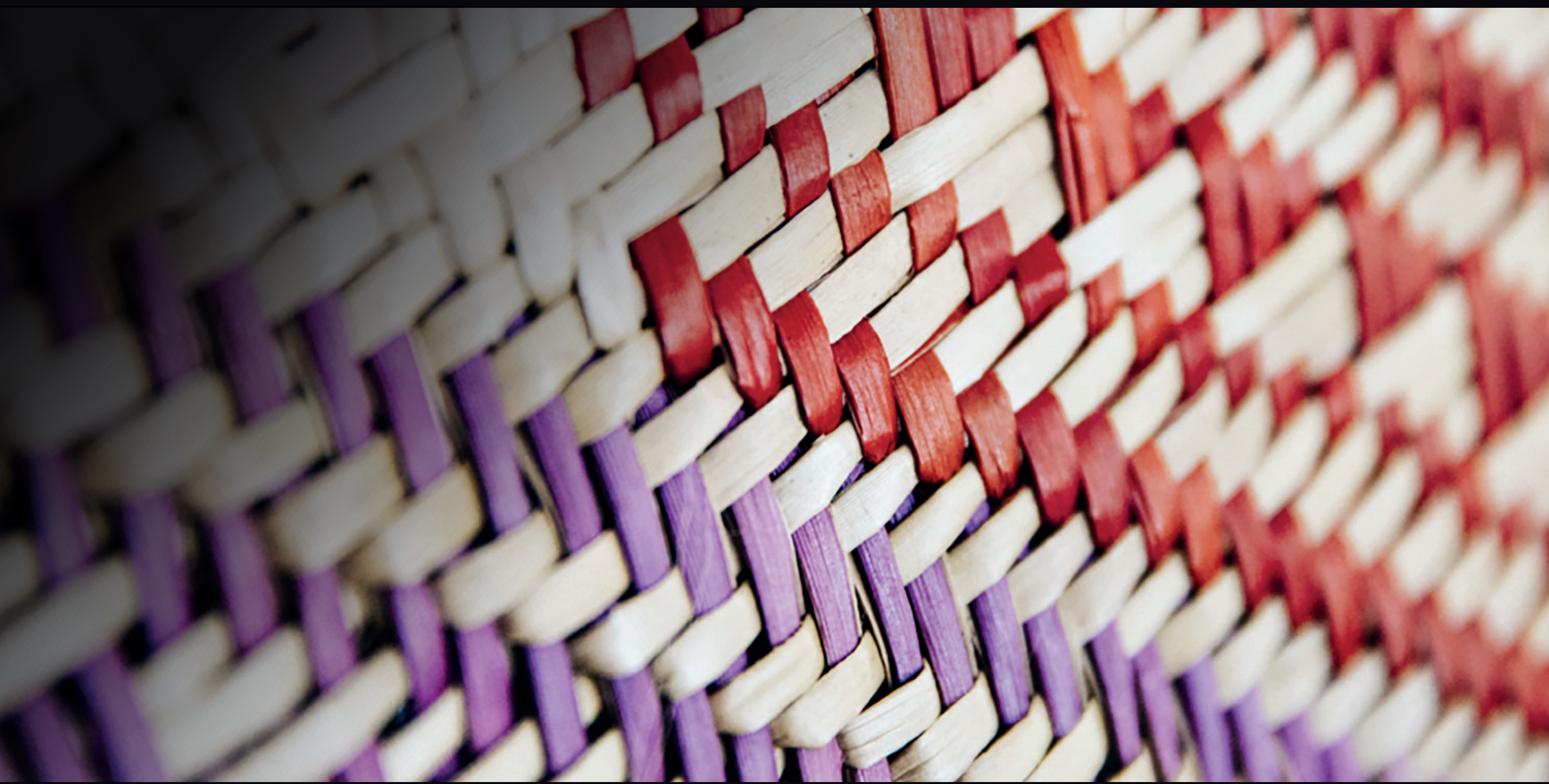
AUCKLAND PLAN 2050



Development Strategy Monitoring report

December 2021

Auckland Council
Te Kaunihera o Tāmaki Makaurau

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December 2021

Auckland Plan, Strategy and Research Department

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Please note that the Auckland Plan 2050 is a digital plan and may be updated from time to time. Please refer to the Auckland Plan website, www.aucklandplan.govt.nz for the most up to date version of the full plan and reporting.


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EXECUTIVE SUMMARY

The Development Strategy sets out how Auckland will grow and change over the next 30 years in response to growth through development. Auckland has taken 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 third monitoring report on the Auckland Plan 2050 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 2020 to 30 June 2021.

The findings show that in the three 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. Total dwellings consented has increased by almost 30 per cent compared with the previous reporting year. While growth has been widespread across Auckland's urban areas, development activity has increased mostly in nodes and development areas. Growth in rural areas has been limited. Across the region, dwelling consented for apartments and townhouses etc. are increasing at a faster rate than consents for standalone houses, particularly in nodes and development areas.

Auckland is changing; our city is growing up instead of just out, the number and location of dwelling consents and completions in 2020/2021 broadly follows 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 2020/2021 monitoring report are:

- 19,035 dwellings were consented in 2020/2021, an increase of 29 per cent from the previous year
    - 82 per cent of these dwellings were consented in the existing urban area
    - 12 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 (79 per cent) occurred through intensification with the balance (21 per cent) in areas not previously developed, for example, Flat Bush
- apartments and townhouses etc. accounted for 62 per cent of all dwellings consented in 2020/2021 compared with 52 per cent in 2019/2020
- standalone houses accounted for 36 per cent of all dwellings consented in 2020/2021 compared with 45 per cent in 2019/2020
- 4,793 dwellings were consented within1,500m catchments of train stations[1] and the Northern Busway stations. This is 25 per cent of the total dwellings consented
- 14,123 dwellings were issued with a Code of Compliance Certificate in 2020/2021
- just under 600,000 square metres of business floor space was consented in 2020/2021
- most business floor space consented was in the light industry zoned areas
- of the nodes, the Manukau node had the greatest amount of business floor space consented.

As this is only the third monitoring report on a 30-year strategy, future monitoring and reporting will provide a more comprehensive understanding of ongoing trends and implementation of the Development Strategy.

1 This refers to train stations on the Southern Train Line, Eastern Train Line, Western Train Line, and Onehunga Train Line.

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 2020 to 30 June 2021.

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 2020/2021, the location of dwellings consented across Auckland indicates most growth is taking place within the existing urban area with a majority happening in brownfields. Some growth is occurring in identified future urban areas, and there is 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 and rural areas

82%	12%	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 third year of implementing the Development Strategy, 19,035 residential dwellings were consented in Auckland, an increase of 4,259 on the previous reporting year. In the past five years, over 70,000 dwellings have been consented in the Auckland region.

4,793 residential dwellings were consented inside 1,500m catchments of train stations[2] and Northern Busway stations in 2020/2021. This is 25 per cent of the total dwellings consented.

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

Reporting Year	Dwellings Consented
2016/2017	10,119
2017/2018	12,368
2018/2019	14,030
2019/2020	14,776
2020/2021	19,035
Total	70,326

2. This refers to train stations on the Southern Train Line, Eastern Train Line, Western Train Line, and Onehunga Train Line.

Local Boards

The local board areas with the highest number of dwellings consented in 2020/2021 were Henderson-Massey, Howick, and Papakura. Great Barrier and Waiheke local board areas had the lowest number of dwellings consented.

Local Board Area	Dwellings Consented 2019/2020	Dwellings Consented 2020/2021
Henderson - Massey	1,290	1,983
Howick	1,306	1,708
Papakura	1,300	1,465
Upper Harbour	1,036	1,408
Hibiscus and Bays	996	1,340
Rodney	892	1,268
Maungakiekie-Tāmaki	879	1,211
Franklin	788	1,120
Ōtara-Papatoetoe	1,090	928
Waitematā	544	860
Kaipātiki	642	833
Manurewa	609	800
Whau	555	797
Māngere-Ōtāhuhu	554	707
Albert - Eden	581	665
Puketāpapa	486	588
Devonport - Takapuna	387	534
Ōrākei	355	493
Waitākere Ranges	436	260
Waiheke	41	50
Great Barrier	9	17
Total	14,776	19,035

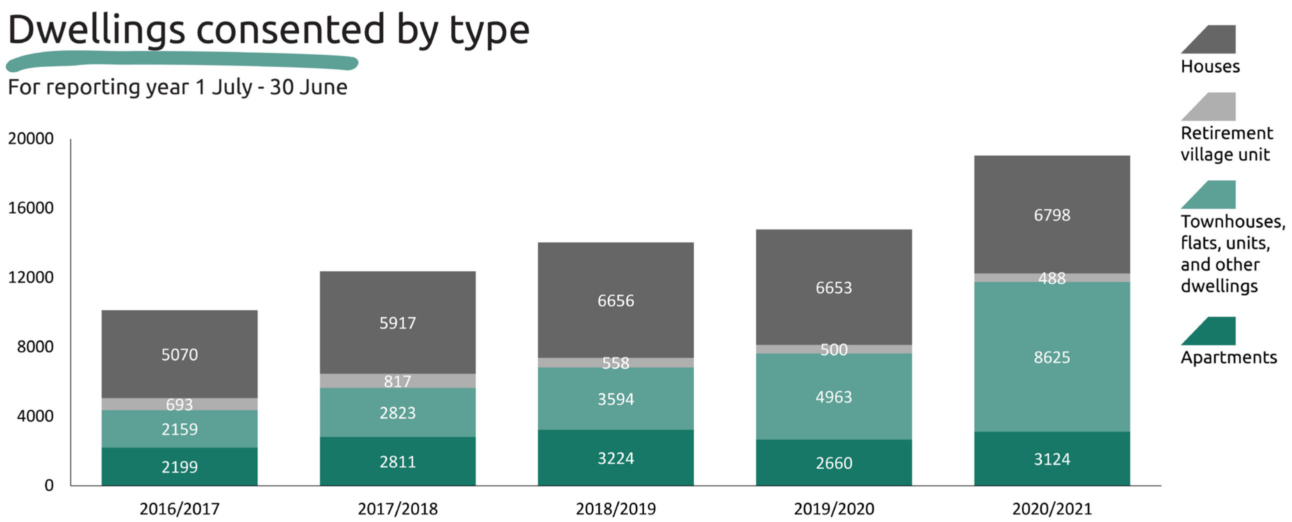
Dwelling typology

Dwellings consented for more intensive housing including apartments and townhouses etc. are increasing while the number of houses consented remains relatively stable.

The number of townhouses etc. consented in 2020/2021 has increased 299 per cent compared with 2016/2017. In the same period, the number of apartments has increased 42 per cent, and the number of houses has increased 34 per cent.

The proportion of each typology has also changed. The proportion of townhouses etc. has increased from 21 per cent of consents issued in 2016/2017 to 45 per cent in 2020/2021. In the same period, the proportion of houses has decreased from 50 per cent to 36 per cent of consents issued, and the proportion of apartments has decreased from 22 per cent to 16 per cent.

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 2020/2021 by dwelling type. The size of each dot corresponds to the number of dwellings attached to each consent.

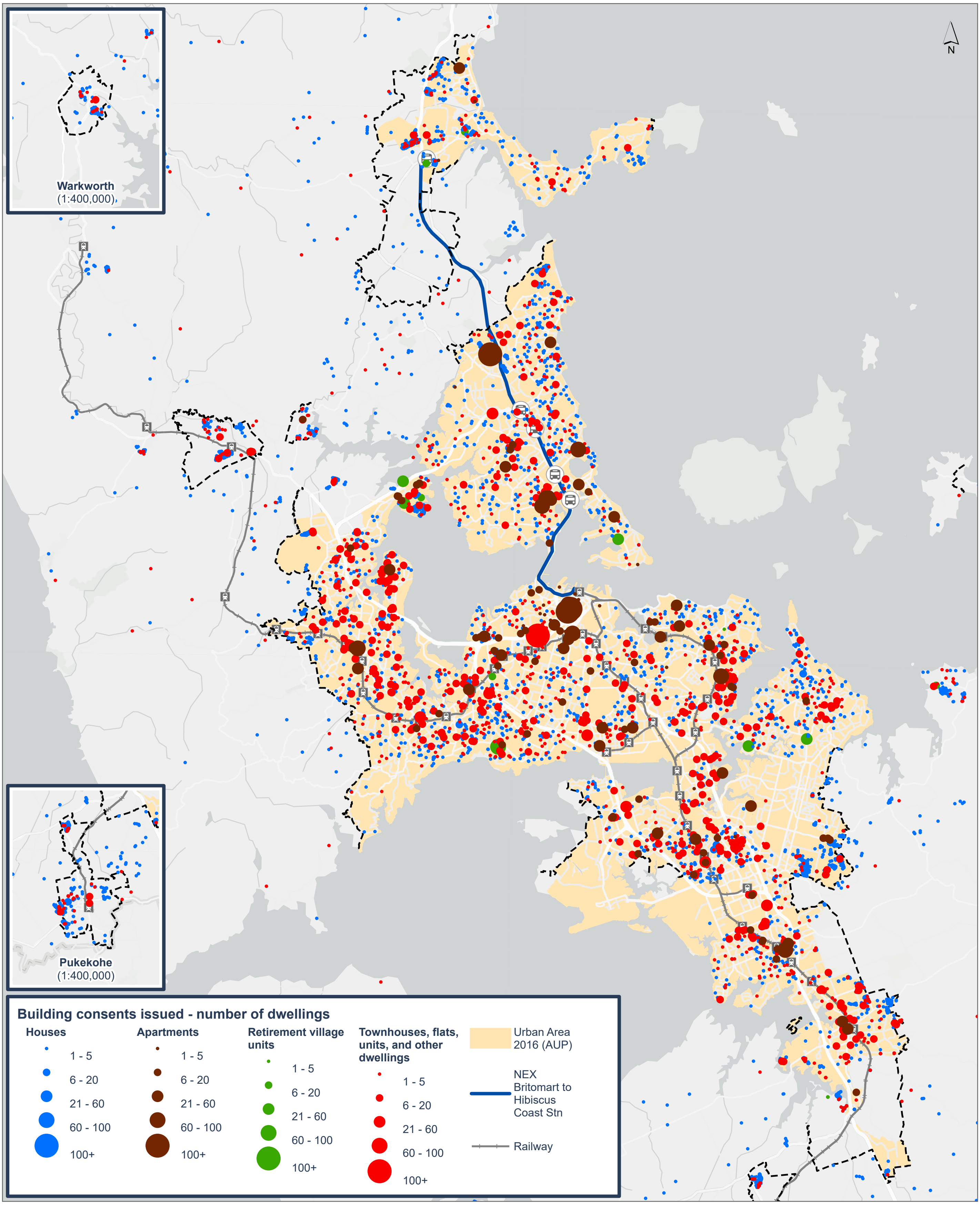
The map shows that the consenting activity is widespread across the urban area. Apartment consents with high number of units (more than 100 units) are mostly located within the city centre. There are also concentrations of apartments and townhouses etc. located around areas with good public transport accessibility. In 2020/2021, 85 per cent of residential dwellings consented within 1,500m catchments of train stations[3] and Northern Busway stations were apartments and townhouses etc.

Established communities such as Te Atatu Peninsula, Glenfield and Mt Roskill also show higher concentrations of more intensive housing typologies occurring through redevelopment.

Consents for 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 and Papakura.

3. This refers to train stations on the Southern Train Line, Eastern Train Line, Western Train Line, and Onehunga Train Line.

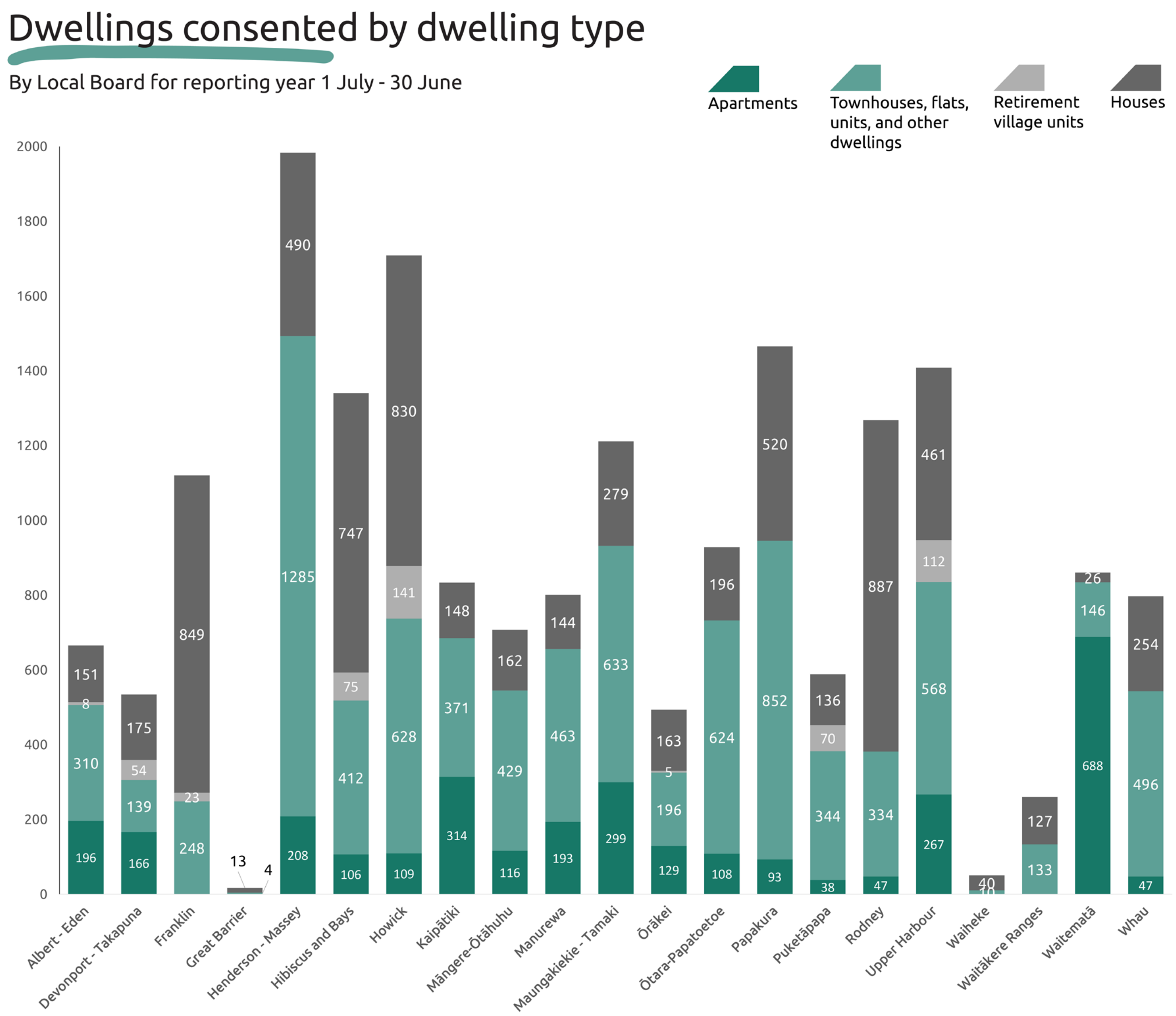
Dwellings consented, by type and size of consent (number of dwellings), 1 July 2010 - 30 June 2021



Local Boards

The dwelling types being consented vary considerably across all local boards reflecting their different characters. For example, 97 per cent of dwellings consented in Waitemata local board area in the 2020/2021 year were more intensive housing types, including apartments and townhouses etc., compared with 22 percent in Franklin.

Dwellings consented by dwelling type, by Local Board, 1 July 2020 - 30 June 2021



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.

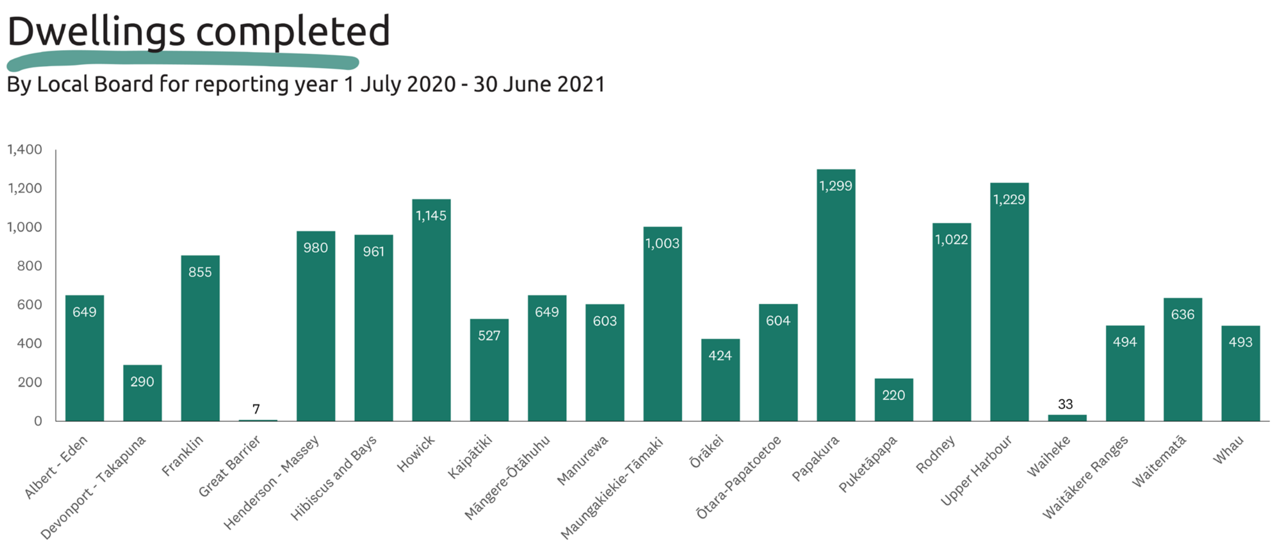
The time between a building consent being issued and a CCC being issued will vary depending on the scale and complexity of the building.

In the third year of implementing the Development Strategy, 14,123 dwellings were issued with a CCC. This is an increase from the 10,778 dwellings issued with a CCC the previous reporting year.

Local Boards

Papakura, Upper Harbour and Howick local boards had the highest numbers of CCC's issued in 2020/2021, with over 1,100 CCCs each. These were closely followed by Rodney, Maungakiekie – Tamaki, Hibiscus and Bays, and Henderson – Massey which had around 1,000 CCCs each.

Dwellings completed by local board area, 1 July 2020 - 30 June 2021



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 urban intensification occurring through infill and redevelopment. However, some areas within the urban extent had not previously been developed. 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 area can be found in the 'Change in the existing urban area' section of the Development Strategy.

Highlights in the existing urban area, for the 2020/2021 reporting year, are:

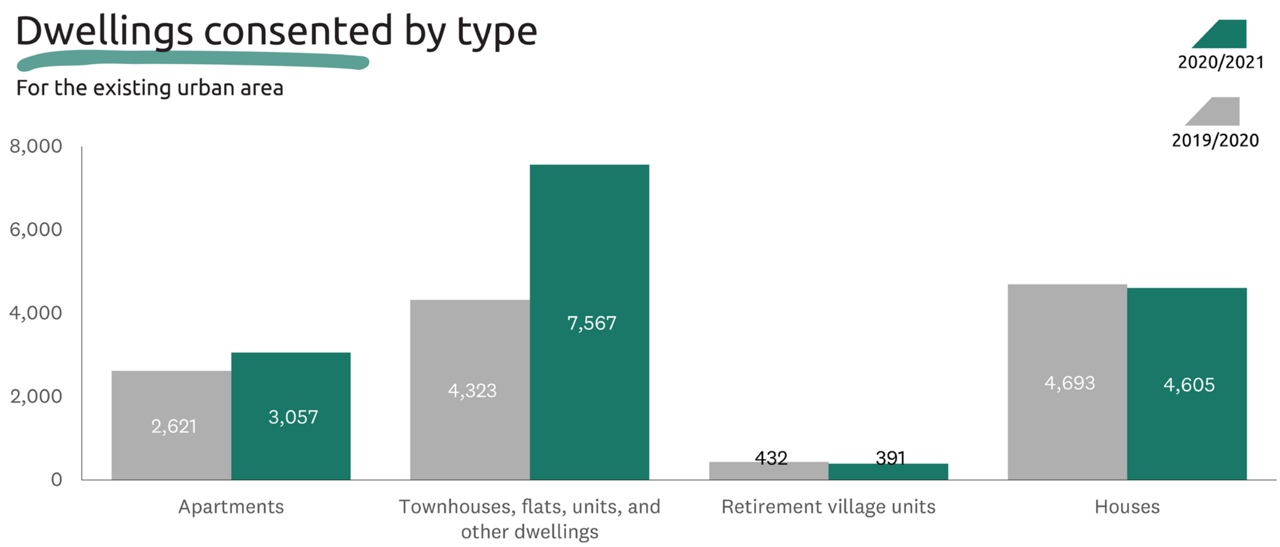
- a total of 15,620 dwellings were consented, which is a 29 per cent increase from the previous reporting year. This is 82 per cent of Auckland's total dwellings consented
- In the existing urban area, most growth (79 per cent) occurred through intensification with the balance (21 per cent) in areas not previously developed
- 68 per cent of the consented dwellings in the existing urban area were more intensive housing types (apartments, townhouses etc.)
- 85 per cent of the consented dwellings with 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 Train Line, Eastern Train Line, Western Train Line, and Onehunga Train Line.

Dwelling typology

Collectively, more intensive housing (apartments and townhouses etc.) made up 68 per cent of dwellings consented in the existing urban area. This is an increase of 10 per cent compared with the previous reporting year and was mainly driven by an increase in townhouses etc. consented in the existing urban area. This shows the preference for higher intensity dwelling types over standalone housing in existing urban areas is increasing over time. This is 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 2019/2020 reporting year, are:

- a total of 1,420 dwellings consented in the urban nodes which is a 5 per cent increase from the previous reporting year. This is 9 per cent of dwellings consent in the existing urban area
- the City Centre had the most dwellings consented
- collectively, apartments and townhouses etc. made up 85 per cent of all dwellings consented in urban nodes.
- a total of 381 dwellings consented in the rural nodes, which is a 46 per cent increase from the previous reporting year.

Urban nodes breakdown

A total of 1,420 dwellings were consented in Auckland's urban nodes in 2020/2021, these were highest in the City Centre node and the Westgate node which together accounted for over half of all the dwellings consented across the urban nodes.

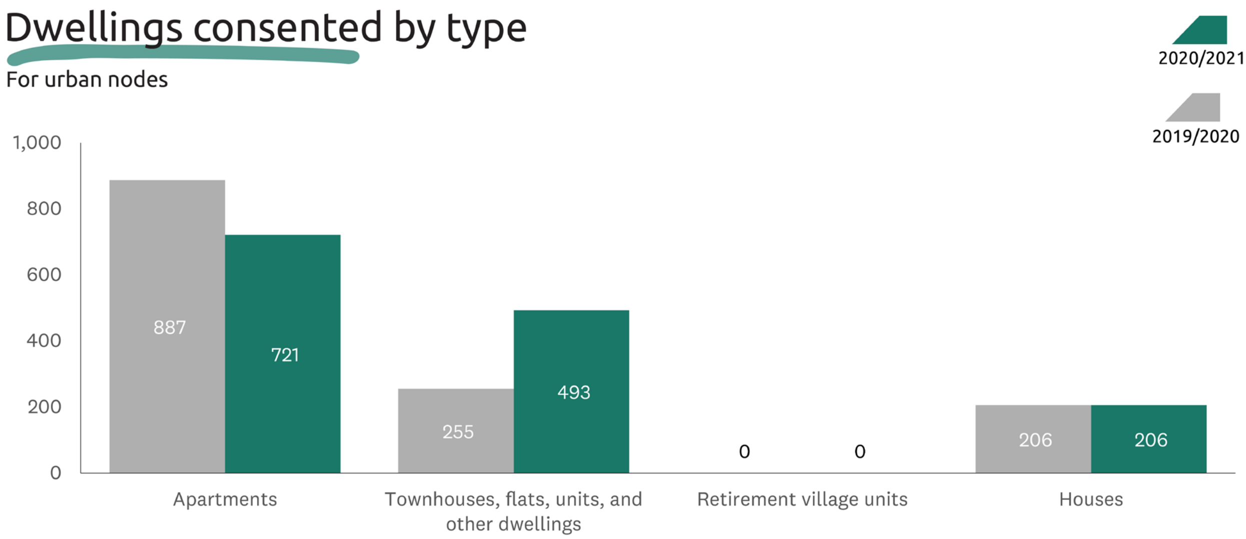
Dwellings consented, by urban node, by reporting year (1 July - 30 June)

Urban Node	Number of dwellings consented, 2019/2020	Number of dwellings consented, 2020/2021	Change
City Centre	855	606	↓
Albany	29	227	↑
Westgate	250	418	↑
Manukau	214	169	↓
Total	1,348	1,420	↑

Dwelling typology

Collectively, more intensive housing such as apartments and townhouses etc. made up 85 per cent of dwellings consented in urban nodes compared with 15 per cent for houses. This indicates that consented development in these locations is typically denser, 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 381 dwellings were consented in Auckland's rural nodes in 2020/2021. While the majority of dwellings consented in rural nodes were for houses (73 per cent), there were also some more intensive housing typologies such as townhouses etc. consented.

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

Rural nodes	Number of dwellings consented, 2019/2020	Number of dwellings consented, 2020/2021	Change
Pukekohe	191	275	↓
Warkworth	70	106	↑
Total	261	381	↑

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 2020/2021 reporting year are:

- 6,143 dwellings were consented, which is a 44 per cent increase from the previous reporting year. This is 40 per cent of dwellings consented in the existing urban area
- 80 per cent of dwellings consented in development areas were apartments and townhouses etc.

Development areas breakdown

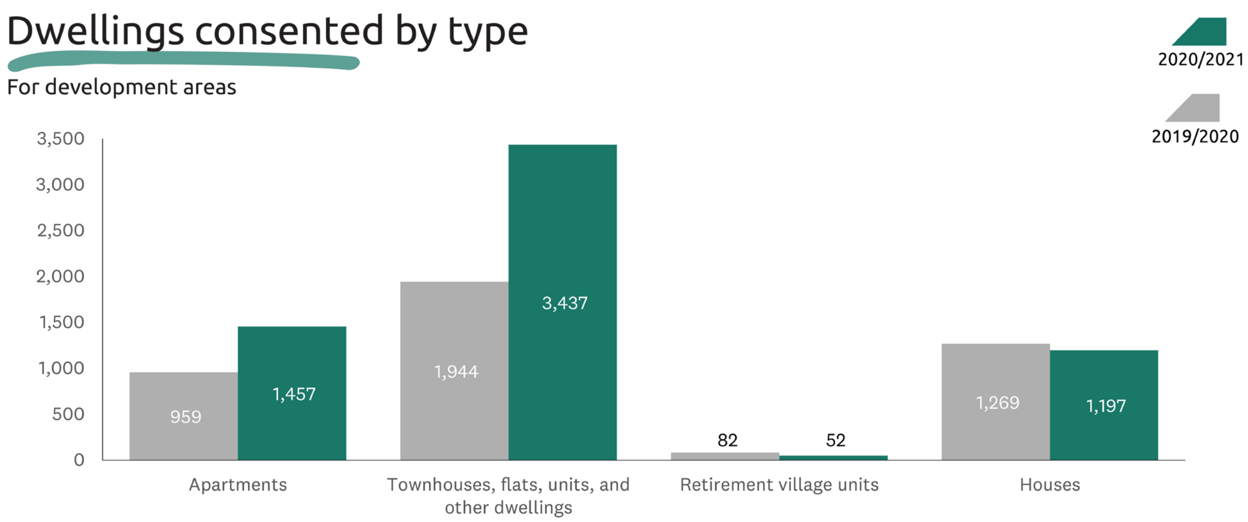
A total of 2,069 dwellings were consented in development areas sequenced for Years 1-3 (2018-2020). Slightly more (2,804) dwellings were consented in development areas sequenced for Years 4-10 of the strategy, and 1,270 dwellings in areas sequenced for Years 11-30. The reasons for this pattern of development will require further investigation and ongoing monitoring.

Development area	Development Strategy Sequencing			Number of Dwellings Consented, 1 July 2019 – 30 June 2020	Number of Dwellings Consented, 1 July 2020 – 30 June 2021	Change
	Years 1-3	Years 4-10	Years 11-30			
Ōtāhuhu				161	283	↑
Glen Innes				217	350	↑
Onehunga				219	185	↓
Avondale				188	163	↓
Dominion Road				21	31	↑
New Lynn				31	64	↑
Panmure				21	90	↑
Takapuna				47	91	↑
Northcote				254	280	↑
Tāmaki				12	254	↑
Māngere				105	278	↑
Mt Roskill-Three Kings				370	422	↑
Glen Eden				190	138	↓
Papatoetoe				286	581	↑
Newton				142	174	↑
Manurewa				242	405	↑
Sylvia Park				54	63	↑
Māngere East				282	156	↓
Henderson				133	316	↑
Te Atatu Peninsula				172	331	↑
St Lukes				48	40	↓
Pakuranga				92	128	↑
Mt Albert				32	36	↑
Morningside				6	14	↑
Papakura				197	339	↑
Birkenhead				45	28	↓
Clendon				79	90	↑
Pakuranga Highway				69	74	↑
Fruitvale				101	153	↑
Sunnynook				78	77	↓
Highland Park				114	163	↑
Ōtara				29	58	↑
Glendene				10	29	↑
Greenlane				21	64	↑
Te Atatu South				69	131	↑
Ellerslie				39	22	↓
Sunnyvale				78	42	↓
Total				4,254	6,143	↑

Dwelling typology

Collectively, in 2020/2021 more intensive housing such as apartments and townhouses etc. made up 80 per cent of dwellings consented in development areas while houses made up 19 per cent. In comparison, the previous reporting year recorded 69 per cent for intensive housing and 30 per cent for houses. This is an 11 per cent shift from houses to more intensive housing types. This shows an increasing preference for higher intensity development in development areas which 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.

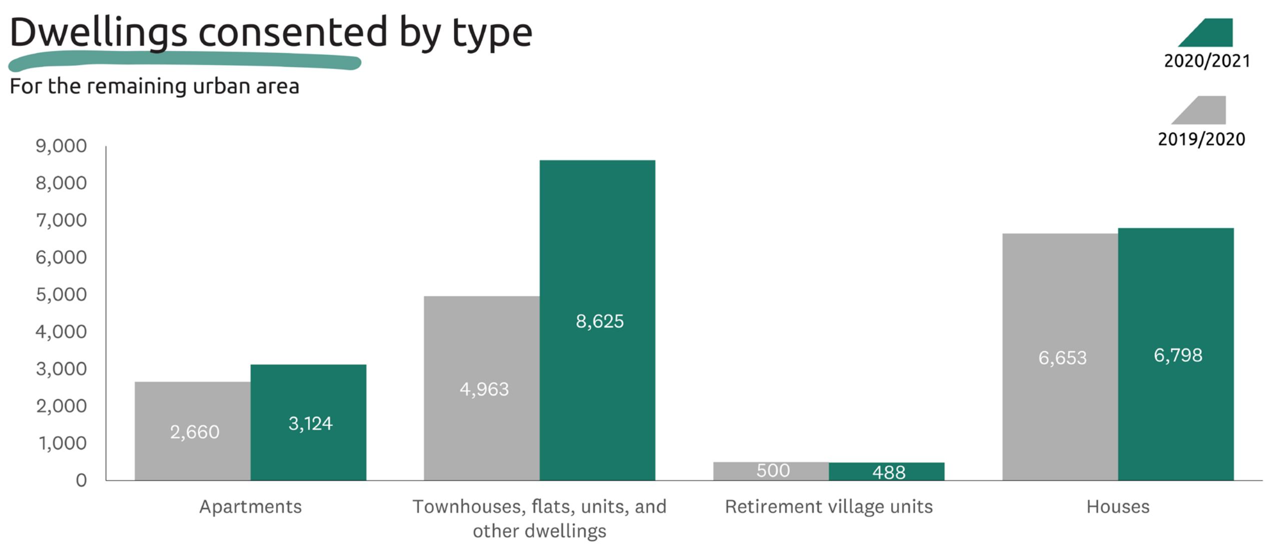
Highlights in the remaining existing urban area in the 2020/2021 reporting year are:

- 8,258 dwellings were consented, which is a 25 per cent increase from the previous reporting year. This is 53 per cent of dwellings consented in the existing urban area
- 57 per cent of dwellings consented were more intensive typologies (apartment and townhouses etc.)

Dwelling typology

Collectively, more intensive housing (apartments and townhouses etc.) made up 57 per cent of dwelling consents issued in the remaining existing urban area in 2020/2021. This is an increase from 45 per cent in 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 2020/2021 reporting year are:

- 2,357 dwellings have been consented, which is a 31 per cent increase from the previous reporting year. This is approximately 12 per cent of all dwellings consented
- 62 per cent of dwellings consented were houses.

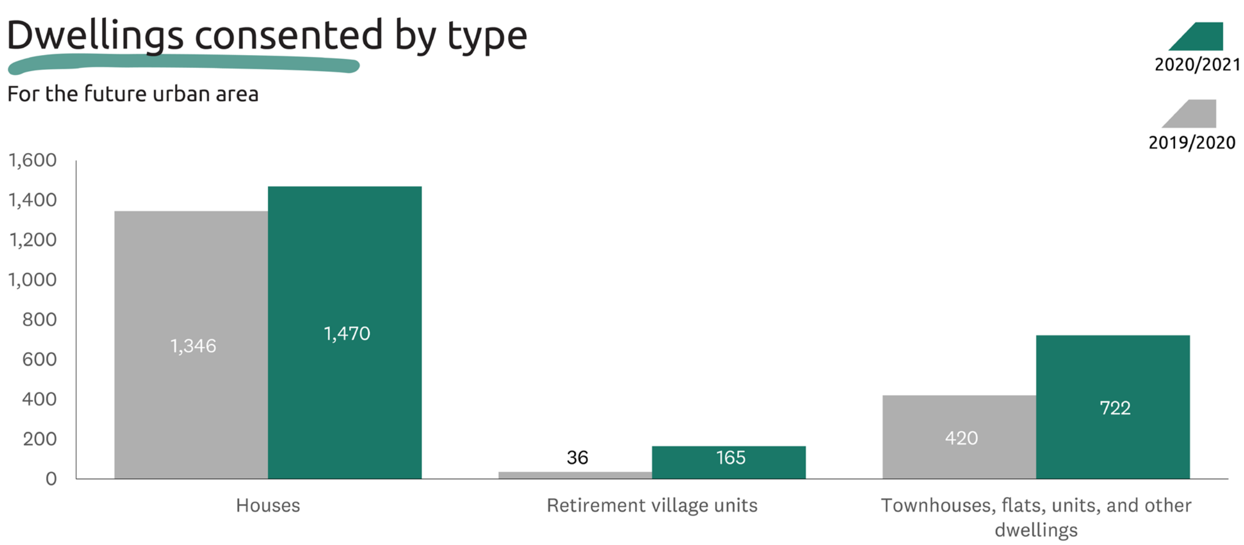
More detailed reporting on the future urban areas is included in the Future Urban Land Supply Strategy section of this report.

Dwelling Typology

Of dwellings consented in the future urban areas in 2020/2021, 62 per cent were houses, down from 75 per cent in the previous reporting year. The proportion of townhouses etc. in the same period increased from 23 per cent to 30 per cent.

While standalone houses are still the predominant typology in these peripheral locations, the increase in more intensive housing 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 2020/2021 reporting year are:

- 1,075 dwellings were consented, this is a 5 per cent increase from the previous reporting year. This is approximately 6 per cent of all dwellings consented
- 79 per cent of dwellings consented were 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 has remained broadly the same for the last 5 years, with around 1,000 dwellings consented each year.

Of dwellings consented in the rural area in 2020/2021, 576 or 54 per cent were in the residential-zoned areas of rural towns and settlements, such as Beachlands, Glenbrook, and Swanson. This is in line with the Development Strategy.

However, the number of dwellings consented in areas zoned for rural production in 2020/2021 was almost equal to the number consented in the countryside living zone.

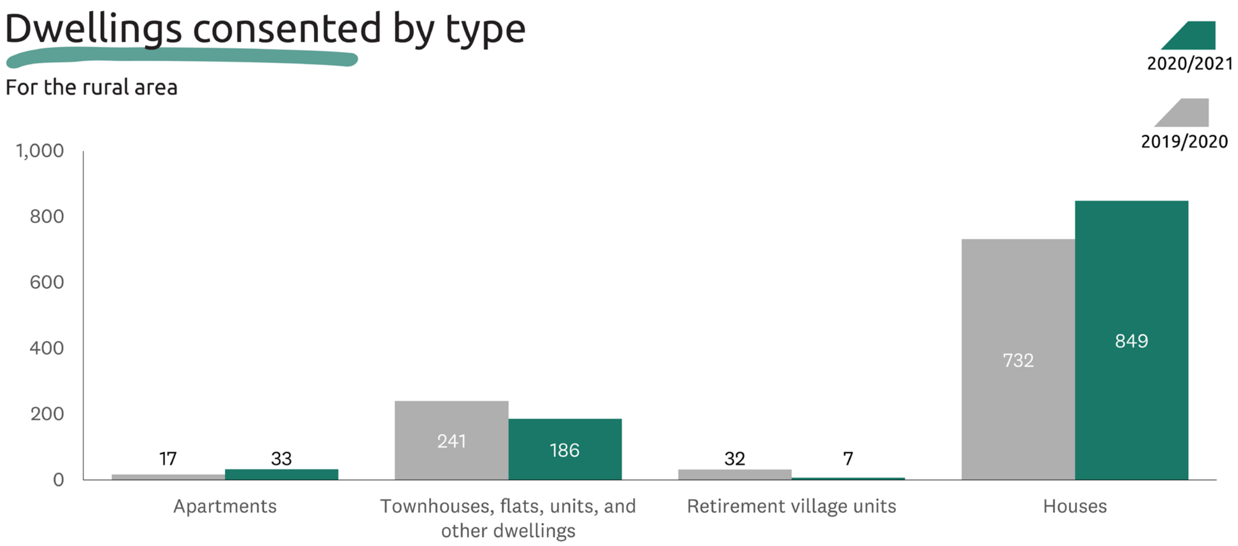
Dwellings consented in rural zones, by reporting year (1 July - 30 June)

Auckland Unitary Plan Zone	Dwellings Consented, 2019/2020	Dwellings Consented, 2020/2021	Change
Hauraki Gulf Islands	50	67	↑
Residential Zones	672	576	↓
Rural - Countryside Living Zone	108	138	↑
Rural - Mixed Rural Zone	27	53	↑
Rural - Rural Coastal Zone	26	32	↑
Rural - Rural Production Zone	111	124	↑
Other Zones	29	85	↑
Total	1,023	1,075	↑

Dwelling Typology

79 per cent of dwellings consented in the rural area in 2020/2021 were houses, compared with 20 per cent for more intensive housing (apartments, and townhouses etc.). This is consistent with the Auckland Unitary Plan zoning in these areas.

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 2020/2021 reporting year are:

- 595,354 square metres (sqm) of business floor space was consented, which is a 31 per cent increase from the previous reporting year
- the light industry and heavy industry zones had the greatest amount of floor space consented
- of the nodes, the Manukau node had the greatest amount of business floor space consented.

Around 31 per cent more business floor space was consented in 2020/2021 than in 2019/2020. The amount of business space consented has fluctuated significantly over the past five years.

Business floor space (sqm) consented, 1 July 2016 – 30 June 2020

Reporting year (1 July – 30 June)	Business Floor Space (sqm)
2016/2017	392,136
2017/2018	692,612
2018/2019	897,679
2019/2020	456,039
2020/2021	595,354
Grand Total	3,033,820

Business floor space consented by Auckland Unitary Plan zone

There were 595,354 square metres (sqm) of business floor space consented in 2020/2021. Most of this was in the light and heavy industrial 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.

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), 2019/2020	Floor space consented (sqm), 2020/2021	Change
Business - City Centre Zone	101,632	59,639	↓
Business - Metropolitan Centre Zone	24,368	28,795	↑
Business - Town Centre Zone	14,026	7,082	↓
Business - Mixed Use Zone	28,721	5,544	↓
Business - Light Industry Zone	160,028	214,836	↑
Business - Heavy Industry Zone	29,758	135,332	↑
Other Business Zones	18,003	42,458	↑
Residential Zones	8,313	5,615	↓
Rural Zones	9,190	11,009	↑
Airports and Airfields Zones	17,086	50,981	↑
Other Zones	44,914	34	↓
Total	456,039	595,354	↑

Local Boards

Māngere - Ōtāhuhu local board area had the greatest amount of business floor space consented in 2020/2021, followed by Manurewa and Upper Harbour. No business floor space was consented in Puketāpapa in the 2020/2021 year.

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

Local Board Area	Floor space consented (sqm), 2019/2020	Floor space consented (sqm), 2020/2021	Change
Māngere - Ōtāhuhu	46,752	148,033	↑
Manurewa	25,574	132,748	↑
Upper Harbour	33,966	66,378	↑
Waitematā	115,622	63,762	↓
Howick	37,810	28,289	↓
Maungakiekie - Tamāki	24,984	25,330	↑
Henderson - Massey	45,313	24,157	↓
Papakura	23,025	22,420	↓
Ōtara - Papatoetoe	34,274	20,774	↓
Franklin	18,409	16,012	↓
Hibiscus and Bays	17,219	15,549	↓
Rodney	11,694	12,177	↑
Albert - Eden	8,207	6,310	↓
Kaipātiki	165	5,300	↑
Ōrākei	3,346	4,519	↑
Waitākere Ranges	1,570	1,450	↓
Waiheke	889	801	↓
Devonport - Takapuna	3,438	756	↓
Whau	3,452	589	↓
Puketāpapa	-	-	-
Great Barrier	330	-	-
Total	456,039	595,354	↑

Nodes

The Manukau node had the greatest amount of business floor space consented in 2020/2021, accounting for over half of the total business floor space consented in nodes.

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

Urban node	Floor space consented (sqm), 2019/2020	Floor space consented (sqm), 2020/2021	Change
Albany	115,451	35,621	↓
City Centre	21,435	61,762	↑
Manukau	32,187	163,800	↑
Westgate	46,783	45,599	↑
Total	215,856	306,782	↑

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

Rural node	Floor space consented (sqm), 2019/2020	Floor space consented (sqm), 2020/2021	Change
Pukekohe	0	344	↑
Warkworth	450	21	↓
Total	450	365	↓

Future Urban Land Supply Strategy

The Future Urban Land Supply Strategy (FULSS) forms part of the council's wider approach to managing Auckland's growth. The Future Urban Land Supply Strategy 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 Future Urban Land Supply Strategy was adopted on 3 July 2017[5], incorporating changes through the Auckland Unitary Plan. Rural settlements are included in the refreshed strategy.

The Future Urban Land Supply Strategy 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 Future Urban Land Supply Strategy. For the purpose of the monitoring report, the areas are grouped by their geographic areas.

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 of the report[6].

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	

5. 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.
6. 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 covered by the Future Urban Land Supply Strategy (in hectare) 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

Table below shows the plan changes that have been made operative or are in progress in the future urban areas. A majority of the plan changes currently in progress are 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 are seeking to live zone land ahead of the sequencing identified in the Future Urban Land Supply Strategy. These plan changes are yet to be determined through RMA processes

Plan changes made operative or in progress in the future urban area as at 30 June 2021

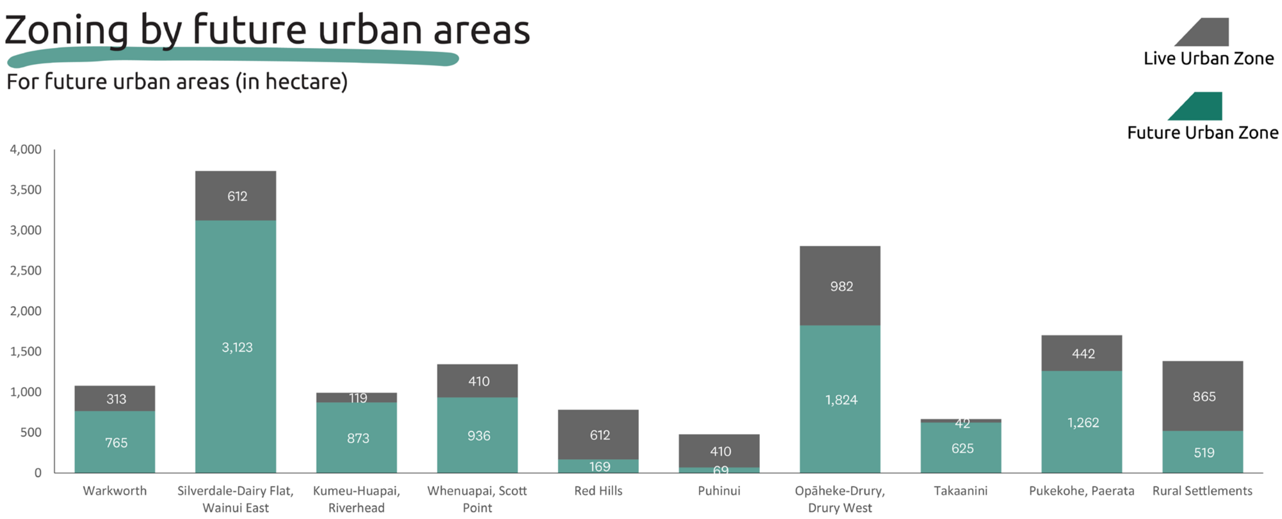
Sub-region	Plan change	Status
North	PC 25: Warkworth North	Operative in part on 12 November 2021
	PC 40: (Warkworth — Clayden Road	Fully Operative on 11 June 2021
North West	PC5: Whenuapai Plan Change	Notified September 2017 Notification of variation 1 is delayed
South	PC 6: Auranga B1 Drury West	Fully Operative on 14 February 2020
	PC 46: Drury South	Fully Operative on 29 October 2021
	PC 48: Drury Centre Precinct	Notified August 2020. In progress
	PC 49: Drury East Precinct	Notified August 2020. In progress
	PC 50: Waihoehoe Precinct	Notified August 2020. In progress
	PC 51: Drury 2 Precinct	Notified August 2020. In progress
	PC 52: 520 Great South Road, Papakura	Notified August 2020. In progress
	PC 55: Patumahoe South	Notified October 2020. In progress
	PC 58: 470 and 476 Great South Road and 2 and 8 Gatland Road, Papakura	Notified December 2020. In progress
	PC61: Waipupuke	Notified January 2021. In progress

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 4,807 ha (32 per cent) of the future urban area covered by the Future Urban Land Supply Strategy is live zoned.

Zoning by future urban areas, as at 30 June 2021



Live zoned future urban areas by zoning type

The majority of the live zoned land is identified for residential activity (57 per cent) and business activity (16 per cent)[7], the remainder of it is used to provide amenity and infrastructure services that are required to support urban growth.

Currently, the percentages 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.

7. Residential category includes Auckland Unitary Plan residential zones and 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 facilities (public transport including rail and bus, roads, cycle facilities and footpaths), water, wastewater, stormwater and community infrastructure.

Bulk infrastructure plays an important role in enabling development of future urban areas. The presence or absence of these services can unlock or inhibit growth. 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).

The table on the following page summarises in progress or completed major infrastructure works delivered by or in partnership with Auckland Council and CCOs (council-controlled organisations). 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 2021

Future Urban Area	Major infrastructure works
North	
Warkworth	• Snells-Algies Bay outfall was completed in 2021 • Several Warkworth Wastewater Scheme projects are in progress. Expected completion 2024 • Construction work for Matakana Link Road underway • Ara Tūhono – Pūhoi to Warkworth project under construction and expected to open in mid-2022 • Dome Valley Safety Improvements under construction and expected to be completed in early 2022
Silverdale-Dairy Flat, Wainui East	• Dairy Flat Highway safety improvements completed 2020 • Penlink - geotechnical investigations underway. Tenders from shortlisted candidates expected early 2022 • Army Bay Wastewater Treatment Plant Upgrade planned for 2026-2029 • Wainui area improvements (arterials and Milldale-Highgate bridge) in progress
Rural Settlements - North	• Wellsford Wastewater Treatment Plan Upgrade – expected completion 2025

Continued on the next page

Future Urban Area	Major infrastructure works
North West	
Area-wide	• The next phase of the northern interceptor construction underway - expected completion 2022 • Business case for an alternative State Highway corridor for northwest Auckland expected 2021 • Northwest Rapid Transit Corridor (Northwest Busway) more detailed investigations underway
Kumeu-Huapai, Riverhead	• SH16 Brigham Creek to Waimauku – Brigham Creek to Kumeu expected completion 2025 • Huapai Road and intersection improvements construction expected to start in early 2022
Whenuapai, Scott Point	• Whenuapai and Redhills Wastewater Scheme – design underway
Red Hills	• Transmission main from Northern Redhills to Brigham Creek Pump Station • Redhills upgraded arterials further investigation underway
Rural Settlements - North West	• Helensville servicing is being reviewed in line with water and wastewater consent expiries. Upgrade works will be required within the decade.
South	
Puhinui	• Airport to Manukau and Botany rapid transit - Stage 1 Puhinui Station upgrade underway • Puhinui Road and Lambie Drive improvements underway
Ōpaheke-Drury, 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 • Consenting underway for new Drury Central and Paerata train stations • New Drury West train station - further work required before lodging consents • 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 – Construction underway • Mill Road – scope reviewed
Rural Settlements - South	• South western WW Servicing Scheme - further detailed assessments on short-listed sites being undertaken 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

The table below reports on the number of new parcels created across the broad future urban areas against the projected development yield as identified in the Future Urban Land Supply Strategy. This is reported by:

- progress in the latest reporting year, 2020/2021
- overall development progress, 2015/2016 – 2020/2021.

In 2021/2020 1,989 new parcels were created in the future urban areas. This is 26 per cent of total parcels created since 2015/2016. Whenuapai, Scott Point had the highest number of parcels created, followed by Ōpaheke-Drury, Drury West and Rural 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 Unitary Plan) and are proposed to be development ready in Decade One 1st half (2018-2022).

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

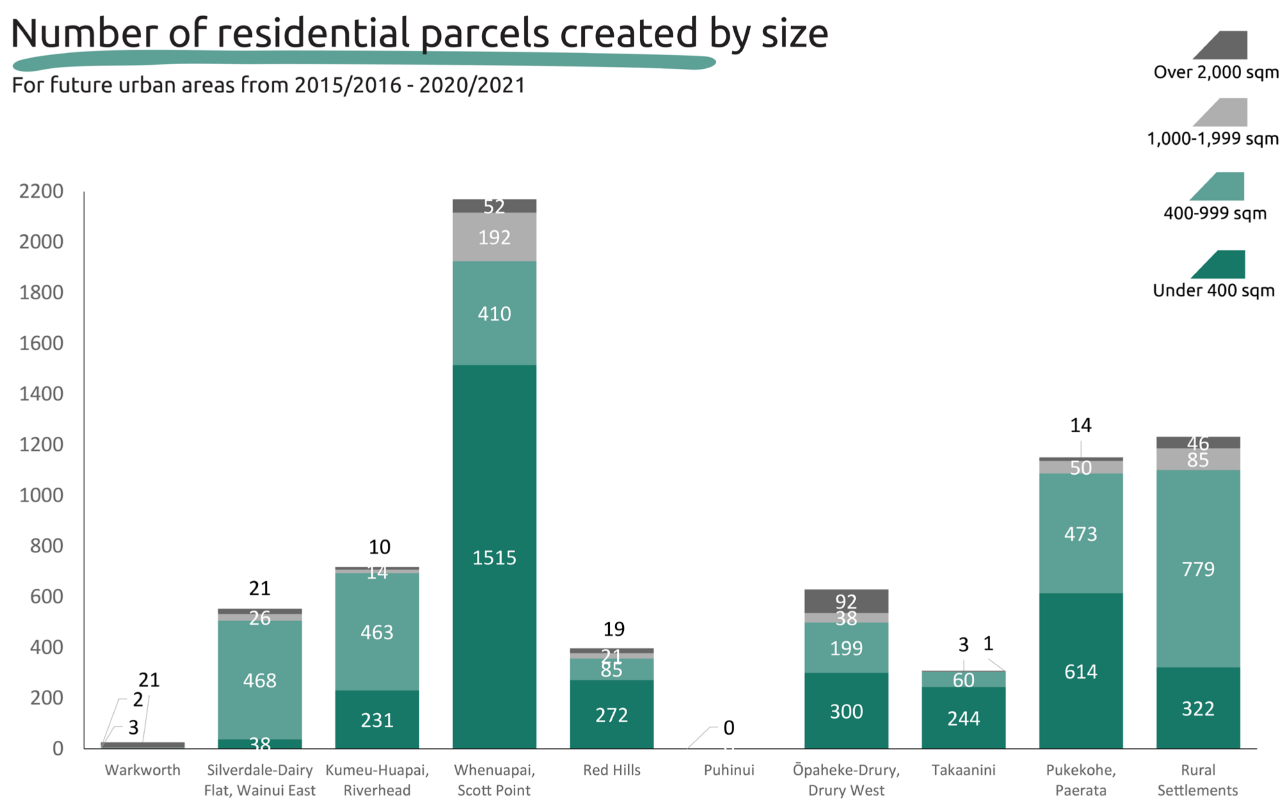
Future urban area	Parcels created 2020/2021	Total parcels created 2015-2021
Warkworth	20	137
Silverdale-Dairy Flat, Wainui East	276	665
Kumeu-Huapai, Riverhead	26	779
Whenuapai, Scott Point	541	2,333
Red Hills	51	399
Puhinui	12	12
Ōpaheke-Drury, Drury West	430	684
Takaanini	41	317
Pukekohe, Paerata	243	1,181
Rural Settlements	349	1,270
Total	1,989	7,777

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 what stage of the development process the parcels are at.

The majority of the new residential parcels created since 2015/2016 were below 1000 sqm (90 per cent)[8].

Number of new residential parcels created, by size, 1 July 2015 - 30 June 2021



8. 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, sizes vary across the future urban areas. Whenuapai, Scott Point features a high proportion of 1,000 – 4,999 sqm parcels while parcels over 2ha were mostly concentrated in Drury South and Puhinui.

Number of new business parcels created, by size, 1 July 2015 - 30 June 2021

Future urban area	under 1,000 sqm	1,000 – 4,999sqm	5,000 – 9,999 sqm	1 - 1.9 ha	over 2ha
Warkworth	-	-	-	-	-
Silverdale-Dairy Flat, Wainui East	-	-	-	-	1
Kumeu-Huapai, Riverhead	6	2	-	-	-
Whenuapai, Scott Point	-	32	3	-	-
Red Hills	-	-	-	-	-
Puhinui	1	-	1	5	5
Ōpaheke-Drury, Drury West	1	5	3	11	13
Takaanini	-	-	-	-	-
Pukekohe, Paerata	3	6	-	-	1
Rural Settlements	-	8	1	-	2
Total	11	53	8	16	22

Dwellings consented

In the period from 2015/2016, 7,302 dwellings were consented in the future urban areas, with 32 per cent of these (2,357 dwellings) consented in 2020/2021. This shows a significant increase in development activity 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 2020/2021 Whenuapai, Scott Point had the highest number of dwellings consented, followed by rural settlements. 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 2020/2021	Dwellings consented 2015-2021
Warkworth	7,600	11	76
Silverdale-Dairy Flat, Wainui East	32,300	314	586
Kumeu-Huapai, Riverhead	8,000	170	852
Whenuapai, Scott Point	21,350	575	2,291
Red Hills	12,050	261	508
Puhinui	38	0	0
Ōpaheke-Drury, Drury West	23,520	339	603
Takaanini	5,300	50	343
Pukekohe, Paerata	14,270	227	1,012
Rural Settlements	12,461	410	1,031
Total	136,889	2,357	7,302

* for areas with structure plan the potential dwelling yield can vary from the Future Urban Land Supply Strategy figure.

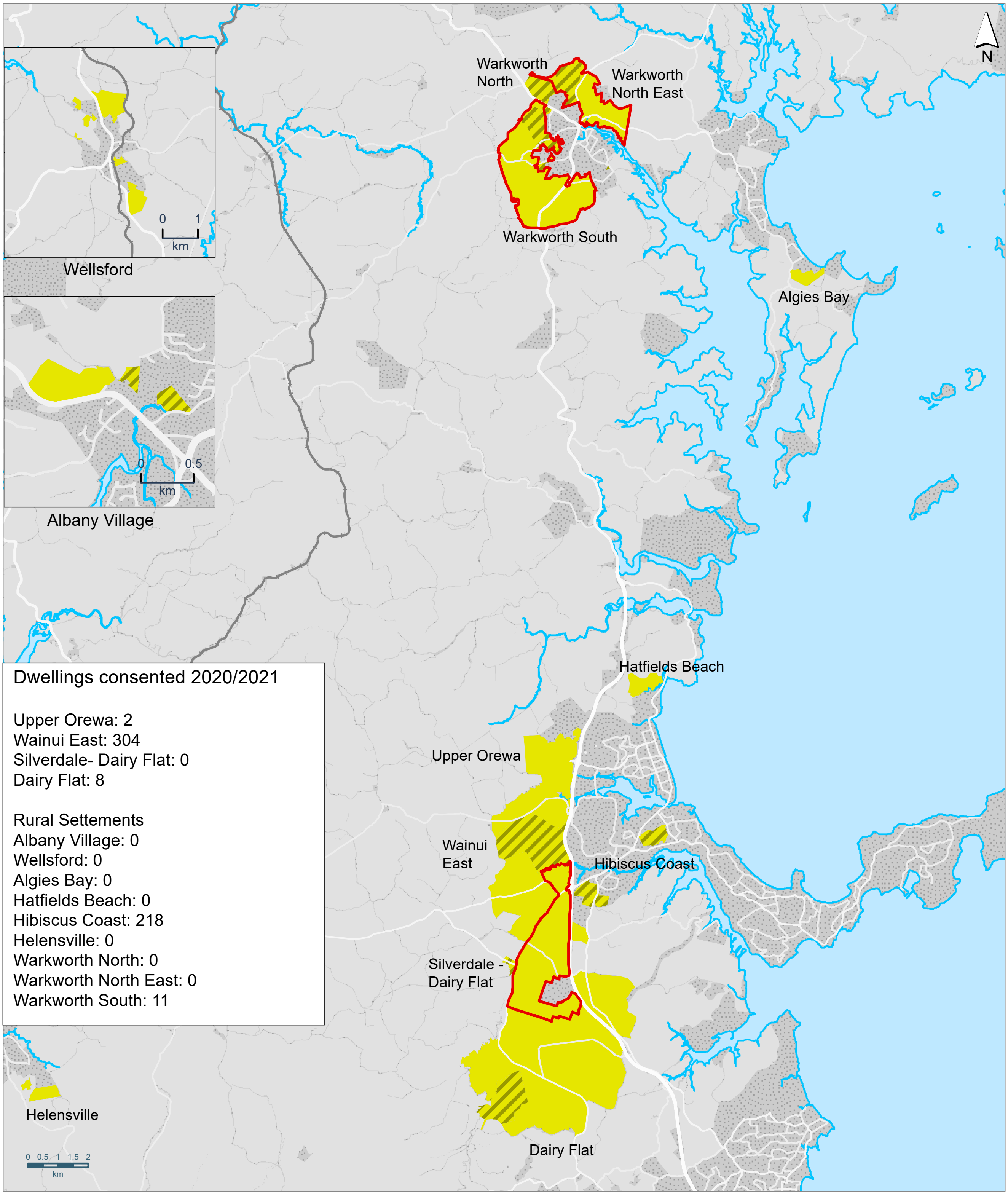
Overall development progress

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 2021



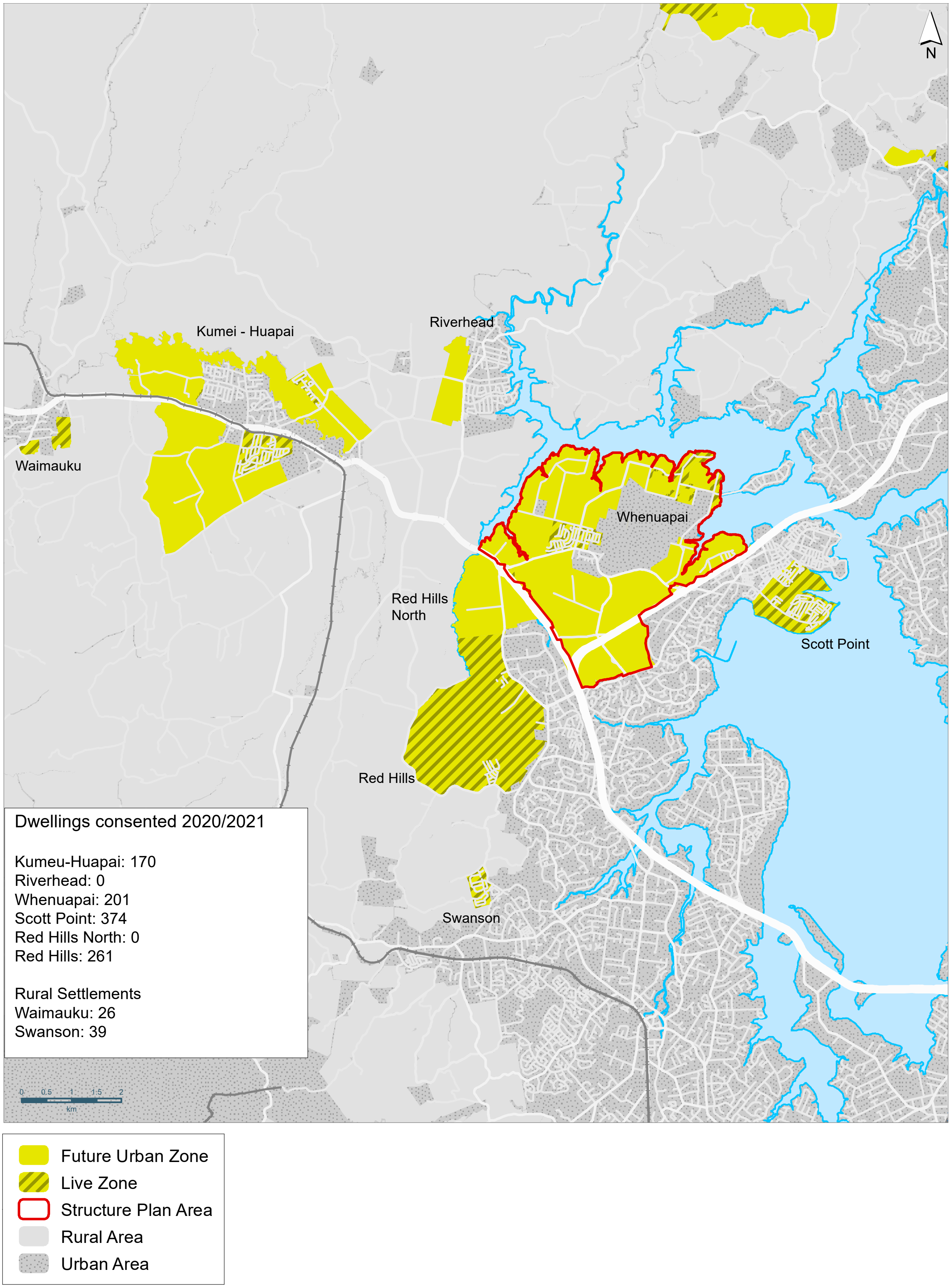
Dwellings consented 2020/2021

Upper Orewa: 2
Wainui East: 304
Silverdale- Dairy Flat: 0
Dairy Flat: 8

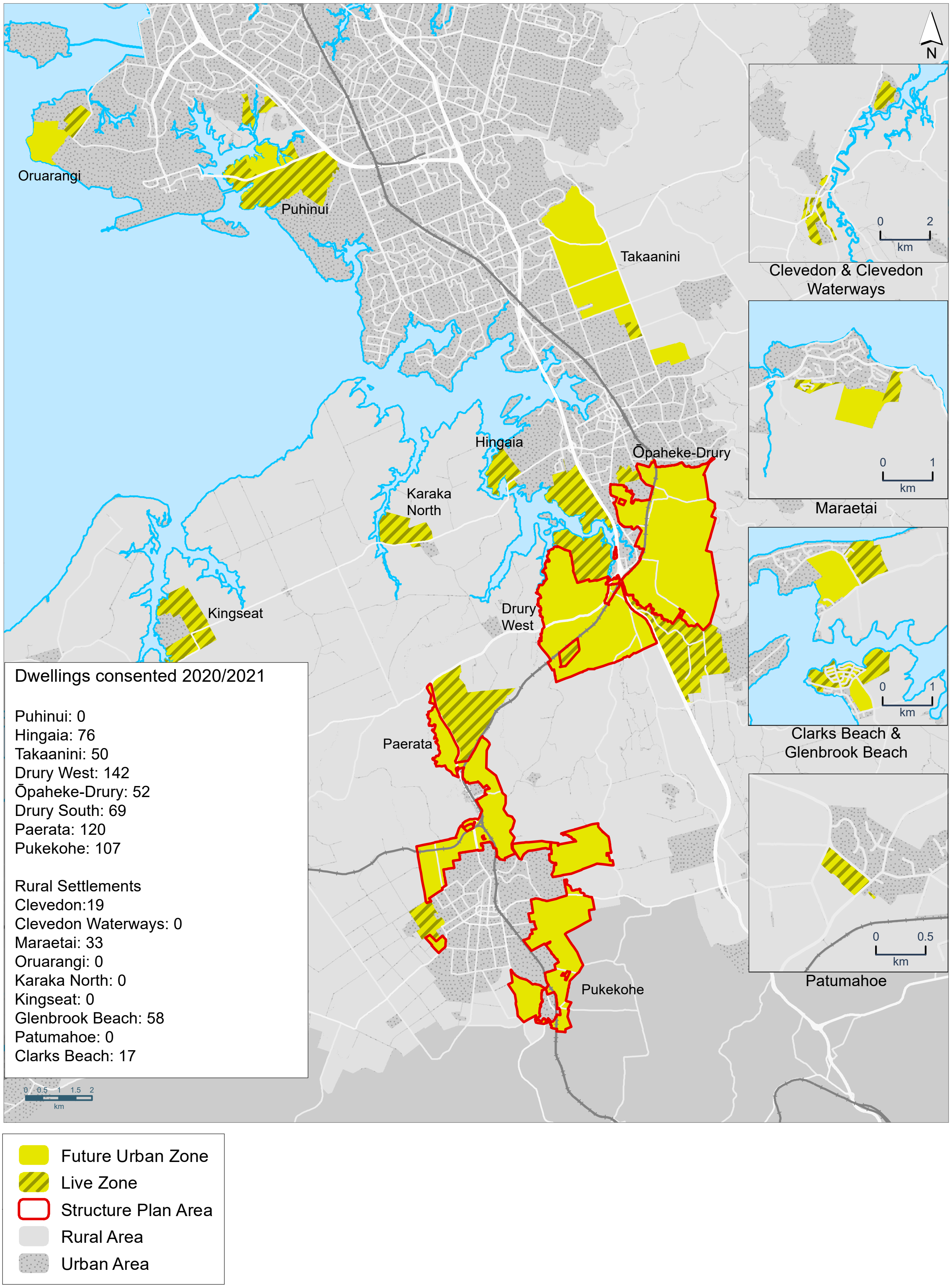
Rural Setements
Albany Village: 0
Wellsford: 0
Algies Bay: 0
Hatfields Beach: 0
Hibiscus Coast: 218
Helensville: 0
Warkworth North: 0
Warkworth North East: 0
Warkworth South: 11

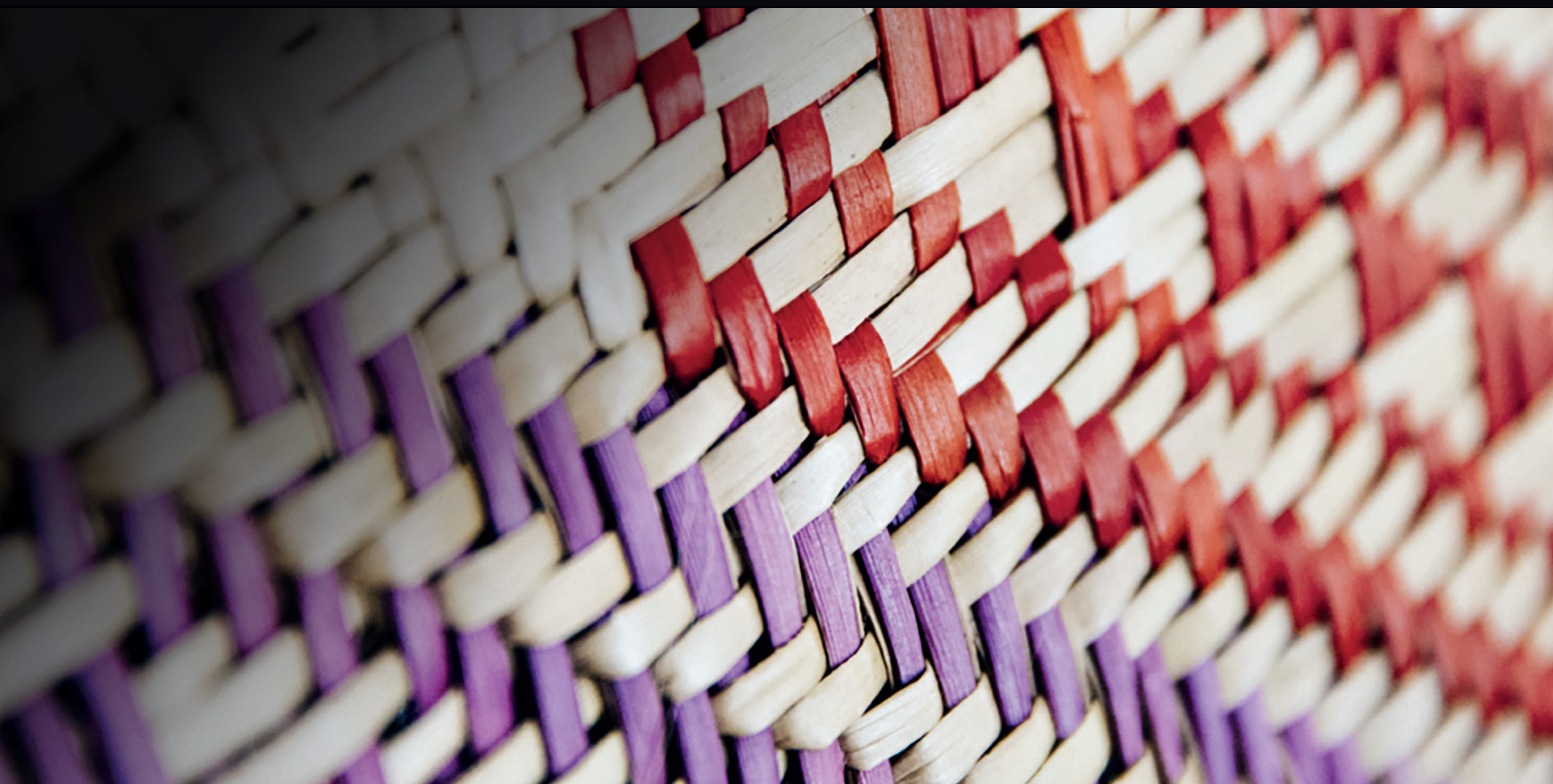
- Future Urban Zone
- Live Zone
- Structure Plan Area
- Rural Area
- Urban Area

Future Urban Areas - North West, as at 30 June 2021



Future Urban Areas - South, as at 30 June 2021





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