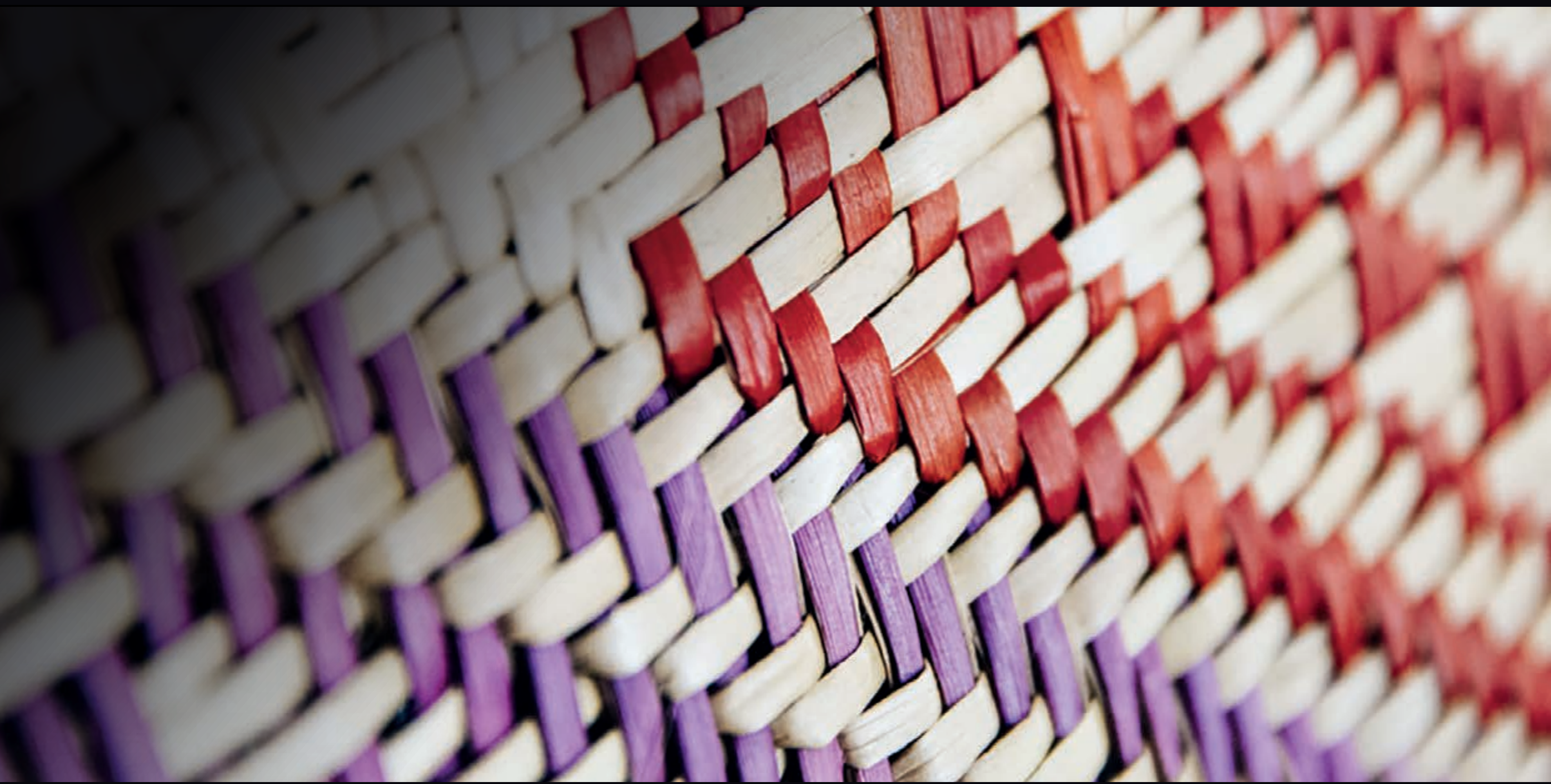
AUCKLAND PLAN 2050



Development Strategy Monitoring report

December 2023

Auckland Council
Te Kaunihera o Tāmaki Makaurau

Contents

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EXECUTIVE SUMMARY

The Development Strategy sets out how Auckland will grow and change over the next 30 years. Auckland has been taking a quality compact approach to growth. This approach means future growth will be focused in the existing urban area and in identified future urban areas within Auckland's urban footprint. Expansion into rural areas will be limited.

This is the fifth monitoring report on the Auckland Plan 2050 Development Strategy (the Development Strategy). This report monitors building consents and code of compliance certificates issued for residential dwellings and business floor space across Auckland. This reporting year covers the period 1 July 2022 to 30 June 2023. The Future Development Strategy (FDS) was adopted in November 2023. The FDS replaces the Development Strategy and this will be reflected in future monitoring.

The findings show that in the five years since the Development Strategy was adopted, the pattern of growth and development activity continues to support the delivery of a more quality compact city. Despite overall consents being down 18 per cent compared to the previous reporting year, a similar pattern of growth has been observed. Across the region, dwellings consented for apartment units and townhouses etc. are increasing at a faster rate than consents for standalone houses. This trend is particularly apparent in nodes and development areas.

Auckland is changing; our city is growing up more than out. The number and location of dwelling consents and completions in 2022/2023 broadly support the implementation of the quality compact approach and the multi-nodal model in the Development Strategy. The vision of a quality, compact future Auckland is progressively becoming reality.

Some key findings from the 2022/2023 monitoring report are:

- 17,705 dwellings were consented in 2022/2023, a decrease of 18 per cent from the previous year
    - 83 per cent of these dwellings were consented in the existing urban area
    - 11 per cent of these dwellings were consented in future urban areas
    - 6 per cent of these dwellings were consented in rural areas
- in the existing urban area, most growth (90 per cent) occurred through intensification with the balance (10 per cent) in areas not previously developed, for example, Flat Bush
- apartments and townhouses etc. accounted for 71 per cent of all dwellings consented in 2022/2023 compared with 69 per cent in 2021/2022
- standalone houses accounted for 23 per cent of all dwellings consented in 2022/2023 compared with 27 per cent in 2021/2022
- 4,733 dwellings were consented within 1,500m catchments of train stations[1] and the Northern Busway stations. This is 27 per cent of the total dwellings consented
- 15,426 dwellings were issued with a Code of Compliance Certificate in 2022/2023
- 378,846 square metres of business floor space were consented in 2022/2023 compared with 607,656 square metres in 2021/2022
- most business floor space consented was in the light industry zoned area

This is the fifth monitoring report on a 30-year strategy.

1. This refers to train stations on the southern, eastern, western, and Onehunga train lines.

DEVELOPMENT STRATEGY PROGRESS

Introduction

Monitoring is a critical component of implementing the Development Strategy. Tracking dwelling consents and completions as well as business floor area consents enable better understanding of the location and scale of growth over time and how this aligns with what the strategy anticipates. Monitoring will inform changes to nodes, development areas and future urban areas if needed. It will also inform subsequent adjustments to the future planning and funding decisions of providers, including Auckland Council.

Monitoring of the Development Strategy is undertaken on an annual basis to measure and report on progress toward achieving quality compact growth and development.

This reporting year covers the period 1 July 2022 to 30 June 2023.

The Future Development Strategy (FDS) was adopted in November 2023. The FDS replaces the Development Strategy and this will be reflected in future monitoring.

Quality Compact approach

Auckland is taking a quality compact approach to growth and development. This means most growth will take place within the existing urban area. Some growth will occur in identified future urban areas while growth in rural areas will be limited.

In 2022/2023, the location of dwellings consented across Auckland indicates most growth is taking place within the existing urban area with a majority happening through intensification in brownfield areas. Some growth is occurring in identified future urban areas, and there continues to be limited growth in rural areas. This pattern has been largely consistent for the last four years.

Quality compact approach

Percentage of dwellings consented between urban, future urban and rural areas

83%	11%	6%
Urban	Future Urban	Rural

Consented dwellings

An approved dwelling consent represents an intention to build, not a completed dwelling.

The Development Strategy anticipates that up to 320,000 additional residential dwellings could be required over the next 30 years. This equates to over 10,000 dwellings a year.

In the fifth year of implementing the Development Strategy, 17,705 residential dwellings were consented in Auckland, a decrease of 3,902 on the previous reporting year. In the past five years, over 87,000 dwellings have been consented in the Auckland region.

4,733 residential dwellings were consented within 1,500m catchments of train stations[2] and the Northern Busway stations. This is 27 per cent of the total dwellings consented.

Dwellings consented in the Auckland region, by reporting year (1 July-30 June)

Reporting year	Dwellings consented
2018/2019	14,030
2019/2020	14,775
2020/2021	19,034
2021/2022	21,607
2022/2023	17,705
Total	87,151

2. This refers to train stations on the southern, eastern, western, and Onehunga train lines.

Local Boards

The local board areas with the highest number of dwellings consented in 2022/2023 were Henderson-Massey, Papakura and Rodney. Henderson-Massey also had the highest number of dwellings consented in the previous reporting year.

Ōrākei experienced the highest growth compared with the previous reporting year (45 per cent increase), whereas Albert-Eden experienced the greatest decrease compared with the previous reporting year (50 per cent decrease).

Dwellings consented in the Auckland region, by local board area (1 July-30 June)

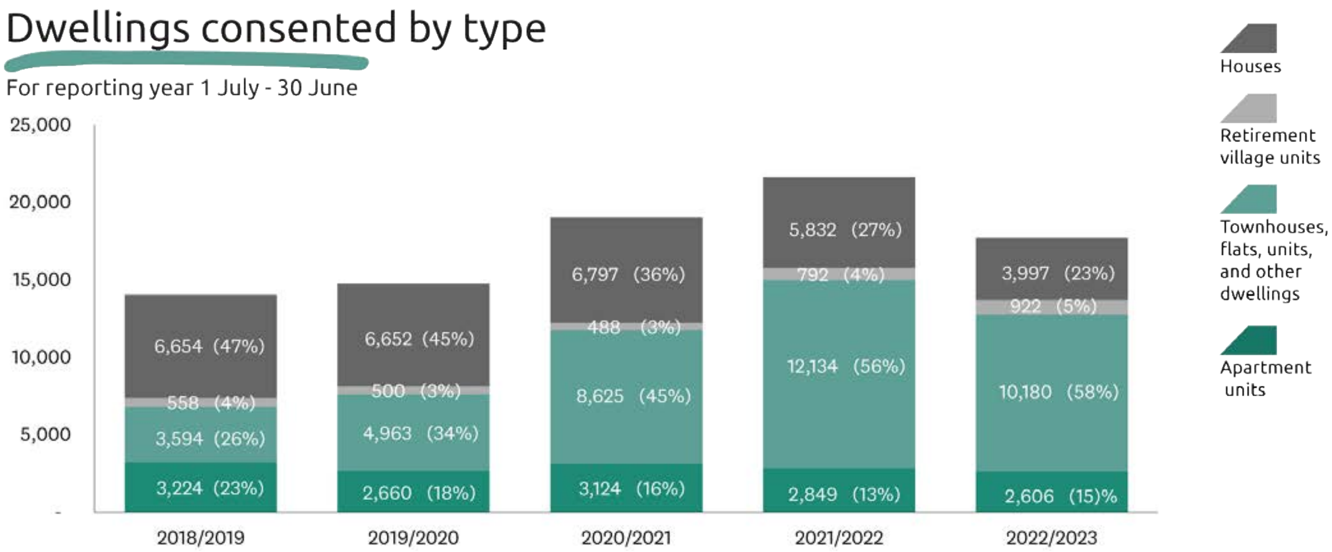
Local Board Area	Dwellings Consented 2021/2022	Dwellings Consented 2022/2023	Change
Henderson - Massey	2,657	1,968	↓ 26%
Papakura	1,481	1,539	↑ 4%
Rodney	1,452	1,303	↓ 10%
Manurewa	939	1,277	↑ 36%
Maungakiekie - Tāmaki	1,945	1,273	↓ 35%
Howick	1,934	1,252	↓ 35%
Mangere - Ōtāhuhu	980	1,042	↑ 6%
Ōrākei	701	1,016	↑ 45%
Franklin	1,185	998	↓ 16%
Hibiscus and Bays	1,309	950	↓ 27%
Upper Harbour	1,059	838	↓ 21%
Whau	1,233	706	↓ 43%
Ōtara - Papatoetoe	739	648	↓ 12%
Waitākere Ranges	457	572	↑ 25%
Kaipātiki	961	548	↓ 43%
Albert - Eden	1,017	512	↓ 50%
Puketāpapa	519	490	↓ 6%
Devonport - Takapuna	611	453	↓ 26%
Waitematā	370	263	↓ 29%
Waiheke	43	48	↑ 12%
Great Barrier	15	9	↓ 40%
Total	21,607	17,705	↓ 18%

Dwelling typology

There is a growing trend towards more intensive housing typologies, including apartment units and townhouses etc.

Over the five-year monitoring period, the general trend has been an increase in intensive housing types and a decrease in standalone houses. However, in the 2022/2023 reporting period, all housing types except retirement units, have decreased.

The proportion of each typology has changed over the past five years. The proportion of townhouses etc. has increased from 26 per cent of consents issued in 2018/2019 to 58 per cent in 2022/2023. In the same period, the proportion of standalone houses has decreased from 47 per cent to 23 per cent of consents issued. The proportion of apartments has decreased from 23 per cent of dwellings consented in 202018/2019 to 15 per cent in 2022/2023.



Dwellings consented by dwelling type (Auckland region), by reporting year (1 July - 30 June)

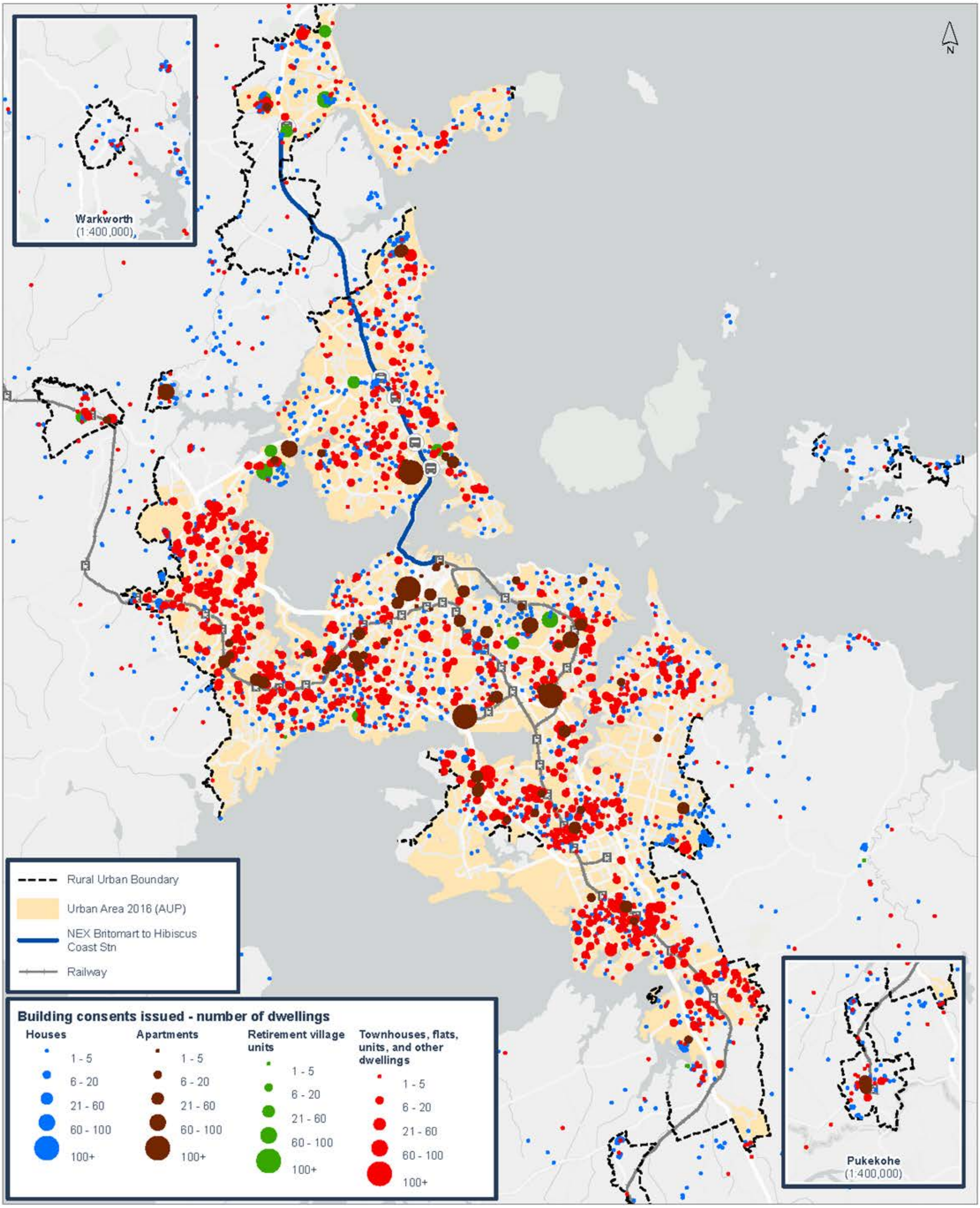
The map on the following page shows the location of dwelling consents issued in 2022/2023 by dwelling type. The size of each dot corresponds to the number of dwellings attached to each consent.

The map shows that the consenting activity is widespread across the urban area. Apartment units consents with a high number of units (more than 60 units) are mostly located around train stations. There are also concentrations of apartment units and townhouses etc. located around areas with good public transport accessibility such as Northcote and Avondale.

Compared with the previous reporting year, there is a similar pattern with consenting activity continuing to shift from the city centre to the outer suburbs within the existing urban area, in particular to the west and south. Established communities such as Manurewa also show higher concentrations of more intensive housing typologies occurring through redevelopment.

Consents for standalone houses are distributed across the urban areas with concentrations at the periphery of the existing urban area in new and growing communities such as Flat Bush.

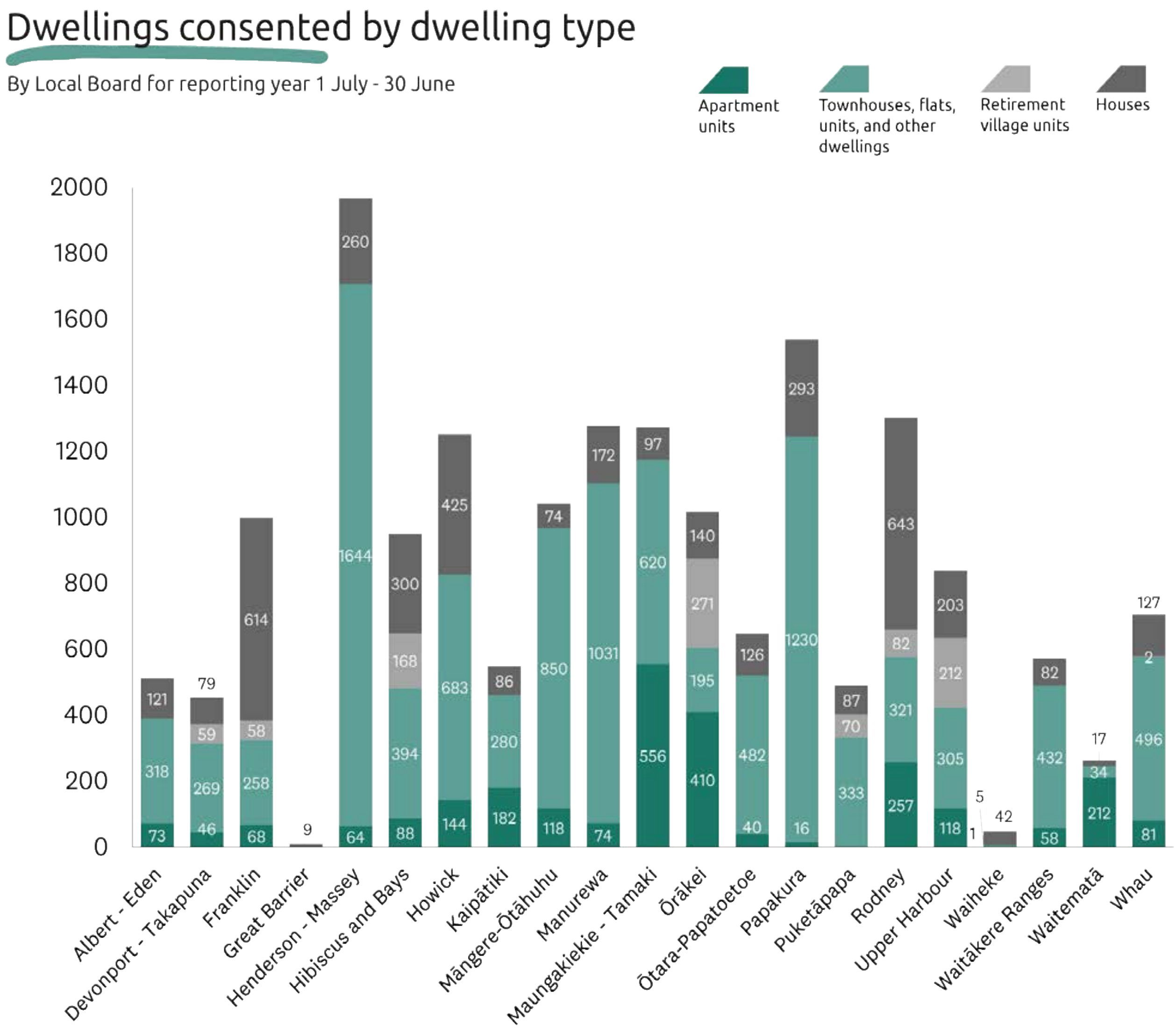
Dwellings consented, by type and size of consent (number of dwellings), 1 July 2022 - 30 June 2023



Local Boards

The dwelling types being consented vary considerably across all local boards reflecting their different characters. For example, 95 per cent of dwellings consented in Waitemata local board area (covering the city centre and established inner city residential suburbs) in 2022/2023 were more intensive housing types (apartment units and townhouses etc.) compared with 33 percent in Franklin local board area (a predominantly rural area with greenfield development opportunities).

Dwellings consented by dwelling type, by Local Board, 1 July 2022 - 30 June 2023



Residential supply (Code Compliance Certificates - CCCs)

What are CCCs?

A code compliance certificate (CCC) is issued for completed dwellings. A CCC is issued under section 95 of the Building Act 2004 and ensures building work carried out under an approved building consent complies with that building consent. Buildings are deemed suitable to occupy once a CCC has been issued.

There is no legal requirement to obtain a CCC, however, insurers, mortgage lenders and other parties are becoming stricter on those undertaking building work to ensure they obtain a CCC. This means CCCs are becoming a more reliable indicator of actual dwelling completions.

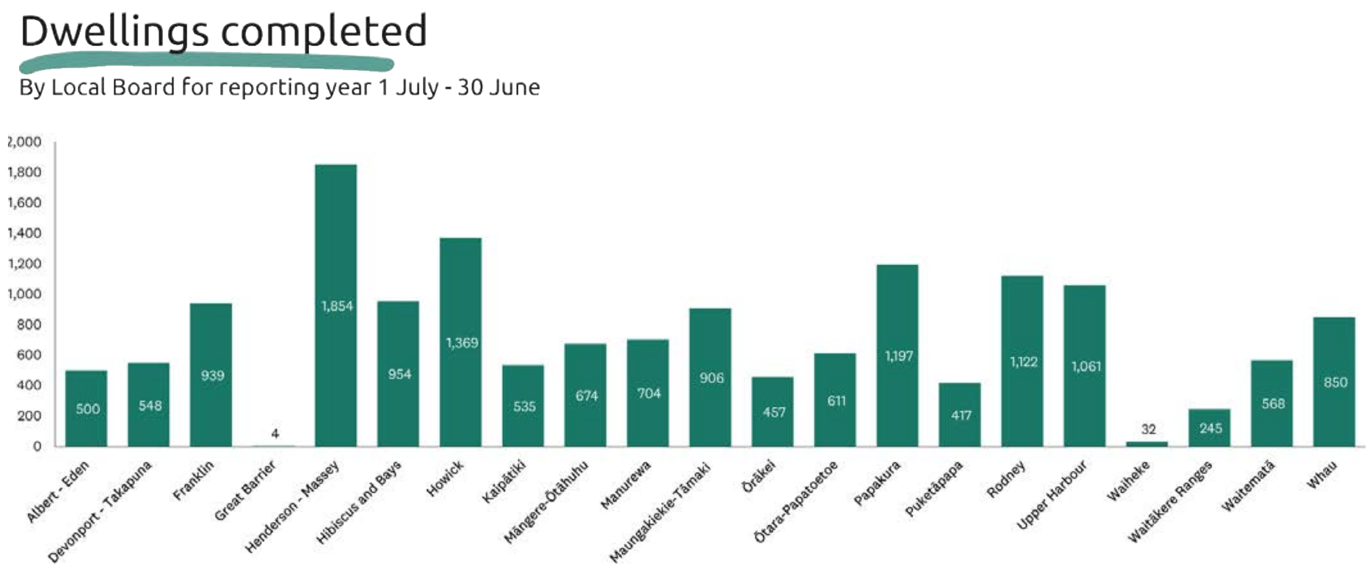
The time between a building consent being issued and a CCC being issued will vary depending on the scale and complexity of the building.

In the fifth year of implementing the Development Strategy, 15,426 dwellings were issued with a CCC. This is an increase from the 12,947 dwellings issued with a CCC the previous reporting year[3].

Local Boards

Henderson – Massey local board had the highest number of CCCs issued in 2022/2023 with over 1,800, followed by Howick with over 1,300. These were followed by Rodney. Papakura and Upper Harbour, which had around 1,000 CCCs each.

Dwellings completed by local board area, 1 July 2021 - 30 June 2022



3. From 2021/2022 the report incorporates an amendment to reported CCC figures. These adjustments are made to correct some duplicate data counts for more complex housing developments. It has the effect of reducing the number of reported certified dwellings for previous reporting years.

Growth and development

The Development Strategy identifies where significant growth and development are anticipated to occur over the next 30 years. The quality compact approach and multi-nodal model form the foundation for growth across Auckland. Most growth is anticipated within the existing urban area with some growth in future urban areas, and limited growth in rural areas. The following sections report on consents issued in the:

- Existing urban areas
  - Nodes
  - Development areas
  - Remaining existing urban area
- Future urban areas
- Rural areas
- Business Areas.

Existing urban area

Incremental growth will happen across all of Auckland over the next 30 years with most growth focused in the existing urban area. However, some areas are likely to experience significantly more growth than other areas, specifically nodes and development areas.

The existing urban area is generally the area of Auckland with live urban zoning at 2016 (excluding live zoned future urban areas).

The majority of growth occurring within the existing urban area is intensification through infill and redevelopment. However, some areas within the urban extent have not been developed previously. These areas are typically at the periphery of Auckland's urban extent and have long term development plans (such as Flat Bush and Millwater). Over time, we expect development activity in these areas to decrease as available land capacity is taken up.

Detailed information on existing urban areas can be found in the 'Change in the existing urban area' section of the Development Strategy.

Highlights in the existing urban area, for the 2022/2023 reporting year, are:

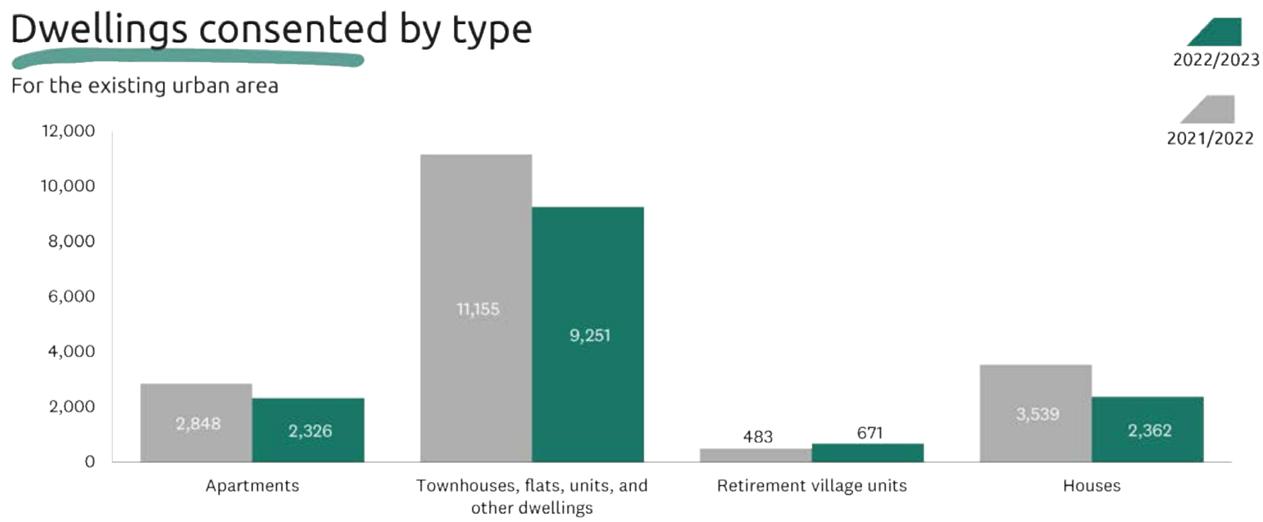
- a total of 14,610 dwellings were consented, which is a 19 per cent decrease on the previous reporting year. This is 83 per cent of Auckland's total dwellings consented
- In the existing urban area, most growth (90 per cent) occurred through infill and redevelopment with the balance (10 per cent) in areas not developed previously
- 79 per cent of the consented dwellings in the existing urban area were more intensive housing types (apartments, townhouses etc.)
- 88 per cent of the consented dwellings within 1,500m catchments of train stations[4] and Northern Busway stations were more intensive housing types (apartments, townhouses etc.).

4. This refers to train stations on the southern, eastern, western, and Onehunga train lines.

Dwelling typology

Collectively, more intensive housing (apartment units and townhouses etc.) made up 79 per cent of dwellings consented in the existing urban area. This is an increase of one per cent compared with the previous reporting year. The number of dwellings in all typologies except retirement village units saw a decrease in 2022/2023 compared to the previous reporting year. However, the preference for more intensive housing types in the existing urban area is still contributing to the implementation of the quality compact approach in the Development Strategy.

Dwellings consented in the existing urban area, by type, by reporting year (1 July - 30 June)



Nodes

Nodes are major growth areas critical to accommodating a high concentration of residential and employment development. Each node is based around a significant centre and serves a large catchment. They encompass surrounding employment and high-density residential areas.

Over time, nodes will offer a broad range of business and employment activity, civic services, efficient transport links and residential options. Auckland's urban nodes are the City Centre, Manukau, Westgate, and Albany. Together with the rural nodes of Warkworth and Pukekohe, they form the multi-nodal model Auckland is moving toward.

A description of each node can be found in the 'What will Auckland look like in the future?' section of the Development Strategy.

Highlights in the nodes, for the 2022/2023 reporting year, include:

- a total of 995 dwellings consented in the urban nodes which is a 10 per cent increase from the previous reporting year
- Westgate had the most dwellings consented, followed by the city centre
- collectively, apartments and townhouses etc. made up 89 per cent of all dwellings consented in urban nodes, which is a 10 per cent increase from 2021/2022
- a total of 153 dwellings consented in the rural nodes, which is a 46 per cent decrease from the previous reporting year.
- standalone houses made up 58% of all dwellings consented in rural nodes, which is a 16% decrease from the previous reporting year.

Urban nodes breakdown

A total of 995 dwellings were consented in Auckland's urban nodes in 2022/2023, these were highest in the Westgate node and the City Centre which together accounted for over half of all the dwellings consented across the urban nodes.

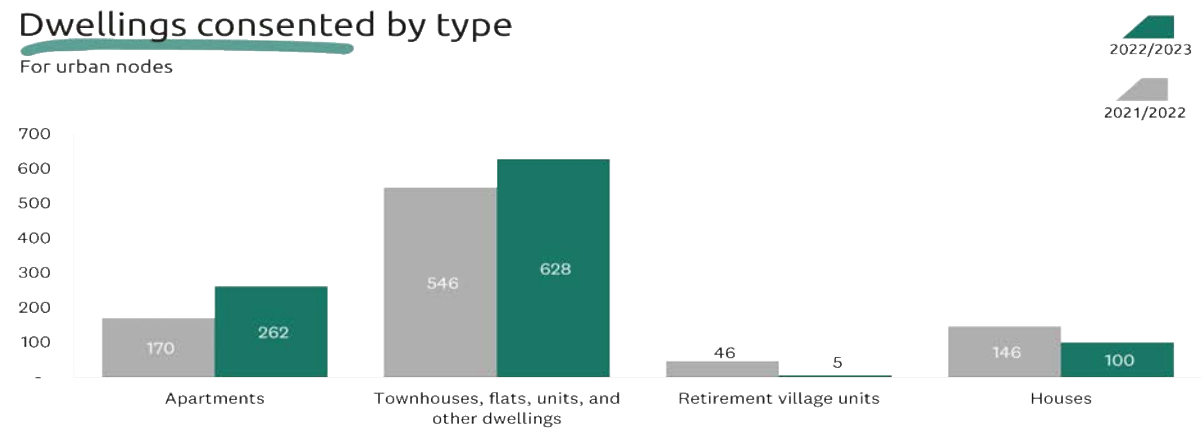
Dwellings consented, by urban node, by reporting year (1 July - 30 June)

Urban Node	Number of dwellings consented, 2021/2022	Number of dwellings consented, 2022/2023	Change
City Centre	245	284	↑ 16%
Albany	49	73	↑ 49%
Westgate	402	373	↓ 7%
Manukau	212	265	↑ 25%
Total	908	995	↑ 10%

Dwelling typology

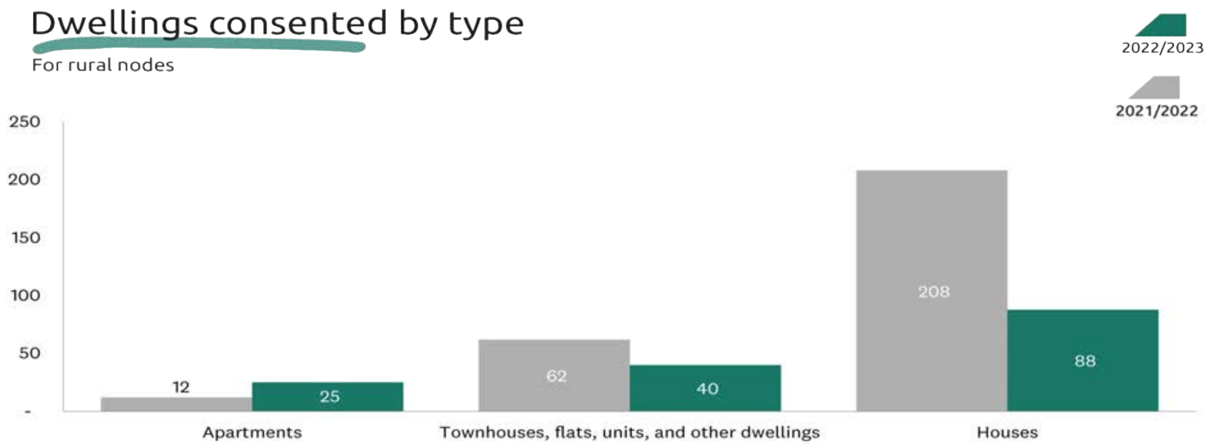
Collectively, more intensive housing such as apartments and townhouses etc. made up 72 per cent of dwellings consented in urban nodes compared with 23 per cent for houses. This indicates that the typology of consented development in these locations is typically more intensive, which is consistent with the quality compact approach outlined in the Development Strategy.

Dwellings consented by type, urban nodes, by reporting year (1 July - 30 June)



Rural nodes breakdown

A total of 153 dwellings were consented in Auckland's rural nodes in 2022/2023. The number of standalone houses consented in rural nodes decreased from 74% in 2021/2022 to 58% in 2022/2023. Whereas the number of intensive housing (apartment units and townhouses etc.) types consented in rural nodes increased from 26% in 2021/2022 to 42% in 2022/2023.



Dwellings consented, by rural node, by reporting year (1 July - 30 June)

Rural nodes	Number of dwellings consented, 2021/2022	Number of dwellings consented, 2022/2023	Change
Warkworth	180	123	↓ 32%
Pukekohe	102	30	↓ 71%
Total	282	153	↓ 46%

Development areas

Development areas are a comprehensive approach to servicing anticipated growth across the existing urban area. They are specific locations where a significant amount of housing and employment growth is anticipated over the next 30 years and are sequenced based on when this growth is most likely to occur.

These areas were identified based on factors such as their ability to accommodate growth and leverage off committed infrastructure projects. Planning and investment will be targeted when growth at scale occurs. They are sequenced in either Years 1-3, Years 4-10 or Years 11-30 depending on the timing of committed infrastructure investment and when large-scale growth is anticipated to occur.

Detailed information on development areas can be found in the 'Change in the existing urban area' section of the Development Strategy.

Highlights in the development areas for the 2022/2023 reporting year are:

- 6,501 dwellings were consented, which is a 21 per cent decrease from the previous reporting year.
- dwellings consented in development areas made up 44 per cent of dwellings consented in the existing urban area
- 89 per cent of dwellings consented in development areas were apartments and townhouses etc., a two per cent decreased from 2021/2022.

Development areas breakdown

In 2022/2023, a total of 2,053 dwellings were consented in development areas sequenced for Years 1-3 (2018-2020). 3,002 dwellings were consented in development areas sequenced for Years 4-10 of the strategy, and 1,446 dwellings in areas sequenced for Years 11-30.

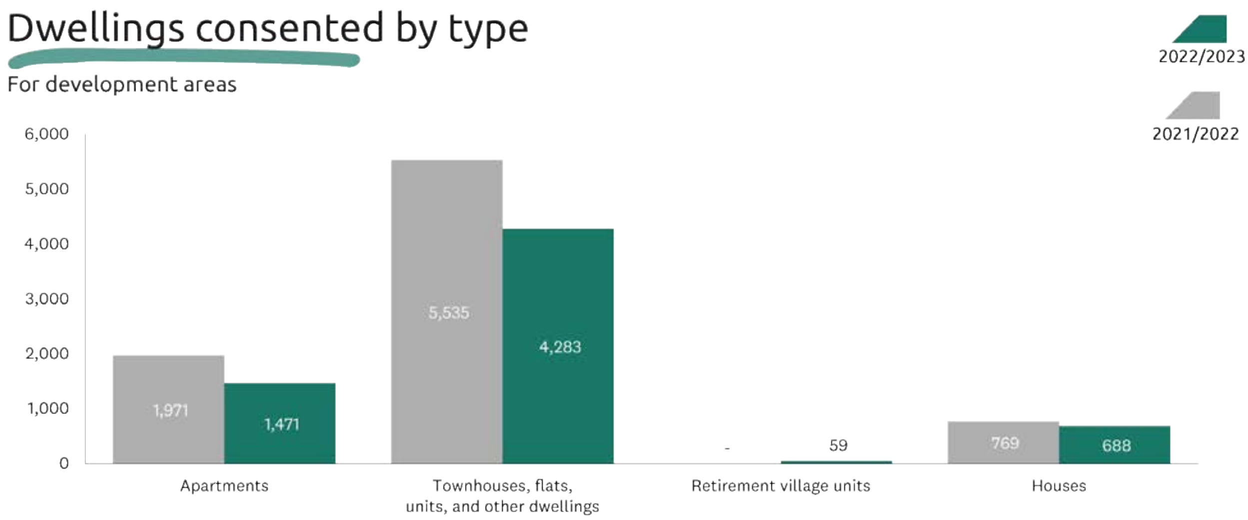
Dwellings consented in development areas, reporting year (1 July -30 June)

Development area	Development Strategy Sequencing			Number of Dwellings Consented, 2021/2022	Number of Dwellings Consented, 2022/ 2023	Change
	Years 1-3	Years 4-10	Years 11-30			
Ōtāhuhu				365	263	↓ 28%
Glen Innes				392	192	↓ 51%
Onehunga				403	237	↓ 41%
Avondale				396	195	↓ 51%
Dominion Road				96	15	↓ 84%
New Lynn				196	68	↓ 65%
Panmure				95	32	↓ 66%
Takapuna				59	116	↑ 97%
Northcote				448	218	↓ 51%
Tāmaki				210	284	↑ 35%
Māngere				302	433	↑ 43%
Mt Roskill-Three Kings				538	403	↓ 25%
Glen Eden				184	201	↑ 9%
Papatoetoe				439	376	↓ 14%
Newton				67	28	↓ 58%
Manurewa				433	579	↑ 34%
Sylvia Park				139	391	↑ 181%
Māngere East				200	280	↑ 40%
Henderson				257	132	↓ 49%
Te Atatu Peninsula				420	312	↓ 26%
St Lukes				143	32	↓ 78%
Pakuranga				204	172	↓ 16%
Mt Albert				95	66	↓ 31%
Morningside				42	30	↓ 29%
Papakura				262	130	↓ 50%
Birkenhead				58	39	↓ 33%
Clendon				114	251	↑ 120%
Pakuranga Highway				172	132	↓ 23%
Fruitvale				236	109	↓ 54%
Sunnynook				132	105	↓ 20%
Highland Park				246	188	↓ 24%
Ōtara				53	104	↑ 96%
Glendene				234	49	↓ 79%
Greenlane				112	84	↓ 25%
Te Atatu South				173	97	↓ 44%
Ellerslie				302	29	↓ 90%
Sunnyvale				58	129	↑ 122%
Total				8,275	6,501	↓ 21%

Dwelling typology

Collectively, in 2022/2023 more intensive housing (apartments and townhouses etc.) made up 89 per cent of dwellings consented in development areas while standalone houses made up 11 per cent and retirement village units made up less than one per cent. In comparison, the previous reporting year recorded 91 per cent for intensive housing and nine per cent for standalone houses. Since the implementation of the development strategy, data shows there has been increasing preference for more intensive housing types in development areas. This follows the quality compact approach in the Development Strategy.

Dwellings consented in development areas, by dwelling type, by reporting year (1 July - 30 June)



Remaining existing urban area

While much of Auckland's growth is anticipated to occur in the nodes and development areas, some growth will take place in the remaining existing urban area. Specifically, Auckland's network of centres and strategic transport corridors play an essential role in accommodating both population and employment growth.

The remaining existing urban area includes all areas in the existing urban area that are not included in a node or development area.

More detailed information on the remaining existing urban area can be found in the 'Change in the existing urban area' section of the Development Strategy.

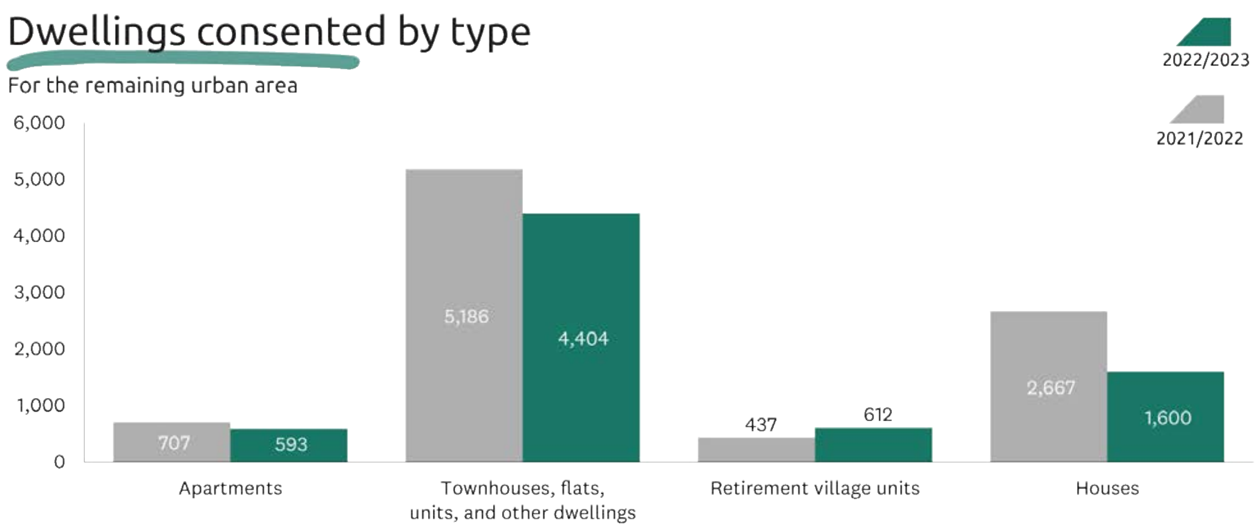
Highlights in the remaining existing urban area in the 2022/2023 reporting year are:

- 7,209 dwellings were consented, which is a 20 per cent decrease from the previous reporting year. This is 49 per cent of dwellings consented in the existing urban area
- 69 per cent of dwellings consented were more intensive types (apartment and townhouses etc.), a three per cent increase from 2021/2022.

Dwelling typology

Collectively, more intensive housing types (apartments and townhouses etc.) made up 69 per cent of dwelling consents issued in the remaining existing urban area in 2022/2023. This is an increase of 3 per cent on the previous reporting year.

Dwellings consented in the remaining existing urban area, by dwelling type, by reporting year (1 July - 30 June)



Future urban areas

The Development Strategy and the Future Urban Land Supply Strategy provide a strategic approach, indicating when future urban areas will be development ready with live zoning and bulk infrastructure in place.

Highlights in the future urban areas for the 2022/2023 reporting year are:

- 1,768 dwellings have been consented, which is a 27 per cent increase from the previous reporting year. This is approximately 11 per cent of all dwellings consented
- 54 per cent of dwellings consented were houses.

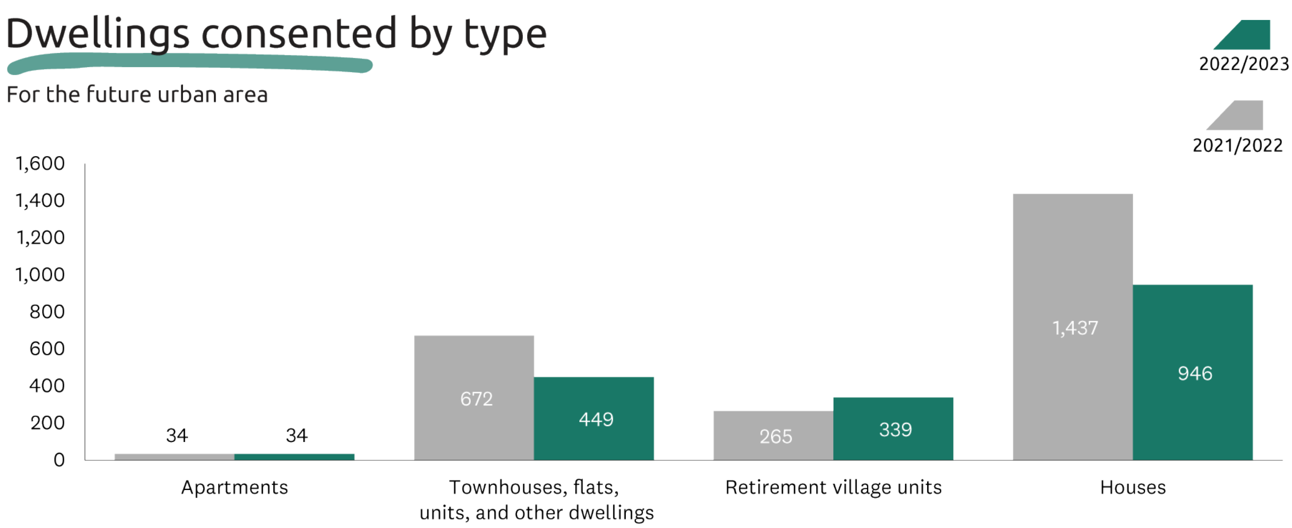
More detailed reporting on the future urban areas is included in the Future Urban Land Supply Strategy section of this report.

Dwelling Typology

Of dwellings consented in the future urban areas in 2022/2023, 54 per cent were standalone houses, down from 60 per cent in the previous reporting year. The proportion of apartments and townhouses etc. in the same period remained similar with a slight decrease from 29 per cent to 27 per cent.

While standalone houses are still the predominant typology in these peripheral locations, the increase in more intensive housing in recent years indicates the housing preferences in future urban areas is changing. This trend supports the quality compact approach. As supporting infrastructure investment is made, and more transport choices become available, it is anticipated that the mix of dwelling typologies will increase as development progresses over time.

Dwellings consented in future urban areas, by type, by reporting year (1 July - 30 June)



Rural areas

Residential growth in rural Auckland will mainly be focused in towns which provide services for the wider rural area and are supported by the rural nodes of Pukekohe and Warkworth. Less growth is anticipated in the smaller towns and villages and rural lifestyle growth will be focused in areas zoned as 'countryside living'. This approach will help maintain rural values and support ongoing rural production.

More detailed information on the approach to growth in the rural area can be found in the 'Rural Auckland' section of the Development Strategy.

Highlights in the rural areas in the 2022/2023 reporting year are:

- 1,111 dwellings were consented, this is a 21 per cent increase from the previous reporting year. This is approximately six per cent of all dwellings consented
- 66 per cent of dwellings consented were standalone houses
- most dwellings consented were in the residential zoned areas of rural towns and settlements.

Consents in rural zones

The number of dwellings consented in rural areas showed a 21 per cent decrease from 2021/2022.

Of dwellings consented in the rural area in 2022/2023, 534 or 48 per cent were in the residential-zoned areas of rural towns and settlements. This is in line with the Development Strategy.

Compared to 2021/2022 there has been an increase in dwellings consented in other zones, however this is spread across a variety of zones, for example Business – Local Centre, Open Space – Informal Recreation, Road, Rural – Conservation, Rural-Waitakere Foothills.

The relative proportion of dwellings consented in rural production zone has decreased compared to 2021/2022 but it remains close to the number of dwellings consented in the countryside living zone.

Dwellings consented in rural zones, by reporting year (1 July - 30 June)

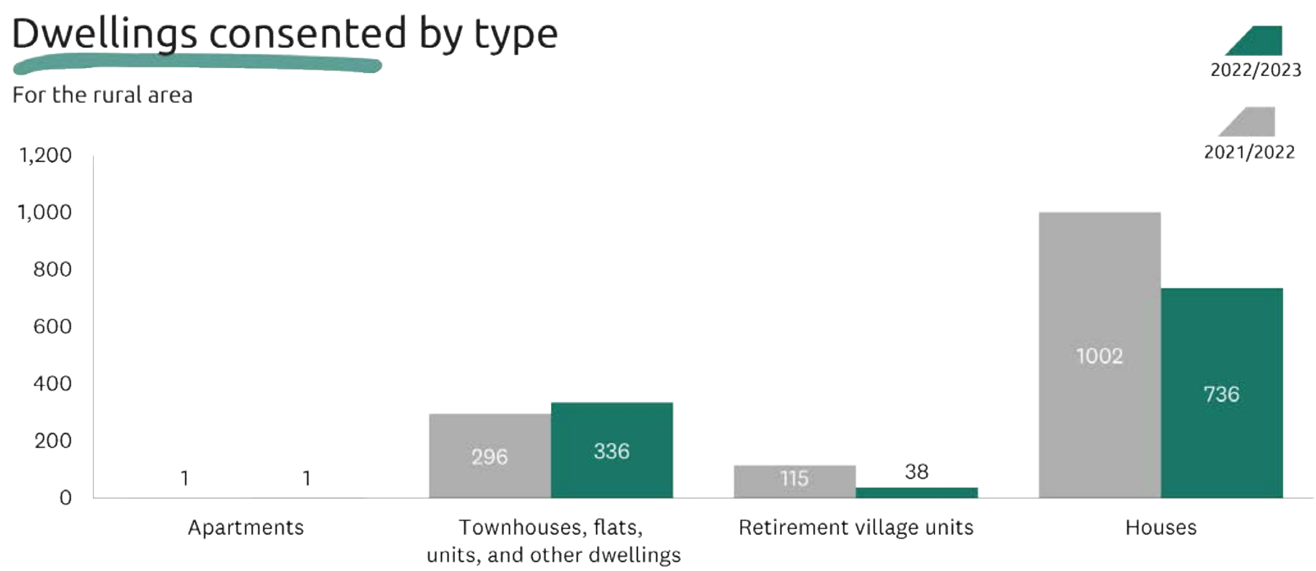
Auckland Unitary Plan Zone	Dwellings Consented, 2021/2022	Dwellings Consented, 2022/2023	Change
Hauraki Gulf Islands[5]	58	56	↓ 3%
Residential Zones	759	534	↓ 30%
Rural - Countryside Living Zone	214	163	↓ 24%
Rural - Mixed Rural Zone	49	29	↓ 41%
Rural - Rural Coastal Zone	42	47	↓ 2%
Rural - Rural Production Zone	198	109	↓ 45%
Other Zones	94	173	↑ 84%
Total	1,414	1,111	↓ 21%

5. The AUP(OP) does not replace the Auckland Council District Plan – Operative Hauraki Gulf Islands Section 2013. This section of the Auckland Council District Plan applies to subdivision, land use and development in the Hauraki Gulf Islands until a plan change is made to incorporate the Hauraki Gulf Islands Section of the Auckland Council District Plan into the Plan. However, the Hauraki Gulf Islands are subject to the AUP(OP) regional policy statement, the regional coastal plan and the regional plan.

Dwelling Typology

66 per cent of dwellings consented in the rural area in 2022/2023 were standalone houses, a decrease of five per cent compared to the previous monitoring year. 30 per cent of dwellings consented in the rural area were more intensive housing types (apartment units, townhouses etc), an 11 per cent increase compared with the previous monitoring year.

Dwellings consented in rural areas, by type, by reporting year (1 July - 30 June)



Business Areas

As Auckland grows it must have capacity for business by making the best use of existing business land and identifying new business land in greenfield areas. Changes in the make-up and distribution of Auckland's economy will continue over the medium to long term. To accommodate these changes, the Development Strategy promotes the creation of flexible and adaptable business areas.

Further information can be found in the 'Business Areas' section of the Development Strategy.

Highlights in business activity in the 2022/2023 reporting year are:

- 378,846 square metres (sqm) of business floor space was consented
- the light industry zone had the greatest amount of floor space consented, followed by the airports and airfields zones and the heavy industry zone
- The Māngere - Ōtāhuhu and Franklin local board areas had the greatest amount of floor space consented
- of the nodes, Manukau had the greatest amount of business floor space consented

Around 38 per cent less business floor space was consented in 2022/2023 than in 2021/2022. The amount of business space consented has fluctuated significantly over the past five years.

Business floor space (sqm) consented, 1 July 2018 – 30 June 2023

Reporting year (1 July – 30 June)	Business Floor Space (sqm)
2018/2019	897,679
2019/2020	456,039
2020/2021	595,354
2021/2022	607,656
2022/2023	378,846
Total	2,917,776

Business floor space consented by Auckland Unitary Plan zone

There were 378,846 square metres (sqm) of business floor space consented in 2022/2023. Most of this was in the light and heavy industrial zones and the Airports and Airfields Zones. Business floor space consented in heavy or light industry zones is generally for land extensive activities such as warehousing and storage, manufacturing, and construction trade services. This contributes to the considerable differences in business floor space consented in these zones compared with other business zones.

Residential and rural zones had the least floor space consented. This is appropriate given the intended activities in these zones. However, it is noted that business floor space increased significantly in the residential and rural zones compared to the previous reporting year. Among the business zones, the Business - Town Centre Zone experienced the most growth in business floor space consented compared with the previous reporting year and the Business - Mixed Use Zone experienced the most signiciant decrease.

The concentration of activity within existing industrial zones is consistent with the Development Strategy approach of making the best use of existing business land. Safeguarding critical industrial areas from encroachment by other activities is important as business land is difficult to replace once it is lost to other uses.

Business floor space consented by zone, by reporting year (1 July - 30 June)

Business Zone	Floor space consented (sqm), 2021/2022	Floor space consented (sqm), 2022/2023	Change
Business - City Centre Zone	15,943	22,121	↑ 39%
Business - Metropolitan Centre Zone	513	1,682	↑ 228%
Business - Town Centre Zone	3,548	18,207	↑ 413%
Business - Mixed Use Zone	41,930	1,255	↓ 97%
Business - Light Industry Zone	343,392	176,419	↓ 49%
Business - Heavy Industry Zone	78,153	58,099	↓ 26%
Other Business Zones	17,070	12,157	↓ 29%
Residential Zones	1,733	10,745	↑ 520%
Rural Zones	3,201	11,496	↑ 259%
Airports and Airfields Zones	36,977	58,580	↑ 58%
Other Zones	65,196	8,085	↓ 88%
Total	607,656	378,846	↓ 38%

Local Boards

Māngere - Ōtāhuhu and Franklin local boards had the greatest amount of business floor space consented in 2022/2023. Kaipātiki local board had the largest increase of 3092 per cent compared to 2021/22. The largest decreases were in Hibiscus and Bays (91 per cent), Great Barrier (90 per cent) and Ōtara-Papatoetoe (88 per cent).

Business floor space consented by local board area, by reporting year (1 July - 30 June)

Local Board Area	Floor space consented (sqm), 2021/2022	Floor space consented (sqm), 2022/2023	Change
Mangere - Ōtāhuhu	128,204	71,797	↓ 44%
Franklin	34,852	71,348	↑ 105%
Upper Harbour	45,182	39,911	↓ 12%
Henderson - Massey	71,949	32,458	↓ 55%
Howick	35,810	27,514	↓ 23%
Papakura	8,416	26,071	↑ 210%
Maungakiekie - Tamāki	39,074	25,013	↓ 36%
Waitematā	44,809	23,090	↓ 48%
Manurewa	79,196	16,633	↓ 79%
Puketāpapa	17,895	12,000	↓ 33%
Rodney	17,314	9,199	↓ 47%
Kaipātiki	150	4,788	↑ 3092%
Waitākere Ranges	11,218	4,700	↓ 58%
Whau	14,429	4,450	↓ 69%
Devonport - Takapuna	10,791	3,583	↓ 67%
Ōtara - Papatoetoe	19,859	2,284	↓ 88%
Hibiscus and Bays	18,210	1,577	↓ 91%
Waiheke	1,947	929	↓ 52%
Ōrākei	3,082	810	↓ 74%
Albert - Eden	4,969	660	↓ 87%
Great Barrier	300	31	↓ 90%
Total	607,656	378,846	↓ 38%

Nodes

The Manukau node had the greatest amount of business floor space consented in 2022/2023, accounting for 42 per cent of the total business floor space consented in nodes.

The Albany node had the greatest increase of 225 per cent in the amount of business floor space consented in 2022/2023.

Business floor space consented by urban node, by reporting year (1 July - 30 June)

Urban Node	Floor space consented (sqm), 2021/2022	Floor space consented (sqm), 2022/2023	Change
Albany	7,765	25,248	↑ 225%
City Centre	48,497	23,090	↓ 52%
Manukau	108,389	74,758	↓ 31%
Westgate	95,136	44,793	↓ 53%
Total	259,787	167,889	↓ 35%

Both Pukekohe and Warkworth had no business floor space consented in 2022/2023.

Business floor space consented by rural node, by reporting year (1 July - 30 June)

Urban Node	Floor space consented (sqm), 2021/2022	Floor space consented (sqm), 2022/2023	Change
Pukekohe	47	-	↓ 100%
Warkworth	179	-	↓ 100%
Total	226	-	↓ 100%

Future Urban Land Supply Strategy

The Future Urban Land Supply Strategy (FULSS) is part of the council's wider approach to managing Auckland's growth. The FULSS provides a strategic approach, indicating when future urban areas are anticipated to be development ready with live zoning and bulk infrastructure in place. A refreshed FULSS was adopted on 3 July 2017[6], incorporating changes through the Auckland Unitary Plan. Rural settlements are included in the refreshed strategy.

The FULSS sets out the development-ready sequencing of future urban areas. This sequencing reflects a range of considerations specific to each area, including the availability of infrastructure.

The full list of all future urban areas can be found in the FULSS. For the purpose of the monitoring report, the areas are grouped by geographic location.

Delivering the Future Urban Land Supply Strategy

It is anticipated that future urban areas will be progressively developed over time. There are three phases in the process of developing future urban zoned land, these are:

- Planning phase: future urban zoned land goes through a structure planning and plan change process to become live urban zoned. This change to a live zone allows for urban land use activities (e.g. residential or business).
- Infrastructure phase: planning and delivery of bulk infrastructure to meet the requirement for development ready land. While this phase may run in parallel to the planning and development phase, the provision of bulk infrastructure is expected to be the prerequisite for future urban growth.
- Development phase: live urban zoning and bulk infrastructure are in place (the land is development ready) and the creation of new lots and consented dwellings is underway.

A set of monitoring measures has been developed to understand the development pipeline in the future urban areas. The delivery of land for new communities is tracked against the steps shown in the table below. Information on each of the phases in the development pipeline is provided in the following sections[7].

Monitoring measure	Delivery phase
1. Future Urban zoned land in the Unitary Plan	Planning phase
2. Structure planning completed	
3. Land rezoned for urban uses	
4. Bulk infrastructure provision	Infrastructure phase
5. New parcels created (subdivision)	Development phase
6. New dwellings consented	
7. New dwellings completed	

6. Information on timing and sequencing of future urban areas in FULSS has also been included in the Auckland Plan 2050 Development Strategy, which was adopted as Auckland Council's Future Development Strategy under the NPS-UDC.
7. Monitoring for this part of the report uses building consent data as the main information source. The New Zealand Primary Parcels and New Zealand Property Titles from Land Information New Zealand (LINZ) data for Auckland region are also used for reporting on new parcels created and parcel sizes.

Planning phase

Structure Planning

Structure plans are an important method for establishing the pattern of land use and the transport and services network within a defined area. Structure plans determine the appropriate staging and timeframes of subsequent plan changes to 'live zone' future urban zoned land within the structure plan area. The Auckland Unitary Plan Regional Policy Statement promotes the preparation of structure plans to support the rezoning of future urban zoned land.

Currently 40 per cent of the land area (hectares) covered by the FULSS has been structure planned. The following structure plans have been developed and adopted:

- Whenuapai Structure Plan, adopted September 2016
- Warkworth Structure Plan, adopted June 2019
- Drury-Ōpaheke Structure Plan, adopted August 2019
- Pukekohe-Paerata Structure Plan, adopted August 2019
- Silverdale West Industrial Area Structure Plan, adopted April 2020.

Plan changes

The table on the following page shows the plan changes that are in progress or have been made operative in the future urban areas as at 30 June 2023.

In 2022/2023, the majority of plan changes in the south and north have had decisions and are now fully operative. These include plan changes in Warkworth, Whenuapai (Spedding Block), Drury, Waihoehoe, Papakura and Waipupuke. Six additional plan changes are currently in progress; one in the north and the others in the south.

The staging of areas for plan changes should generally follow the sequence and timeframes identified in the Future Urban Land Supply Strategy.

A number of private plan changes have sought or are seeking to live zone land ahead of the Development Ready sequencing identified in the Future Urban Land Supply Strategy. Several of these plan changes are yet to be determined through RMA processes.

With the exception of PC 5: Whenuapai, all of the plan changes in the table on the following page have been privately initiated.

Plan changes in progress or made operative in the future urban area as at 30 June 2023.

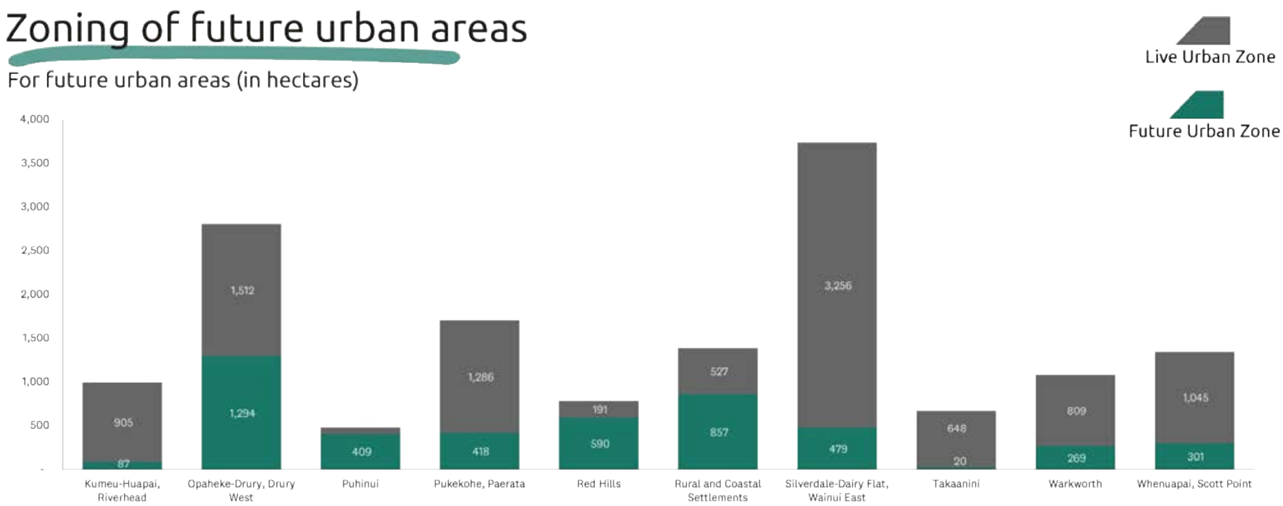
Sub-region	Plan change	FULSS sequencing	Status
North	PC 25: Warkworth North	2018-2022	Operative in part November 2021
	PC 40: Warkworth — Clayden Road	2018-2022	Fully Operative June 2021
	PC72: McKinney Road, Warkworth	2028-2032	Fully Operative June 2023
North West	PC5: Whenuapai Plan Change	2028-2032	Withdrawn June 2022
	PC 69: Spedding Block	2028-2032	Fully Operative March 2023
	PC86: 41-43 Brigham Creek Road, Whenuapai	2028-2032	In progress - Further submissions closed December 2022
South	PC 6: Auranga B1 Drury West	2012-2017	Fully Operative February 2020
	PC 46: Drury South	2012-2017	Fully Operative October 2021
	PC 48: Drury Centre Precinct	2028-2032	Fully Operative December 2022
	PC 49: Drury East Precinct	2028-2032	Fully Operative December 2022
	PC 50: Waihoehoe Precinct	2028-2032	Fully Operative December 2022
	PC 51: Drury 2 Precinct	2018-2022	Fully Operative December 2022
	PC 52: 520 Great South Road, Papakura	2028-2032	Fully Operative December 2021
	PC 55: Patumahoe South	Previously rural	In progress - Appeals close July 2022
	PC 58: 470 and 476 Great South Road and 2 and 8 Gatland Road, Papakura	2028-2032	Fully Operative March 2022
	PC61: Waipupuke	2018-2022	Consent order issued June 2022, decision to approve with modifications.
	PC74: Golding Meadows and Auckland Trotting Club Inc	2023-2027	In progress – Appeals closed March 2023
	PC76: Kohe	2023-2027	In progress – Appeals closed May 2023.
	PC87: 301 and 303 Buckland Road, Pukekohe	2023-2027	In progress – Appeals closed 7 December 2023
	PC91: 80 McLarin Road, Glenbrook	2023-2027	In progress – Further submissions closed June 2023

Live zoned future urban areas

Future urban areas contain both future urban zoned and live zoned land. All future urban areas are of a size and scale that will take a number of years to build out. Areas sequenced in the second and third decades of the strategy are likely to be only partially built out within the 30-year strategy timeframe. Detailed sequencing of the future urban areas can be found in 'Section 4. The Programme - sequencing of the future urban areas' of the Future Urban Land Supply Strategy

Currently a total of 4,724 ha (31 per cent) of the future urban area covered by the Future Urban Land Supply Strategy is live zoned[8].

Zoning of future urban areas, as at 30 June 2023



Live zoned future urban areas by zoning type

The majority of the live zoned land is identified for residential activity (64 per cent) and business activity (19 per cent)[9] , the remainder of it is used to provide amenity and infrastructure services that are required to support urban growth.

Currently, the percentages of zoned uses are indicative of land which is only partially developed and will change as development progresses. For instance, the proportion of roading will increase as the initial rural roading pattern changes to accommodate an urban pattern at a scale down to local roads.

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8. The total area of live zoned land reported in 2021 Development Strategy Monitoring Report was a gross figure. Since the 2022 report, the reported figure is net land area which excludes sections of road that extend into future urban zoned land.

9. The residential category includes Auckland Unitary Plan residential zones and the business category includes all business zones which can contain a mix of commercial and residential activities

Infrastructure phase

Land in future urban areas is predominantly rural, therefore bulk infrastructure has to be provided to enable urban development. The infrastructure investment required in these areas includes transport (roads and public transport including rail and bus, roads, cycle facilities and footpaths), water, wastewater, stormwater and community infrastructure. It also includes investment such as energy, telecommunications, and infrastructure provided by the Crown such as education and medical facilities.

Bulk infrastructure plays an important role in enabling development of future urban areas. Once bulk infrastructure is in place, generally developers fund and deliver local infrastructure within their developments (such as water and wastewater pipes, stormwater assets, local roads and neighbourhood parks). Infrastructure providers plan their long-term investment to deliver infrastructure efficiently.

The following table summarises in progress or completed major infrastructure works delivered by or in partnership with Auckland Council including council-controlled organisations (CCOs). In practice infrastructure planning and delivery will occur concurrently, through all steps of the planning and development phases.

Major infrastructure works by future urban area as at 30 June 2023

Future Urban Area	Major infrastructure works
North	
Warkworth	• Construction work for Matakana Link Road underway • Ara Tūhono – Pūhoi to Warkworth project completed in 2023 • Dome Valley Safety Improvements stage 2 - 5 completed 2023 • Snells-Algies Bay outfall completed in 2021 • Warkworth Wastewater Growth Strategy (conveyance pipeline and pump station) under construction. Expected completion 2025. • Snells Beach Wastewater Treatment Plant under construction. Expected completion 2025. • Warkworth Wastewater Growth Servicing in planning phase
Silverdale-Dairy Flat and Wainui East	• Penlink - Main construction starting October 2023. • Wainui area improvements (arterials and Milldale-Highgate bridge) in progress • Army Bay Wastewater Treatment Plant Upgrade in concept design phase.
Rural Settlements - North	• • Wellsford Wastewater Treatment Plan Upgrade – expected completion 2025. • Wellsford Water Treatment Plant Upgrade in concept design phase.

Continued on the next page

Future Urban Area	Major infrastructure works
North West	
Area-wide	• Trig Road Water Reservoir in planning phase • North Harbour No.2 Watermain Project in planning phase • The Northern interceptor - Phase 1 construction is now complete. Phase 2 (Stage 1) of the project is expected to be complete towards the end of 2027. • Alternative State Highway corridor for northwest Auckland - Notices of Requirement notified in early 2023. • Northwest Rapid Transit Corridor (Northwest Busway) - Waka Kotahi commenced business case in 2023. • SH16 Brigham Creek to Waimauku upgrade in plan/design phase
Kumeu-Huapai and Riverhead	• SH16 Brigham Creek to Waimauku – Brigham Creek to Kumeu expected completion 2025 • Work to widen SH16 and upgrade the Station Road intersection will begin late 2023. Tapu Road construction expected to start late 2023. SH16 and Access Road intersection upgrade complete.
Whenuapai and Scott Point	• Brigham Creek Pump Station in planning phase • Slaughterhouse interim wastewater Pump Station (Whenuapai Package 1) in design phase • Whenuapai Wastewater Packages 1 and 2 – in design phase • Whenuapai upgraded arterials further investigation underway
Red Hills	• Wastewater transmission main from Northern Redhills to Brigham Creek Pump Station in planning phase • Whenuapai wastewater Package 3 in design phase • Redhills upgraded arterials further investigation underway
Rural Settlements - North West	• Helensville Water Treatment Plant Upgrade – concept design underway
South	
Area-wide	• Hingaia Watermain Enhancement – Southern Auckland in design phase • Drury and Hingaia – Southern Auckland Wastewater Service Scheme in planning phase • Wesley, Paerata and Drury South resilience watermain in planning phase
Puhinui	• Airport to Manukau and Botany rapid transit - Stage 1 Puhinui Station updagrade completed, Notices of Requirement for route protection notified in early 2023

Continued on the next page

Future Urban Area	Major Infrastructure Works
South continued	
Ōpaheke-Drury and Drury West	• Southern motorway upgrade: Papakura to Drury South Stage 1 construction underway • The third main Rail Line and enabling works are underway for Papakura to Pukekohe electrification • The planning approvals for Drury Central and Paerata stations have been granted • New Drury West train station – consent has been lodged • Improvements planned for Drury arterials connecting to southern train stations
Takaanini (Cosgrave Road)	• Awakeri Wetlands stage 1 completed in 2020 • Takaanini stormwater channel Stages 2 & 3 construction start in 2024 – 2025
Pukekohe, Paerata	• Pukekohe Wastewater Treatment Plant upgrade completed in 2022 • Paerata Transmission Wastewater Pumpstation in planning phase • Isabella wastewater Pump station in design phase
Rural Settlements - South	• Southwestern Wastewater Servicing Scheme - Preferred site for the new wastewater treatment plan has been chosen with scheme completion expected by 2026 • Beachlands Maraetai servicing is being reviewed in line with wastewater consent expiry. Upgrades works will be required within the decade.

Development phase

Creation of new parcels

For each future urban area, the table below shows the number of new parcels created against the projected development yield (as identified in the FULSS). This is reported by:

- progress in the latest reporting year, 2022/2023
- overall development progress, 2015/2016 – 2022/2023.

In 2022/2023, 2,357 new parcels were created in the future urban areas. This is 20 per cent of total parcels created since 2015/2016.

Since 2015, Whenuapai, Scott Point has had the highest number of parcels created, followed by Rural and Coastal Settlements. This is generally consistent with the sequencing identified in the Future Urban Land Supply Strategy as most of these areas contain already live zoned land (including Special Housing Areas and areas with a live urban zone applied by the Auckland Unitary Plan) and are proposed to be development ready in Decade One 1st half (2018-2023).

Number of new parcels created, by future urban area, by reporting year (1 July - 30 June)

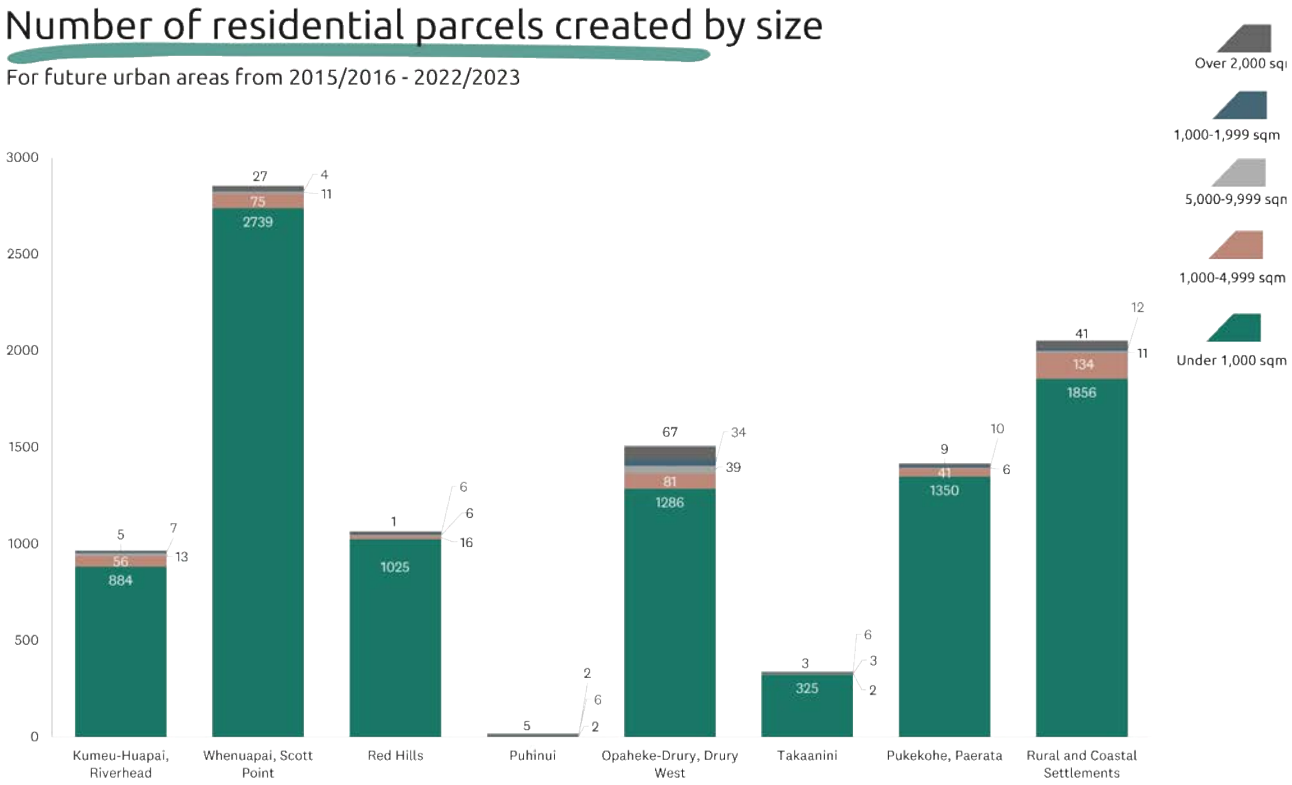
Future urban area	Parcels created 2022/2023	Total parcels created 2015-2023
Warkworth	52	208
Silverdale-Dairy Flat, Wainui East	393	1,418
Kumeu-Huapai, Riverhead	57	965
Whenuapai, Scott Point	232	2,856
Red Hills	228	1,065
Puhinui	1	17
Ōpaheke-Drury, Drury West	653	1,507
Takaanini	0	339
Pukekohe, Paerata	245	1,416
Rural Settlements	496	2,054
Total	2,357	11,845

Creation of new parcels by size

New parcels are created through the process of subdivision. While land can be subdivided into individual house parcels which allow for dwellings to be built, in some cases land is split into larger super blocks and developments are carried out in stages. The size of parcels therefore can be an indication of the stage of the development process for specific areas.

The majority (92 per cent) of the new residential parcels created since 2015/2016 were below 1000 sqm[10].

Number of new residential parcels created, by size, 1 July 2015 - 30 June 2023



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10. Residential parcels consist of land with Auckland Unitary Plan residential zoning. Business parcels consist of land with business zoning which can contain a mix of commercial and residential uses.

For new business parcels, Silverdale-Dairy Flat, Wainui East has high proportion of development under 5000sqm. Opaheke-Drury and Drury West has a high portion of business parcels created over 1ha in 2022/23. Overall, the number and size of new business parcels created since 1 July 2015 vary across the future urban areas. Whenuapai, Scott Point features a high proportion of under 1,000 sqm parcels while parcels over 2ha were concentrated in Ōpaheke-Drury, Drury West and Puhinui.

Number of new business parcels created, by size, 1 July 2015 - 30 June 2023

Future urban area	under 1,000 sqm	1,000 – 4,999sqm	5,000 – 9,999 sqm	1 - 1.9 ha	over 2ha
Warkworth	2	3	1	-	2
Silverdale-Dairy Flat, Wainui East	5	5	-	-	-
Kumeu-Huapai, Riverhead	4	2	-	-	-
Whenuapai, Scott Point	30	4	3	-	-
Red Hills	-	-	-	-	-
Puhinui	2	2	2	6	5
Ōpaheke-Drury, Drury West	4	15	15	19	17
Takaanini	-	-	-	-	-
Pukekohe, Paerata	16	-	-	-	1
Rural and Coastal Settlements	2	12	2	-	4
Total	65	43	23	25	29

Dwellings consented

In the period from 2015/2016, 11,598 dwellings were consented in the future urban areas, with 16 per cent of these (1,881 dwellings) consented in 2022/2023. While there has been 22% decrease in dwellings consented between 2021/2022 and 2022/2023, in recent years development activity has been increasing as future urban areas have progressed through the planning phase to the point where bulk infrastructure is in place, land is being subdivided and homes are being delivered.

In 2022/2023, Ōpaheke-Drury, Drury West had the highest number of dwellings consented, followed by Silverdale-Dairy Flat, Wainui East. Puhinui had no dwellings consented which is not unexpected as the area is live zoned for business activities.

Dwellings consented in future urban areas, by reporting year (1 July - 30 June)

Future urban area	Potential dwelling yield in FULSS*	Dwellings consented 2022/2023	Dwellings consented 2015-2023
Warkworth	7,600	9	108
Silverdale-Dairy Flat,	32,300	403	989
Wainui East	32,300	390	1,379
Kumeu-Huapai, Riverhead	8,000	130	1,090
Whenuapai, Scott Point	21,350	307	3,062
Red Hills	12,050	143	889
Puhinui	38	0	0
Ōpaheke-Drury, Drury	5,300	2	345
West	23,520	453	1,425
Takaanini	5,300	3	348
Pukekohe, Paerata	14,270	69	1,222
Rural Settlements	12,461	377	2,075
Total	136,889	1,881	11,598

* for areas with structure plan the potential dwelling yield can vary from the FULSS figure.

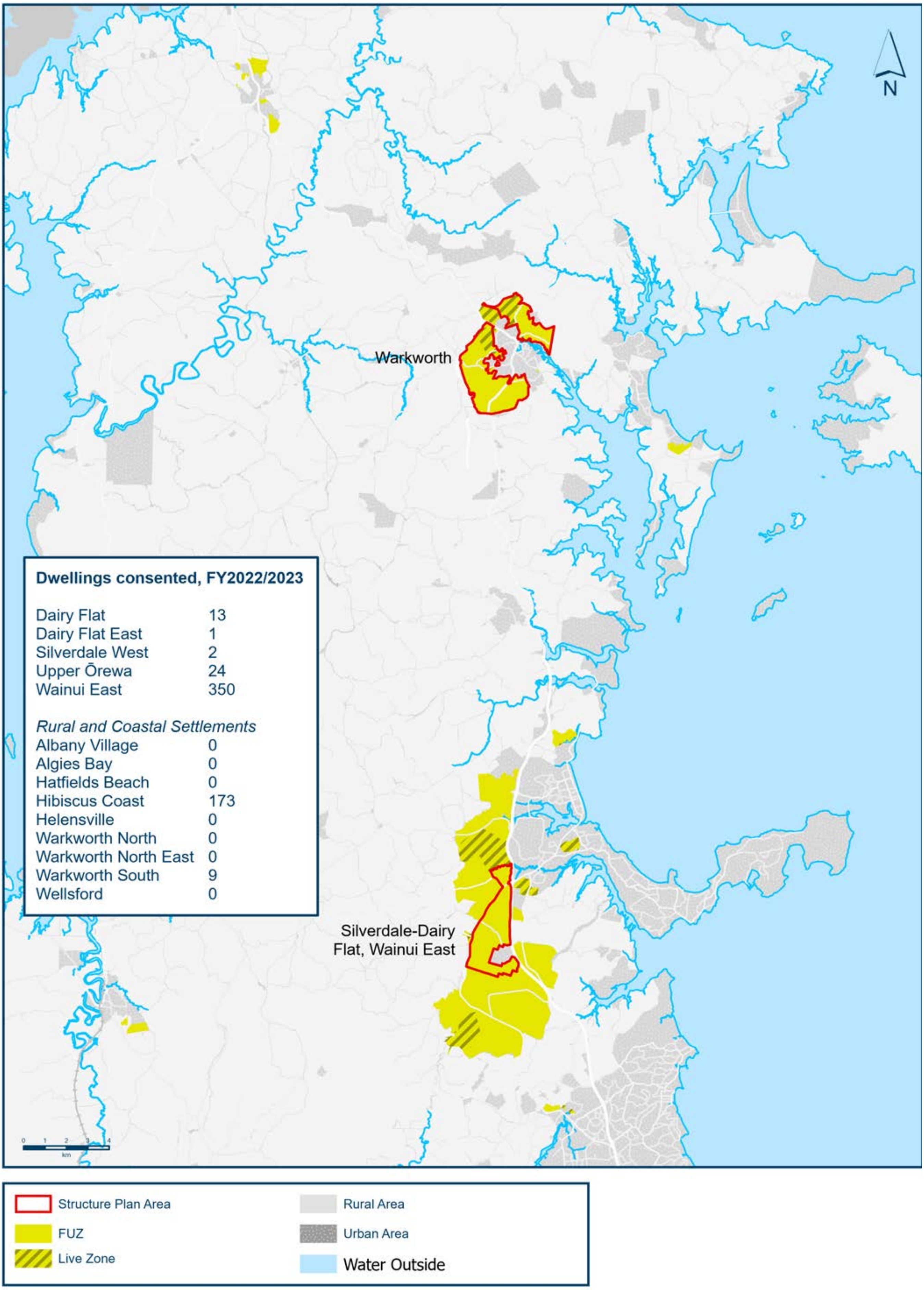
Overall development progress

The maps on the following pages bring together the information on the development pipeline in the future urban areas by sub-region. It shows that many of the future urban areas with structure plans in place and identified to be development ready in Decade One (2018-2028) have progressed through the planning and infrastructure phase and building activities are now ready to take place.

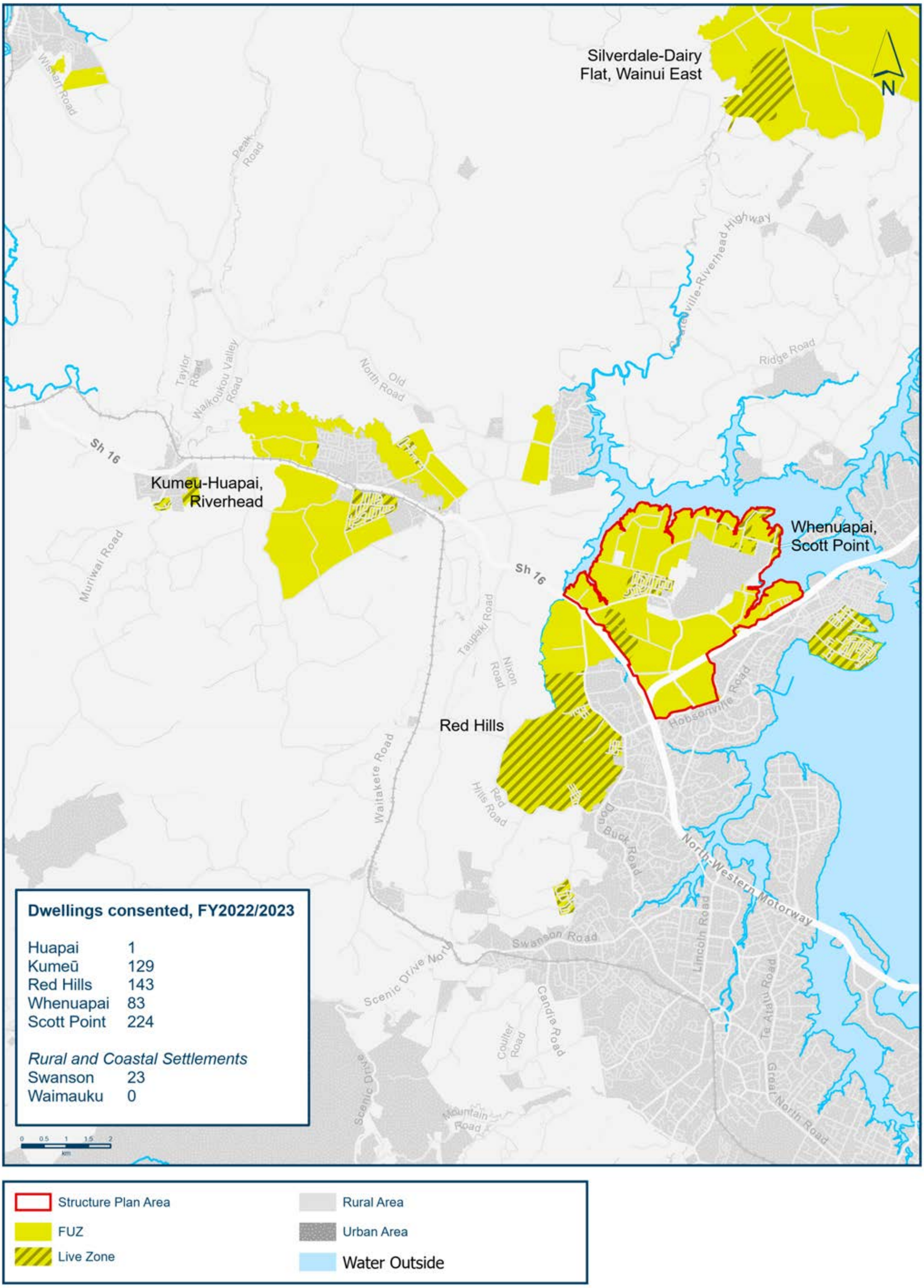
An increase in development pressure in the future urban areas south sub-region is evidenced through the number of private plan changes in progress and the pressure to fund infrastructure projects.

Ongoing monitoring and reporting will provide a more comprehensive understanding of trends and progress against the Future Urban Land Supply Strategy.

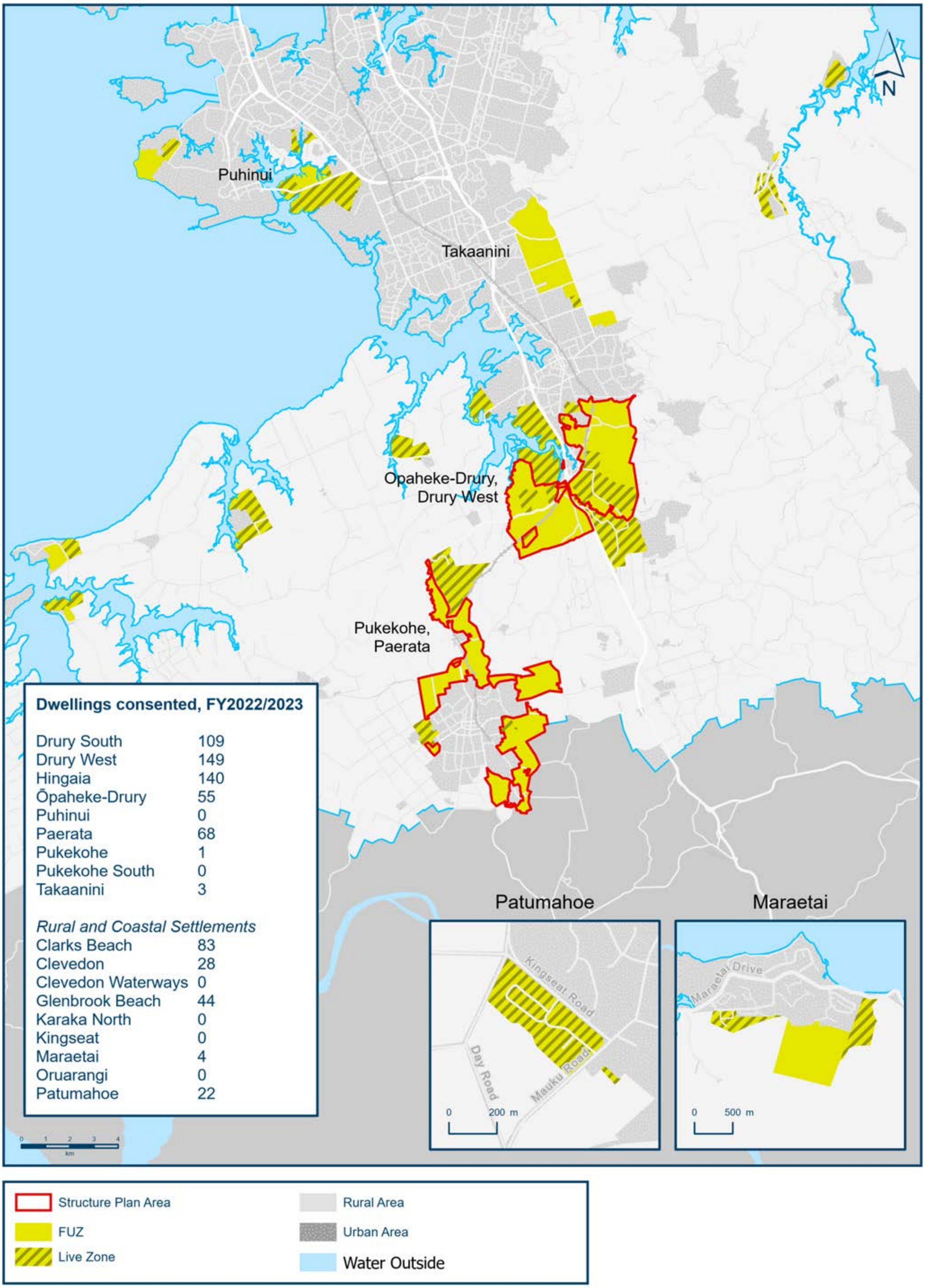
Future Urban Areas - North, as at 30 June 2023

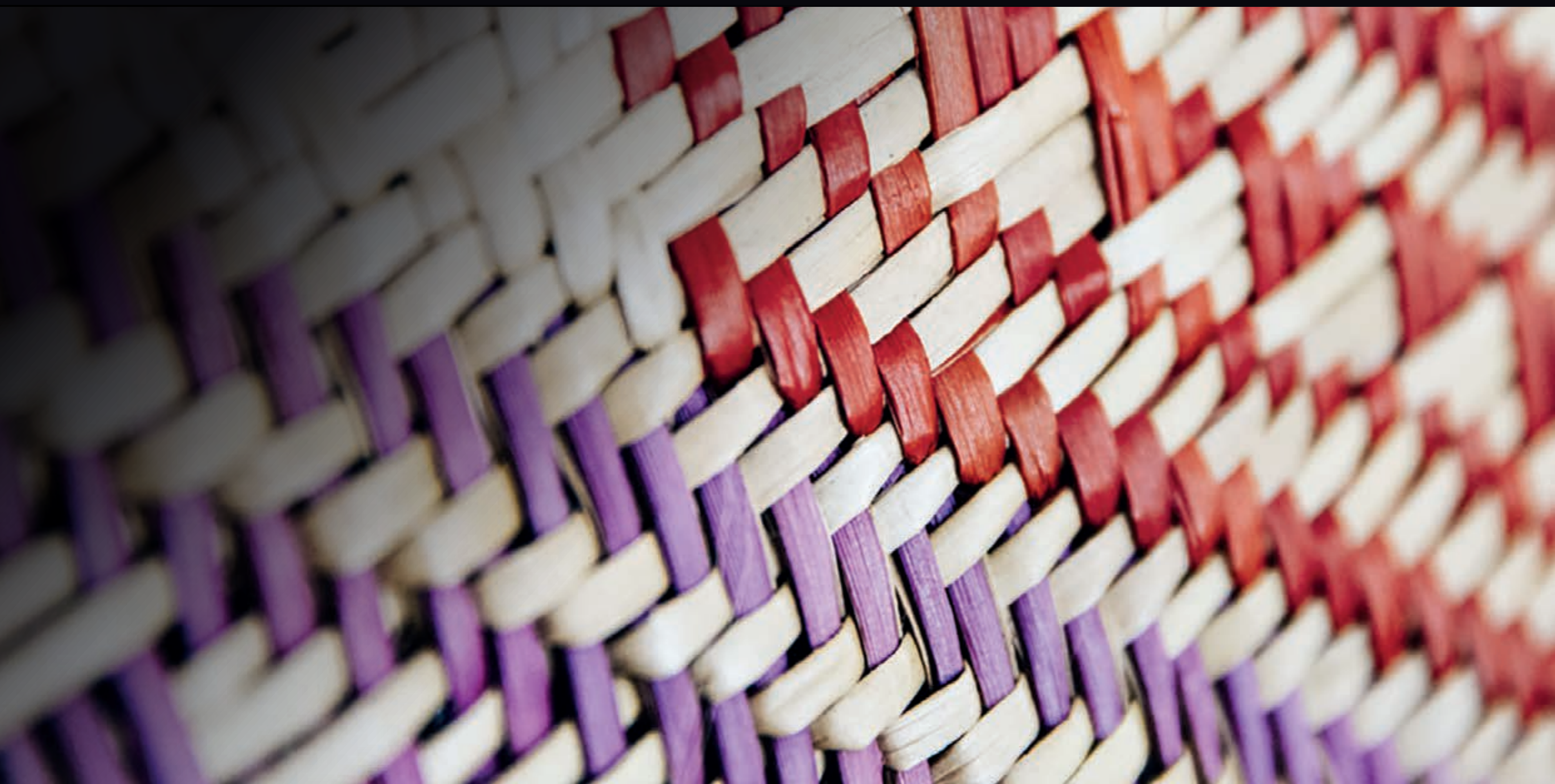


Future Urban Areas - North West, as at 30 June 2023



Future Urban Areas - South, as at 30 June 2022





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Te Kaunihera o Tāmaki Makaurau