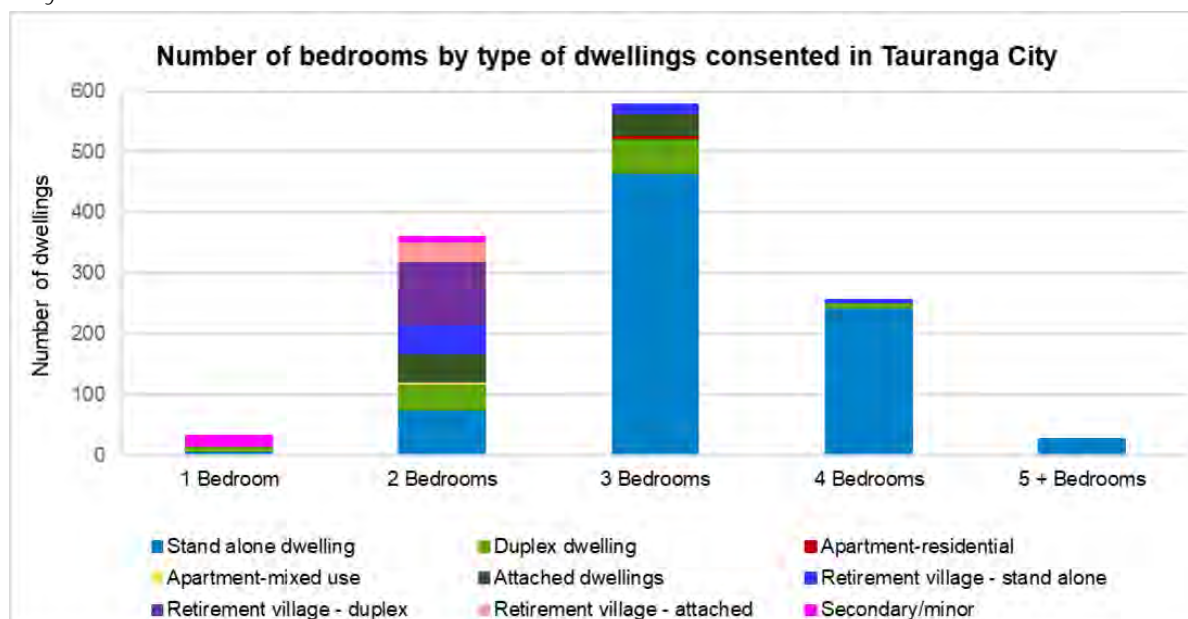


Table 21 Number of bedrooms by type of dwelling for dwellings consented in Tauranga City, July 2021 to June 2022

Type of dwelling	Number of bedrooms					Total
	1	2	3	4	5	
Standalone dwelling	7	72	460	243	27	809
Duplex dwelling	10	36	57	9		112
Attached dwellings		47	37			84
Secondary/minor dwelling	16	7				23
Apartments – residential			5			5
Apartments – mixed use		4				4
Sub-total	33	166	559	252	27	1,037
Retirement village unit – standalone dwelling		49	20	2		72
Retirement village unit – duplex		112				112
Retirement village unit – attached dwellings		32				32
Subtotal	-	193	20	2		215
Total	33	359	579	254	27	1,252

## Floor size of dwellings

### Tauranga City

In the last five years, the size of new dwellings consented in Tauranga City decreased. The proportion of dwellings with floor areas of 125m<sup>2</sup> and smaller increased from 20% in 2017/18 to 31% in 2021/22, while those bigger than 125m<sup>2</sup> decreased in proportion from 80% to 69%.

While the 151m<sup>2</sup> to 200m<sup>2</sup> were the most prevalent dwelling size five years ago with a total proportion of 41% of new dwellings consented, the smaller dwelling size of 101m<sup>2</sup> to 150m<sup>2</sup> were the most prevalent at 37% in 2021/22.

Figure 40 Floor size of dwellings consented in Tauranga City, July 2021 to June 2022

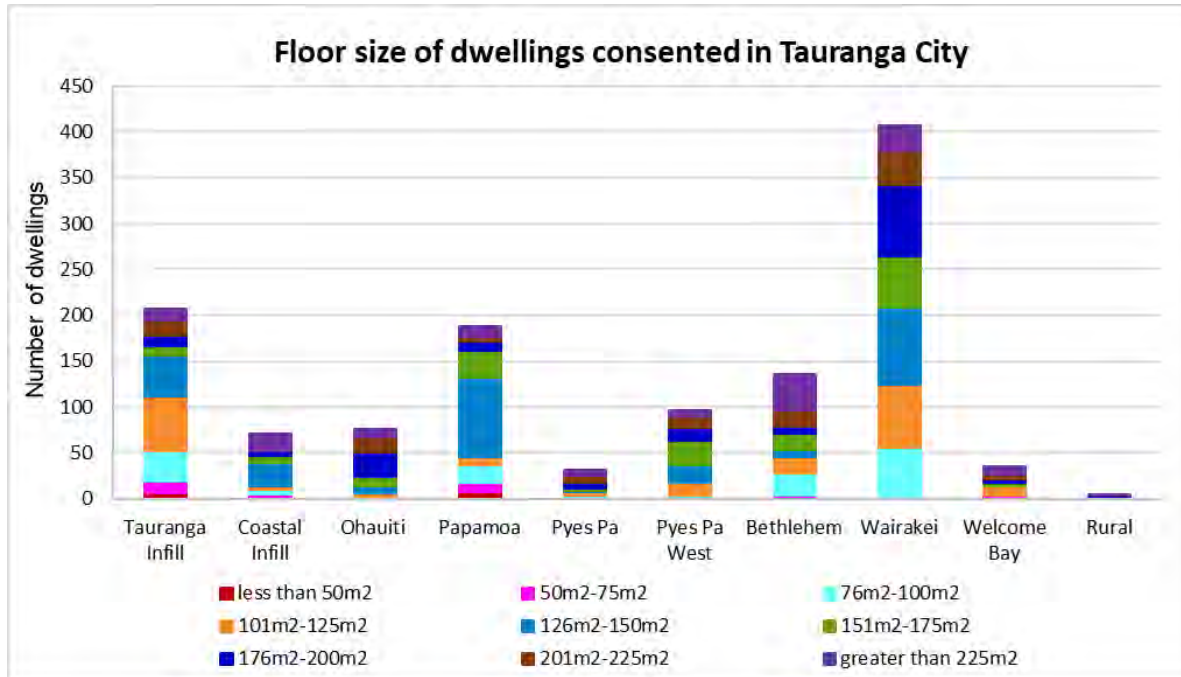
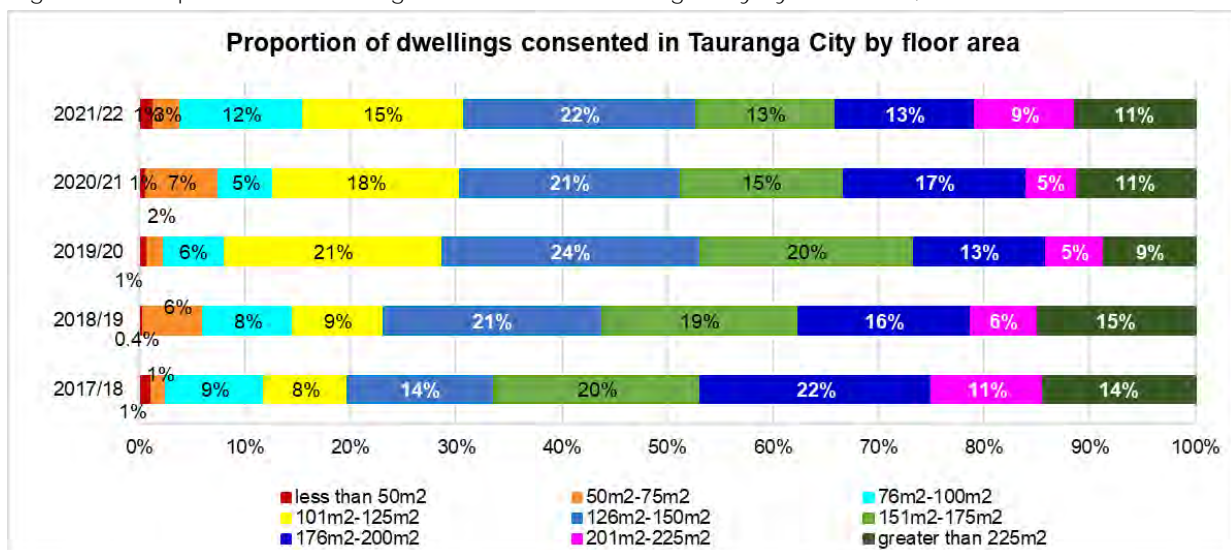


Table 22 Floor size for dwellings consented in Tauranga City, July 2019 to June 2022

Floor size (m <sup>2</sup> )	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m <sup>2</sup>	9	less than 1	9	less than 1%	17	1.4
50m <sup>2</sup> – 75m <sup>2</sup>	19	1.5	102	6.9	32	2.6
76m <sup>2</sup> – 100m <sup>2</sup>	72	5.8	76	5.1	145	11.6
101m <sup>2</sup> – 125m <sup>2</sup>	255	20.6	262	17.7	191	15.3
126m <sup>2</sup> – 150m <sup>2</sup>	303	24.5	309	20.9	275	22.0
151m <sup>2</sup> – 175m <sup>2</sup>	251	20.3	229	15.5	166	13.3
176m <sup>2</sup> – 200m <sup>2</sup>	155	12.5	255	17.2	165	13.2
201m <sup>2</sup> – 225m <sup>2</sup>	68	5.5	71	4.8	118	9.4
Greater than 225m <sup>2</sup>	107	8.6	166	11.2	143	11.4
Total	1,239	100	1,479	100	1,252	100

Figure 41 Proportion of dwellings consented in Tauranga City by floor area, 2017/18 to 2021/22



## Western Bay of Plenty District

In both 2020/2021 and 2021/2022, most of the consented dwellings in the UGA's of WBOPD have a floor area between 151-175m<sup>2</sup> (both years at 28%), followed by a floor area between 126-150m<sup>2</sup> making up 25%. In the rural areas, larger dwellings are built where 93 of the total dwellings consented have a floor area of 250m<sup>2</sup> or more.

Figure 42 Floor size of dwellings consented in WBOPD, July 2020 to June 2022

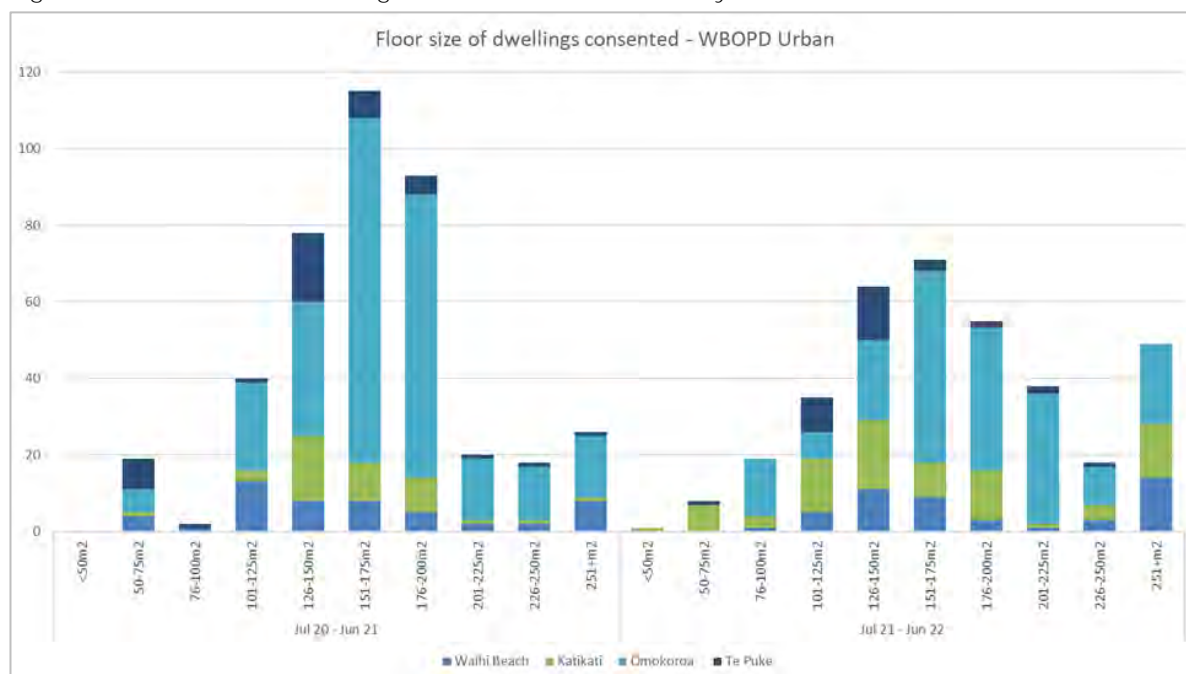


Table 23 Floor size for dwellings consented in WBOPD, July 2019 to June 2022

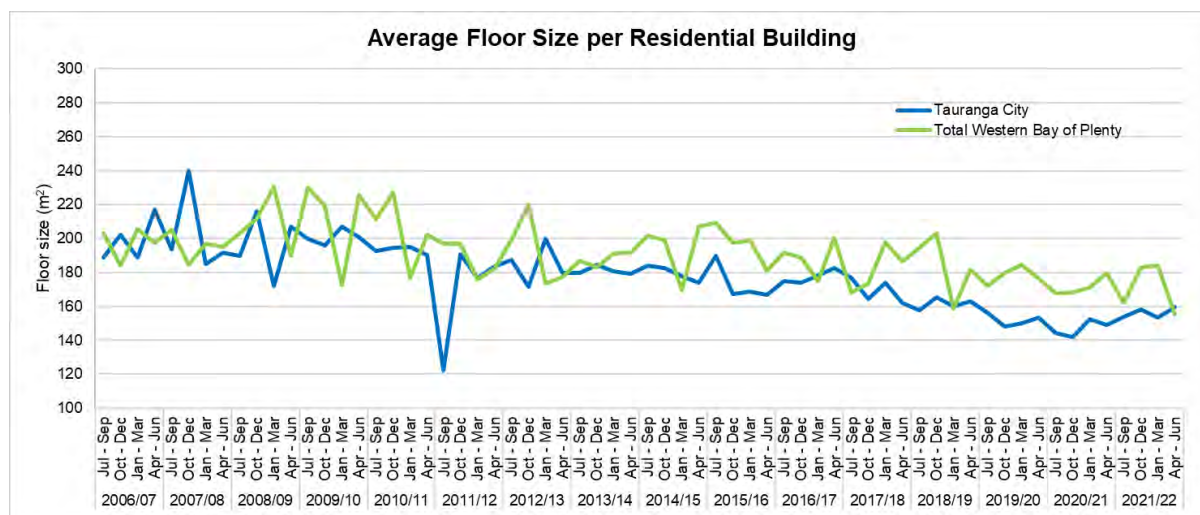
Floor size (m <sup>2</sup> )	2019/20		2020/21		2021/22	
	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total	Number of dwellings	Per cent to total
Less than 50m <sup>2</sup>	2	0.5	0	0.0	3	0.6
50m <sup>2</sup> – 75m <sup>2</sup>	17	4.6	35	6.5	22	4.4
76m <sup>2</sup> – 100m <sup>2</sup>	18	4.9	10	1.9	31	6.2
101m <sup>2</sup> – 125m <sup>2</sup>	19	5.2	44	8.1	37	7.4
126m <sup>2</sup> – 150m <sup>2</sup>	46	12.5	86	15.9	76	15.2
151m <sup>2</sup> – 175m <sup>2</sup>	88	23.9	124	23.0	84	16.8
176m <sup>2</sup> – 200m <sup>2</sup>	60	16.3	111	20.6	63	12.6
201m <sup>2</sup> – 225m <sup>2</sup>	36	9.8	42	7.8	52	10.4
Greater than 225m <sup>2</sup>	82	22.3	88	16.3	132	26.4
Total	368	100.00	540	100.00	500	100.00

## Historical Floor Size per Residential Building

In the sub-region, residential buildings have become significantly smaller in the last 16 years. The average floor size of new dwellings consented in Tauranga City was 197m<sup>2</sup> in 2006/07 and fell to 156m<sup>2</sup> in 2021/22. Historically, WBOPD had bigger residential buildings than Tauranga City, with 170m<sup>2</sup> average floor size in 2021/22. Residential building size in WBOPD declined from 197m<sup>2</sup> in 2006/07 to 170m<sup>2</sup> in 2020/21.

In 2021/22, average floor size per residential building in Tauranga City was 9m<sup>2</sup> bigger compared to the previous year, while average floor size in WBOPD was slightly smaller (by 2m<sup>2</sup>) in the same period.

Figure 43 Average floor size per residential building, Tauranga City and WBOPD, July 2006 to June 2022



Source: Stats NZ Infoshare

Table 24 Average floor size, Tauranga City and WBOPD

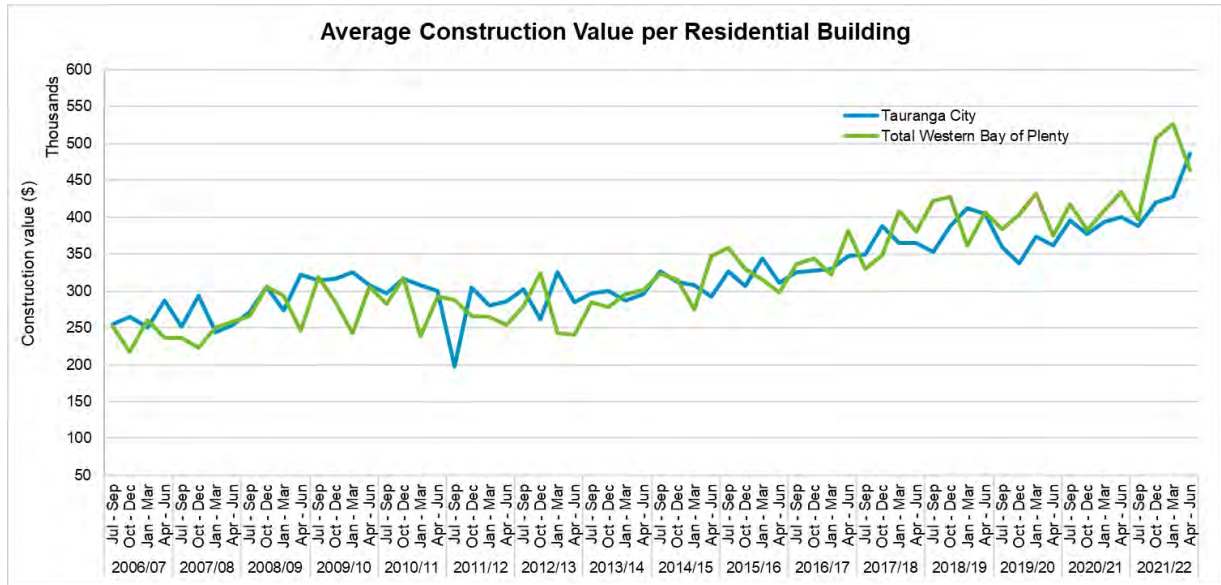
Average floor size (in m <sup>2</sup> )	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
156			
Last year	↑	9	6.1
Last 5 years (average)	↓	-1	-0.6
Last 10 years (average)	↓	-12	-7.1
<i>Western BOPD</i>			
This year			
170			
Last year	↓	-2	-1.2
Last 5 years (average)	↓	-6	-3.4
Last 10 years (average)	↓	-14	-7.6

## Construction Value per Residential Dwelling

Average construction value per residential building increased by 9% and 14% in Tauranga City and WBOPD respectively, in the last 12 months to June 2022. **WBOPD’s construction value in 2021/22 was nearly double the 2006/07 level, while that of Tauranga City was 63% higher than it was in the same period.** WBOPD also recorded higher construction values than Tauranga City in the last four years, with the 2021/22 WBOPD construction values being higher by more than \$43,000.

For the first time in the last 16 years, **Tauranga City’s average construction cost was lower than WBOPD’s** in 2021/22 by \$44 per square metre which can be attributed to **WBOPD’s higher construction value and slight increase in Tauranga City’s average floor size.** Construction costs increased by a respective \$63 and \$382 per square metre in Tauranga City and WBOPD compared to the previous year. **Tauranga City’s average construction costs increased by more than \$2,000 per square metre, more than 30%, in the last ten years.** In WBOPD average construction cost increases were slightly below \$2,000 per square metre from ten years ago, but an increase of more than 40% from June 2012 to June 2022.

Figure 44 Average construction value per residential building, Tauranga City and WBOPD, July 2006 to June 2022

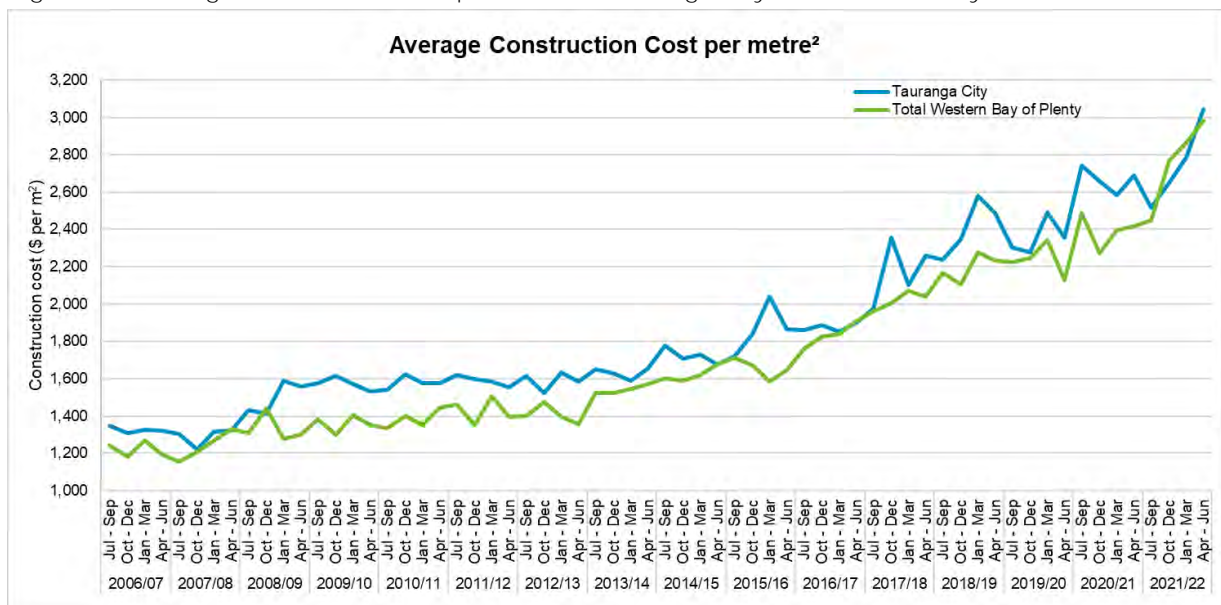


Source: Stats NZ Infoshare

Table 25 Average construction value, Tauranga City and WBOPD

Average construction value		Trend	Change	% Change
<i>Tauranga City</i>				
This year	\$426,824			
Last year	\$391,293	↑	\$35,531	9.1
Last 5 years (average)	\$386,227	↑	\$40,597	10.5
Last 10 years (average)	\$348,042	↑	\$78,782	22.6
<i>Western BOPD</i>				
This year	\$470,329			
Last year	\$412,218	↑	\$58,114	14.1
Last 5 years (average)	\$408,333	↑	\$61,996	15.2
Last 10 years (average)	\$357,966	↑	\$112,363	31.4

Figure 45 Average construction cost per metre<sup>2</sup>, Tauranga City and WBOPD, July 2006 to June 2022



Source: Stats NZ Infoshare

Table 26 Average construction cost per square metre, Tauranga City and WBOPD

Average construction cost per m <sup>2</sup>	Trend	Change	% Change
<i>Tauranga City</i>			
This year	\$2,730		
Last year	\$2,667	↑	\$63 2.4
Last 5 years (average)	\$2,464	↑	\$266 10.8
Last 10 years (average)	\$2,100	↑	\$630 30.0
<i>Western BOPD</i>			
This year	\$2,774		
Last year	\$2,392	↑	\$382 16.0
Last 5 years (average)	\$2,323	↑	\$451 19.4
Last 10 years (average)	\$1,966	↑	\$808 41.1

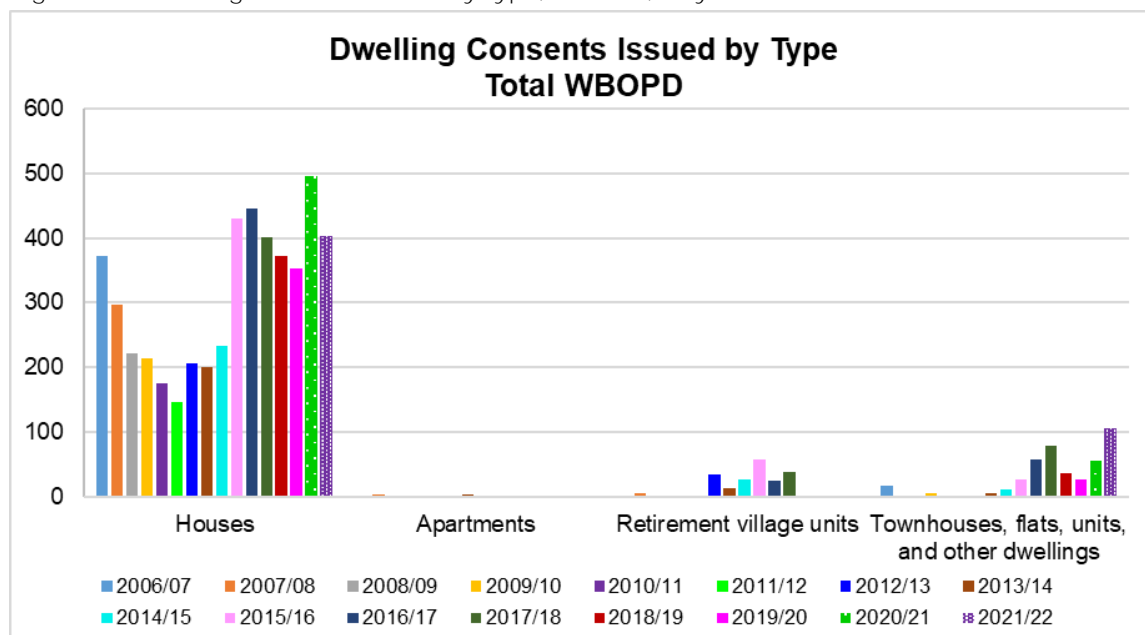
## Residential Building Consents Issued by Type

Statistics New Zealand classifies residential buildings into houses, apartments, retirement village units and townhouses, flats, units and other dwellings<sup>23</sup>. By this classification, standalone house was the main type of dwelling consented in the sub-region in the last 16 years.

Although Tauranga City recorded a lower number of stand alone houses in 2021/22 compared to the previous year, its proportion increased from 58% (907 houses) to 62% (814 houses) in 2021/22. Likewise, the proportion of retirement village units (18%) and townhouses, flats, units & other dwellings (20%) also increased from the previous year. Only a few apartments were consented (6) comprising less than 1% of all residential buildings consented during the year.

In the last three years, the proportion of standalone houses in WBOPD declined from a high of 93% in 2019/20 to 79% in 2021/22. Townhouses, flats and other dwellings comprised the remaining 21% of the residential buildings consented in WBOPD in 2021/22.

Figure 46 Dwelling consents issued by type, WBOPD, July 2006 to June 2022



<sup>23</sup> Residential statistics from Statistics New Zealand were included in addition to Figures 29 and 30 to provide time-series data from 2006.

Figure 47 Dwelling consents issued by type, Tauranga City, July 2006 to June 2022

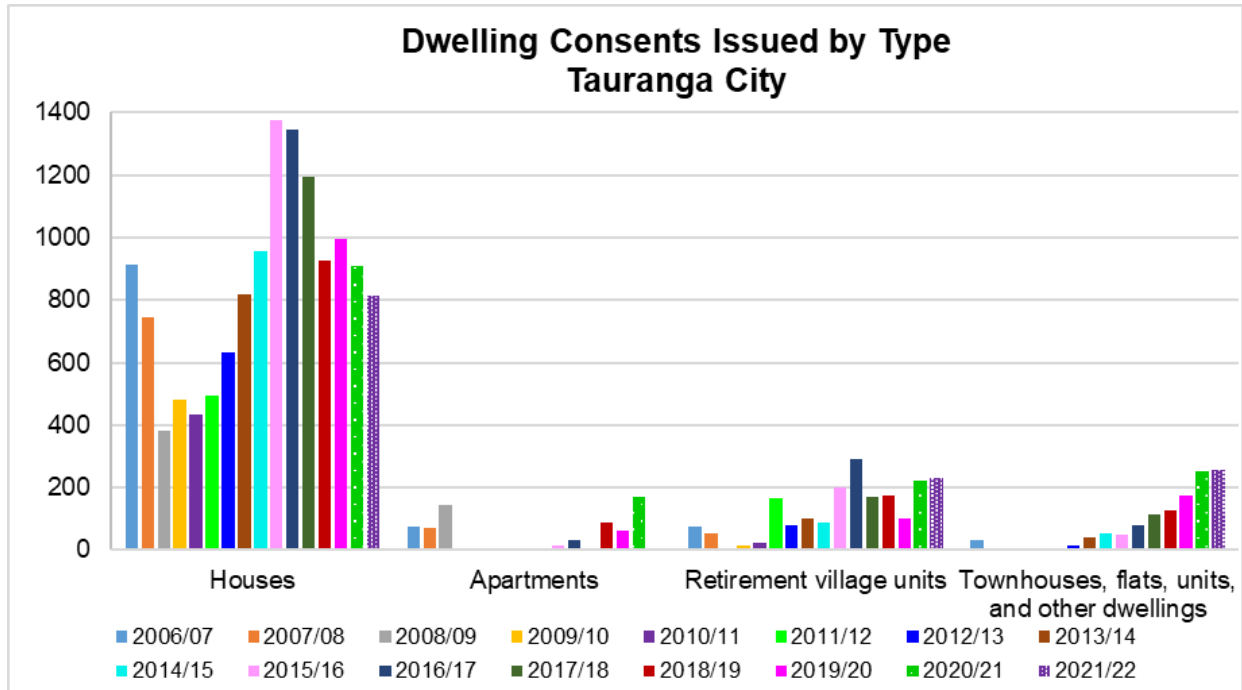


Table 27 All residential buildings, Tauranga City and WBOPD

All residential buildings	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-246	-15.8
Last 5 years (average)	↓	-92	-6.6
Last 10 years (average)	↓	-11	-0.8
<i>Western BOPD</i>			
This year			
Last year	↓	-41	-7.4
Last 5 years (average)	↑	37	7.8
Last 10 years (average)	↑	95	22.9

Table 28 Dwelling Type, Tauranga City and WBOPD

Period	Territorial Authority	Houses	Apartments	Retirement village units	Townhouses, flats, units, and other dwellings
Last 12 months	Tauranga City	62.3%	0.5%	17.6%	19.7%
	WBOPD	79.2%	-	-	20.8%
Last 5 Years	Tauranga City	69.2%	4.7%	12.8	13.2%
	WBOPD	85.6%	-	1.6%	12.8%



Table 29 Stand alone dwellings, Tauranga City and WBOPD

Stand alone dwellings		Trend	Change	% Change
<i>Tauranga City</i>				
This year	814			
Last year	907	↓	-93	-10.3
Last 5 years (average)	968	↓	-154	-15.9
Last 10 years (average)	996	↓	-182	-18.3
<i>Western BOPD</i>				
This year	404			
Last year	496	↓	-92	-18.5
Last 5 years (average)	405	↓	-1	-0.2
Last 10 years (average)	354	↑	50	14.1

## 7 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 2022. The two Parton Road commercial areas in Papamoa combined provide **the largest area of 'Commercial' zoning at 39.3 ha, 2.6 ha** greater in area than the Central Business District (CBD) in Tauranga Central, refer to Table 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 Papamoa 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 6.

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 <sup>th</sup> Avenue	3.6	
Parton Road (2 areas)	39.3	
Judea	2.7	
Wairakei Town Centre	27.0	
Wairakei Neighbourhood Centres	6.6	
Te Tumu <sup>1</sup>		1.4
Other <sup>2</sup>	31.2	
Total	281.6	1.4

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

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

Of Tauranga City's Greenfield UGA's, vacant land was identified within the Bethlehem, Papamoa (Palm Beach and Parton Road) and Papamoa East (Wairakei) commercial zoned areas, refer to Table 31.

Table 31 Uptake of Commercial Zoned Land in Tauranga City

Urban Growth Area Commercial Centres <sup>1</sup>	Commercial Zoned land (ha)	Vacant Commercial Zoned Land (ha)	Percentage (%) Vacant
Bethlehem	12.57	0.62	5
Papamoa - Palm Beach	8.55	1.07	12
Papamoa - Parton Road <sup>2</sup>	39.28	5.89	15
Pyes Pa West - Tauriko	13.51	0	0
Papamoa East - Wairakei	33.60	33.60	100
Total	107.51	41.18	38

<sup>1</sup> 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 August 2022.

<sup>2</sup> 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 WBOPD, Te Puke has the largest commercial zoned land with 10.29 ha, followed by Katikati and Waihi Beach with 9.20 ha and 7.39 ha respectively (refer to Table 32). The 7.39 ha of commercial land in Waihi Beach, largely consists of the Wilson Road shopping centre and an additional 1.55 ha is part of the commercial transitional zone.

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

Table 32 Operative and Future Commercial Zoned Land in the Western Bay of Plenty District

Location	Commercial Land (ha)	
	Operative	Transitional <sup>1</sup>
Waihi Beach	7.39	1.54
Athenree	0.40	
Island View-Pios Beach	0.12	
Katikati	9.20	1.47
Omokoroa <sup>2</sup>	9.2	0.8
Pahoia	1.08	
Minden	2.21	
Te Puna	7.73	
Te Puke	9.18	
Pukehina	0.43	
Maketu	0.87	
Paengaroa	2.15	
<b>Total</b>	<b>49.95</b>	<b>3.81</b>

<sup>1</sup> Transitional Commercial zoned land is located in Waihi Beach and Katikati.

<sup>2</sup> Exclude the Special Housing Area which falls in the commercial zone.

## Availability and Uptake of Industrial Zoned Land

### Tauranga City

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

In May 2011 rezoning of 101.1 hectares of land for industrial purposes (Papamoa East Employment zone) was made operative at Wairakei in Papamoa East. A large proportion of employment land at Wairakei has been rezoned for residential activity following approval of a number of Special Housing Area's under the Housing Accord and Special Housing Area legislation in this locality. This has reduced the employment land by 41.2 hectares, with a further 11.2 hectares of this to be taken for the future Papamoa Eastern Interchange (PEI). The future Te Tumu urban growth area is expected to provide for some of that loss of employment land at Wairakei.

Table 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 <sup>1</sup>		60.3
Tauriko Extension <sup>2</sup>		91.8
<b>Total</b>	<b>1,005.8</b>	<b>152.1</b>

<sup>1</sup> 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.

<sup>2</sup> 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 October 2022, in the general industrial zoned land and the port industry zone. Around 21% (or 173.5 hectares) of the 815 hectares of zoned general industrial land in Tauranga City was vacant, with 49% (or 84.5 hectares) located at Tauriko industrial area.

In the Port Industry zone 4% (or 7.2 hectares) of the 190.8 hectares of Port Industry zoned land was vacant as at October 2022.

Table 34 Uptake of Industrial Zoned Land in Tauranga City (as at October 2022)

Area	Vacant (ha) <sup>1</sup>	Partially Vacant (ha)	Total Vacant	Vacant but Not Available (ha)	Partially Vacant but Not Available	Occupied (ha)	Total Occupied (ha)	Total Area (ha) <sup>3</sup>
General Industrial Zoned Land <sup>2</sup>								
Judea	0.00	0.00	0.00	0.00	3.26	20.46	23.72	23.72
Mt Maunganui	6.12	11.52	17.64	0.74	0.00	249.71	250.45	268.08
Oropi	0.89	0.00	0.89	0.59	5.28	42.72	48.59	49.48
Greerton	0.33	0.25	0.58	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	75.46	9.03	84.49	33.22	0.00	<b>119.27</b>	152.49	236.99
Wairakei <sup>4</sup>	30.02	0	30.02	11.2	0	0	11.20	41.22
<b>Total</b>	<b>151.05</b>	<b>22.49</b>	<b>173.54</b>	<b>54.24</b>	<b>33.87</b>	<b>553.39</b>	<b>641.50</b>	<b>815.05</b>
Port Industry Zone <sup>3</sup>								
Within Port Security Fence	0.58	0.37	0.95	0	0	156.19	156.19	157.14
Outside Port Security Fence	0.3	5.93	6.23	0	0	27.41	27.41	33.64
<b>Total</b>	<b>0.88</b>	<b>6.3</b>	<b>7.18</b>	<b>0</b>	<b>0</b>	<b>183.6</b>	<b>183.6</b>	<b>190.78</b>

<sup>1</sup> "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.

<sup>2</sup> General Industrial zoned land includes land zoned Tauriko Industry, Industry, and Papamoa East Employment.

<sup>3</sup> 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.

<sup>4</sup> 11.19 ha of Wairakei Employment land is subject to designation for the future Papamoa East Interchange and classified "vacant but not available".

While there was 173.5 hectares identified as vacant industrial land, it is estimated that this will decrease as new areas are developed for industrial activity (eg: as industrial zoned land is used for road corridors and stormwater reserves, and steep or low lying undevelopable land is deducted) – see Table 35.

The 2022 industrial land survey estimated 37.2 hectares of zoned industrial land in Tauriko would be lost to escarpments, and future roads and stormwater ponds leaving approximately 80 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 80 hectares of vacant land, approximately 32.9 hectares was ready to be occupied for industrial activity (subdivided, earthworked, services in place), however all of this land had been sold by the developer Element IMF. A few parcels have current or lapsed building consents for business or commercial purposes. Limited opportunities to purchase or lease land from new owners was evident at survey in October 2022 with only 4 properties with buildings and 11 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) <sup>1</sup>	Ready to go land <sup>2</sup>
Judea	0.00	0	0
Mt Maunganui	17.64	17.64	17.64
Oropi	0.89	0.89	0.89
Greerton	0.58	0.58	0.58
Sulphur Point	0.00	0	0
Te Maunga	39.93	27.98	6.89
Owens Place	0.00	0	0
Tauriko <sup>3</sup>	84.49	80.3	32.89
Wairakei	30.02	22.52	0
subtotal	173.54	149.87	58.90
Port Industry subtotal	7.18	7.18	7.18
Total	180.72	157.05	66.08

<sup>1</sup> **Nett developable area of land (estimated “nett” area) removes land that will be external to the site, such as roads, escarpments and stormwater reserves.**

<sup>2</sup> Site earthworks completed, services in place, ready to be occupied for industrial activity.

<sup>3</sup> **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 October 2022, 58.9 hectares of industrial land was assessed to be ready to be occupied for industrial activity, and 10 properties with buildings and 12 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	27.81	35.89
Te Puna		30.58
Ōmokoroa		16.04
Te Puke	79.31	88.28
Rangioru	37.02	179.63
Paengaroa	9.57	
<b>Total</b>	<b>153.71</b>	<b>369.26</b>

Industrial land in Te Puke includes 72 Hectares from Plan Change 70 which is dependent on roading and infrastructure upgrades. **New private plan change area included in Te Puke and new State Highway alignment included in Ōmokoroa.**

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, Rangioru 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 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 2022								
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
<b>Ōmokoroa</b>	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
Rangioru <sup>1</sup>	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
<b>TOTAL</b>	<b>127.43</b>	<b>202.49</b>	<b>191.98</b>	<b>521.90</b>	<b>0.00</b>	<b>81.29</b>	<b>18.68</b>	<b>621.87</b>
Percentage	20.49%	32.56%	30.87%	83.92%	-	13.07%	3.00%	100.00%

<sup>1</sup> Include AFFCO as part of Total Occupied

## Business Land Capacity

A Housing and Business Capacity Assessment (2017 HBA) was completed under requirements of the NPS-UDC for SmartGrowth in 2017. Under the NPS-UD, which replaced the NPS-UDC in August 2020, a full HBA including a business capacity assessment, is required in time to inform the 2024 long-term plan (LTP), and is currently being prepared by SmartGrowth for release early 2023.

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

- Development capacity in the commercial zones is well catered across the sub-region, with some emerging pressure on some smaller neighbourhood centres especially if increasing demand for services results from higher densities of residential activity and higher proportions of older residents in these areas.

- The bulk of retail employment growth in Tauranga City is projected to occur in the city centre and the large shopping malls at Tauranga Crossing and Bayfair, located to the west and east respectively; all three of these locations have significant zoned capacity for expansion.
- The projections indicate that Tauriko Business Estate in the western corridor and the Rangiuru Business Estate in the eastern corridor will cater for a large proportion of the forecast industrial growth in the sub-region. Other areas for industrial activity of smaller but still significant scale will become available in the eastern corridor at Te Tumu, and in the northern corridor at Te Puna and Omokoroa during the medium term.
- While short term industrial land demand is provided for, medium term supply requires the roll out of the SmartGrowth settlement pattern to provide for additional industrial capacity including land south of Belk Road at Tauriko and at Te Tumu in Papamoa East.

Since the 2017 HBA was completed Tauriko Business Estate has experienced high land sales and a high rate of industrial land uptake. Enabling works to extend the Tauriko Business Estate to the south of Belk Road is underway with the Tauranga City boundary recently altered to include this future industrial area within Tauranga City. This will potentially add approximately 91.8 hectares of net industrial land supply in the medium term. While additional industrial land combined with remaining capacity in Tauriko and other industrial areas, and future industrial land provision in Te Tumu is expected to provide sufficient industrial land capacity in the short to medium term for Tauranga City, recent high uptake rates of industrial land if sustained may impact the sufficiency of medium term supply.

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

The updated business capacity assessment required under the NPS-UD will re-evaluate the sufficiency of business land, particularly industrial land, to meet future demand<sup>24</sup>. Given the considerable lead in time to structure plan and rezone land, and to deliver infrastructure, it is important that future industrial land is identified, assessed, and where appropriate progressed to maintain continuous and unimpeded industrial land supply.

## Business Land/Population Ratio

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

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

Territorial Authority	2022 Estimated Resident Population	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
Tauranga City	158,300	1157.9	0.0073	283	0.0018
Western Bay of Plenty District	59,700	621.87	0.0104	53.76	0.0009
Total	218,000	1,779.77	0.0082	327.28	0.0015

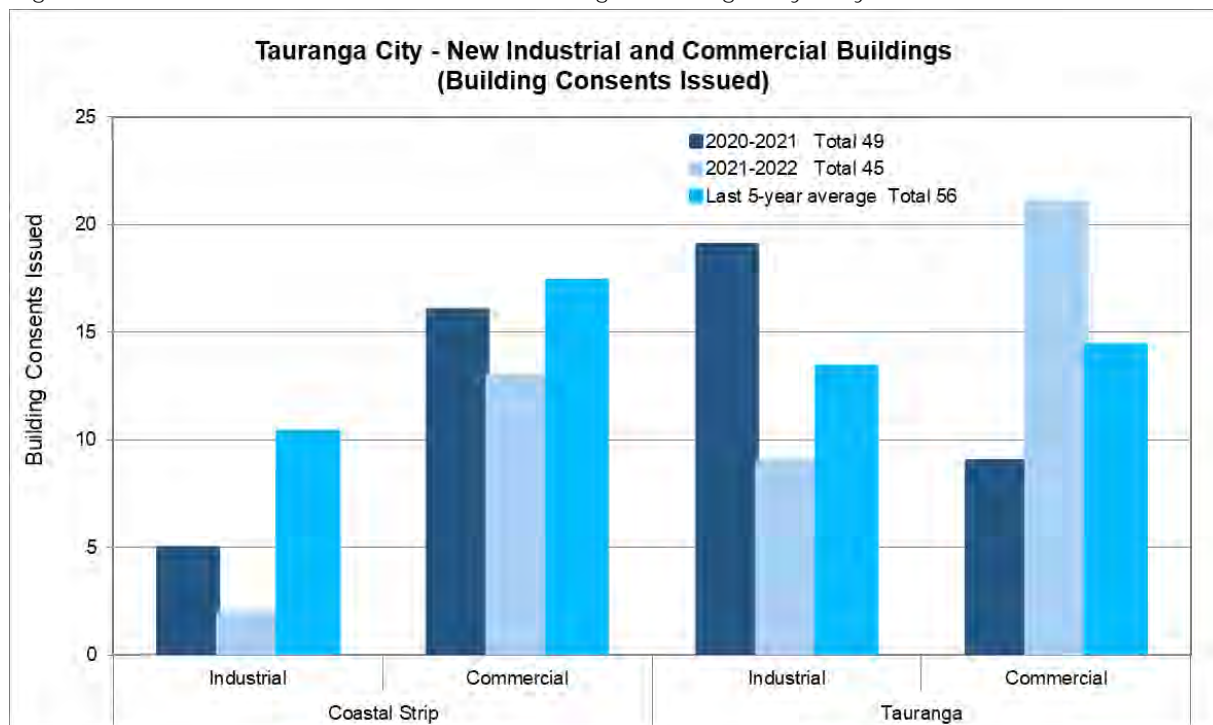
<sup>24</sup> The full HBA (both housing and business assessments) is expected to be completed by early 2023 to inform the Future Development Strategy (FDS); both are required under the NPS-UD to be completed in time to inform the 2024-2034 LTP.

## Industrial and Commercial Building Consents Issued

### Tauranga City

In 2021/22, Tauranga City has a total of 11 new industrial and 34 commercial buildings consented in 2020/21, 9 more commercial buildings and 13 less industrial buildings compared to the previous year. Of the total 45 buildings consented during the year, 15 were located in the Coastal Strip and 30 were located in the Tauranga area.

Figure 48 New industrial and commercial buildings, Tauranga City, July 2020 to June 2022



### 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.

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
5 Year Average	1.2	4.25



## Non-Residential Building Consents Issued by Type

In the last 16 years to June 2022, WBOPD had more non-residential buildings consented than Tauranga City, except in 2020/21 when Tauranga City had 5 more non-residential buildings consented than WBOPD. The type of non-residential buildings consented vary between the two local authorities. WBOPD had a higher number of farm buildings consented due to the more rural nature of activities in the district, while Tauranga City had more commercial buildings and factories, industrial and storage buildings consented.

In 2021/22 WBOPD had a total of 117 non-residential buildings consented, 27 (or 14%) more buildings compared to the previous year. More than 64% (75) of these buildings were farm buildings, 24% were factories, industrial, & storage buildings and 8% were hotels, motels, boarding houses, and prison buildings.

Tauranga City had a total of 94 non-residential buildings consented in the same period, 1 less building compared to the previous year. More than 72% of these buildings consisted of factories, industrial, and storage (35%) and commercial (37%) buildings.

Figure 49 Non-residential building consents, WBOPD (total), 2006 to 2022

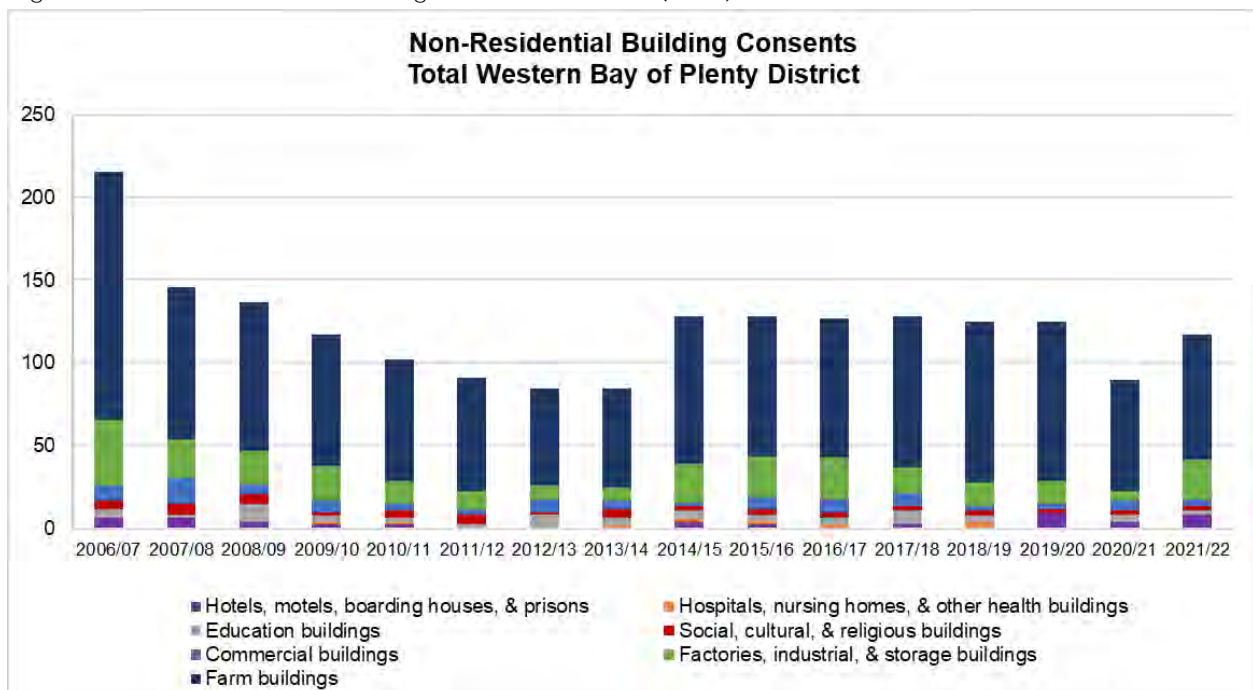
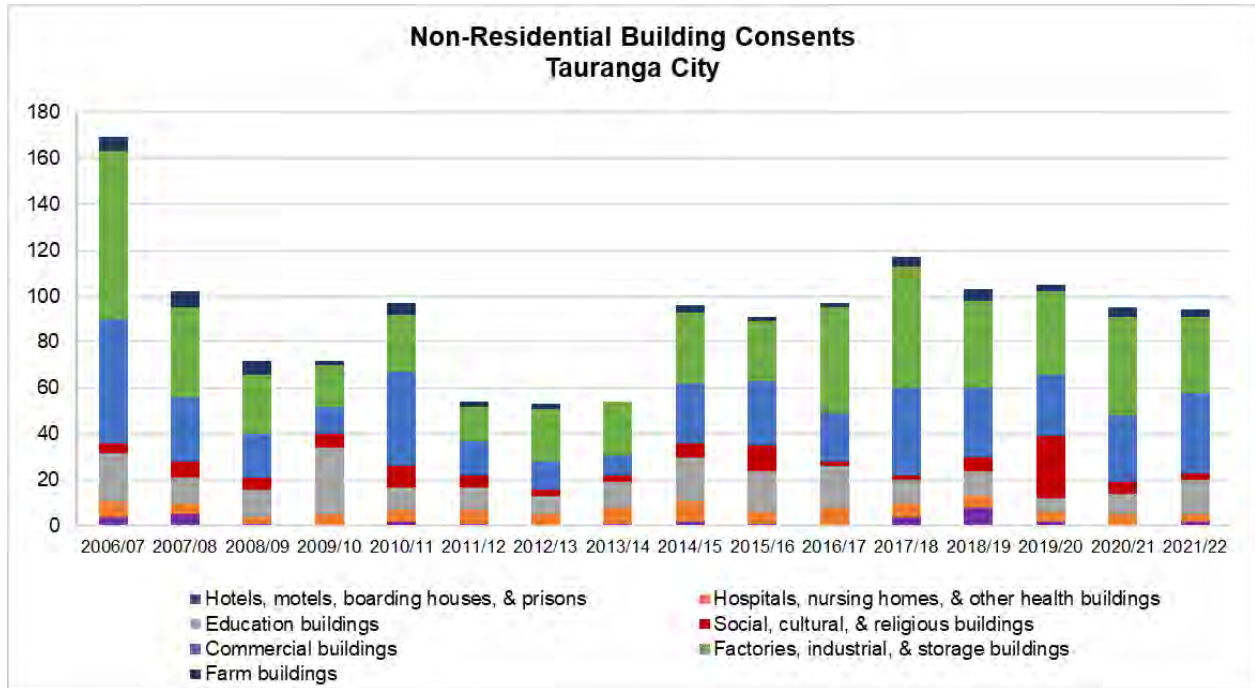


Figure 50 Non-residential building consents, Tauranga City, 2006 to 2022



Source: Statistics NZ Infoshare

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

All non-residential buildings	Trend	Change	% Change
<i>Tauranga City</i>			
This year			
Last year	↓	-1	-1.1
Last 5 years (average)	↓	-9	-8.7
Last 10 years (average)	↑	7	8.0
<i>Western BOPD – Urban</i>			
This year			
Last year	↑	27	30.0
Last 5 years (average)	≡	-	-
Last 10 years (average)	↑	3	2.6

### Non-Residential Building Consents by Construction Value

While the number of non-residential buildings consented in the sub-region had increased from 2020/21 to 2021/22 by 14%, the total value had declined by 20% as less high value non-residential buildings (like cool stores/ packhouses in WBOPD and factories and industrial buildings in Tauranga City) were consented during the year.

Figure 51 Non-residential building consents and average construction value, WBOPD, 2006 to 2022

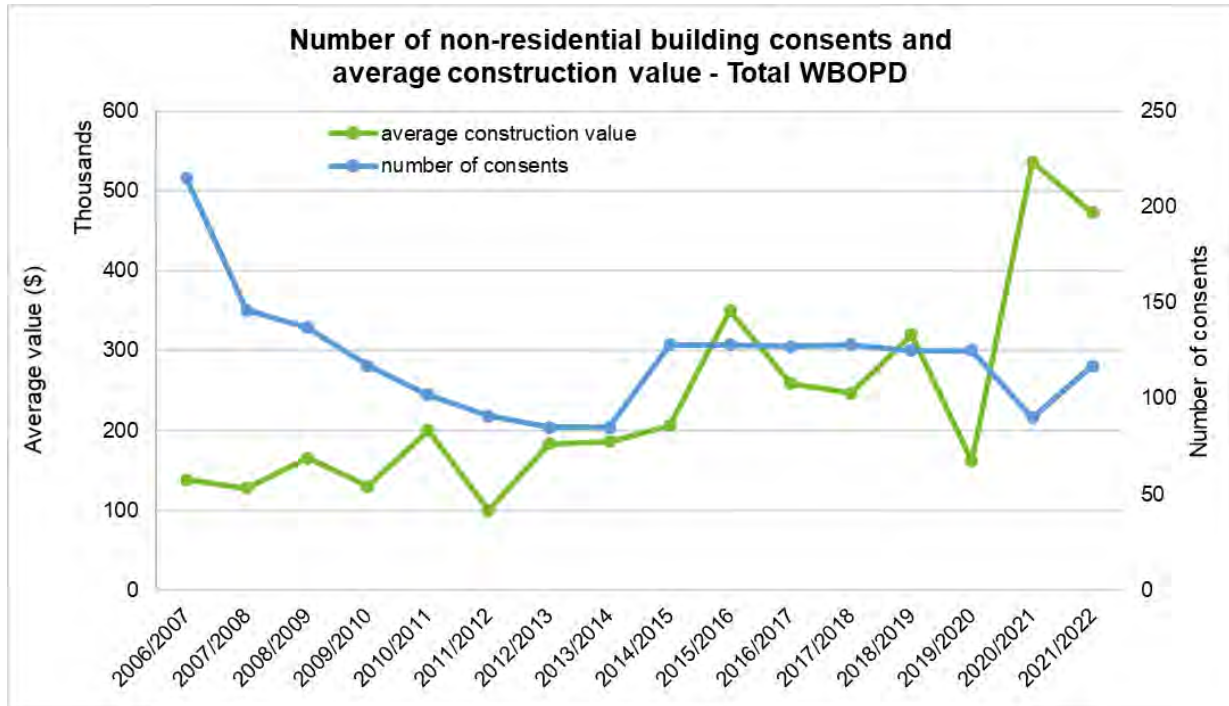
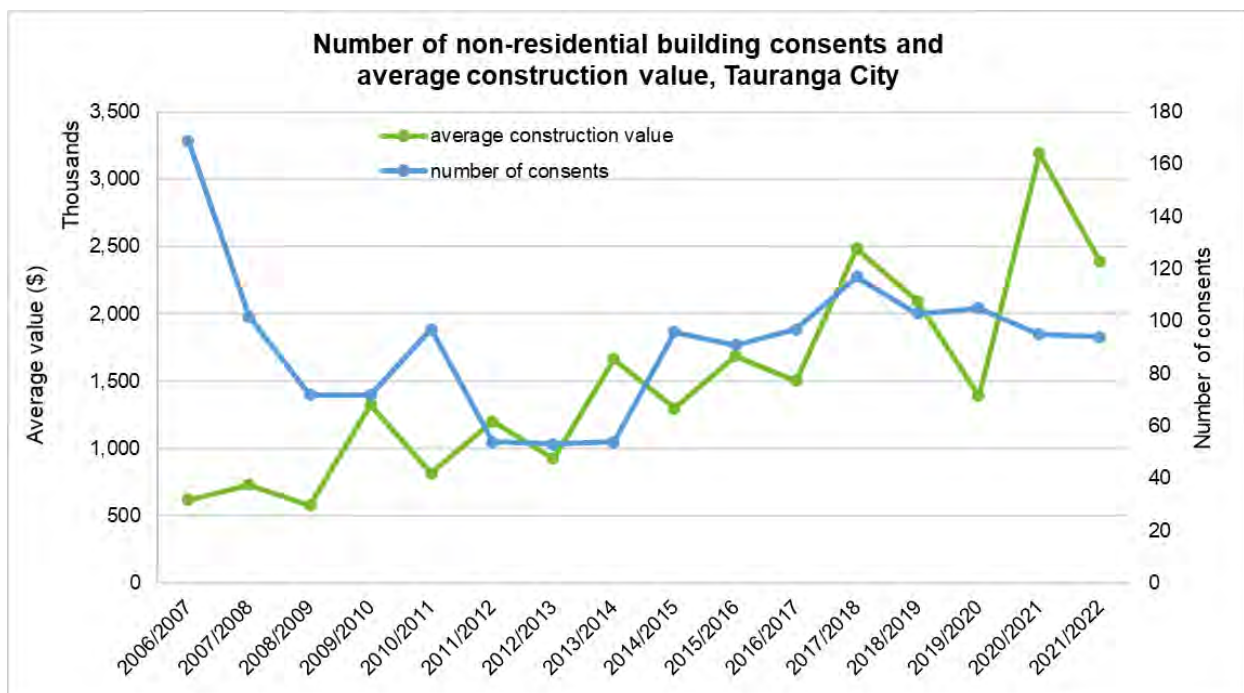


Figure 52 Non-residential building consents and average construction value, Tauranga City, 2006 to 2022



## Commercial and Industrial Buildings

In Tauranga City, the total value of all new non-residential buildings consented in 2021/22 was \$224.4 million, which was 26% below the previous year's value of \$303.1 million. The combined value of new commercial and industrial (factories, industrial and storage) buildings accounted for \$127.4 million and equivalent to 56.8% of the total value of all non-residential buildings consented during the year. This was significantly lower than the value of commercial and industrial buildings consented in the previous year recorded at \$256.2 million, the highest value and proportion (85%) recorded in the last 16 years.

Table 41 Value and proportion of new commercial and industrial buildings to all new non-residential buildings consented, Tauranga City, 2006/07 to 2021/22

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

In WBOPD, the value of all non-residential buildings consented in 2021/22 was \$55.3 million, the highest value recorded in the last 16 years. The combined value of new commercial and industrial (factories, industrial and storage) buildings accounted for \$40.9 million and equivalent to almost three fourths of the total value of all non-residential buildings consented during the year. Although this was slightly higher by \$2.6 million than the previous year, the proportion was slightly lower by 5.3% than the **previous year's** record of 79%.

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 2021/22

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

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

SmartGrowth is committed to improving the annual monitoring document over time. This year marks the fourth year of monitoring residential section size, typology and number of bedrooms for dwellings consented. These indicators will be monitored continuously on a quarterly basis and included in future annual reports. This is also the fourth annual report that includes dwelling density for Tauranga City urban growth areas. This will be continuously monitored as future development occurs. Density assessment will be expanded in the 2022/23 report to include density in the established infill/intensification parts of the City. Density work in WBOPD 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 Development<sup>25</sup>

### 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**

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<sup>25</sup> 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

### Explanation of Development Terms

**"Urban"** refers to subdivisions or dwelling consents in:

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

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

**"Rural"** refers to subdivisions or dwelling consents in:

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

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

*Other terms used:*

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

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

*Greenfield UGA* – Greenfield Urban Growth Area.

*SP* – Structure Plan.

### Subdivision Process

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

#### Stage 1 Subdivision Plan

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

#### Stage 2 Survey Plan

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

#### Stage 3 Final Approval

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

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

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



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

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

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

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

## Building Consent Issue for Dwellings

### Western Bay of Plenty District

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

### Tauranga City

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

## Residential Growth Areas

### Western Bay of Plenty District

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

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

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

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

for subdivision potential except in Omokoroa where a minimum lot size of 400m<sup>2</sup> is permitted in Stage 1 and a minimum of 600m<sup>2</sup> is allowed in the existing village.

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

## Tauranga City

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

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

## Vacant Land

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

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

## Western Bay of Plenty District

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

*Residential infill* existing urban areas of Western Bay District where a land parcel is 800m<sup>2</sup> or with the potential to enable subdivision to a minimum lot size of 350m<sup>2</sup>. Except in Omokoroa where a minimum lot size of 400m<sup>2</sup> is permitted in Stage 1 and a minimum of 600m<sup>2</sup> is allowed in the existing village.

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

In the Western Bay of Plenty District a practical figure of potential infill development is calculated by taking the number of developed lots over 800m<sup>2</sup> (sewered) and 1800m<sup>2</sup> (unsewered) in a residential zone and multiplying this figure by 56%<sup>1</sup>.

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

## Tauranga City

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

### *Residential Intensification Areas*

currently this classification is applied to development within the High Density Residential zoned area in Mount Maunganui North, and City Living and City Centre zoned areas where greater density is permitted.

### *Residential infill/ Intensification*

existing urban areas of Tauranga zoned Suburban Residential where a land parcel is 650 m<sup>2</sup> or with the potential to enable subdivision to a minimum lot size of 325 m<sup>2</sup>. Includes residential growth in other zones within the infill area such as in Commercial Business zoned areas.

### *Rural Infill*

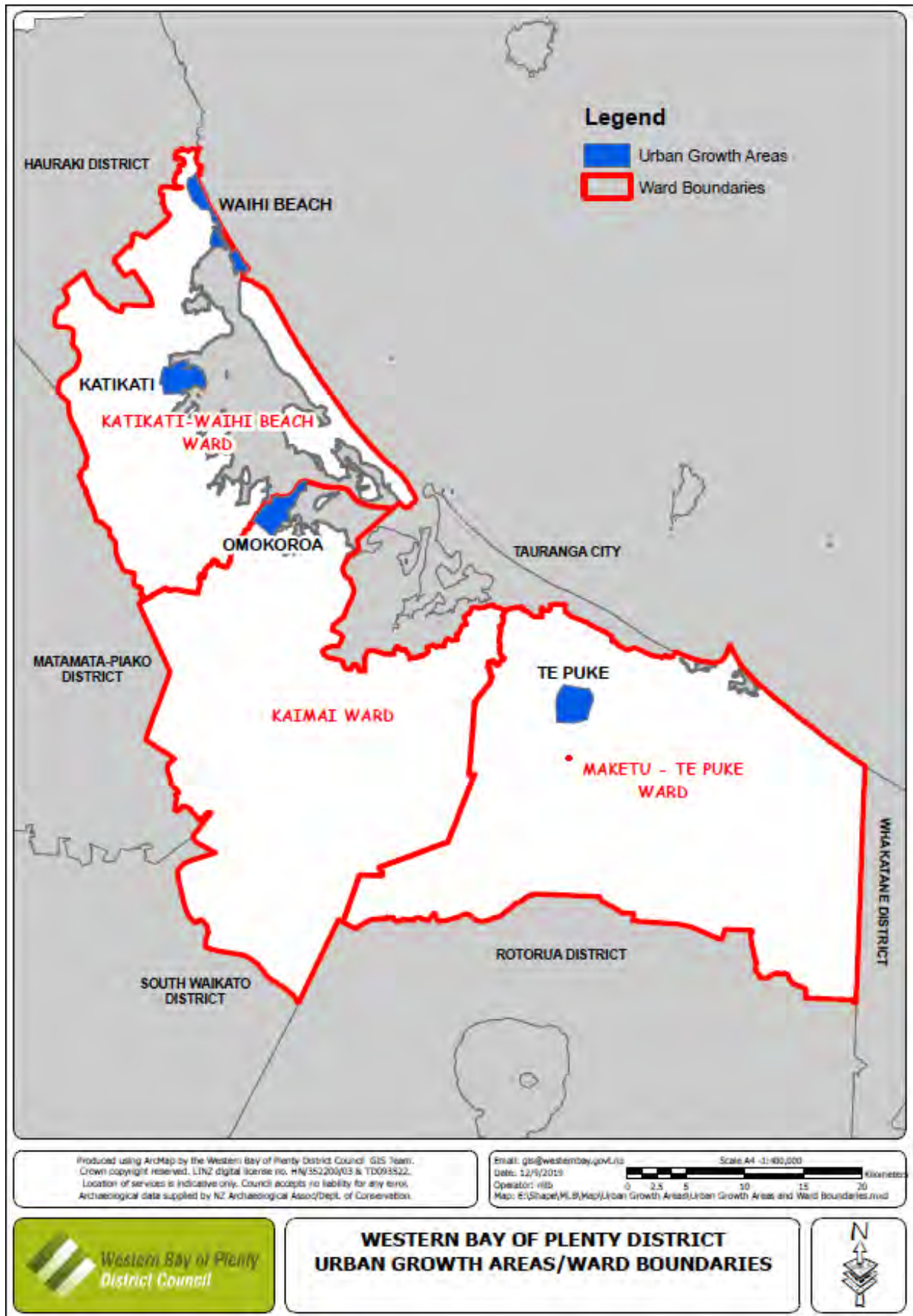
Areas of Tauranga City with Rural zoning outside the Greenfield **UGA's**

### *Residential Greenfield UGA's*

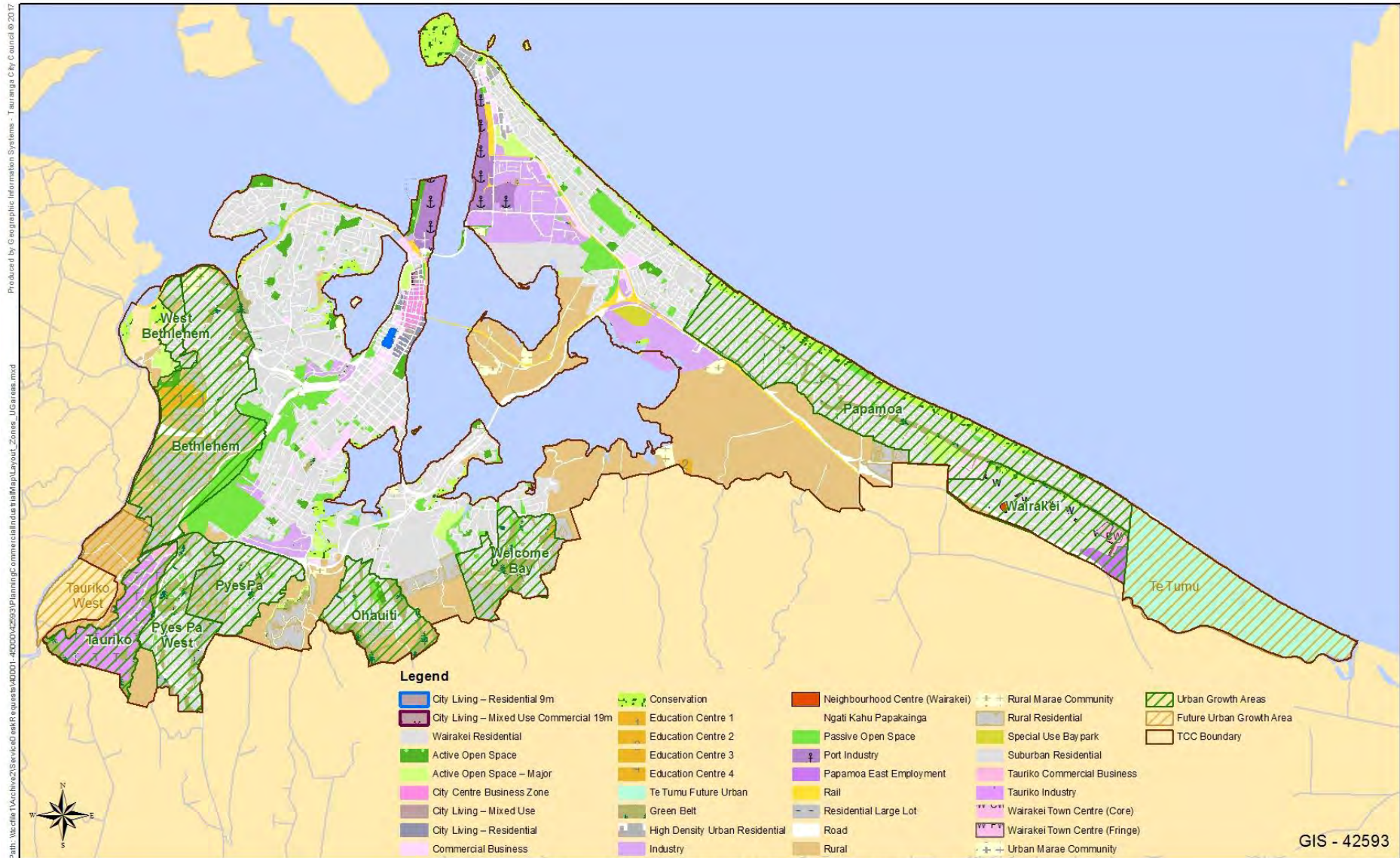
**any land parcel which is subdivided within Greenfield UGA's (constituting "traditional" rezoning of rural land to residential, and subdivision and development for residential purposes).**

# Appendix 3

## Western Bay of Plenty District Development Map

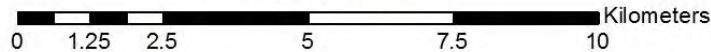


# Tauranga City Development Map



## PLANNING ZONES AND URBAN GROWTH AREAS

- Tauranga City Council -



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## Appendix 4

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

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

#### Western Bay of Plenty District (2018 Census)

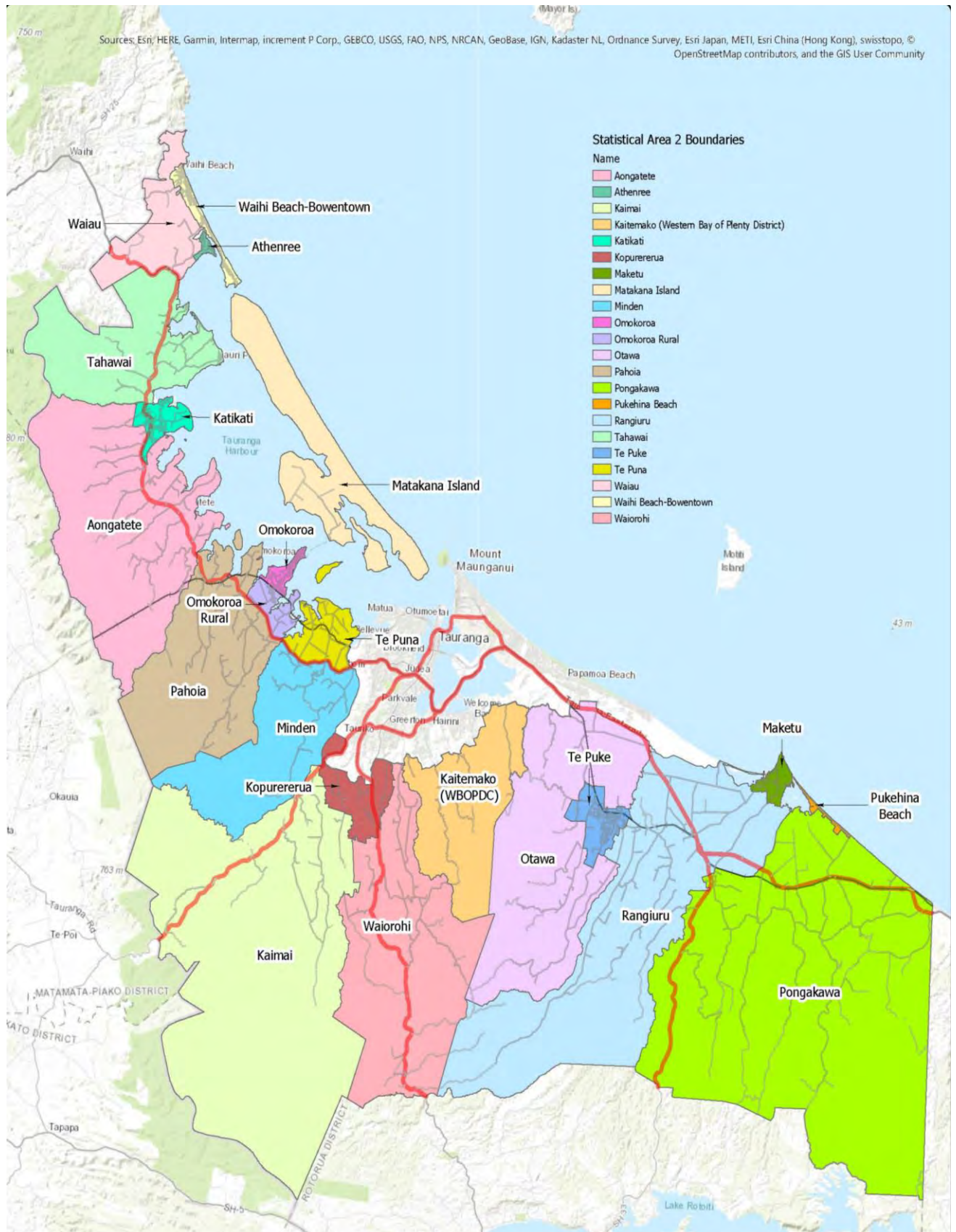
Statistical Area2	Population	2018 Occupied Dwelling Count	2018 Unoccupied Dwelling Count	Total Dwellings 2018	Unoccupied/ Total Ratio (%)
Waihi Beach-Bowentown	2,484	1,071	1,410	2,481	57
Athenree	804	297	117	414	28
Waiau	333	123	45	168	27
Tahawai	1,833	744	87	831	10
Aongatete	3,279	1,305	108	1,413	8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

Tauranga City (2018 Census)

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

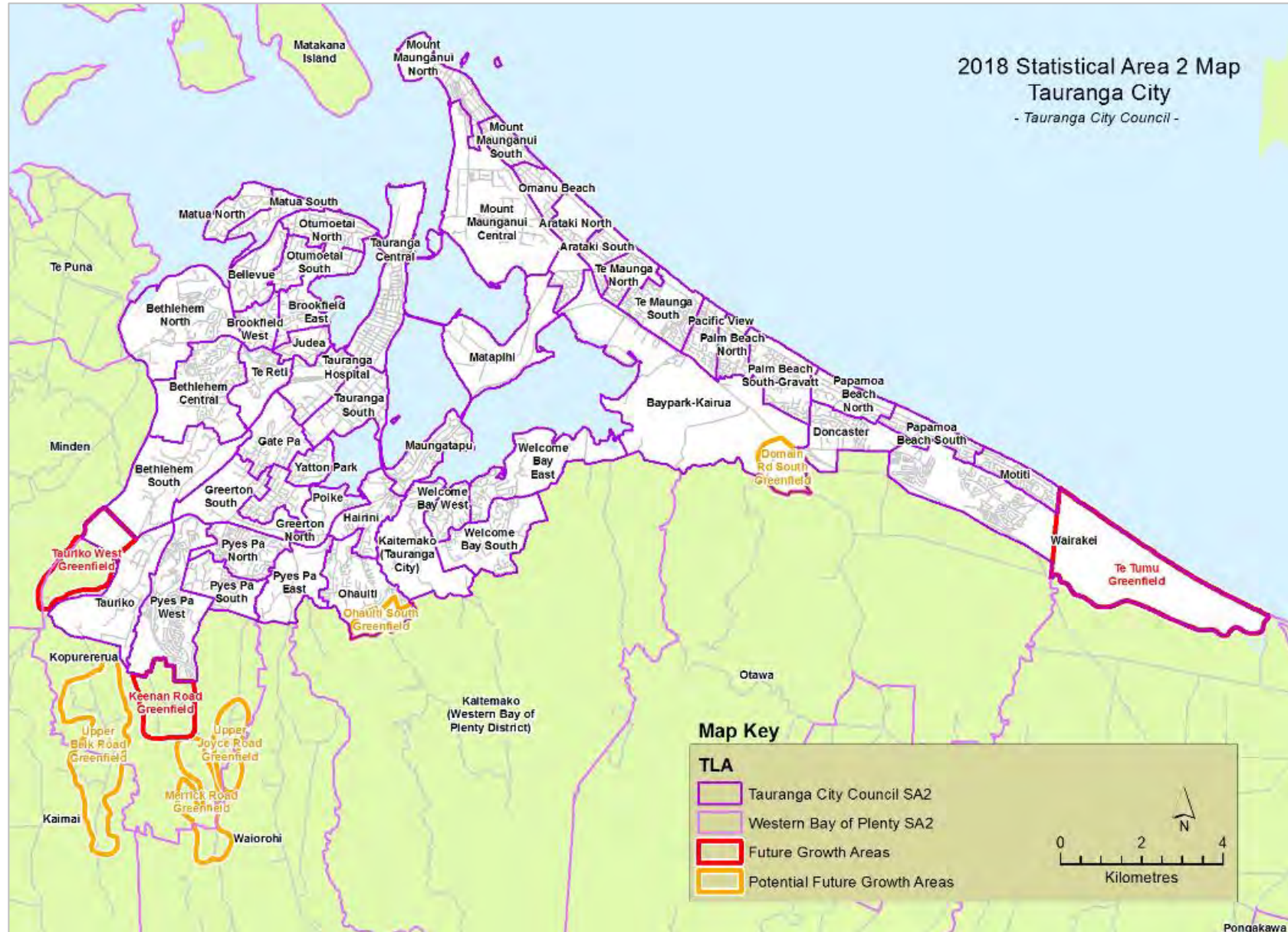
# Appendix 5

## Western Bay of Plenty District Statistical Area 2 Map



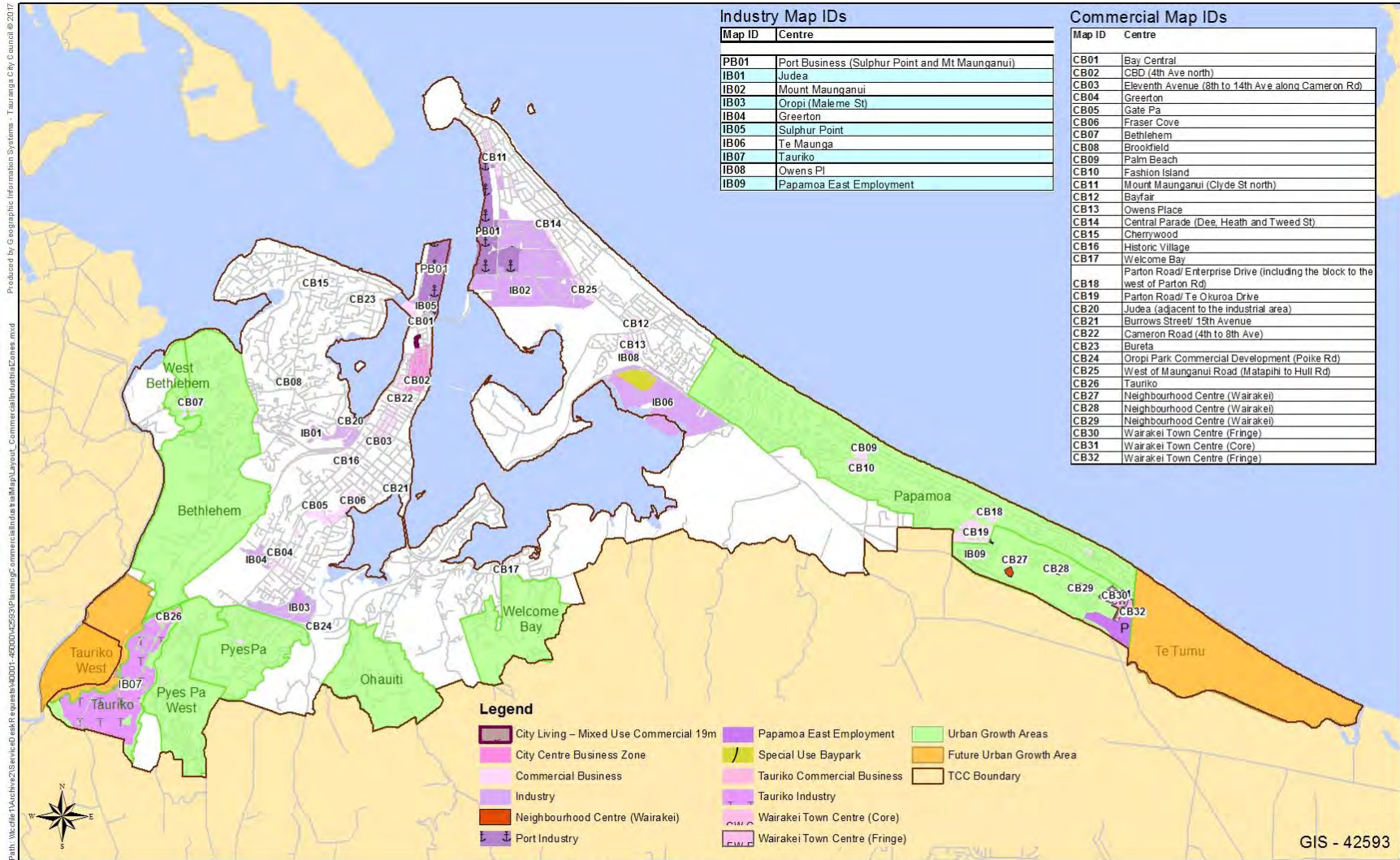


# Tauranga City Statistical Area 2 Map



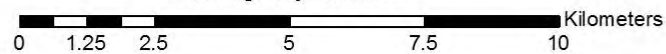
# Appendix 6

## Tauranga City Commercial and Industry Zoned Areas



### COMMERCIAL AND INDUSTRIAL AREAS

- Tauranga City Council -



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## Appendix 7

### Tauranga City Plan Definition of Nett Area

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

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

### Calculation of dwelling density

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

Where:

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

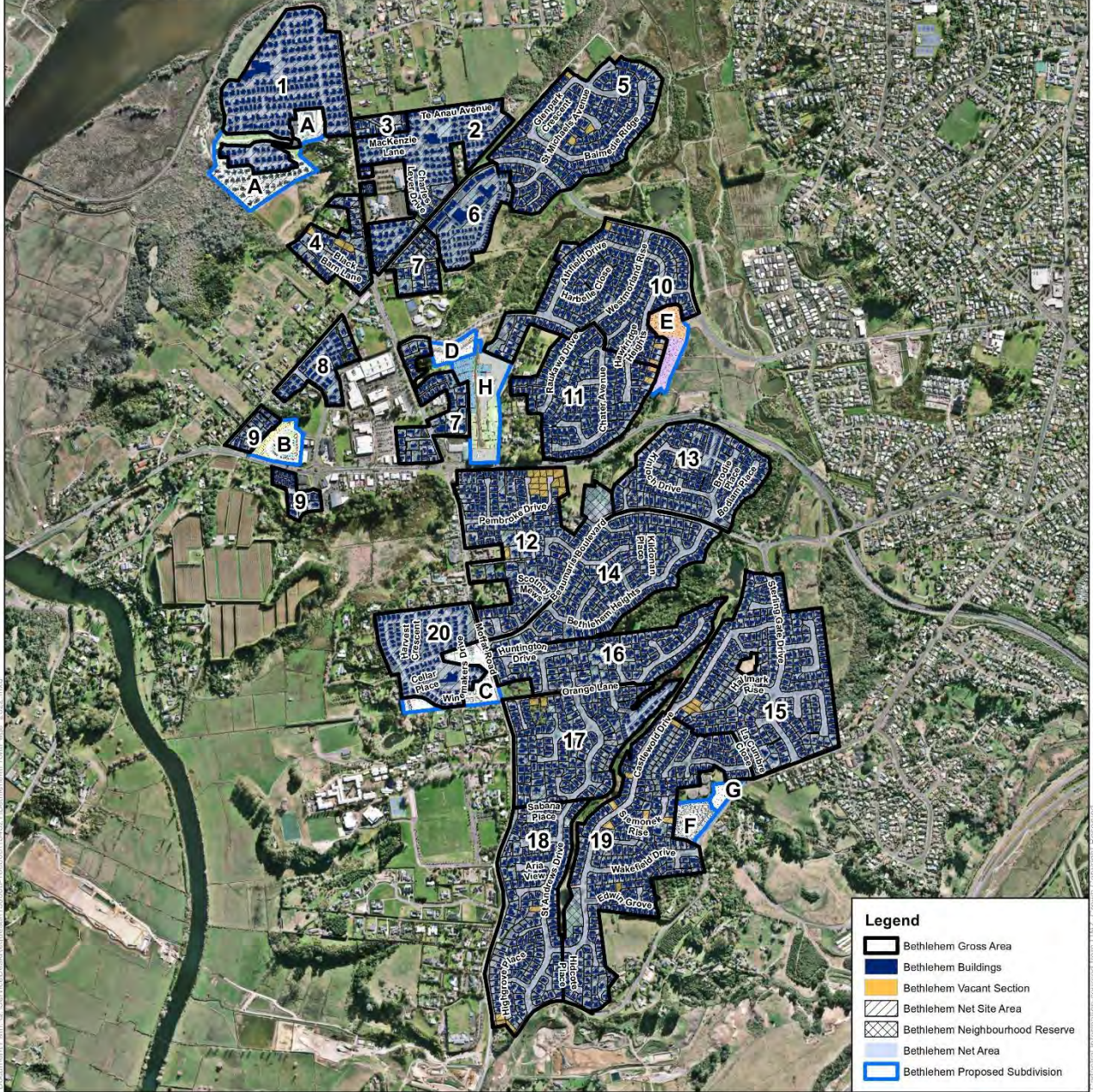
$$\text{Area} = \text{nett area in ha}$$

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

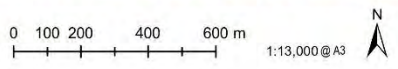
# Tauranga City Density Maps

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

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	248	0	248	15.73	15.76	15.38	16.13	15.73	15.76
2	172	0	172	12.52	13.74	11.66	14.75	12.16	14.15
3	19	0	19	1.89	11.27	1.55	12.25	1.89	11.27
4	35	4	39	4.06	7.63	4.35	9.96	4.94	7.50
5	174	8	177	17.85	10.08	18.07	18.54	17.62	10.04
6	279	0	279	6.20	44.97	5.79	48.20	6.20	44.97
7	64	0	64	8.40	7.63	6.37	10.05	7.45	8.59
8	69	0	69	3.88	17.76	3.00	22.98	3.58	19.20
9	38	0	38	3.88	13.17	2.43	15.62	2.89	13.17
10	197	8	200	18.44	10.29	14.62	18.88	19.42	10.50
11	156	2	158	13.79	11.46	10.80	14.63	13.77	11.48
12	165	15	180	18.40	9.78	13.35	13.48	17.60	10.23
13	172	1	173	13.27	13.03	10.73	16.12	13.26	13.26
14	153	0	153	16.77	9.12	12.29	12.45	16.77	9.12
15	252	3	256	24.67	10.46	18.62	12.06	24.67	10.46
16	117	0	117	12.13	9.85	9.53	12.26	12.13	9.85
17	181	2	183	16.08	11.30	12.52	14.64	15.74	11.65
18	168	5	173	17.19	10.07	12.13	14.26	17.07	10.14
19	274	8	282	26.90	10.64	19.38	14.57	26.44	10.67
20	156	0	156	9.41	16.70	9.22	17.14	9.41	16.70
<b>Total</b>	<b>3094</b>	<b>46</b>	<b>3140</b>	<b>261.58</b>	<b>12.00</b>	<b>206.17</b>	<b>15.19</b>	<b>258.50</b>	<b>12.15</b>
<b>Proposed</b>									
A	0	21	21	5.43	3.87	3.20	5.56	5.43	3.87
B	0	100	100	1.86	53.83	1.29	77.35	1.86	53.83
C	0	17	17	2.67	8.61	0.90	18.88	2.67	8.61
D	0	25	25	1.04	24.01	0.40	63.91	1.04	24.01
E	0	31	31	2.30	13.49	1.80	17.24	2.30	13.49
F	0	28	28	1.56	17.92	1.09	25.79	1.56	17.92
G	0	14	14	0.59	23.83	0.59	23.83	0.59	23.83
H	0	46	46	4.70	8.78	2.36	19.18	4.70	8.78
<b>Proposed Total</b>	<b>0</b>	<b>232</b>	<b>232</b>	<b>20.05</b>	<b>14.06</b>	<b>11.64</b>	<b>24.22</b>	<b>20.05</b>	<b>14.06</b>
<b>Total Incl Proposed</b>	<b>3094</b>	<b>178</b>	<b>3272</b>	<b>281.64</b>	<b>12.16</b>	<b>217.81</b>	<b>15.67</b>	<b>278.55</b>	<b>12.29</b>



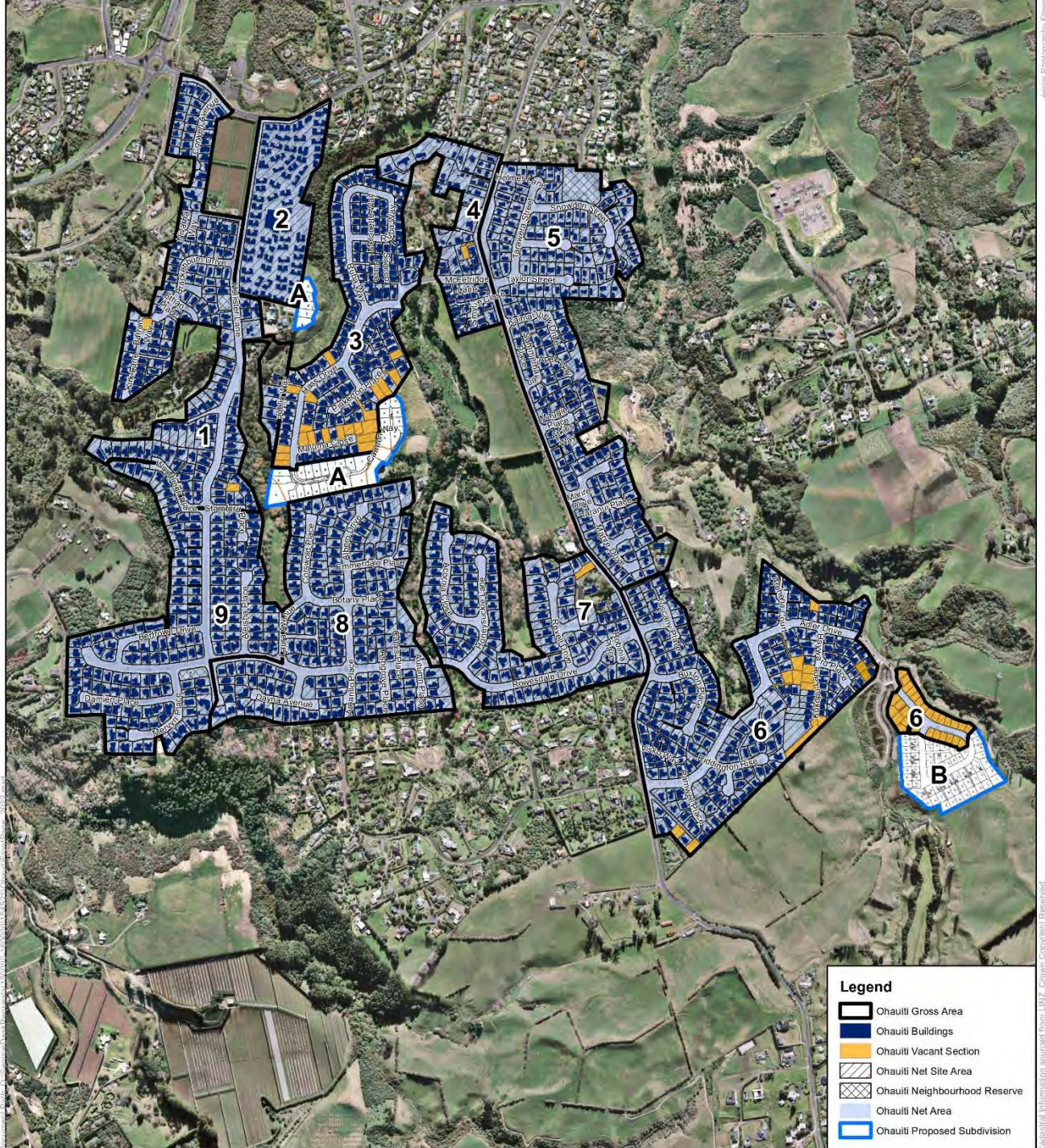
**Bethlehem Dwelling Density**



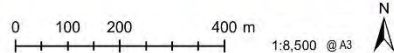
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	181	2	183	17.84	10.26	13.57	13.48	17.05	10.74
2	139	0	139	6.95	20.01	6.36	21.86	6.99	20.07
3	164	21	185	13.43	13.78	10.66	17.36	13.38	13.82
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	244	14	258	21.66	11.91	17.18	15.02	21.34	12.09
7	124	1	125	14.84	8.42	10.74	11.64	13.96	8.96
8	183	0	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
<b>Total</b>	<b>1515</b>	<b>39</b>	<b>1654</b>	<b>139.91</b>	<b>11.11</b>	<b>108.38</b>	<b>14.34</b>	<b>136.89</b>	<b>11.35</b>
<b>Proposed</b>									
A	0	35	35	3.40	10.31	3.03	11.54	3.40	10.31
B	0	65	65	3.26	19.95	2.80	23.25	3.26	19.95
<b>Proposed Total</b>	<b>0</b>	<b>100</b>	<b>100</b>	<b>6.65</b>	<b>15.03</b>	<b>5.83</b>	<b>17.15</b>	<b>6.65</b>	<b>15.03</b>
<b>Total Incl Proposed</b>	<b>1515</b>	<b>139</b>	<b>1654</b>	<b>146.56</b>	<b>11.29</b>	<b>114.21</b>	<b>14.48</b>	<b>143.55</b>	<b>11.52</b>



### Ohauti Dwelling Density



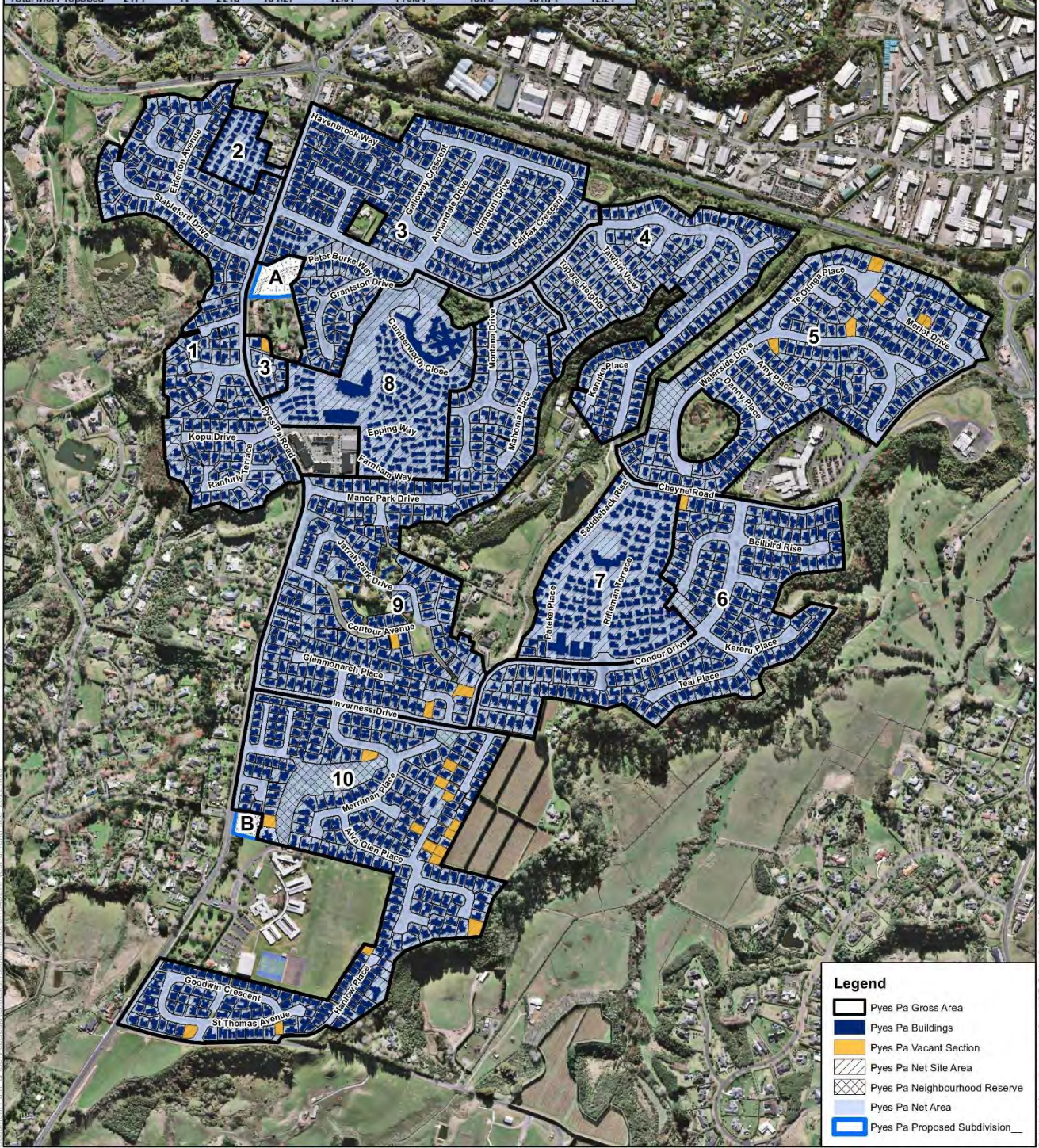
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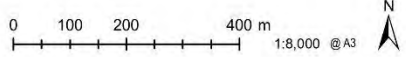
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area [ha]	Gross Dwellings / ha	Net Site Area [ha]	Net Site Dwellings / ha	Net Area [ha]	Net Area Dwellings / ha
1	227	0	227	19.44	11.68	15.26	14.87	19.43	11.68
2	59	0	59	1.92	30.68	1.90	31.09	1.92	30.68
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	219	6	225	22.14	30.16	16.44	13.69	22.08	10.19
6	192	1	193	18.60	30.38	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	298	15	313	28.78	10.88	20.02	15.64	28.66	10.92
<b>Total</b>	<b>2177</b>	<b>26</b>	<b>2203</b>	<b>183.20</b>	<b>12.03</b>	<b>140.00</b>	<b>15.74</b>	<b>180.64</b>	<b>12.20</b>
<b>Proposed</b>									
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
<b>Proposed Total</b>	<b>0</b>	<b>15</b>	<b>15</b>	<b>1.07</b>	<b>14.01</b>	<b>0.85</b>	<b>17.73</b>	<b>1.07</b>	<b>14.01</b>
<b>Total Incl Proposed</b>	<b>2177</b>	<b>41</b>	<b>2218</b>	<b>184.27</b>	<b>12.04</b>	<b>140.84</b>	<b>15.75</b>	<b>181.71</b>	<b>12.21</b>



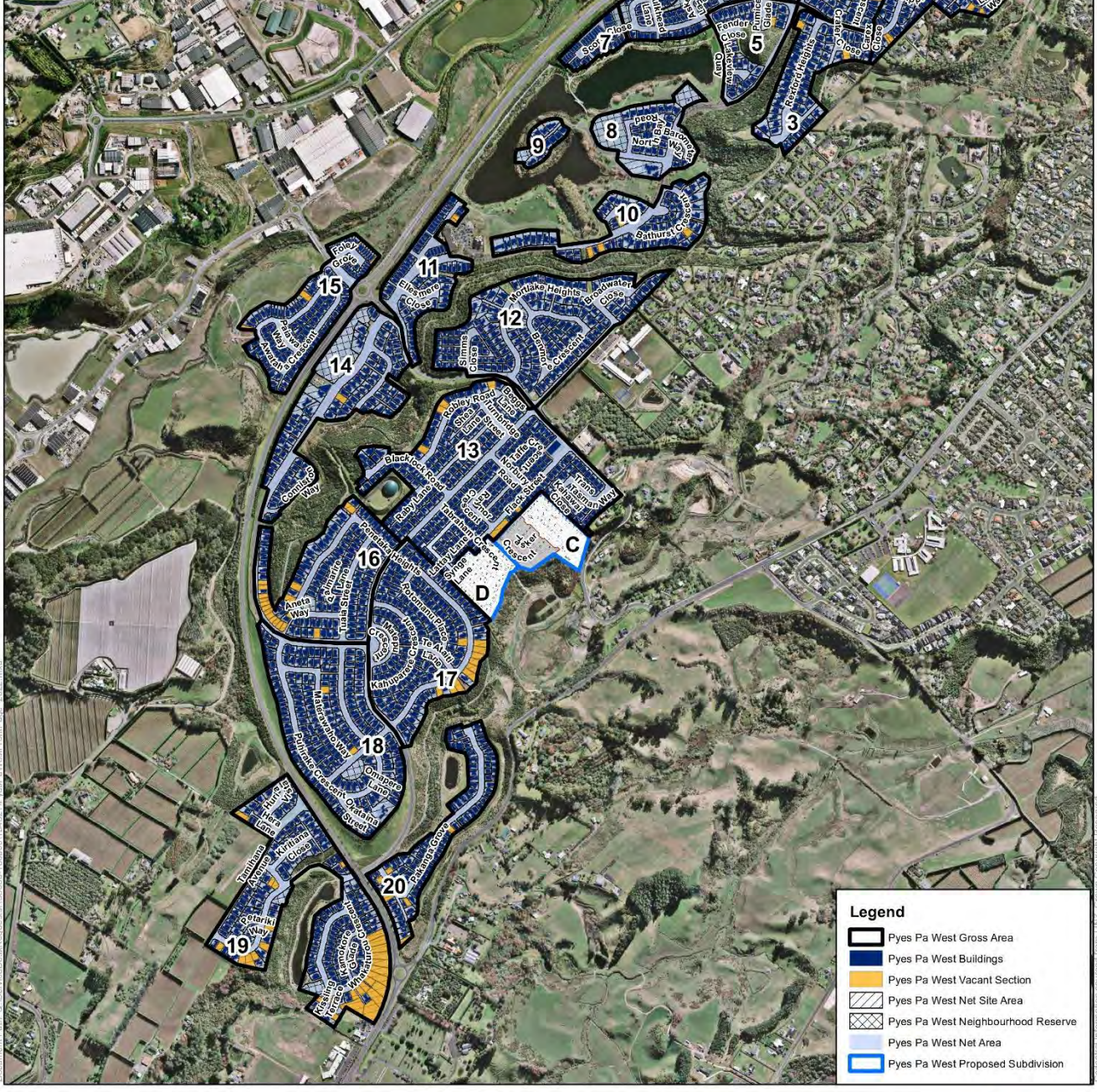
**Pyes Pa Dwelling Density**



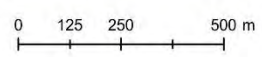
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	138	8	146	9.96	14.81	7.62	19.16	9.64	19.88
2	69	9	78	7.21	10.67	5.02	15.51	7.27	10.78
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	45	1	44	4.76	9.21	2.23	19.71	3.64	12.10
6	118	0	118	7.11	18.59	3.84	30.74	6.92	17.04
7	96	0	96	1.74	20.64	0.98	36.67	1.70	21.13
8	35	0	35	5.14	7.59	2.62	14.90	5.14	7.59
9	11	0	11	1.17	9.44	0.88	12.49	1.16	9.44
10	66	4	72	6.96	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	9.07	17.74	13.70	12.70
13	338	6	344	21.44	16.04	15.14	22.73	21.91	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	18.21
16	125	17	142	10.59	13.41	7.56	18.81	20.57	13.44
17	169	10	179	13.42	13.34	9.34	19.17	13.29	13.47
18	205	2	207	15.49	13.41	11.02	18.79	15.40	13.44
19	175	32	208	17.00	13.24	12.11	17.17	16.55	12.57
20	90	7	97	6.19	15.66	4.75	20.43	6.17	15.72
<b>Total</b>	<b>2202</b>	<b>104</b>	<b>2306</b>	<b>174.40</b>	<b>13.22</b>	<b>117.98</b>	<b>19.54</b>	<b>170.18</b>	<b>13.55</b>
<b>Proposed</b>									
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	58	58	3.61	16.05	2.84	20.40	3.61	16.05
D	0	71	71	2.57	27.61	2.11	33.62	2.57	27.61
E	0	10	10	0.71	14.06	0.63	15.95	0.71	14.06
<b>Proposed Total</b>	<b>0</b>	<b>208</b>	<b>208</b>	<b>12.01</b>	<b>17.32</b>	<b>10.04</b>	<b>20.71</b>	<b>12.01</b>	<b>17.32</b>
<b>Total Incl Proposed</b>	<b>2202</b>	<b>312</b>	<b>2514</b>	<b>186.41</b>	<b>13.49</b>	<b>128.03</b>	<b>19.64</b>	<b>182.19</b>	<b>13.80</b>



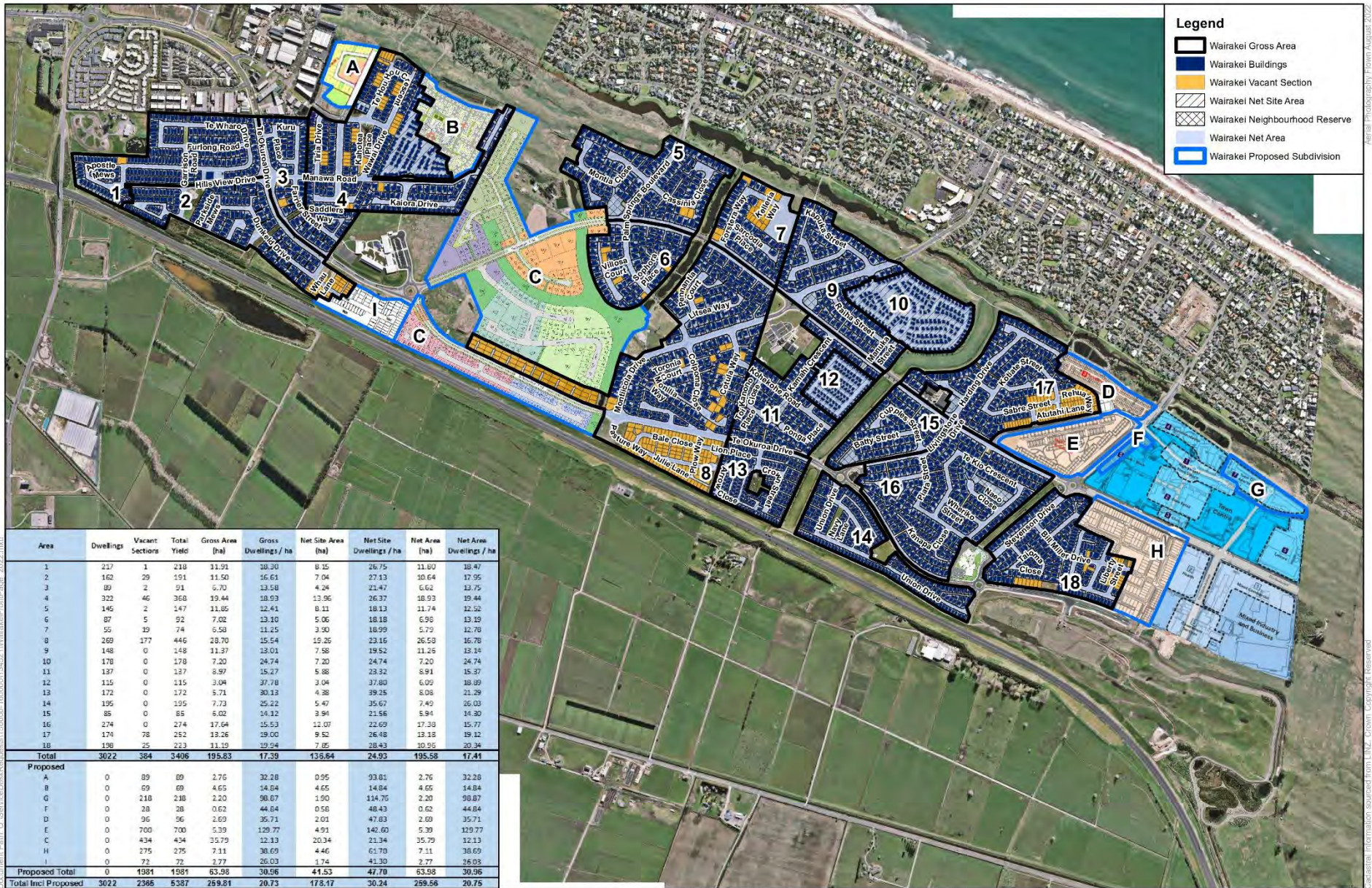
**Pyes Pa West Dwelling Density**



1:11,000 @ A3

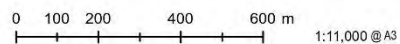
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Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	217	1	218	11.91	18.30	8.35	11.80	18.47	18.47
2	162	29	191	11.50	16.61	7.04	27.13	10.64	17.95
3	89	2	91	6.70	13.58	4.24	21.47	6.62	13.75
4	322	46	368	19.44	18.93	13.96	26.37	18.93	19.44
5	146	2	147	11.05	12.41	8.11	18.13	11.74	12.52
6	87	5	92	7.02	13.10	5.06	18.18	6.90	13.19
7	55	19	74	5.98	11.25	3.90	18.99	5.79	12.78
8	269	177	446	28.70	15.54	15.26	23.16	26.58	16.78
9	148	0	148	11.37	13.01	7.58	19.52	11.26	13.34
10	178	0	178	7.20	24.74	7.20	24.74	7.20	24.74
11	137	0	137	8.97	15.27	5.88	23.32	8.91	15.37
12	115	0	115	3.04	37.78	3.04	37.80	6.09	18.89
13	172	0	172	5.71	30.12	4.38	39.25	8.08	21.29
14	195	0	195	7.73	25.22	5.47	35.67	7.40	26.03
15	86	0	86	8.02	14.12	3.94	21.56	5.94	14.30
16	274	0	274	17.64	15.53	11.07	22.69	17.39	15.77
17	174	78	252	19.26	19.00	9.52	26.48	13.18	19.12
18	198	25	223	11.19	19.94	7.05	28.43	10.95	20.34
<b>Total</b>	<b>3022</b>	<b>384</b>	<b>3406</b>	<b>195.83</b>	<b>17.39</b>	<b>136.64</b>	<b>24.93</b>	<b>195.58</b>	<b>17.41</b>
<b>Proposed</b>									
A	0	89	89	2.76	32.28	0.95	93.81	2.76	32.28
B	0	69	69	4.65	14.84	4.65	14.84	4.65	14.84
G	0	218	218	2.20	98.87	1.90	114.75	2.20	98.87
F	0	28	28	0.62	44.84	0.58	48.43	0.62	44.84
D	0	96	96	2.69	35.71	2.01	47.83	2.69	35.71
E	0	700	700	5.39	129.77	4.91	142.60	5.39	129.77
C	0	434	434	35.79	12.13	20.34	21.34	35.79	12.13
H	0	275	275	7.11	38.69	4.46	61.70	7.11	38.69
I	0	72	72	2.77	26.03	1.74	41.30	2.77	26.03
<b>Proposed Total</b>	<b>0</b>	<b>1981</b>	<b>1981</b>	<b>83.98</b>	<b>30.96</b>	<b>41.53</b>	<b>47.70</b>	<b>83.98</b>	<b>30.96</b>
<b>Total Incl Proposed</b>	<b>3022</b>	<b>2366</b>	<b>5387</b>	<b>269.81</b>	<b>20.73</b>	<b>178.17</b>	<b>30.24</b>	<b>269.56</b>	<b>20.75</b>

### Wairakei Dwelling Density

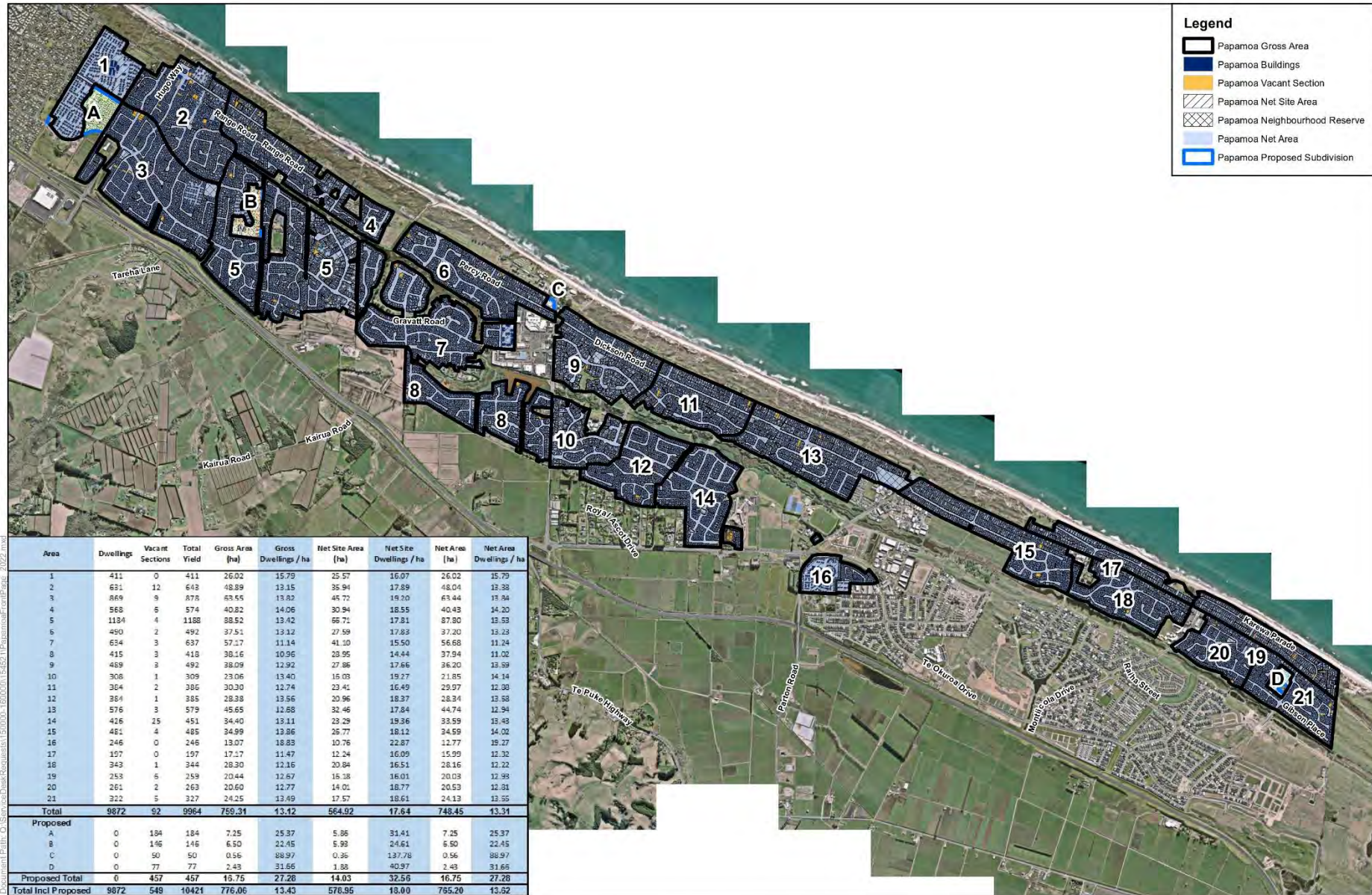


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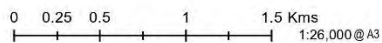


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**Papamoa Dwelling Density**



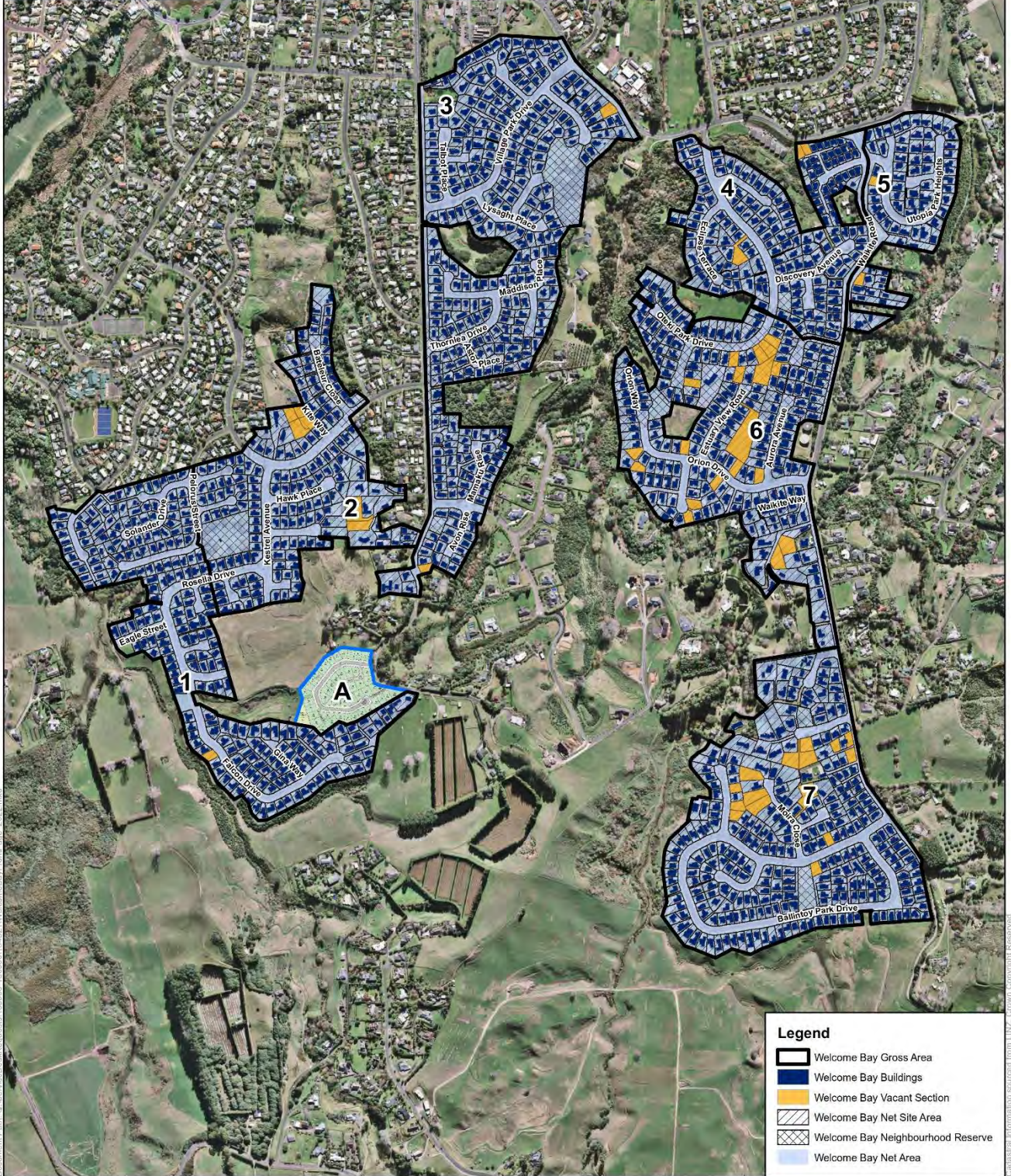
Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.



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Aerial Photography From August 2022  
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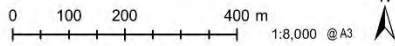
Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	234	1	235	19.35	12.14	14.96	15.71	19.22	12.23
2	167	6	173	17.28	10.01	12.95	13.35	17.23	10.04
3	320	2	322	31.48	10.23	22.74	14.16	31.16	10.33
4	171	3	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	201	19	220	23.54	9.35	18.62	11.81	23.18	9.49
7	265	15	280	27.17	10.31	21.14	13.24	26.42	10.60
<b>Total</b>	<b>1426</b>	<b>48</b>	<b>1474</b>	<b>140.28</b>	<b>10.51</b>	<b>106.76</b>	<b>13.81</b>	<b>138.58</b>	<b>10.64</b>
<b>Proposed</b>									
A	0	47	47	2.85	16.52	2.07	22.68	2.85	16.52
<b>Proposed Total</b>	<b>0</b>	<b>47</b>	<b>47</b>	<b>2.85</b>	<b>16.52</b>	<b>2.07</b>	<b>22.68</b>	<b>2.85</b>	<b>16.52</b>
<b>Total Incl Proposed</b>	<b>1426</b>	<b>95</b>	<b>1521</b>	<b>143.13</b>	<b>10.63</b>	<b>108.83</b>	<b>13.98</b>	<b>141.43</b>	<b>10.75</b>



Aerial photography courtesy of Aeris

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**Welcome Bay Dwelling Density**



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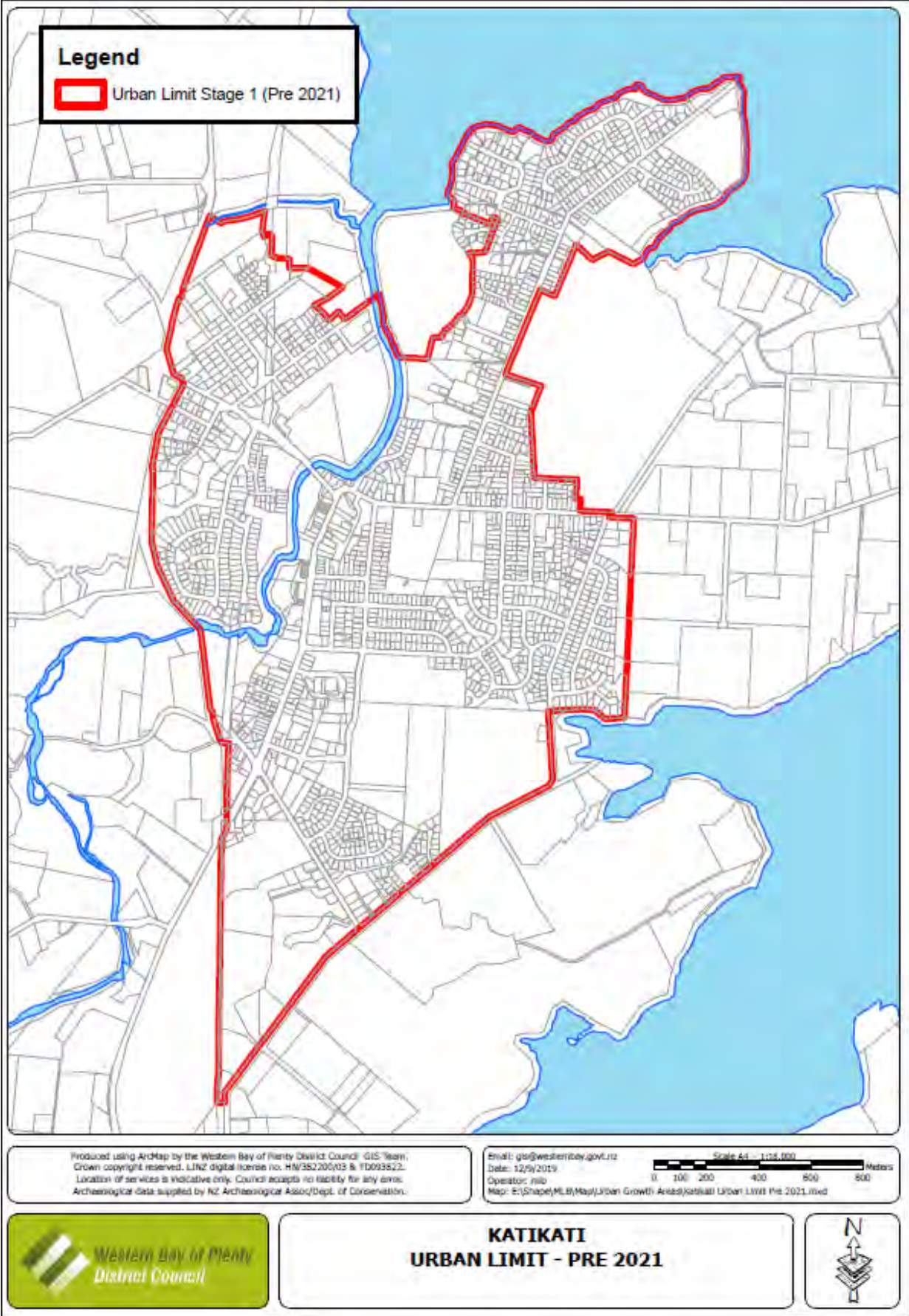
## Appendix 8

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

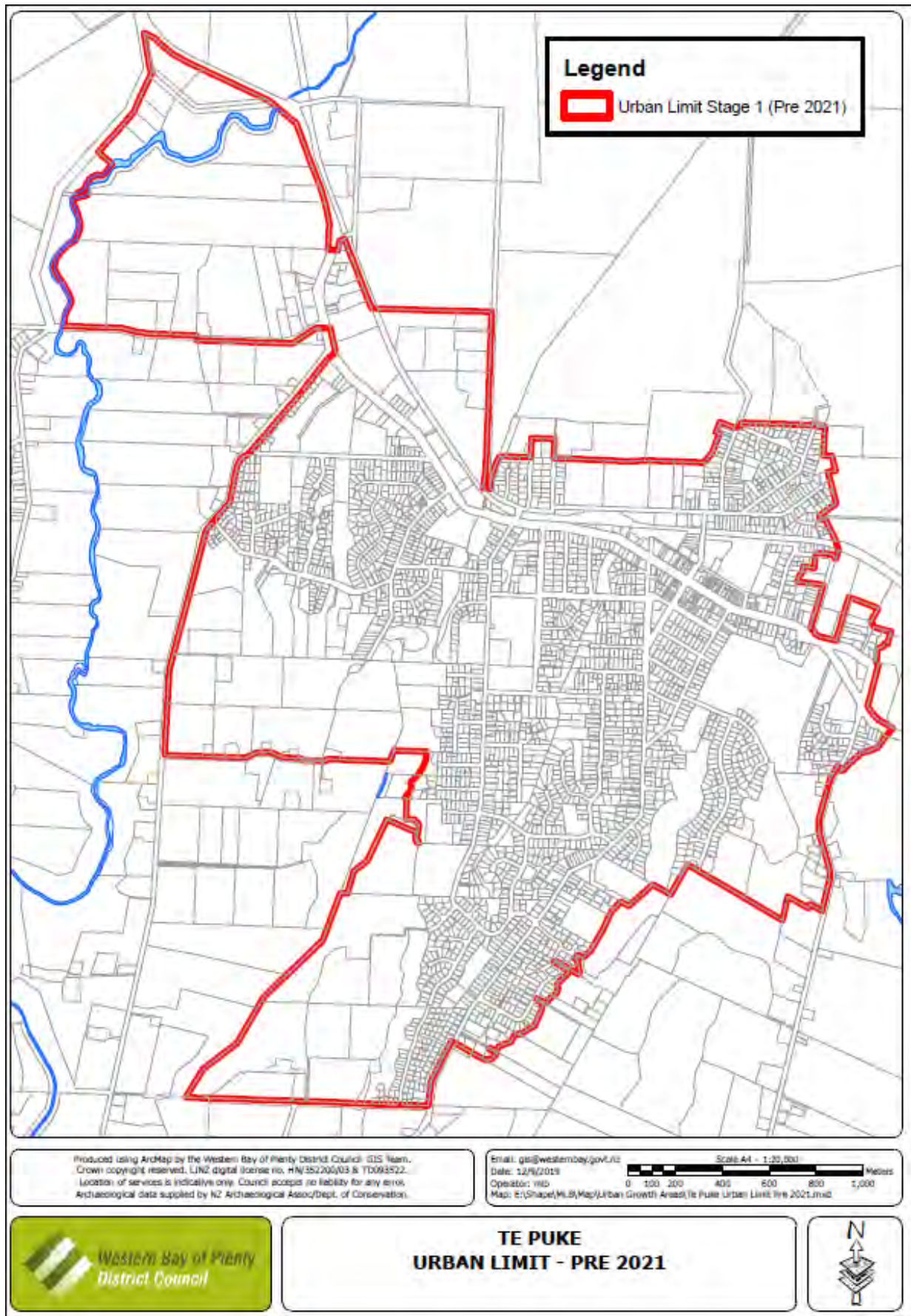
#### Waihi Beach



Katikati



# Te Puke



Omokoroa

