SmartGrowth Development Trends

Technical Report 2025

Tauranga City

Western Bay of Plenty District Council

BAY OF PLENTY REGIONAL COUNCIL TOI MOANA

SmartGrowth
Building our futures together

Development Trends Technical Report 2025

Including Housing and Business Land Indicators to meet the monitoring requirements of the National Policy Statement on Urban Development

Tauranga City
Western Bay of Plenty District
2025

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December 2025

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Executive Summary

Every year, the SmartGrowth partnership publishes the joint Development Trends Report for the Western Bay of Plenty Sub-region. The report presents key trends in subdivision activity, residential and non-residential development and population growth in Tauranga City and Western Bay of Plenty District. It generally covers an annual period from 1 July to 30 June and includes longer term trends for selected indicators to show how development is evolving over time.

The partner Councils collect the development statistics as part of the monitoring requirements under the Resource Management Act 1991, SmartGrowth Strategy, Bay of Plenty Regional Policy Statement, and the National Policy Statement on Urban Development. These development insights assist both Councils and other SmartGrowth partners to understand development patterns and changes across the sub-region.

The following sections outline the development highlights as at 30 June 2025.

Western Bay of Plenty Sub-region

In the sub-region, residential building activity improved slightly in 2025, while subdivision activity continued to decline compared to the previous year.

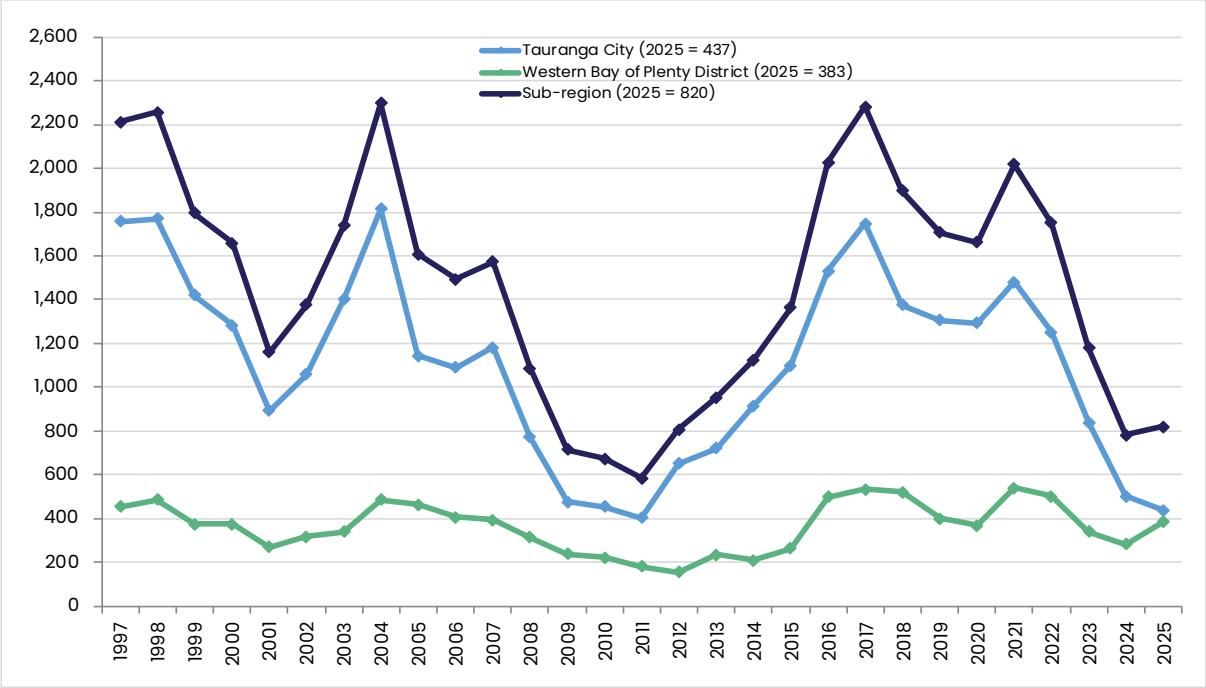
New dwellings consented increased by 5% while new lots created fell by 28%. These trends reflect ongoing economic pressures, including high construction costs, limited supply of developable land, and reduced demand. Although interest rates have eased slightly, broader market conditions continue to constrain development momentum.

In recent years, both dwelling and section sizes have become smaller, further highlighting the impact of rising construction costs, affordability challenges and changing lifestyle and life stage needs.

Residential Building and Subdivision Activity

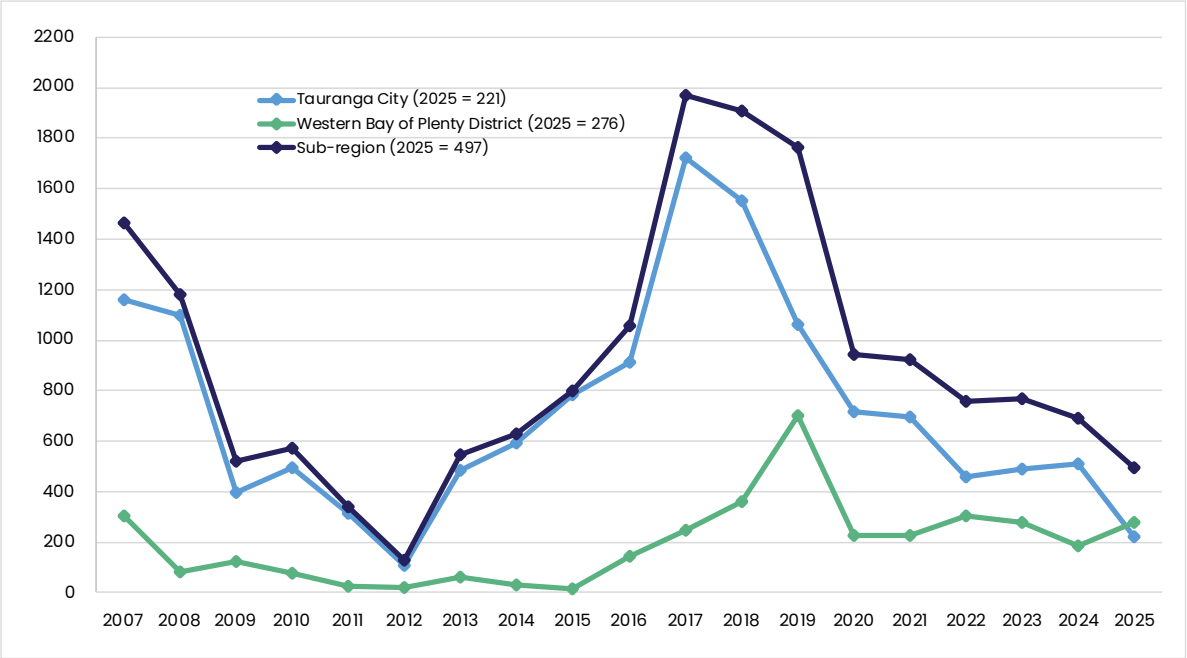
- In 2025, the sub-region had 820 new dwellings consented, reflecting a 5% increase from the 782 dwellings consented in 2024. The net increase is attributable to more residential development in Western Bay of Plenty District, offsetting a reduction in Tauranga City.

Figure 1 New dwellings consented, Western Bay of Plenty Sub-region, 1997 to 2025



- Subdivision activity in the sub-region was at its peak in 2017, but has slowed down continuously, reaching the lowest point in 2025 at 497 new lots created. It declined by 28% from the previous year's 691 new lots.

Figure 2 New lots created, Western Bay of Plenty Sub-region, 2007 to 2025



Residential Development Capacity

- The sub-region had 1,602 dwellings consented in the two years between 1 July 2023 and 30 June 2025, only 15 dwellings lower than the SmartGrowth projection of 1,617 dwellings in the same period.
- Of the total estimated dwelling yield for the sub-region's greenfield UGAs, 31% capacity or 15,631 potential dwellings remained as at 30 June 2025.

Business Land and Building Activity

- Vacant industrial zoned land is available at Mount Maunganui, Tauriko, Te Maunga, Oropi, Wairakei (Pāpāmoa East) and Greerton in Tauranga City and at Rangiuru, Te Puke, Katikati, Te Puna, Ōmokoroa, Waihī Beach and Paengaroa in Western Bay of Plenty District.
- Vacant commercial land in greenfield UGAs is available at Bethlehem, Pāpāmoa and Wairakei in Tauranga City and at Ōmokoroa in Western Bay of Plenty District.
- Over the last 5 years, the number of new industrial and commercial buildings consented ranged from 38 to 59 annually, with 38 new buildings recorded in 2025.
- In 2025, the sub-region recorded a historic low of just 135 non-residential building consents.

Tauranga City

July 2024 to June 2025 Comparison with previous year

	Indicator	Trend	Actual Change	Percent Change
	Dwellings consented	↓	-63	-13%
	New lots created	↓	-287	-56%
	Dwelling sale prices	↓	-$12,000	-1.4%
	Dwellings sold	↓	-336	-14%
	Dwelling rents	↓	-$11	-2%
	Average floor area	↑	13m²	10%
	2-bedroom dwellings	↓	-84	-41%
	3-bedroom dwellings	↑	29	15%
	Non-residential building consents	↓	-9	-11%

Residential Building and Subdivision Activity

- Tauranga City had a 13% reduction in new dwellings consented from 500 units in 2024 to 437 units in 2025.
- Around 57% of residential development occurred in greenfield urban growth areas (UGAs) and 41% occurred in existing infill and intensification areas.
- Among the UGAs, Wairakei had the most development of 30% while Pyes Pa, Ohauiti and Welcome Bay had the least at 1% each.
- Pyes Pa West and Wairakei recorded increases of 13 and 29 dwelling units, respectively, compared to the previous year while Bethlehem, Ohauiti and Pāpāmoa recorded declines in dwellings consented in the same period.
- Subdivision activity declined by 56% from 508 new lots created in 2024 to 221 in 2025.
- The number of new lots created in 2025 was lowest in 13 years at 221 lots, with 62% in the infill areas surpassing greenfield UGAs. 90% of the new lots in the infill areas were located in the Tauranga urban area, primarily resulting from infill subdivision to accommodate multi-unit development.
- 38% (84) of the new lots were created in the greenfield UGAs, with 39% of these located in Pyes Pa West and 33% in Wairakei.

Table 1 Trends summary compared to previous year, Tauranga City, 2025

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

Residential Development Capacity

- A total of 937 dwellings were consented between 1 July 2023 to 30 June 2025 which aligned with the SmartGrowth projections in the same period. While the overall dwelling numbers matched, monthly data showed variation between projections and actual number of dwellings consented.
- Remaining greenfield UGA capacity was 30% or 10,215 potential dwellings as at 30 June 2025.
- Tauriko West and Ohauiti South greenfield UGAs, which were recently rezoned for residential development, had the highest percentage of capacity remaining at 100% or 3,350 potential dwellings, while Welcome Bay UGA had the lowest remaining dwelling capacity of 8% or 175 potential dwellings.
- Keenan Road and Te Tumu future greenfield UGAs are currently being progressed.

Residential Sales and Rents[1]

- Median selling price (12-month rolling average) decreased by 1% or $12,000 to $852,750 in the 12 months to 30 June 2025.
- Average dwelling rent (12-month rolling average) decreased by 2% or $11 to $656 per week in the 12 months to 30 June 2025.

Dwelling Typology

- The main dwelling types consented in 2025 were stand-alone dwellings, duplexes, attached dwellings and retirement village units.
- The proportion of stand-alone dwellings consented increased from 48% in 2024 to 59% in 2025. Conversely, duplexes and attached dwellings declined from 38% to 31% and retirement village units decreased from 12% to 8%.
- The proportion of single storey dwellings increased from 42% in 2024 to 56% in 2025 while double storey dwellings declined from 44% to 32%.
- 52% of dwellings consented had 3 bedrooms, 27% had 2 bedrooms and the remaining 21% had 1 bedroom (3%), 4 bedrooms (15%) and 5+ bedrooms (3%). The proportion of 3-bedroom dwellings increased from 39% in 2024 to 52% in 2025 while 2-bedroom dwellings declined from 41% to 27% in the same period.
- Dwellings with floor areas smaller than 100m^2 accounted for 25% of all the dwellings consented while the next three larger size categories each comprised between 15% to 22% of all dwellings consented during the year.
- Average floor area (143m^2) of residential buildings was 13m^2 larger than the previous year.

Business Activity

- 28% or 255.6 ha of industrial land remained vacant in 2025 with 66 ha in the Tauriko area and 108 ha in Tauriko extension south of Belk Road.
- 30 ha of commercial land in the UGAs remained vacant, with 25 ha or 83% in Wairakei.
- 27 industrial and commercial buildings were consented, 17 buildings fewer than the previous year's total of 44 buildings.

[1] Dwelling sale prices were sourced from Ministry of Housing and Urban Development (HUD). The 12-month rolling average selling price is calculated as the average of the monthly median selling prices across the 12 months to the reference month, hence, it is typically lower than the observed (actual) market selling prices and smooths the time series data.

Western Bay of Plenty District

July 2024 to June 2025 Comparison with previous year

	Indicator	Trend	Actual Change	Percent Change
	Dwellings consented	↑	101	36%
	New lots created	↑	93	51%
	Dwelling sale prices	↑	$16,338	2%
	Dwellings sold	↓	-41	-8%
	Dwelling rents	↓	-$8	-1%
	Average floor area	↓	-6m²	-4%
	2-bedroom dwellings	↑	23	64%
	3-bedroom dwellings	↓	-65	-33%
	Non-residential building consents	↓	-14	-19%

Residential Building and Subdivision Activity

- Western Bay of Plenty District had a 36% increase in new dwellings consented from 282 units in 2024 to 383 units in 2025.
- 76% of new dwellings were in UGAs of Ōmokoroa (122), Te Puke (70), Katikati (63) and Waihī Beach (35). Number of new dwellings in the rural and minor urban areas remained steady at 93.
- Subdivision activity also increased by 51% or 93 new lots created, from 183 in 2024 to 276 in 2025.
- 81% of new lots created were in UGAs of Ōmokoroa (164), Waihī Beach (42), Te Puke (9) and Katikati (8). Number of new lots created in minor urban and rural areas were up by 7 to 53.
- Ōmokoroa had a significant recovery in development compared to the previous 2 years.

Table 2 Trends summary compared to previous year, Western Bay of Plenty District, 2025

Area		Dwellings Consented	New Lots Created
Urban Growth Area	Waihī Beach	=	↑
	Katikati	↑	↓
	Ōmokoroa	↑	↑
	Te Puke	=	↓
Minor Urban Area	Maketu and Pukehina Beach	↓	↑
Rural Area	Waiau, Tahawai and Aongatete	↓	↑
	Te Puna, Pahoia and Minden	↑	↓
	Kaimai, Kopurererua, Kaitemako and Waiorohi	↑	↓
	Otawa, Rangiuru and Pongakawa	↓	↑

Note: Paengaroa is counted in Pongakawa count due to not being recognised as an SA2 by Stats NZ.

Residential Development Capacity

- Western Bay of Plenty District had 15 less dwellings consented compared to SmartGrowth dwelling projections from 1 July 2023 to 30 June 2025.
- As at 30 June 2025, the District had 31% capacity or 5,416 potential dwellings remaining in urban growth areas. Ōmokoroa had the largest remaining capacity available at 2,321 dwellings, while Waihī Beach had the lowest remaining capacity at 293 dwellings.

Residential Sales and Rents

- Median selling price (12-month rolling average) increased by 2% or $16,338 to $1,039,798 in the 12 months to 30 June 2025.
- Average dwelling rent (12-month rolling average) decreased by 1% or $8 to $573 per week in the 12 months to 30 June 2025.

Dwelling Typology

- The majority of dwellings consented in Western Bay of Plenty District were stand-alone dwellings at 61%, multi-units at 23% and duplexes at 6%.
- 70% were single storey dwellings and 26% were double storey dwellings.
- 3-bedroom dwellings declined further to 42%, in favour of 1-2 bedroom dwellings which increased to 39%. 4-bedroom dwellings continued their ongoing decline to 15%, and 5+-bedroom homes remained in very low numbers at 3% of all dwellings consented.
- Accordingly, average floor area of 151m^2 was smaller by 6m^2 compared to the previous year.

Business Activity

- Western Bay of Plenty District has 619.50 ha of operative Industrial zoned land and 52.37 ha of Commercial zoned land.
- 82% or 503.64 ha of Industrial zoned land was vacant and 15% or 92.61 ha was occupied at 30 June 2025 (3% or 16.10 ha was allocated as reserve).
- 10 commercial buildings and 1 industrial building were consented in 2025.

1 Introduction

This year marks the 24th year that Tauranga City Council and Western Bay of Plenty District Council have jointly monitored and reported development trends in the sub-region. This ongoing collaboration helps both Councils, other SmartGrowth partners and stakeholders to understand changing and evolving development patterns, and to meet obligations under Section 35 of the Resource Management Act 1991, which requires information gathering, monitoring and record-keeping.

Since 2007, the annual Development Trends Report has incorporated development measures that relate to the Bay of Plenty Regional Policy Statement (RPS) and SmartGrowth[2] Strategy requirements. The RPS requires annual reviews to be undertaken to monitor, assess and report on population distribution, dwelling yields, zoned business land, and the proportion of potential residential allotments approved. SmartGrowth requires monitoring of uptake rates and land availability for both residential and business land, permanent versus holiday residences, and rural subdivision, as well as a comparison of actual growth against SmartGrowth projected dwelling growth.

The National Policy Statement on Urban Development Capacity (NPS-UDC) took effect on 1 December 2016, classifying Tauranga Urban Area (which relates to both Tauranga City and Western Bay of Plenty District[3]) as a high growth urban area. The National Policy Statement on Urban Development (NPS-UD) superseded NPS-UDC effective 20 August 2020 and classified the Tauranga urban area as a Tier 1 urban environment.

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

a) supply of dwellings
b) sale prices and rents for dwellings
c) housing affordability
d) the proportion of housing development capacity that has been realised:
   (i) in previously urbanised areas (such as through infill housing or redevelopment); and
   (ii) in previously undeveloped (ie, greenfield) areas
e) available data on business land.

In relation to Tier 1 urban environments, Tier 1 local authorities must monitor the proportion of development capacity that has been realised in each zone with development outcomes that are monitored. The NPS-UD also requires every Tier 1, 2, and 3 local authority to publish the results of its monitoring at least annually.

In the last six years, the SmartGrowth Development Trends Report incorporated a number of relevant indicators that meet NPS-UDC/UD monitoring requirements (refer Table 3), while maintaining a time series of development trends data. The report is produced annually for the period 1 July to 30 June.

The NPS-UD also requires Tier 1 and Tier 2 local authorities to prepare a Housing and Business Development Capacity Assessment (HBA) every 3 years. The latest HBA was prepared in December 2022 and released in March 2023. The updated SmartGrowth Strategy 2024-2074[5] for the sub-region was approved by all partners on 17 July 2024. It also builds on the direction and programme laid out in the Urban Form and Transport Initiative (UFTI)[6] framework.

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[2] SmartGrowth is a partnership that provides a unified vision, direction and voice for the future of the Western Bay of Plenty. The SmartGrowth partnership was established in the early 2000s, to deliver an integrated approach to sub-regional growth management pressures, with a collaborative cross-boundary approach. The SmartGrowth partnership includes Tauranga City Council, Western Bay of Plenty District Council, Bay of Plenty Regional Council, Tangata Whenua and central government. SmartGrowth engages with groups, businesses, and organisations to help build a framework for future planning and growth.

[3] Western Bay of Plenty District indicators are displayed for the total District (urban and rural) or for the urban growth areas of Waihī Beach-Bowentown/Athenree, Katikati, Ōmokoroa and Te Puke.

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

[5] SmartGrowth Strategy 2024-2074 is the growth management plan for the sub-region that considers how housing, land, infrastructure, transport, community development, tangata whenua aspirations, and the natural environment need to be looked at together to achieve long-term growth. It aims to proactively plan for growth to improve travel, living options, community connections and the preservation of natural and cultural environment, fostering strong, resilient and well-connected communities.

[6] SmartGrowth Partners (Western Bay of Plenty District Council, Tauranga City Council, Bay of Plenty Regional Council, and Iwi) and Waka Kotahi NZTA developed the UFTI integrated land use and transportation programme and delivery plan for the sub-region, aligning transportation infrastructure with the SmartGrowth Strategy to enhance connectivity and support diverse mobility options.

National Policy Statement on Urban Development - Monitoring

To respond to the requirements of the NPS-UDC/UD, staff from the three Councils (Tauranga City Council, Western Bay of Plenty District Council and Bay of Plenty Regional Council) prepare the report under SmartGrowth.

Monitoring and reporting on the NPS-UDC/UD started in December 2017, with the quarterly monitoring results published on the Councils' websites and/or included in the annual Development Trends report. The Ministry of Housing and Urban Development (HUD) provides guides[7] to support the implementation of the NPS-UD, an online dashboard that publishes charts and maps, and time series data on local housing markets. These are used as a reference in the preparation of the monitoring reports, particularly on housing market indicators.

Table 3 outlines the indicators that are relevant to the NPS-UD 2020 monitoring requirements. The majority of the indicators have a residential focus due to the availability of residential data through the HUD dashboard and data portal, and Council records.

Table 3 NPS-UD indicators monitored, Tauranga City and Western Bay of Plenty District

NPS-UD category	Type	Topic	Indicator	Ref
a) Prices and rents for dwellings	Residential	Prices	Dwelling Sale Prices	p.23
		Prices	Dwellings Sold	p.26
		Rents	Nominal Dwelling Rents	p.25
		Prices/Rents	Ratio of Dwelling Sale Prices to Rents	p.27
		Floor Size	Average Floor Area per Residential Building	p.51
		Prices	Average Value per Residential Dwelling Consent	p.53
		Type	Building Consents by Type	p.54
		Rents	Detailed Geographic Data on Dwelling Rents	p.25
		Prices	Detailed Geographic Data on Dwelling Sale Prices	p.24
	Business	Type	Non-Residential Building Consents by Type	p.65
b) Supply of dwellings	Residential	New Lots	New Lots Created	p.15
		New Dwellings	New Dwelling Consented	p.13
		New Dwellings	New Dwellings Consented Compared to Dwelling Projections	p.17
c) Housing affordability	Residential	Prices	Mortgage Affordability Index Deposit Affordability Index	p.28 p.28
		Rents	Rental Affordability Index Proportion of Average Rent to Household Income	p.29 p.29

An explanation of indicators listed in category a) and published via the HUD/MFE dashboard is provided in Appendix 1 and referenced within the relevant section in the report.

Data for category b) is provided by Tauranga City Council and Western Bay of Plenty District Council.

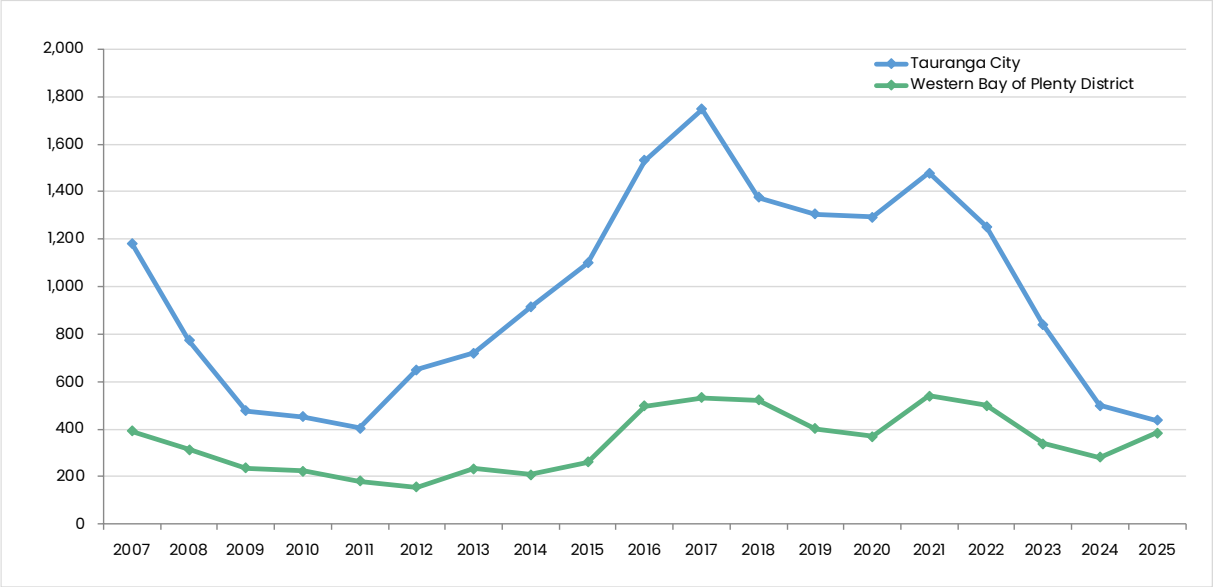
The definition/explanation and sources of data for indicators listed in category c) are contained in Appendix 2.

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

2 Supply and Demand

New Dwellings Consented

Figure 3 New dwellings consented, Tauranga City and Western Bay of Plenty District, 2007 to 2025



Residential building activity in the sub-region increased by 5% (38 dwellings) in 2025 compared to the previous year. This net growth is driven primarily by increased residential development in Western Bay of Plenty District.

There is a clear contrast in residential development between the two local authorities. Tauranga City experienced a 13% decline (63 dwellings) while Western Bay of Plenty District recorded a significant 37% increase with 101 more dwellings consented in 2025 than the previous year, bringing activity near to the 5 and 10 year averages.

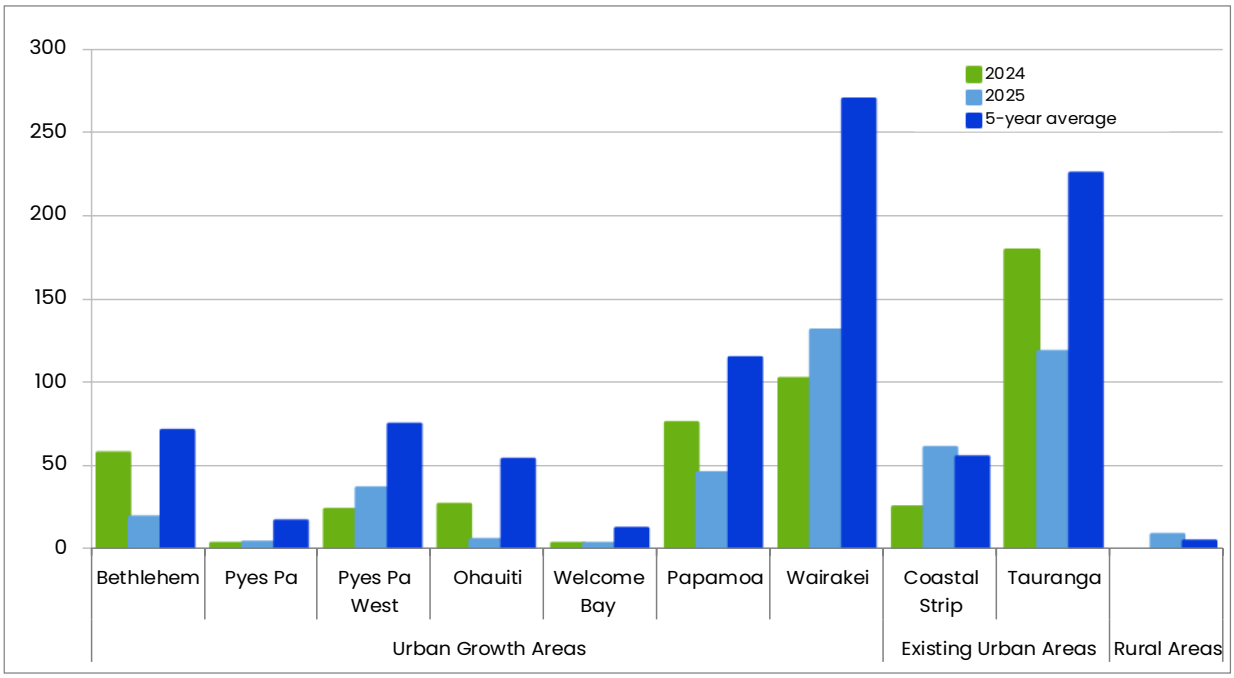
In Western Bay of Plenty District's urban growth areas, 76% or 290 dwellings were consented in Waihī Beach, Katikati, Ōmokoroa and Te Puke, up from 190 new dwellings in 2024.

The level of sub-regional activity overall remains at about 50% of the average over the last 10 years.

Table 4 New dwellings consented, Tauranga City and Western Bay of Plenty District

Dwelling Consents Issued		Trend	Change	% Change
Tauranga City				
This year	437			
Last year	500	↓	-63	-13%
Last 5 years (average)	901	↓	-464	-51%
Last 10 years (average)	1,176	↓	-739	-63%
Western Bay of Plenty District Total				
This year	383			
Last year	282	↑	101	36%
Last 5 years (average)	409	↓	-26	-6%
Last 10 years (average)	437	↓	-54	-12%
Western Bay of Plenty District Urban				
This year	290			
Last year	190	↑	100	53%
Last 5 years (average)	298	↓	-8	-3%
Last 10 years (average)	297	↓	-7	-2%
Western Bay of Plenty Sub-region				
This year	820			
Last year	782	↑	38	5%
Last 5 years (average)	1,310	↓	-490	-37%
Last 10 years (average)	1,613	↓	-793	-49%

Figure 4 New dwellings consented by growth area, Tauranga City, 2021 to 2025



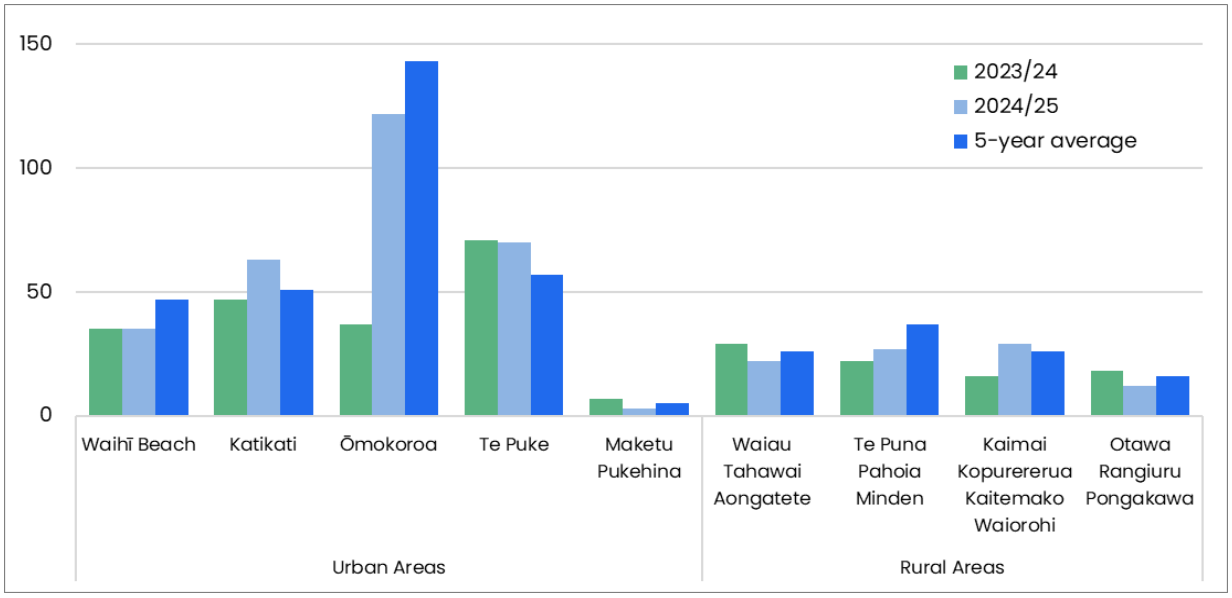
In 2025, Tauranga City had 437 new dwellings consented, marking a 13% decline from the 500 dwellings recorded in the previous year. Around 57% of residential development (249 dwellings) occurred in the greenfield UGAs, while 41% (179 dwellings) occurred in the existing and intensification areas. The remaining 2% (9 dwellings) were in the rural areas.

Within the UGAs, Wairakei accounted for more than half of the development in these areas at 131 dwellings. In contrast, Pyes Pa, Ohauiti and Welcome Bay contributed only 2% each (4 to 6 dwellings).

Among the UGAs, Pyes Pa West had the biggest proportional increase in development by 54% (13 dwelling units) while Wairakei had the biggest numerical increase with 29 more dwellings – a 28% increment from the previous year. Conversely, Bethlehem, Ohauiti and Pāpāmoa recorded declines ranging from 21 to 38 dwellings, representing reductions of 39% to 78%. All of the UGAs had lower development compared to the five-year averages, with decreases ranging from 51% to 89%.

Of the 179 dwellings consented in the existing urban or intensification areas, 66% (118 dwellings) were located in the Tauranga infill areas while the remaining 34% (61 dwellings) were located in the Coastal Strip.

Figure 5 New dwellings consented by growth area, Western Bay of Plenty District, 2021 to 2025

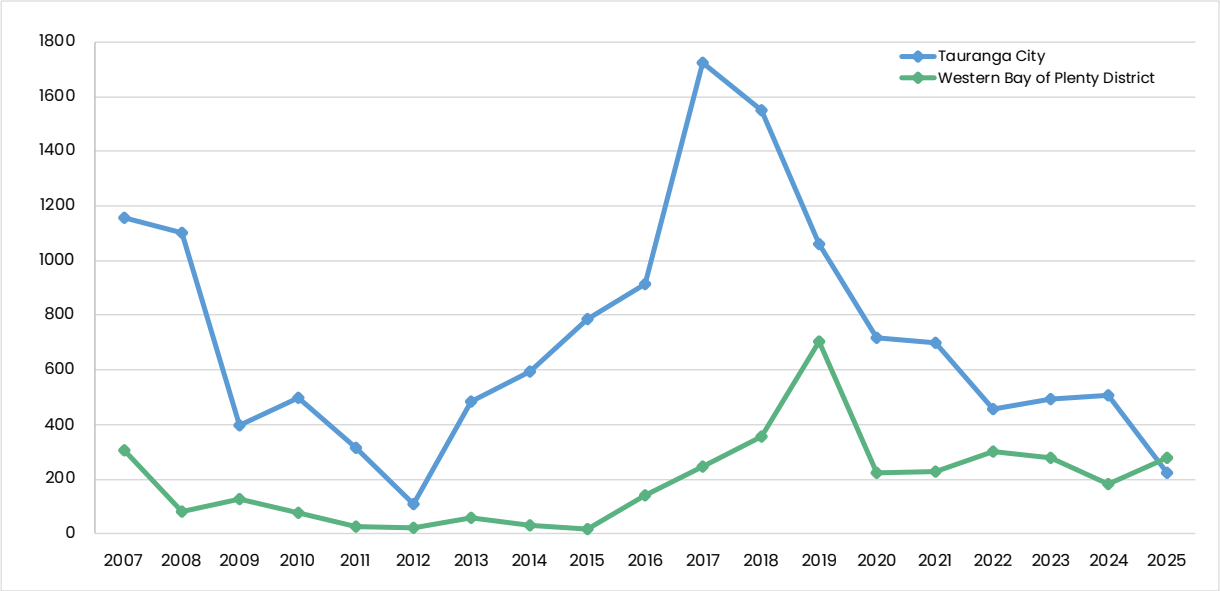


In Western Bay of Plenty District, 76% of dwelling consents issued were in urban growth areas.

Ōmokoroa had a significant increase to 122 consents in 2025. Te Puke had a similar number as last year at 71 consents, as did Waihī Beach at 35 consents, while Katikati increased from 47 to 63 consents. Dwelling consents in minor urban and rural areas remained steady at 93 consents, up by 1 consent on the previous year.

New Lots Created

Figure 6 New lots created, Tauranga City and Western Bay of Plenty District, 2007 to 2025



The continued shortage in supply of residential zoned land in Tauranga City and low market demand for dwellings have brought subdivision development to a very low 221 new lots created in 2025. This is equivalent to less than half of the previous year's 508 new lots created, and just 15% of the 2017 peak.

Subdivision activity in Western Bay of Plenty District peaked in 2019 totalling 703 new lots, with 391 created in greenfield Ōmokoroa, and 92 in Te Puke that year. Since then, new lots have averaged 243 per year until 2024, and increased to 282 in 2025 (about 40% of the 2019 peak), with urban areas growing to 81% of all new lots created.

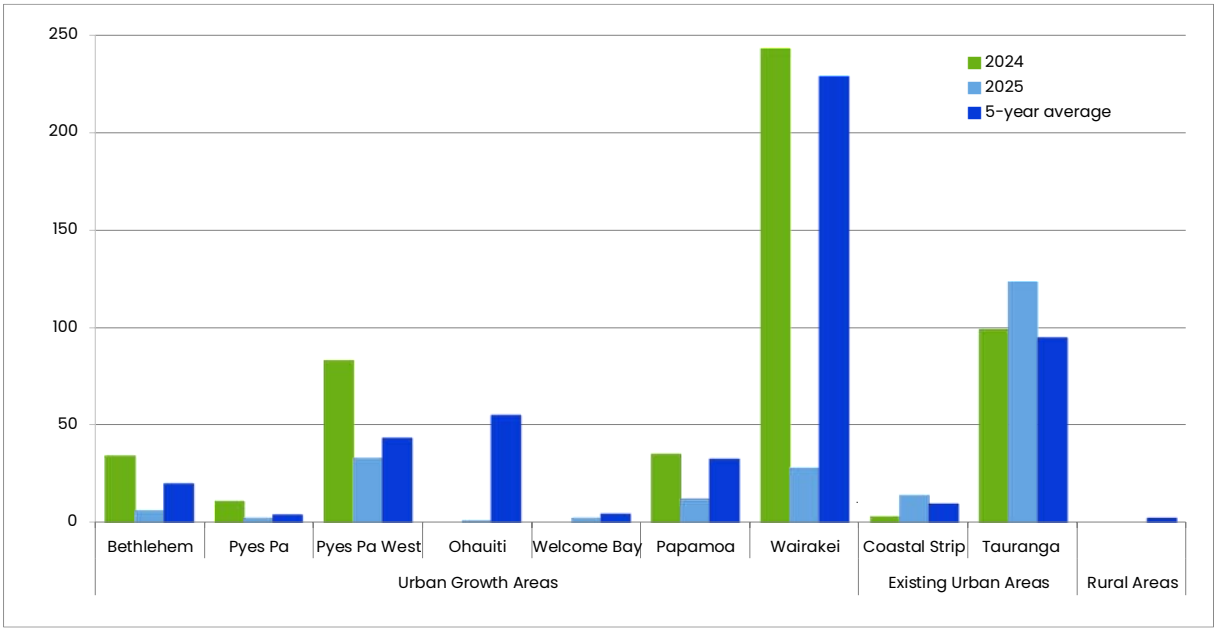
However, the level of combined sub-regional subdivision activity remains at about 70% of the average over the last 5 years.

Table 5 New lots created, Tauranga City and Western Bay of Plenty District

New Lots Created		Trend	Change	% Change
Tauranga City				
This year	221			
Last year	508	↓	-287	-56%
Last 5 years (average)	475	↓	-254	-54%
Last 10 years (average)	834	↓	-613	-74%
Western Bay of Plenty District Total				
This year	276			
Last year	183	↑	93	51%
Last 5 years (average)	249	↑	27	11%
Western Bay of Plenty District Urban				
This year	223			
Last year	137	↑	86	63%
Last 5 years (average)	196	↑	27	14%

Western Bay of Plenty Sub-region				
This year	497			
Last year	691	↓	-194	-28%
Last 5 years (average)	724	↓	-227	-31%

Figure 7 New lots created by growth area, Tauranga City, 2021 to 2025

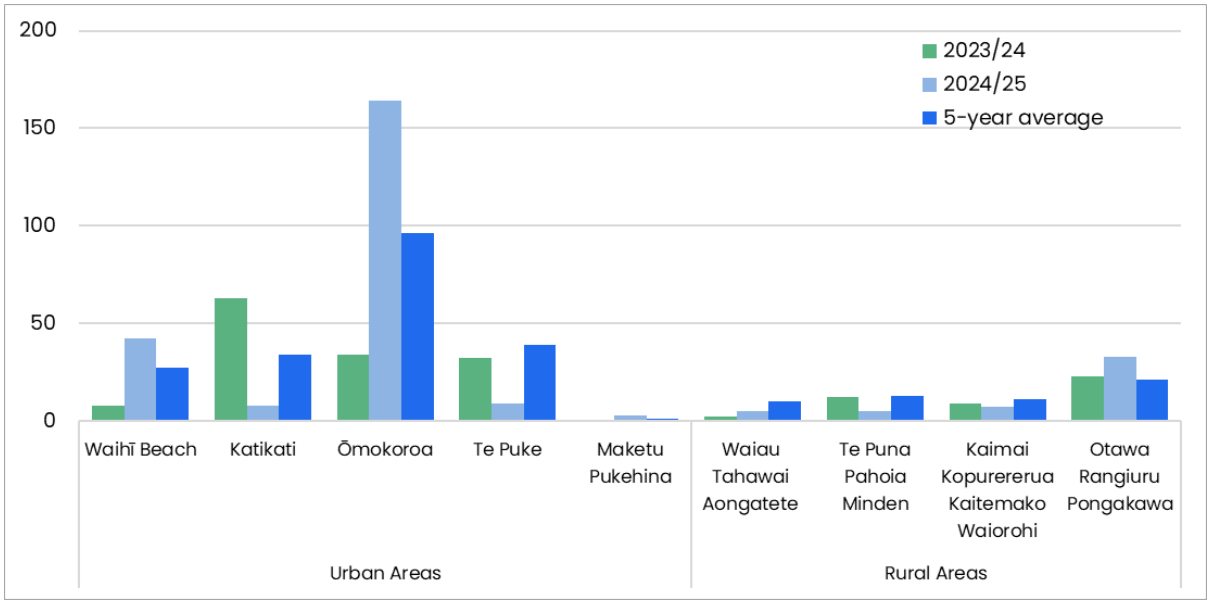


In 2025, Tauranga City recorded its lowest level of subdivision activity in the past 13 years, with only 221 new lots created. For the first time since monitoring began in 1998, the majority of new lots (62%) were created within existing urban areas, surpassing those in the greenfield UGAs. Of these, 90% were located in the Tauranga urban area, primarily resulting from infill subdivision to accommodate multi-unit developments.

Greenfield UGAs experienced a record low of just 84 new lots created, marking a 79% decrease compared to the previous year. Among the UGAs, Wairakei contributed 29 new lots, experiencing the steepest decline of 89%.

Over the past 5 years, greenfield UGAs contributed 78% of the new lots created, while the existing urban areas accounted for 22%. Among the UGAs, Wairakei had 62% of the new lots while other UGAs contributed between 1% and 15%. In the existing urban areas, the majority (91%) of the new lots created were located in the Tauranga urban area and 9% were in the Coastal Strip.

Figure 8 New lots created by growth area, Western Bay of Plenty District, 2021 to 2025



For Western Bay of Plenty District, new lots created in 2025 show a significant recovery in Ōmokoroa with 164 new lots, being mostly 52 in Te Awanui Waters, 41 in Kayelene Place, 36 in Harbour Ridge, and 22 in Prole Road. Waihī Beach had a jump up to 42 new lots due to a 29-lot subdivision in Athenree. Katikati and Te Puke were significantly down on the previous year, with only 8 and 9 in each urban growth area respectively. Maketu and Pukehina Beach had 3 new lots combined.

New lot numbers were only 5 for Waiau Tahawai Aongatete, 5 for Te Puna Pahoia Minden, and 7 for Kaimai Kopurererua Kaitemako Waiorohi. Otawa Rangiuru Pongakawa had a higher level of 23 new lots created in 2025, in small numbers throughout the year, rather than in larger developments.

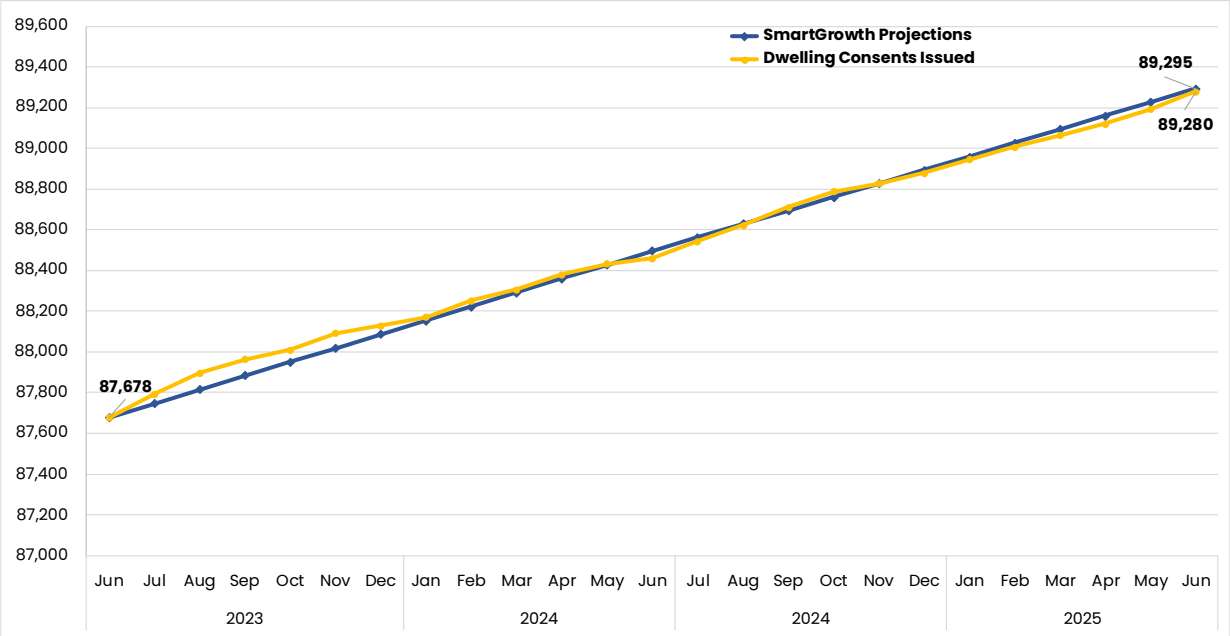
Comparison with SmartGrowth Projections

SmartGrowth adopted the population and household projections produced by the National Institute of Demographic and Economic Analysis (NIDEA) in 2014. Since 2018, Tauranga City and Western Bay of Plenty District have revised the population projections to reflect changes driven by several factors, including the impacts of COVID-19, particularly on migration and supply chains, updated population estimates and projections from Stats NZ, and more recently, identified constraints in housing supply.

In June 2023, the population for the Western Bay of Plenty sub-region was 217,700. The population of the sub-region is projected to increase to 286,880[8] people (+69,180 people) by 2053, while the number of dwellings is projected to increase from 87,678 to 121,294 over that period.

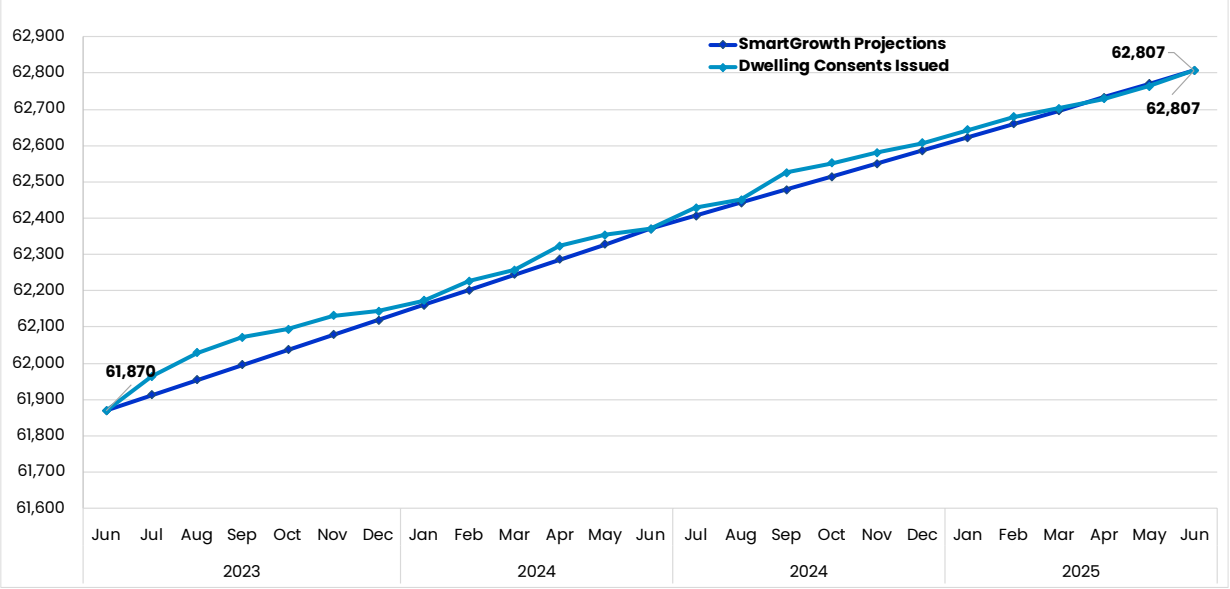
[8] SmartGrowth population projections for Tauranga City were reviewed in August 2025 and Western Bay of Plenty District LTP projections were updated in April 2023.

Figure 9 New dwellings consented compared to SmartGrowth projections, Western Bay of Plenty Sub-region, 2023 to 2025



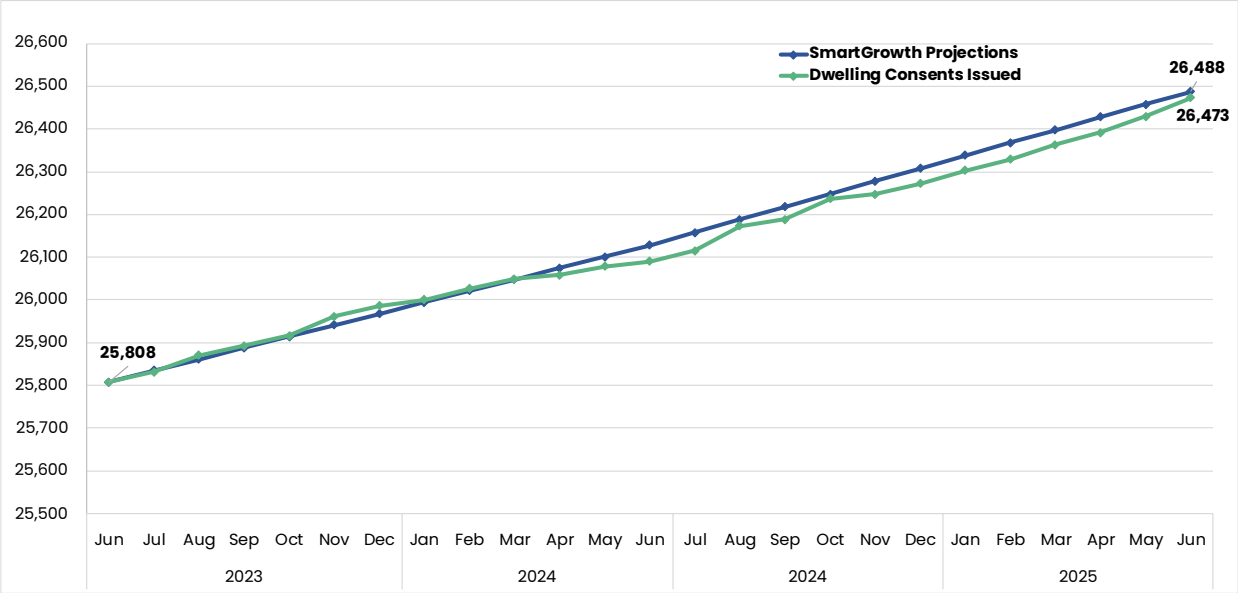
Western Bay of Plenty Sub-region had a total of 1,602 dwellings consented between 1 July 2023 and 30 June 2025. The number of dwellings consented closely aligned with the SmartGrowth dwelling projections in the same period, with a difference of only 15 dwellings in 2025.

Figure 10 New dwellings consented compared to SmartGrowth projections, Tauranga City, 2023 to 2025



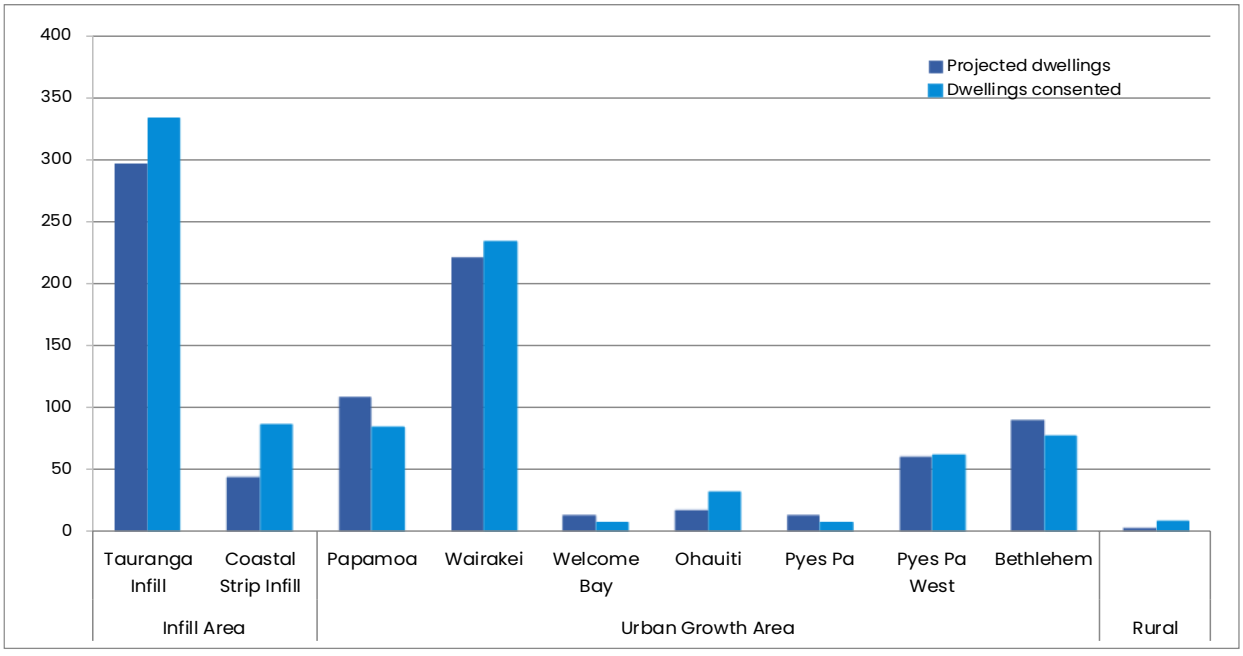
Tauranga City had 937 dwellings consented from 1 July 2023 to 30 June 2025. The number of dwellings consented aligned with the SmartGrowth projections during the reference period.

Figure 11 New dwellings consented compared to SmartGrowth projections, Western Bay of Plenty District, 2023 to 2025



Western Bay of Plenty District had 665 dwellings consented from 1 July 2023 to 30 June 2025. The number of dwellings closely aligned with the SmartGrowth dwelling projections in the same period, being a difference of only 15 less dwellings.

Figure 12 New dwellings consented compared to SmartGrowth projections by growth area, Tauranga City, 2024 to 2025



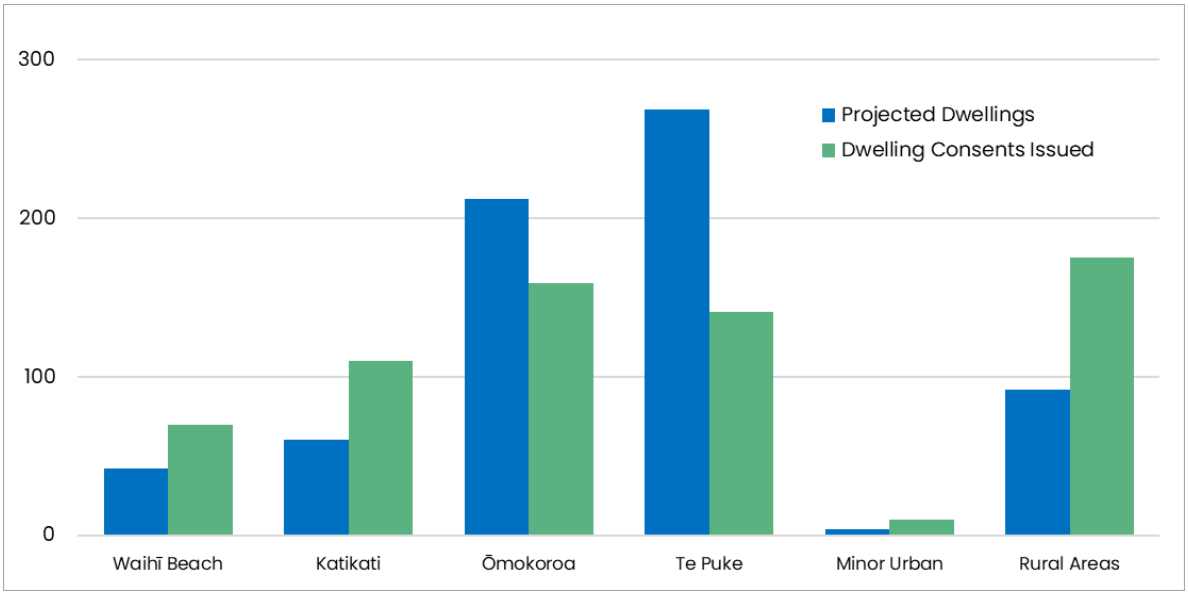
From July 2023 to June 2025, a total of 937 dwellings were consented in Tauranga City which closely aligned with SmartGrowth projections in the same period. A shortfall of 3% from the projections was observed in dwellings consented in the UGAs. Among the UGAs, Wairakei, Ohauiti and Pyes Pa West recorded between 2 to 15 more dwellings than projected during the 2-year period while the rest of the UGAs had shortfalls between 5 to 23 less dwellings.

In Tauranga City's existing urban areas, residential growth exceeded projections by 13%, with 80 more dwellings than anticipated. Of this growth, 54% occurred in the Tauranga infill areas and 46% in the Coastal Strip.

Multi-unit developments were concentrated in the infill and intensification areas, particularly in:

- Gate Pa - 35 dwellings across consents of 4 to 19 units
- Greerton - 48 dwellings across consents of 5 to 12 units
- Ōtūmoetai - 17 dwellings across 2 consents
- Tauranga South and Tauranga Hospital - 29 dwellings across consents of 3 to 8 units
- Yatton Park - 15 dwellings across consents of 4 to 9 units.

Figure 13 New dwellings consented compared to SmartGrowth projections by growth area, Western Bay of Plenty District, 2024 to 2025



From July 2023 to June 2025, the 665 dwelling consents issued in the Western Bay of Plenty District were only 15 less than the SmartGrowth dwelling projection of 680.

Ōmokoroa and Te Puke had 53 and 128 dwellings less than projected, whereas Waihī Beach and Katikati consented 28 and 50 more dwellings than projected. In Maketu and Pukehina Beach, 6 more dwellings were consented than projected, and in rural areas, 83 additional dwellings were consented compared to SmartGrowth projections, all combining to even out the shortfall in Ōmokoroa and Te Puke.

Growth Rates and Land Availability

SmartGrowth requires that uptake rates and land availability for residential development be monitored. This is based on zoned residential land across the sub-region.

Tauranga City

For each greenfield UGA in the sub-region, total dwelling capacity yield is estimated through site assessment, with uptake regularly monitored in order to calculate remaining dwelling yield.

Of the operative greenfield UGAs, Tauriko West and Ohauiti South greenfield UGAs, which were recently rezoned for residential development, had the highest percentage of capacity remaining at 100% or 3,350 dwellings, while Welcome Bay UGA had the lowest remaining dwelling capacity of 8% or 175 dwellings, refer to Table 6.[9]

Pāpāmoa UGA which has the largest expected yield, has estimated potential for a further 960 dwellings. A high number of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block.

[9] Have been reviewed in response to Proposed Plan Change 33 (PPC 33) Enabling Housing Supply, and via the Population and Dwelling Projection Allocation Review, August 2025, Tauranga City Council (the 2025 Review).

Wairakei UGA in Pāpāmoa East was made operative in May 2011, providing further capacity for an estimated 5,700 dwellings. At 30 June 2025 it had remaining dwelling capacity of 2,050 dwellings (36% of capacity remaining).

Bethlehem UGA estimated yield has been increased to better reflect proposed developments, new higher density zoning opportunity, and development aspirations. It has the highest remaining capacity (2,390 dwellings) and highest percentage of capacity remaining (38%).

Keenan Road and Te Tumu future greenfield UGAs are currently being progressed. Other greenfield areas have been identified for future urban development and their suitability is currently being considered.

By June 2028 it is estimated that capacity for a further 8,210 dwellings will remain in the current operative greenfield UGAs, which is 24% of the total estimated yield of these UGAs, falling to 3,255 dwellings (or 10% of total yield) by 2035. For the future greenfield UGAs it is anticipated that a further 8,900 dwelling capacity will be added to the yield by 2036.

Table 6 Dwelling growth rate and projected uptake by urban growth areas, Tauranga City, 2025

				Short term (3 years)		Medium Term (10 years)	
Greenfield Urban Growth Area (UGA)	Estimated Yield - Total Dwellings	Total dwellings (existing and consented) at June 2025	Remaining capacity as at June 2025	Estimated uptake July 2025 – June 2028	Estimated remaining capacity at June 2028	Estimated uptake July 2028- June 2035	Estimated remaining capacity at June 2035
Bethlehem[1]	6,350	3,960	2,390	300	2,090	840	1,250
Pyes Pa	2,960	2,675	285	45	240	130	110
Pyes Pa West[1]	2,950	2,410	540	190	350	240	110
Ohauiti	2,105	1,640	465	45	420	265	155
Welcome Bay	2,160	1,985	175	50	125	90	35
Pāpāmoa	8,050	7,090	960	335	625	400	225
Wairakei[2]	5,700	3,650	2,050	700	1,350	1,140	210
Tauriko West	3,000	0	3,000	340	2,660	1,660	1,000
Ohauiti South	350	0	350	0	350	190	160
UGA (current) Sub-Total	**33,625**	**23,410**	**10,215**	**2,005**	**8,210**	**4,955**	**3,255**
Te Tumu[3]	6,500	0	0	0	0	0	6,500
Keenan Road[3]	2,400	0	0	0	0	0	2,400
UGA (future) Sub-Total	**8,900**	**0**	**0**	**0**	**0**	**0**	**8,900**
Greenfields Total	**42,525**	**23,410**	**10,215**	**2,005**	**8,210**	**4,955**	**12,155**

[1] The UGA yields have been increased from estimates published in the 2024 Development Trends report in response to PPC 33 and proposed developments as allocated in the Population and Dwelling Projection Allocation Review, Tauranga City Council, August 2025 (the 2025 Review).

[2] Timing of housing uptake in parts of the Wairakei Town Centre and periphery is dependent on delivery of future infrastructure and/or the release of Te Tumu UGA to provide the necessary population scale to support it.

[3] The release of Te Tumu and Keenan Road future UGAs are proposed to be released from 2036 under the 2025 Review.

Western Bay of Plenty District

In Western Bay of Plenty District, Ōmokoroa and Te Puke have the largest total dwelling capacity consisting of 4,985 and 4,723 dwellings in each urban centre, followed by Katikati with 3,975 and Waihī Beach with 3,511 dwellings.

In 2025, Ōmokoroa has the largest remaining capacity with 2,321 potential dwellings or 47%. Katikati and Te Puke have dwelling capacity remaining at a similar level of 1,430 (36%) and 1,372 (29%) dwellings each. Waihī Beach has the lowest remaining capacity available due to coastal inundation areas, at only 293 dwellings or 8%.

There is still enough availability of land in Western Bay of Plenty District for the short term. When the NPS-UD competitive margins are taken into account, there is a shortfall in the medium and long terms.

Table 7 Dwelling growth rate and projected uptake by urban growth areas, Western Bay of Plenty District, 2025

				Short Term (3 years)		Medium Term (10 years)	
Urban Growth Area	**Total capacity (dwellings)[3]**	**Total dwellings (existing and consented) June 2025**	**Remaining capacity June 2025**	**Projected uptake July 2025–June 2028**	**Estimated remaining capacity June 2028**	**Estimated uptake July 2028–June 2035**	**Estimated remaining capacity June 2035**
Waihī Beach	3,511	3,218	293	62	231	66	165
Katikati[1]	3,975	2,545	1,430	90	1,340	285	1,055
Ōmokoroa[2]	4,985	2,664	2,321	488	1,833	1,128	705
Te Puke	4,723	3,351	1,372	426	946	468	478
Urban Total	**17,194**	**11,778**	**5,416**	**1,066**	**4,350**	**1,947**	**2,403**

[1] Katikati capacity calculation includes the Park Road Dairy Farm and Tetley Road Orchard.
[2] Ōmokoroa includes Stages 1, 2 and 3.
[3] Total dwellings capacity from HBA 2022.

Housing Capacity Assessment

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

The HBA has identified a housing supply insufficiency for the Western Bay of Plenty Sub-region.[10] In addition to this forward-looking assessment of the housing shortage, the New Zealand Institute of Economic Research (NZIER)[11] was engaged to assess whether the housing market is currently in equilibrium regarding supply and demand for housing, and if not, to quantify an existing shortage (or surplus) of housing.

NZIER estimated a current housing shortage in Tauranga City to be from 4,300 to 5,300 houses, and for Western Bay of Plenty District to be 2,500 houses, as at 30 June 2022.[12]

Recognition and quantification of this existing housing supply shortage exacerbates the level of housing supply insufficiency in the Western Bay of Plenty Sub-region.

Occupied and Unoccupied Dwelling Ratio

SmartGrowth requires that "permanent" vs "holiday residences" be monitored. A comparison of Census night occupied dwelling with unoccupied dwelling counts provides an indication of this. A table outlining occupied and unoccupied dwelling ratios based on 2023 Census is provided in Appendix 5 and a Statistical Area 2 (SA2) map is provided in Appendix 6.[13]

Tauranga City

For Tauranga City the coastal strip SA2 areas of Mount Maunganui North, Mount Maunganui South, Mount Maunganui Central and Motiti all registered an unoccupied dwellings proportion of 15% or greater at Census 2023, suggesting a higher rate of holiday residences in these areas, refer to Appendix 5. These results correspond with the traditional holiday nature of the coastal strip. Outside the coastal strip only Tauriko exceeded 15% unoccupied dwellings.

[10] See Housing Development Capacity Assessment for Tauranga and the Western Bay of Plenty District, July 2021, and full HBA completed in March 2023.
[11] NZIER - Impact of a housing shortage, an update of the effects on Tauranga City, August 2022.
[12] Estimating the housing shortfall: A report for Western Bay of Plenty District Council, NZIER, November 2022.
[13] Note: Statistics NZ replaced "Census Area Units" (CAUs) with "Statistical Area 2" (SA2s) in 2018 Census. Although the SA2s are generally the same as CAUs, the boundaries and names have changed to reflect changes in land use and population patterns.

Western Bay of Plenty District

In Western Bay of Plenty District, the coastal settlements of Waihī Beach-Bowentown and Pukehina Beach show the highest ratios of unoccupied dwellings with 55% and 49% respectively, signifying a high number of holiday homes in these areas, refer to Appendix 5.

Other areas of Athenree, Waiau, Maketu, Matakana Island and Ōmokoroa South also indicate a relatively high proportion of non-permanent residences, each between 20% and 24% of homes unoccupied at Census 2023. Te Puke, Waiorohi and Kopurererua have the least unoccupied dwellings at 5% to 6%.

3 Dwelling Sales, Prices and Rent

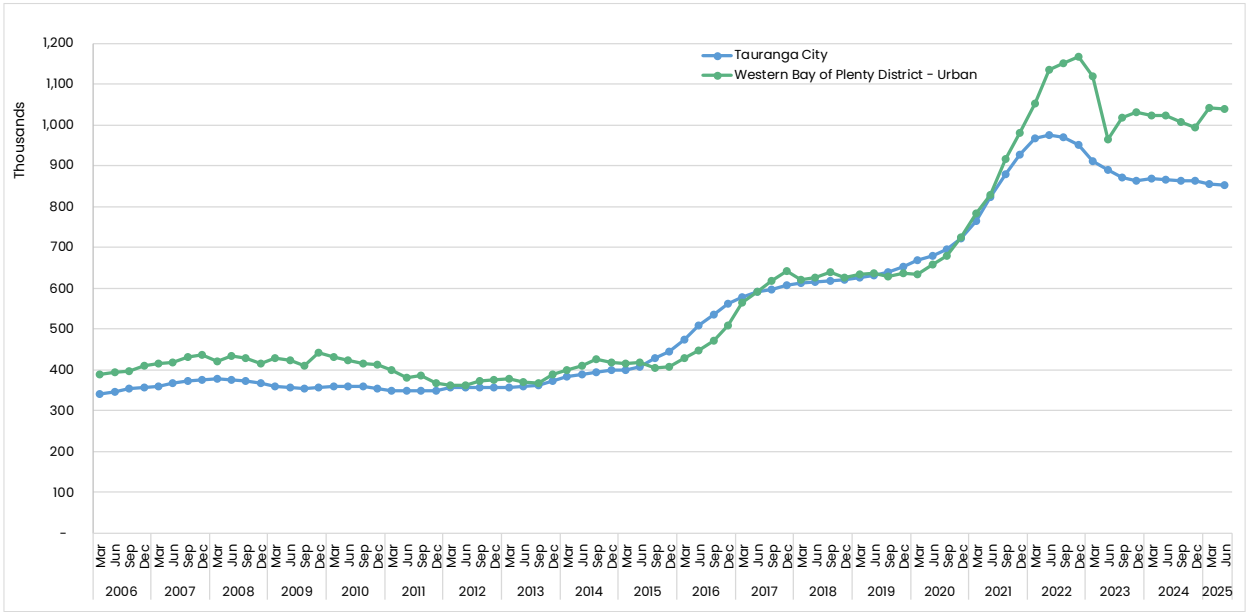
Dwelling Sale Prices

Figure 14 and Table 8 show that the housing market experienced a significant surge in dwelling sale prices following the COVID-19 pandemic, with Tauranga City reaching peak average prices of nearly $1 million ($975,000) and Western Bay of Plenty District registering close to $1.2 million.

From 2023 onward, the sub-region's housing market has shown a cooling trend, with Tauranga City's median price decreasing by 1% from $854,250 in 2024 to $852,750 in 2025. This represents a notable decline of 13% from the peak median price of $975,375 observed in 2022.

In contrast, average median house prices in Western Bay of Plenty District urban areas have increased by 2% or $16,000 to $1.04 million in 2025 from 2024. However, there has been a similar decline to Tauranga from the peak median price observed in 2022.

Figure 14 Median dwelling sale prices (12-month rolling average), Tauranga City and Western Bay of Plenty District, 2006 to 2025



Source: HUD NPS-UD

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

Dwelling Sale Prices ($)		Trend	$ Change	% Change
Tauranga City				
June 2025	852,750			
June 2024	864,750		-12,000	-1.4%
June 2021	822,750		30,000	4%
June 2016	508,500		344,250	68%
Western Bay of Plenty District Urban				
June 2025	1,039,798			
June 2024	1,023,460		16,338	2%
June 2021	828,256		211,542	26%
June 2016	447,089		592,709	133%

[1] Dwelling sale price data was sourced from HUD. The 12-month rolling average selling price is calculated as the average of the monthly median selling prices across the 12 months to the reference month, hence it is typically lower than the observed/actual market selling prices. The rolling average also smooths the fluctuations in the time series prices.

The sub-region's housing market has shown a dynamic shift over the past year, with several area units experiencing strong growth while others registered declines.

In Tauranga City, price increases ranged from modest gains of 2% in Pacific View to a significant 77% in Kaitemako, which recorded the highest increase. In contrast, declines ranged from 1% to as much as 60%, with Matapihi experiencing the steepest drop. Other area units that have shown growth of more than 20% include Bethlehem, Bellevue, Ōtūmoetai North, Ōtūmoetai South and Mount Maunganui North.

In Western Bay of Plenty District, median sale prices range from $561,000 to $2.49 million, with Tahawai recording the lowest price and Otawa (Upper Pāpāmoa) recording the highest price. Otawa recorded the highest growth of 89%. Other area units that have shown growth of more than 20% include Te Puke East, Athenree, Pongakawa, Minden and Paengaroa. Declines in house prices range from 2% to 39%, with the lowest decline recorded for Te Puke West and the steepest in Tahawai.

Figure 15 Dwelling sale prices, June 2025

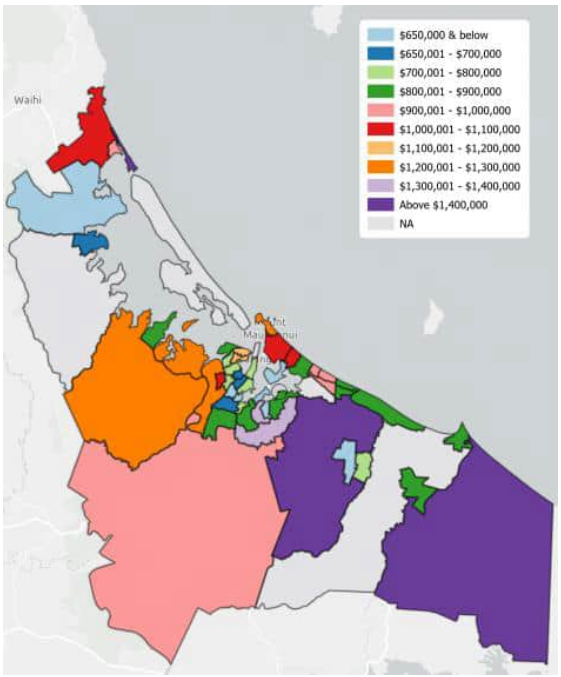
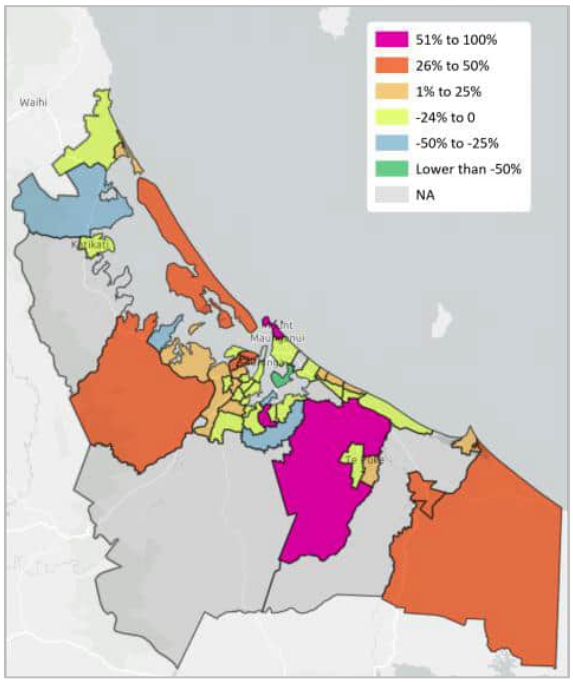


Figure 16 Change in dwelling sale prices, June 2023 to June 2025

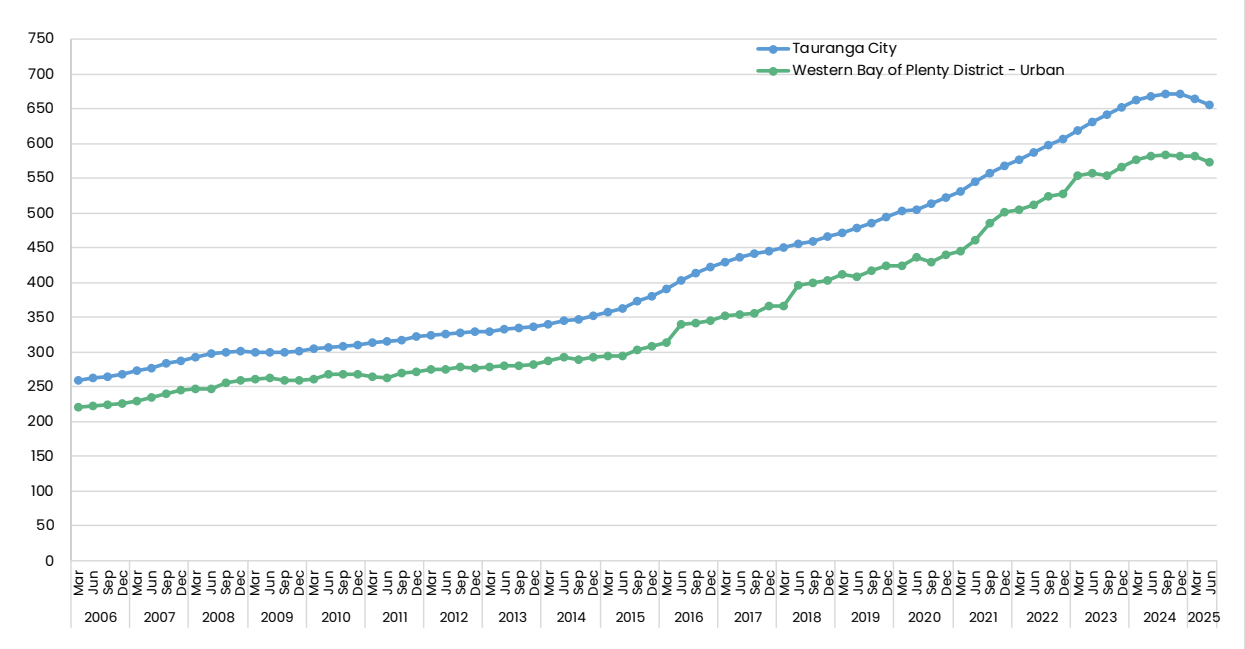


Dwelling Rents

Rental prices in Tauranga City are typically higher than in Western Bay of Plenty District urban areas (Waihī Beach, Katikati, Ōmokoroa and Te Puke), as shown in Figure 17 and Table 9. The dwelling rent data reflects only the properties where bonds have been lodged at Tenancy Services of MBIE in the previous 6 months of the reference quarter, hence may not indicate the residential rental situation in the sub-region.

Rental prices this year were more than 20% higher than they were 5 years ago. However, rental prices in the sub-region were lower during the year, with average weekly rent becoming cheaper by 2% or $11 in Tauranga City and 1% or $8 in Western Bay of Plenty District. Refer to Appendix 1 for an explanation of this indicator.

Figure 17 Dwelling rents, Tauranga City and Western Bay of Plenty District Urban, 2006 to 2025



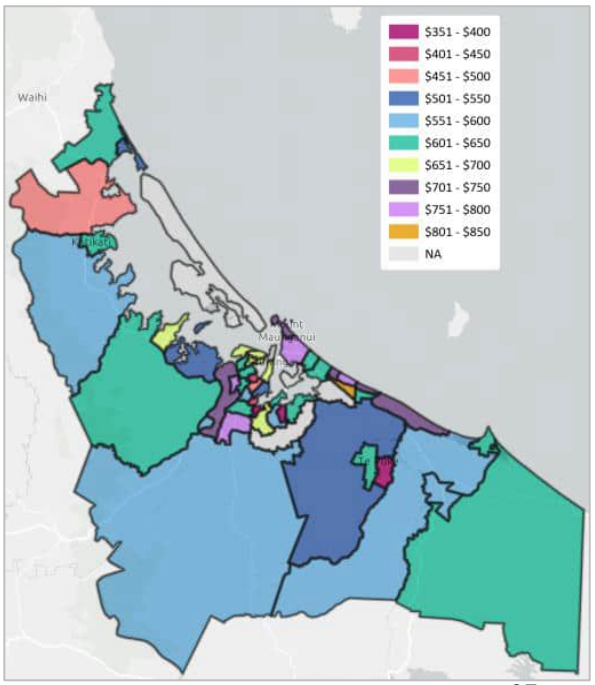
Source: HUD

Table 9 Dwelling rents

Dwelling Rents ($)		Trend	$ Change	% Change
Tauranga City				
June 2025	656			
June 2024	667	↓	-11	-2%
June 2021	545	↑	111	20%
June 2016	403	↑	253	63%
Western Bay of Plenty District Urban				
June 2025	573			
June 2024	581	↓	-8	-1%
June 2021	461	↑	112	24%
June 2016	339	↑	234	69%

Source: HUD NPS-UD

Figure 18 Weekly dwelling rents, June 2025

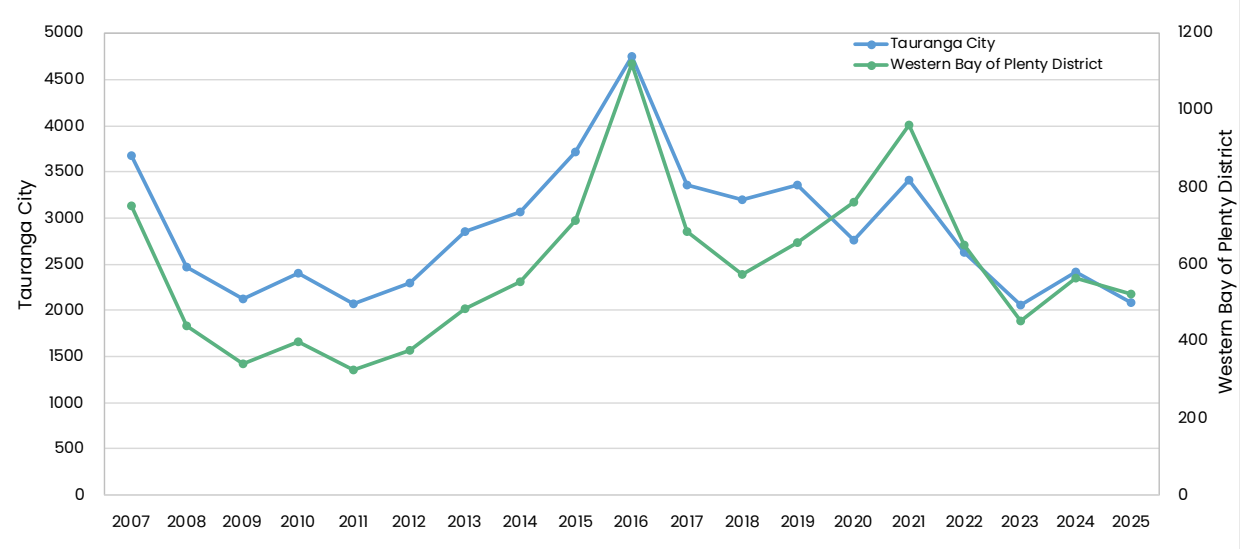


Dwellings Sold

Figure 19 shows that following the decline from a sharp peak in 2016, the sub-region's housing market experienced a notable surge in 2021 at 4,374 dwellings sold. Tauranga City and Western Bay of Plenty District accounted for 78% and 28% of these sales, respectively. This second peak, although lower than the 2016 high, likely reflects the impact of post COVID-19 economic stimulus, low interest rates and renewed buyer confidence.

From this recovery point, sales have declined steadily, falling by 40% to around 2,600 dwellings in 2025. This downward trend suggests a cooling market potentially driven by changing financial conditions, affordability pressures and buyer behaviour. Refer to Appendix 1 for an explanation of this indicator.

Figure 19 Dwellings sold, Tauranga City and Western Bay of Plenty District, 2007 to 2025



Source: HUD

Figure 20 Dwellings sold, 2025

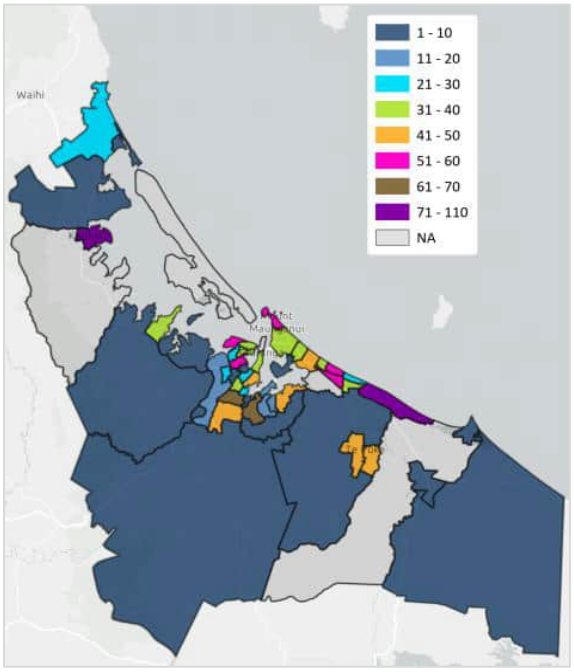
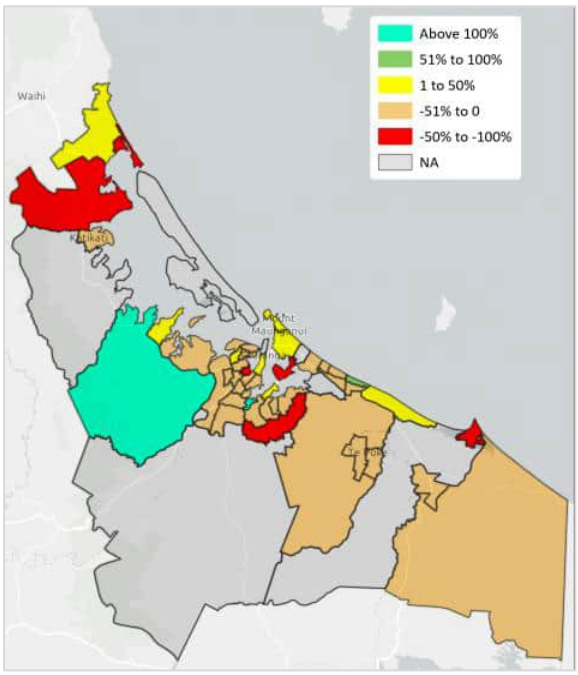


Figure 21 Percentage change in annual dwellings sold, 2024 to 2025

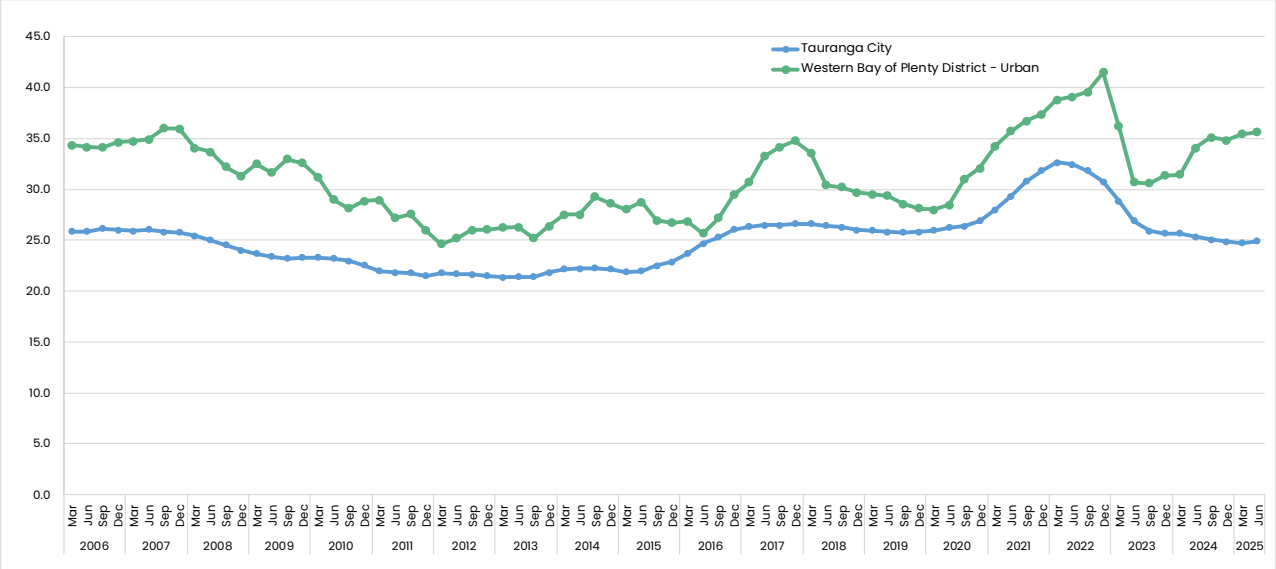


Ratio of Dwelling Sale Prices to Rents

The ratio of dwelling sale prices to rents provides another indicator of housing affordability. In Tauranga City, the ratio was highest (32.7) in March 2022, but has continuously decreased reaching 24.9 in June 2025. This indicates a relative improvement in home ownership affordability compared to the previous year's level of 25.3. However, it remains high compared to historical levels, likely indicating ongoing affordability challenges.

In contrast, the urban areas of Western Bay of Plenty District have historically recorded higher sales to rent ratios, with more pronounced fluctuations. The ratio peaked at 41.5 in December 2022 and declined to 35.6 in June 2025. While this decline suggests improving affordability, the level remains relatively high, suggesting that renting continues to be more financially accessible than purchasing a home at these times. Refer to Appendix 1 for an explanation of this indicator.

Figure 22 Ratio of dwelling sale prices to rents, Tauranga City and Western Bay of Plenty District Urban, 2006 to 2025



Source: HUD

4 Housing Affordability

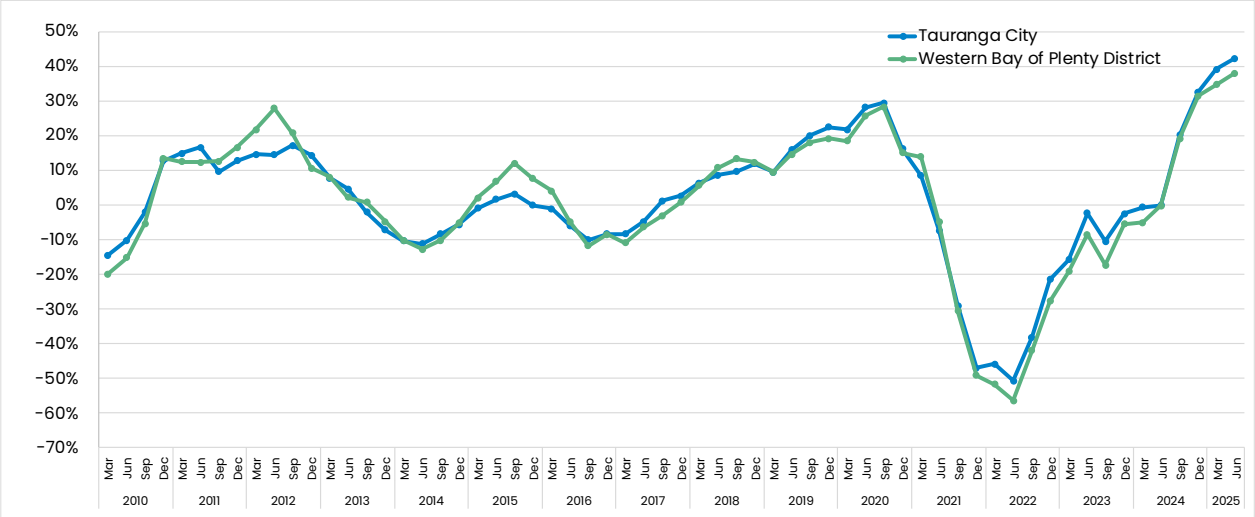
In November 2022, the Ministry of Housing and Urban Development introduced the Change in Housing Affordability Indicators (CHAI) for housing affordability. The indicators include changes in mortgage affordability, deposit affordability and rental affordability. A positive change in these indicators indicates improving affordability and negative change indicates declining affordability. Please see Appendix 2 for definition of, and sources of data for these indicators.

Change in Mortgage Affordability Index

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

The cooling of the housing market in the sub-region translates to improvement in mortgage serviceability as shown by positive change in mortgage affordability from near zero in June 2024 to 42% in Tauranga City and 38% in Western Bay of Plenty District in June 2025 (Figure 23). The index change indicates that servicing a mortgage has become more affordable, making conditions more favourable for prospective home buyers compared to the previous year.

Figure 23 Annual change in mortgage affordability index, Tauranga City and Western Bay of Plenty District, 2010 to 2025



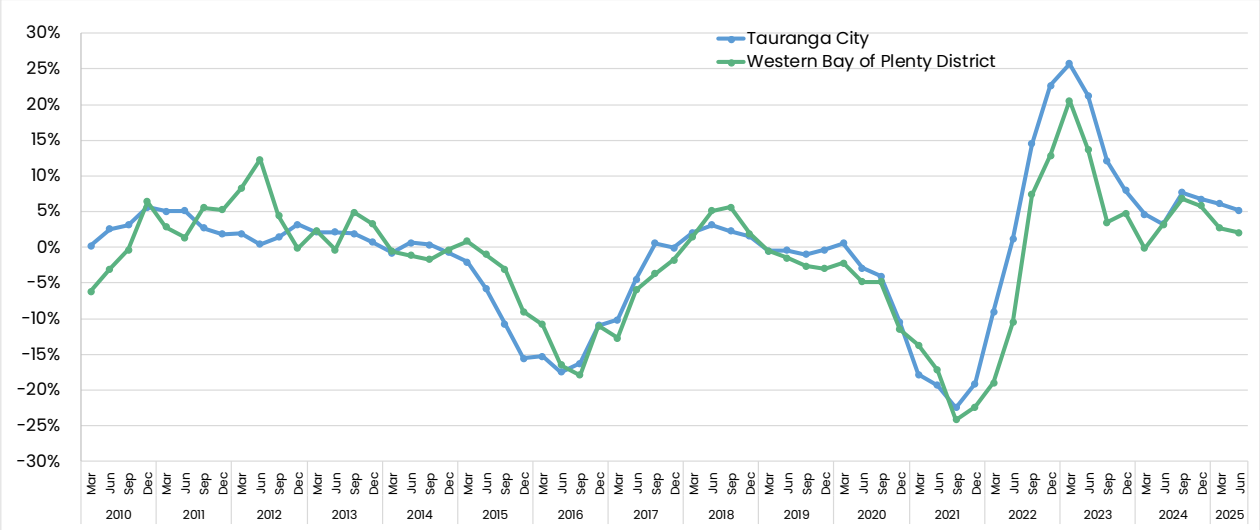
Source: HUD

Change in Deposit Affordability Index

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

Securing a deposit has worsened in the last two years, as shown by changes in deposit affordability of 26% in Tauranga City and 21% in Western Bay of Plenty District in March 2023 to 5% and 2% respectively in June 2025. This means it has become more difficult to secure a deposit in the sub-region recently.

Figure 24 Annual change in deposit affordability index, Tauranga City and Western Bay of Plenty District, 2010 to 2025



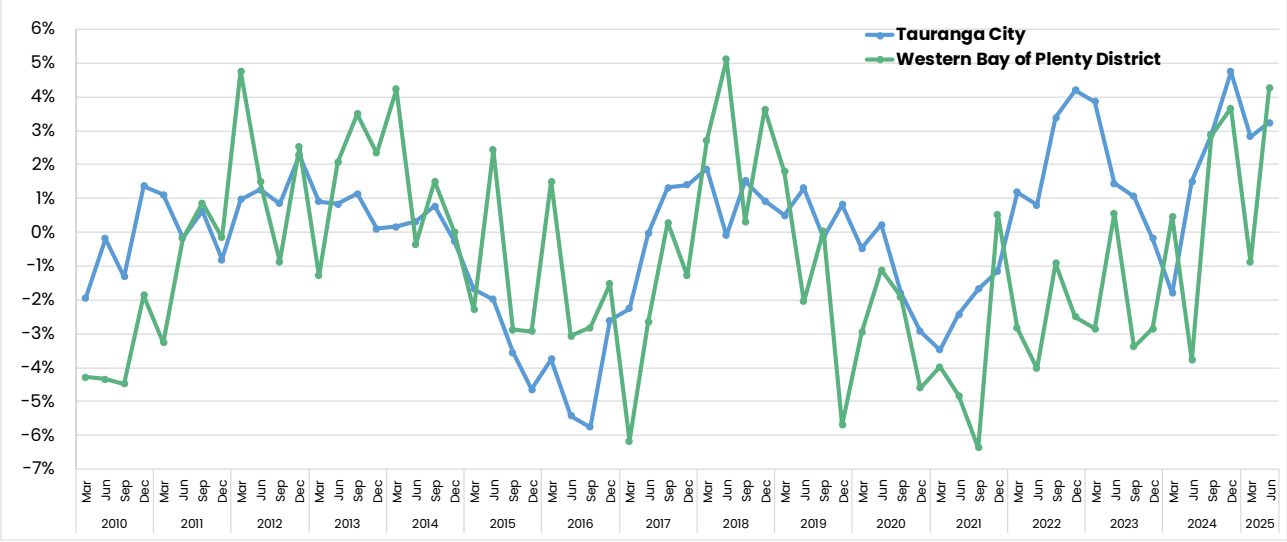
Source: HUD

Change in Rental Affordability Index

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

Rental affordability in the sub-region has slightly improved in the last 12 months to June 2025. In Tauranga City, the change in rental affordability increased from 2% to 3%, while in Western Bay of Plenty District, it increased from below zero to 4%.

Figure 25 Annual change in rental affordability index, Tauranga City and Western Bay of Plenty District, 2010 to 2025



Source: HUD

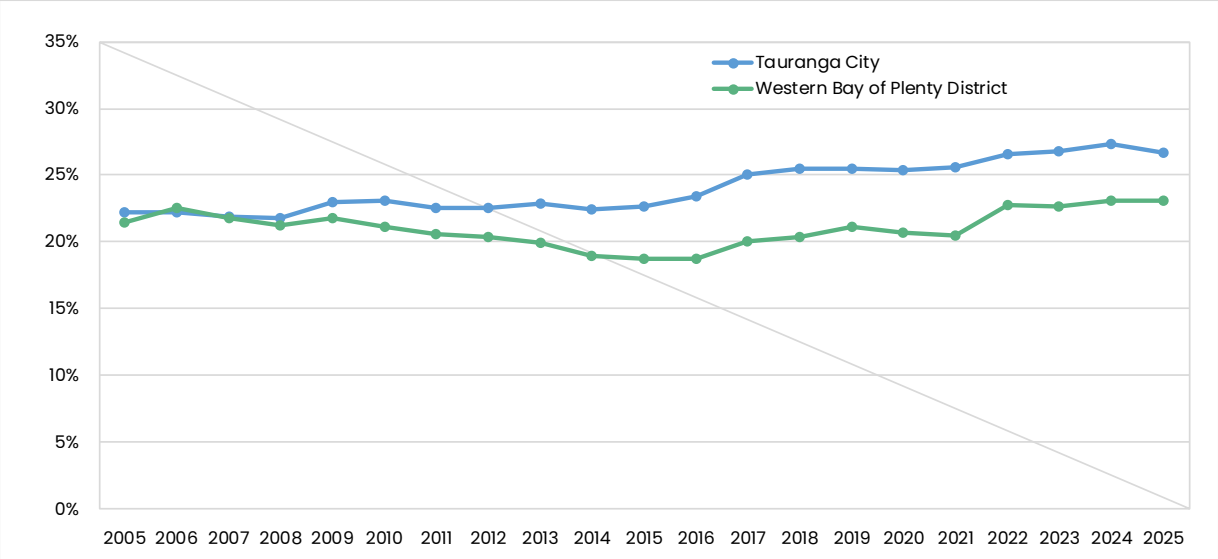
Proportion of Average Rent to Household Income

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

Over the last two years, rental affordability in Tauranga City has shown slight improvement. The proportion of average annual rent to household income decreased by 1% from 2024 to 27% in 2025, suggesting that a slightly smaller portion of household income is required to cover rent. While still close to 30%[14], a benchmark often used to indicate rental stress, this downward shift reflects a modest easing in rental pressure for households.

In contrast, Western Bay of Plenty District maintained a stable proportion of average annual rent to household income ratio of 23% across 2024 and 2025. This consistency indicates that rental affordability has remained relatively steady, and comfortably below the stress threshold. Compared to Tauranga City, the District continues to offer more favourable rental conditions and less financial strain on renting households.

Figure 26 Proportion of average rent to household income, Tauranga City and Western Bay of Plenty District, 2005 to 2025



Source: Infometrics

5 Residential Section Size

New Lots Created

Tauranga City

In the three year period between 2023 and 2025, there has been a clear shift toward smaller section sizes.

The proportion of sections 175m² and below increased significantly from 10% in 2023 to 39% in 2025, indicating a strong trend toward more compact housing developments. Meanwhile, the 176–325m² category, which previously dominated at 51% in 2023, dropped sharply to 25% in 2025.

Larger section sizes have remained relatively stable but low in proportion. Sections 326–500m² fluctuated, decreasing from 21% in 2023 to 12% in 2024, then rising slightly to 19% in 2025. The 501–750m² range saw a similar dip and partial recovery. Sections 751–1000m² and greater than 1000m² consistently accounted for a small share of the market, with the latter increasing modestly from 5% to 7% over the period. Overall this pattern may suggest an emerging shift toward higher density development, potentially driven by the shortage of residential zoned land and recent changes to City Plan rules to enable greater housing density.

[14] 30% of household income is the ideal maximum limit that should be spent on rent.

There was also a shift in the most common section size, from 176m² to 325m² in 2024 at 48% of all new lots, to smaller than 175m2 at 39% of all new lots in 2025. Larger lots of more than 500m² continue to make up a smaller fraction of new subdivisions. Subdivision of these lots are expected to occur in the future, particularly in medium density residential zones.

Table 10 Residential lot/section size of new lots created, Tauranga City, 2023 to 2025

Residential Lot/ Section Size (m²)	Dwelling yield per ha	2023		2024		2025	
		Number	Percent	Number	Percent	Number	Percent
175 & below	40 & above	50	10	139	27	86	39
176-325	21-39	247	50	245	48	56	25
326-500	14-21	100	21	63	12	42	19
501-750	9-14	58	12	22	4	21	10
751-1,000	7-9	6	1	9	2	0	0
Above 1,000	Below 7	31	6	30	6	16	7
Total		**492**	**100**	**508**	**100**	**221**	**100**

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

Tauranga City Urban Growth Areas

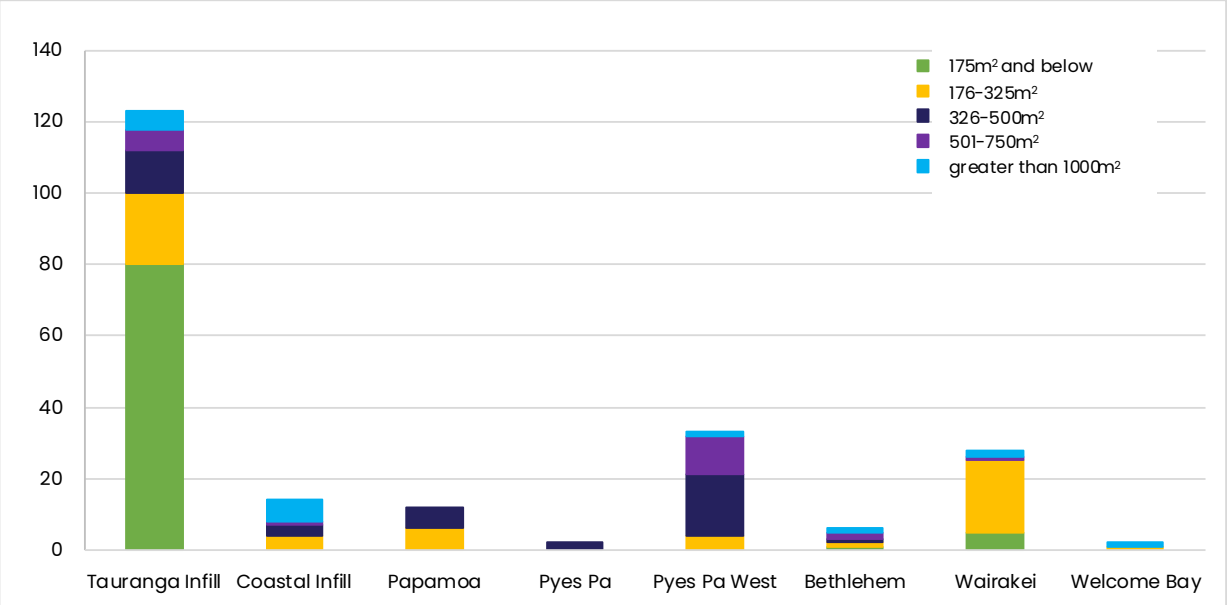
Compared to previous years, a greater share of new lots was created in existing urban areas during 2025, accounting for 62% of total new lots, while greenfield UGAs contributed the remaining 38%.

The majority of smaller lots measuring 175m² and below were concentrated in the Tauranga infill areas, making up 93% of those lot sizes, with only 7% located in the greenfield UGAs. In contrast, more larger lots were created in the greenfield UGAs, which accounted for 58%, compared to 42% in existing urban areas.

All of the smaller lots within the existing urban areas were created in the Tauranga infill area. Among the larger lots in these areas, 75% were located in Tauranga infill area and 25% in the Coastal Strip. Within the UGAs, Pyes Pa West contributed 42% of the larger lots, followed by Wairakei at 30%, with the remaining 28% distributed across other UGAs.

The increase in smaller lots in the existing urban areas reflects both the shortage of residential-zoned land and a growing interest toward more intensified development.

Figure 27 Residential lot/section size of new lots created, Tauranga City, 2025



Historical Residential Lot Size

The shortage in supply of land zoned for residential development is more evident in 2025 compared to the previous years, with only 221 new lots created. This is the lowest level since the peak in 2017 when more than 1,600 new lots were created.

Historically the predominant residential lot size was 326-500m², which consistently accounted for the largest share of new lots created between 2015 and 2021, ranging from 31% to 59%. The second most common lot size during this period was 501-750m², which also held a substantial share, peaking at 53% in 2012. These figures reflect a development pattern focused on medium to large lots.

From 2016 onward, a gradual decline in the proportion of these two lot sizes became evident, accompanied by a steady rise in smaller lots. By 2021, lots measuring 176–325m² had overtaken the previously dominant category, reaching 31%, while the 175m² and below category began to emerge more prominently, climbing to 5%. This trend accelerated sharply in subsequent years, with the smallest lot size category reaching 39% in 2025, becoming the new dominant lot size. At the same time, the share of 176–325m² lots dropped to just 19%.

It must be noted that new lots created and section size information does not fully capture the extent of residential development activity, as certain types of development such as multi-unit dwellings (e.g. apartments, terraced or attached dwellings) are often created under unit title arrangements rather than fee simple subdivisions. Additionally, some types or category of residential development, like retirement villages, may not require subdivision at all. Therefore, section size information may not reflect the full range or intensity of residential development occurring in the City.

Figure 28 Residential lot/section size for new lots created, Tauranga City, 2006 to 2025

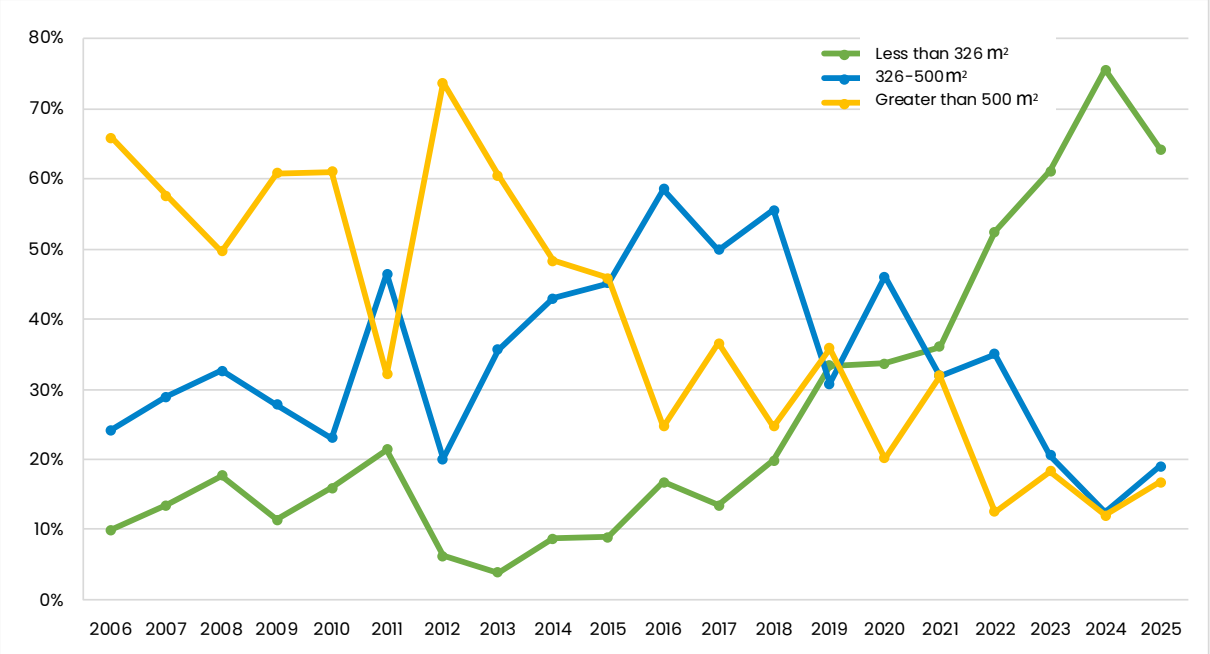
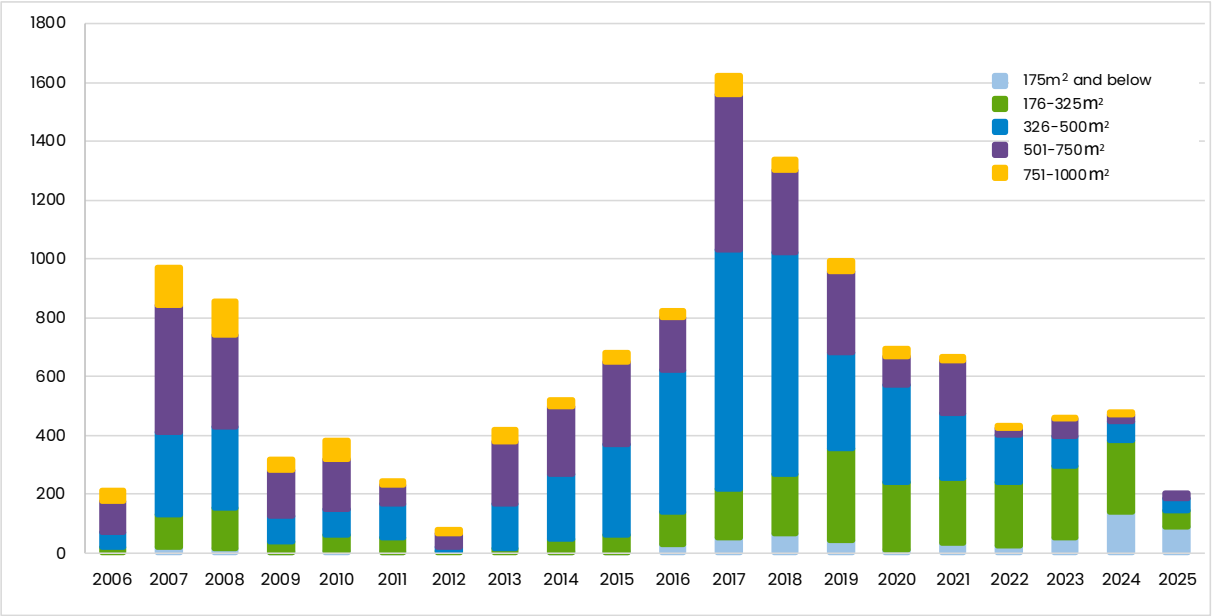


Figure 29 Residential lot/section size of new lots created, Tauranga City, 2006 to 2025



The additional 221 new lots created in 2025 brought Tauranga City's residential land stock to 47,559 lots/sections as at 30 June 2025. These lots were in the four residential zones including high density urban residential, city living – residential and mixed use, medium density/suburban residential and Wairakei residential zones. The majority or 97% of these lots were in the medium density/suburban (90%) and Wairakei (7%) residential zones. Further, Wairakei has been rezoned with some areas being medium and high density residential. More than two thirds (68%) of the lots were greater than 500m^2 and future subdivision is expected to occur in these lot sizes.

Table 11 Number of lots/sections by City Plan residential zone and section size, Tauranga City, 2025

City Plan Zone[1]	Lot/section size	Number of lots/sections	Percent
High density residential	< 325m^2	420	1
	325m^2 – 500m^2	75	<1
	> 500m^2	298	1
City Living – residential and mixed use	< 325m^2	32	<1
	325m^2 – 500m^2	46	<1
	> 500m^2	266	1
Medium density/Sub-urban residential	< 325m^2	2,385	5
	325m^2 – 500m^2	9,458	20
	> 500m^2	31,118	65
Wairakei residential	< 325m^2	1,371	3
	325m^2 – 500m^2	1,414	3
	> 500m^2	676	1
Total		**47,559**	**100**

[1] Excludes other zones where residential development has occurred and/or is expected to occur: Future Urban, Neighbourhood Centre (Wairakei), Ngāti Kahu Papākainga, Residential Large lot and Rural Residential. The number of lots in these zones are not expected to change much over time except in >500m^2 sections.

Section Size of Dwellings Consented

Western Bay of Plenty District

Residential section size of dwellings consented varies by urban growth area. This year Katikati shifted from smaller sites in 2024 to the majority of sites being 751-1,000m² in 2025. Ōmokoroa's higher number of dwellings were mainly being built on 326-500m² sites for smaller dwellings, and >1,000m² sites for larger 3 and 4 bedroom stand-alone houses. Te Puke had a much higher number of sites of >1,000m² being intensified into multiple dwelling developments this year. Rural areas continue to have dwellings consented largely on sites greater than 1000m².

Figure 30 Residential lot/section size, Western Bay of Plenty District, 2024 to 2025

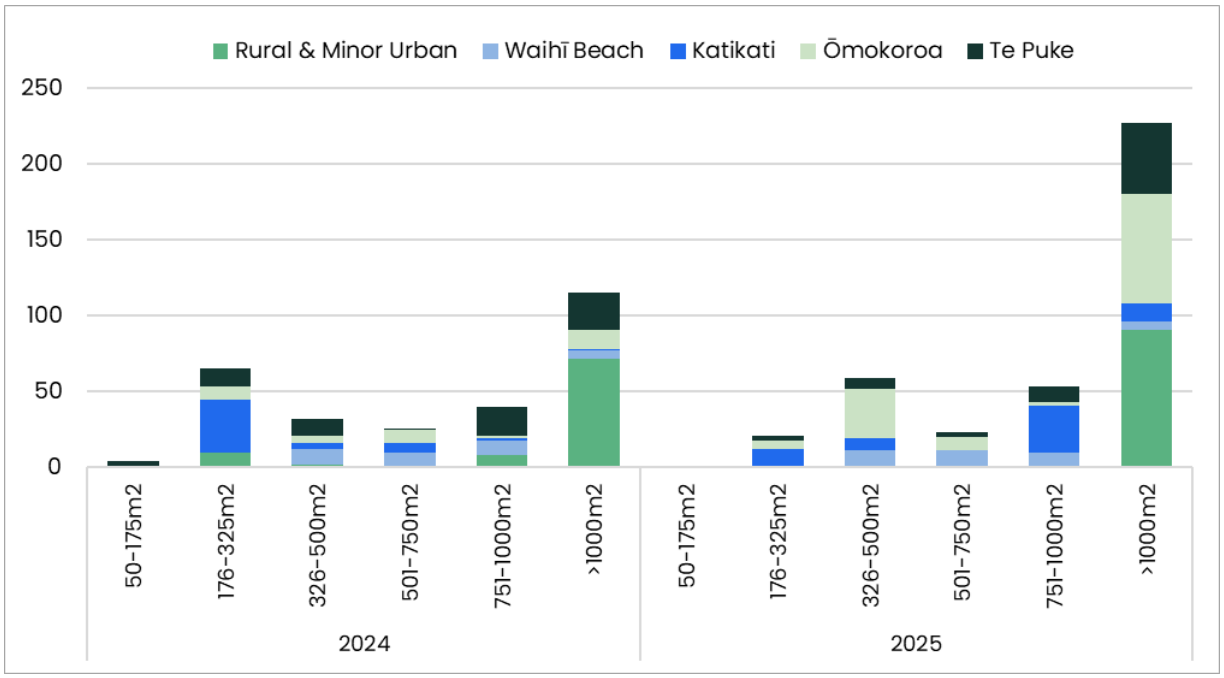


Table 12 Residential lot/section size for dwellings consented, Western Bay of Plenty District, 2023 to 2025

Residential Lot/Section Size (m²)	Dwelling yield per ha	2023		2024		2025	
		Number	Percent	Number	Percent	Number	Percent
50-175	40+	0	0	4	1	0	0
176-325	21-39	52	15	65	23	21	7
326-500	14-21	62	18	32	11	59	21
501-750	9-14	56	17	26	9	23	8
751-1,000	7-9	27	8	40	14	53	19
>1,000	<7	141	42	115	41	227	80
Total		**338**	**100**	**282**	**100**	**383**	**100**

Table 13 Residential lot/section size for dwellings consented, Western Bay of Plenty District, 2025

Residential Lot/Section Size (m^2)	Waihī Beach	Katikati	Ōmokoroa	Te Puke	Rural and Minor Urban
50-175	0	0	0	0	0
176-325	0	12	6	3	0
326-500	11	8	33	7	0
501-750	10	0	9	3	1
751-1,000	9	31	2	10	1
>1,000	5	12	72	47	91
Total	**35**	**63**	**122**	**70**	**93**

6 Dwelling Density

Residential Dwelling Density

Tauranga City

As at August 2025, Wairakei has achieved the highest nett area dwelling density of 18.2 dwellings per ha in the developed areas and 31.1 dwellings per ha in the proposed undeveloped areas, which together deliver an overall nett area dwelling density of 20.9 dwellings per ha. Pyes Pa West (the Lakes) and Pāpāmoa have overall nett area dwelling densities of 13.7 and 13.5 dwellings per ha respectively of nett area. Development areas within each greenfield UGA have a range of different densities, while further developable areas not currently included in the density calculation may potentially increase density when developed (see Appendix 8).

In comparison, the older greenfield areas released for development in the early 1990s are currently achieving the lower overall densities based on current and proposed development: Bethlehem 12.4, Pyes Pa East 12.3, Ohauiti 11.6 and Welcome Bay 10.8 dwellings per ha. Refer to Appendix 8 for more details on density figures and maps for the UGAs.

Table 14 Residential dwelling density by urban growth areas, Tauranga City, August 2025

Residential Development	Growth area	Dwelling density (dwellings per ha)		
		Gross area[1]	Nett area[2]	Nett site area[3]
Developed	Bethlehem	12.05	12.14	15.08
	Pyes Pa West	13.33	13.67	19.68
	Pyes Pa East	12.03	12.3	15.73
	Ohauiti	11.42	11.62	14.66
	Welcome Bay	10.51	10.65	13.82
	Pāpāmoa	13.31	13.47	17.95
	Wairakei	17.70	18.24	25.54
Proposed	Bethlehem	20.44	20.44	32.20
	Pyes Pa West	15.03	15.03	17.44
	Pyes Pa East	14.01	14.01	17.73
	Ohauiti	10.88	10.88	12.34
	Welcome Bay	16.52	16.52	22.68
	Pāpāmoa	29.74	29.74	36.48
	Wairakei	31.13	31.13	53.80
	Bethlehem	12.30	12.38	15.47
	Pyes Pa West	13.41	13.73	19.55
	Pyes Pa East	12.04	12.31	15.74

Residential Development	Growth area	Dwelling density (dwellings per ha)		
		Gross area[1]	Nett area[2]	Nett site area[3]
Total	Ohauiti	11.41	11.60	14.59
	Welcome Bay	10.63	10.77	13.99
	Pāpāmoa	13.61	13.77	18.32
	Wairakei	20.39	20.90	30.45

[1] Gross Area includes everything within the full greenfield UGA boundary – includes all roads, business areas, schools, reserves and stormwater areas.

[2] Nett Area is "Nett Developable Area" as defined in the Tauranga City Plan (see Appendix 8) – only includes residential sites, local and collector roads and neighbourhood reserves.

[3] Nett Site Area - only includes land within residential sites, excluding local and collector roads and neighbourhood reserves.

Table 15 Area, yield and residential density in urban growth areas, Tauranga City, August 2025

Growth Area	Nett area (ha)	Dwellings	Vacant sections + proposed sections/ lots or dwellings	Total yield (Vacant & proposed sections & dwellings)	Residential density (dwellings per ha)[1]
Bethlehem	280.26	3,199	272	3,471	12.38
Pyes Pa West	182.24	2,239	259	2,498	13.71
Pyes Pa East	180.12	2,187	31	2,218	12.31
Ohauiti	145.83	1,598	93	1,691	11.60
Welcome Bay	141.35	1,443	79	1,522	10.77
Pāpāmoa	767.70	10,063	510	10,573	13.77
Wairakei	255.93	3,445	1,903	5,348	20.90

[1] Includes both developed and proposed dwellings and sections.

Western Bay of Plenty District

Western Bay of Plenty District has four urban growth areas – Waihī Beach (including Bowentown and Athenree), Katikati, Ōmokoroa and Te Puke. Refer to Appendix 8 for more details on density figures and maps for the UGAs.

Table 16 shows that Waihī Beach is currently achieving the highest net area dwelling density of 9.28 dwellings per ha. Katikati and Te Puke have similar net area dwelling densities of 7.43 and 7.34 dwellings per ha respectively. Ōmokoroa net area dwelling density has increased to 6.56 dwellings per ha this year due to more dwellings built, and has historically large lots in the rural area with only one dwelling.

Being the second year providing these density maps for the District, more work will be done to exclude areas that are undevelopable or unlikely to be developed, and densities will increase accordingly.

Table 16 Residential dwelling density in urban growth areas, Western Bay of Plenty District, 2025

Urban Growth Area	Dwelling density (dwellings per ha)		
	Gross area[1]	Net area[2]	Net site area[3]
Waihī Beach	7.06	9.28	10.90
Katikati	6.71	7.43	9.42
Ōmokoroa	4.98	6.56	7.85
Te Puke	7.03	7.34	8.87

[1] Gross area includes all residential zoned land and excludes commercial and industrial zoned land within the urban boundary.

[2] Net area includes residential sites, local and collector roads and neighbourhood reserves.

[3] Net site area includes land within residential sites, excluding local and collector roads and neighbourhood reserves.

Table 17 Area, yield and residential density in urban growth areas, Western Bay of Plenty District, 2025

Urban Growth Area	Net area (ha)	Dwellings	Vacant sections	Total yield	Residential density (dwellings per ha)
Waihī Beach	328.76	2,888	165	3,053	9.28
Katikati	304.39	2,218	45	2,263	6.71
Ōmokoroa	402.75	2,438	207	2,645	6.56
Te Puke	439.81	3,015	77	3,092	7.03

For Western Bay of Plenty District, dwelling density is calculated within residential area boundaries, rather than by Stats NZ SA2 boundaries, so dwelling numbers do not correlate directly with Census.

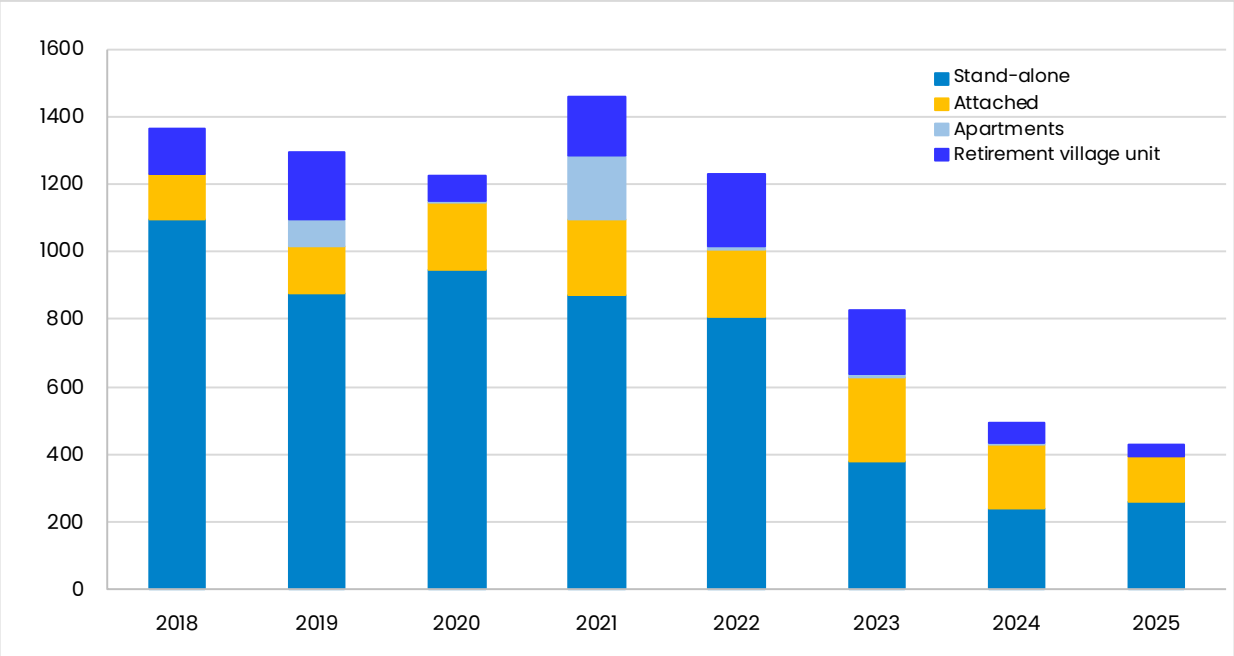
7 Dwelling Typology

Type of Dwellings Consented

Tauranga City

Figure 31 shows a gradual shift in housing typologies[15] in Tauranga City, with stand-alone dwellings consistently dominating the market in earlier years, accounting for 80% of all dwelling units consented in 2018. Other dwelling types, attached dwellings and retirement village units made up a relatively smaller share of 9% and 10%, respectively. Although stand-alone homes remained the most common typology throughout, the proportion declined over time to 59% in 2025.

Figure 31 Main type of dwellings consented, Tauranga City, 2018 to 2025



[15] Tauranga City classifies dwellings into the following types: stand-alone dwellings, duplex, attached dwellings, apartments (residential and mixed use), retirement village units and secondary/minor dwellings.
Tauranga City further classifies retirement village units into stand-alone, duplex, and attached dwellings.
Apartments are 3 or more dwelling units joined horizontally, whether purely residential or mixed residential and commercial use.
Attached dwellings are 3 or more dwelling units attached vertically.

This downward trend in stand-alone homes was accompanied by consistent growth in attached dwellings (duplexes and townhouses) from 10% in 2020 to 31% in 2025.

Retirement village units remained a substantial component of between 6% and 23%, although their share dropped to 8% in 2025. Although there were no apartments consented in 2025, this typology was a minor component in the years prior, at 1% to 13%, with its highest share in 2021 primarily attributed to Elizabeth Towers apartments.

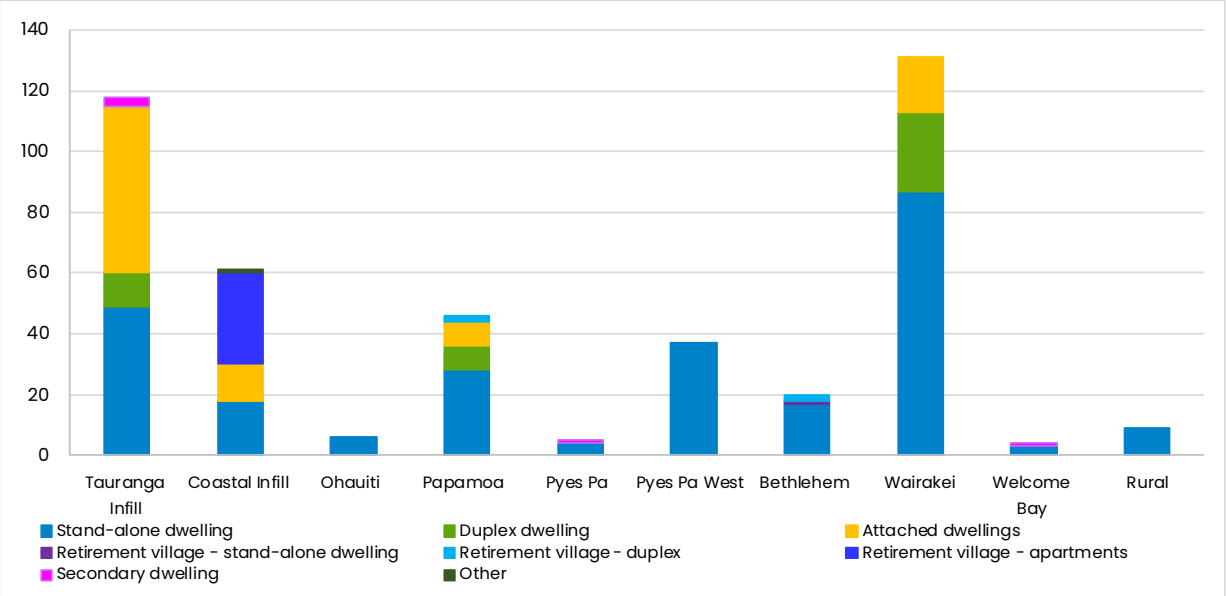
Overall, these changes and shifts in housing typologies illustrate a diversifying housing landscape, with attached dwellings and retirement village units gaining ground, while stand-alone homes remain dominant but less prevalent.

Table 18 Type of dwellings consented, Tauranga City, 2023 to 2025

Dwelling Typology	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
Stand-alone dwelling	378	45	240	48	258	59
Duplex	66	8	48	10	45	10
Attached dwellings	186	22	142	28	93	21
Secondary/minor/other dwelling	13	2	8	2	6	1
Apartments – residential	0	0	0	0	0	0
Apartments – mixed use	6	1	4	1	0	0
Subtotal	649	77	442	88	402	92
Retirement village unit – stand-alone dwelling	12	1	1	<1	1	<1
Retirement village unit – duplex	53	6			4	1
Retirement village unit – attached dwellings	105	13	4	1	0	0
Retirement village unit – apartment	20	2	53	11	30	7
Subtotal	190	23	58	12	35	8
Total	**839**	**100**	**500**	**100**	**437**	**100**

In the last three years, the proportion of dwellings consented in infill areas has gradually increased from 33% in 2023 to reach 43% in 2025. Conversely, dwellings consented in the greenfield UGAS declined from 65% to 57% in the same period.

Figure 32 Type of dwellings consented by growth area, Tauranga City, 2025



In 2025, Wairakei and Pāpāmoa stood out among the urban growth areas for their diverse mix of dwelling typologies. Wairakei accounted for 33% and Pāpāmoa for 11% of all stand-alone dwellings consented during the year. Notably, these were the only two UGAs where duplex dwellings were consented, contributing 58% and 18%, respectively, to the total number of duplexes across all UGAs. In contrast, all 37 dwellings consented in Pyes Pa West were stand-alone, while Bethlehem recorded just 20 consents, the majority (17) also being stand-alone.

The Tauranga infill area had the second highest share of total dwellings consented at 27%, following Wairakei's 30%. Within Tauranga infill area, the mix included 43% stand-alone, 9% duplex, and 45% attached dwellings. Meanwhile, the Coastal Strip contributed 14% of total consents, with a distinctive composition: 30% stand-alone, 20% attached, and 40% retirement village units that were all part of the MetLifeCare retirement village.

Additionally, 5 secondary dwellings were consented during the year, maintaining a consistent share of 1%, the same as the previous year. These dwellings were an additional or studio unit, an alteration or conversion of a garage or rumpus room, or alteration to the main dwelling, resulting in an additional independent dwelling unit.

Tauranga City Plan Zone

With Plan Change 33 becoming operative during the year, there are significant changes across City Plan zones in both the infill and UGAs. Areas that were previously zoned suburban residential and Wairakei residential were reclassified into medium and high density residential zones, meaning development activity in 2025 can no longer be directly compared to the former zoning framework.

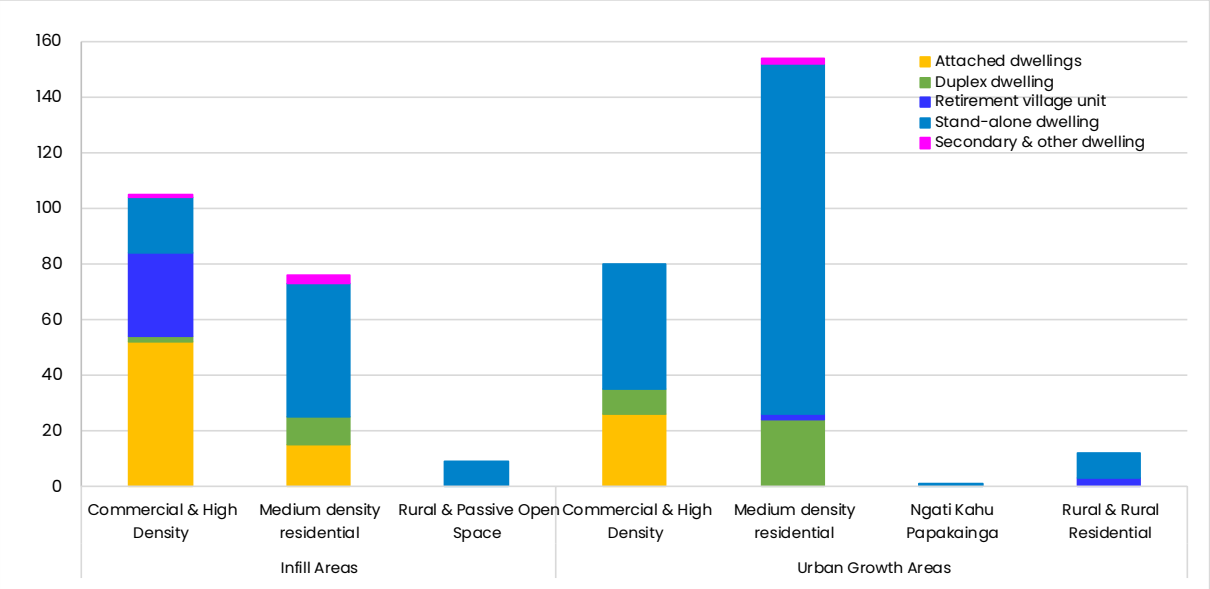
In the UGAs, around 62% of the dwellings were consented in the medium density residential zones, 29% in the high density and 4% in the commercial zones. Infill areas showed a different pattern, with 55% of dwellings located in the high density residential zones and 40% in the medium density residential zones.

Within the infill high density residential zones, nearly half of the dwellings consented were attached dwellings while the 30 retirement village units representing 29% of the total were part of the MetLifeCare Retirement Village. In the medium density residential zones in the infill areas, stand-alone dwellings made up more than 60% of the dwellings consented.

Conversely, in the UGAs, stand-alone dwellings were more prominent across both the medium and high density residential zones in the UGAs comprising 62% and 82%, respectively. In the commercial zone, 8 of the 9 dwellings consented were attached – notably a pentaplex and a triplex in the Parton Road commercial zone.

Of the 45 duplex dwellings consented across the infill and UGAs, 75% were located in the medium density residential zones, with the remaining 25% or 11 dwellings in the high density residential zones.

Figure 33 Type of dwellings consented by City Plan zone and growth area, Tauranga City, 2025



Western Bay of Plenty District

Numbers of stand-alone dwellings increased in number to 232 in 2025, yet continued to decline as a proportion of total dwellings consented to 61%, down from 84% in 2023 and 65% in 2024. 79 stand-alone dwellings were built in rural areas, 76 in Ōmokoroa, 33 in Waihī Beach, and 22 each in Katikati and Te Puke.

Due to the recent MDRS rules, duplex and multi-unit dwellings combined increased to 111 dwellings or 29% of all new builds, with an almost equal number of 48 in Te Puke due to intensification of larger existing sites, and 46 in Ōmokoroa, all being new dwellings in Pip Lane and Kayelene Place built by the New Zealand Housing Foundation. 14 minor dwellings were consented, all in rural areas, and 26 retirement village units were built in a single development by Council at Heron Crescent in Katikati.

Figure 34 Types of dwellings consented, Western Bay of Plenty District, 2024 to 2025

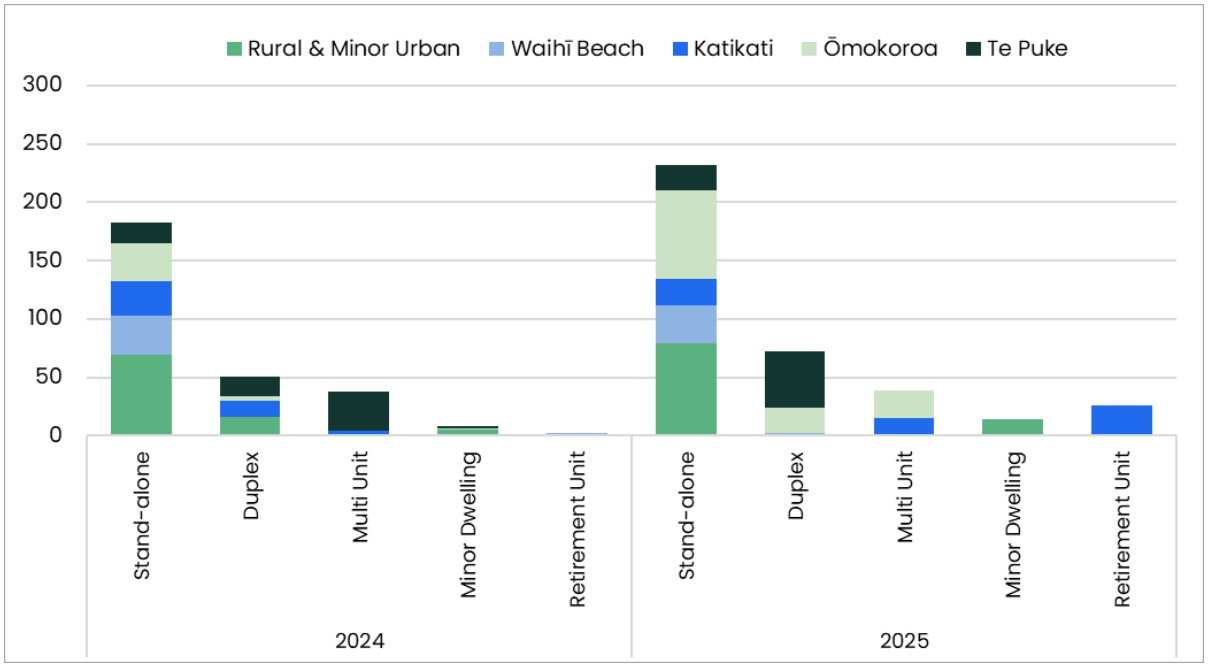


Table 19 Types of dwellings consented, Western Bay of Plenty District, 2023 to 2025

Dwelling Typology	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
Stand-alone dwelling	284	84	183	65	232	61
Duplex dwelling	18	5	51	18	24	6
Multi-unit dwelling	6	2	38	13	87	23
Minor dwelling	12	4	8	3	14	4
Retirement village unit	18	6	2	1	26	7
Total	**338**	**100**	**282**	**100**	**383**	**100**

Table 20 Types of dwellings consented, Western Bay of Plenty District Urban and Rural, 2025

Dwelling Typology	Waihī Beach	Katikati	Ōmokoroa	Te Puke	Rural and Minor Urban
Stand-alone dwelling	33	22	76	22	79
Duplex dwelling	2	0	22	48	0
Multi-unit dwelling	0	15	24	0	0
Minor dwelling	0	0	0	0	14
Retirement village unit	0	26	0	0	0
Total	**35**	**63**	**122**	**70**	**93**

Papakāinga Housing

Papakāinga housing generally refers to communal, whānau based residential development around marae or on shared Māori land. For the first time in 2025, number of dwelling consents issued on multiply-owned Māori land have been reported, covering the period from 2000-2025. This work will evolve in the future, with the goal of identifying the difference between additional dwellings and papakāinga housing. This year's reporting doesn't cover papakāinga housing on General land, and a process is being developed to capture this information in future reporting.

Tauranga City

Since 1 July 1999, a total of 189 dwellings have been consented on multiply owned Māori land across Tauranga City.

The 11 housing units consented in 2025 were higher than the previous year's 6 units, and above the last 5, 10, and 20 year averages (between 7 to 8 dwellings per annum). Of the 11 dwellings consented in 2025, 5 were in Kairua, 2 in Welcome Bay, 2 in Matapihi, 1 in Bethlehem, and 1 in Poike. Of the 6 dwellings consented in 2024, 3 were in Te Reti and 3 in Matapihi.

Of the 189 dwellings consented, 130 (69%) were for new houses to be built on site, 3 (2%) were for new transportable dwellings to be moved to site, and 56 (30%) were for existing homes to be relocated to site.

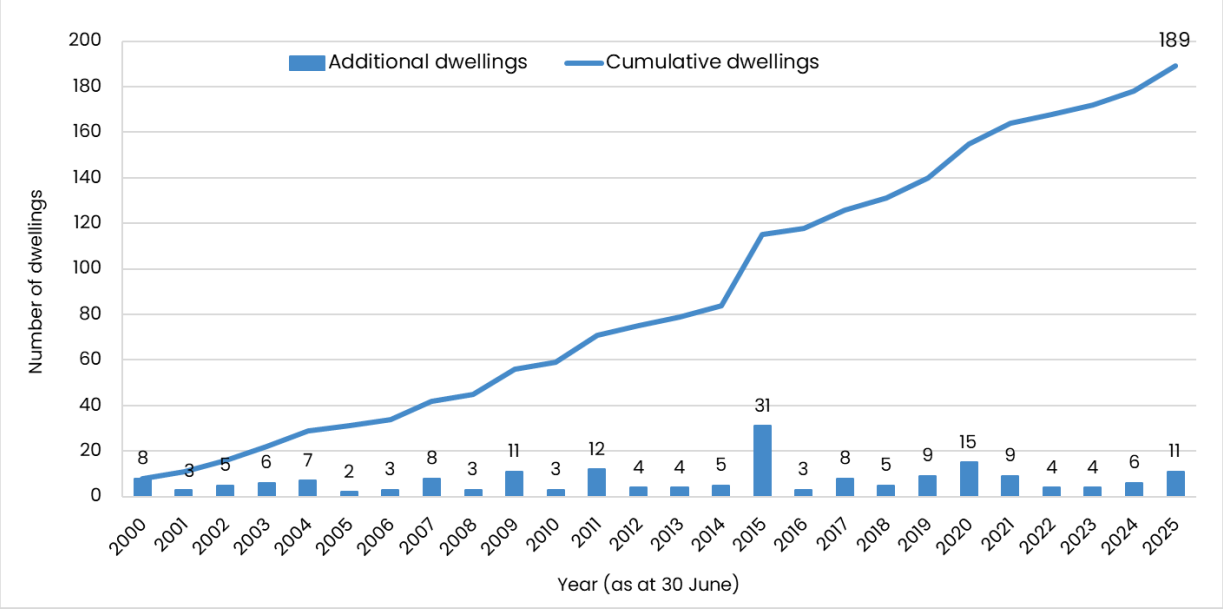
In addition to residential developments, multiply owned Māori land has also been leased for other purposes including commercial residential activity. In Tauranga City, 511 retirement units[16] have been consented on leased multiply owned Māori land since 2009 at Pacific Lakes retirement village in Pāpāmoa, which are not included in residential counts.

[16] Includes serviced apartments/units where services are provided like meals, cleaning, etc.

Table 21 Dwellings consented on Māori land, Tauranga City, 2000-2025

Tauranga City	Dwellings Consented
2025	11
2024	6
5 year average	7
10 year average	7
20 year average	8

Figure 35 Dwellings consented on Māori land, Tauranga City, 2000-2025



Western Bay of Plenty District

Since 1 July 1999, a total of 198 dwellings have been consented on multiply owned Māori land across the Western Bay of Plenty District.

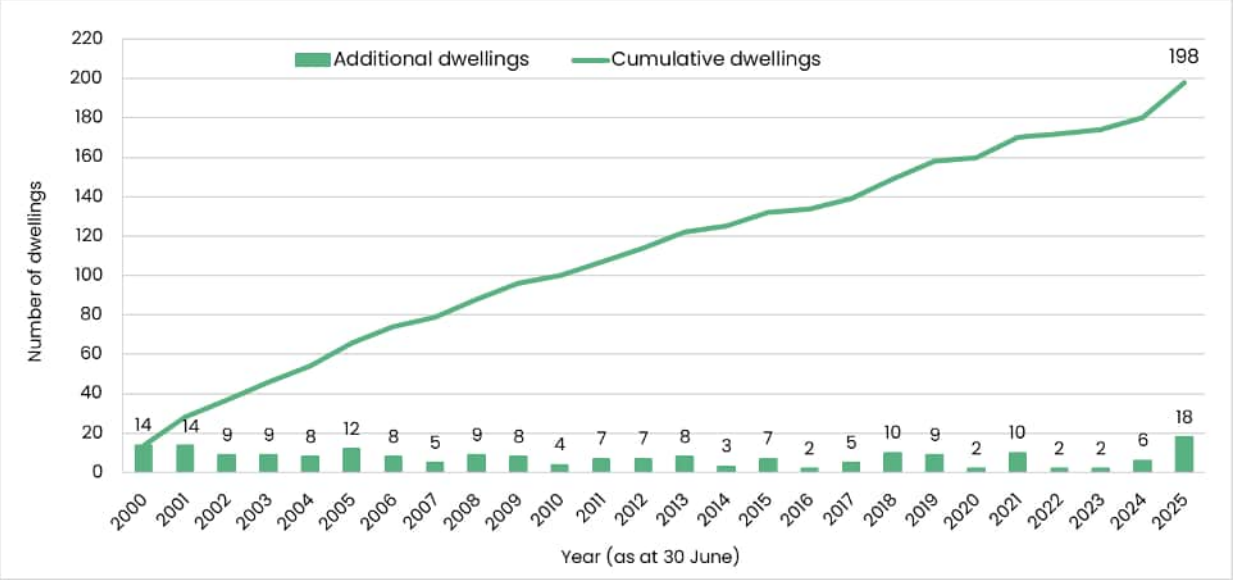
18 dwellings consented in 2025 were triple the previous year's 6 dwellings, due to a 10-unit development at Tuapiro Marae, and well above the last 5, 10, and 20 year averages of 7 to 8 dwellings per annum. Otherwise, 5 cabins were built at Rangiuru, 2 dwellings at Kaitemako and 1 dwelling at Waihī Beach-Bowentown this year.

Of the total 198 dwellings consented since 2000, 107 (54%) were for new houses to be built on site, and 91 (46%) were for new or existing homes to be relocated to site.

Table 22 Dwellings consented on Māori land, Western Bay of Plenty District, 2000-2025

Western Bay of Plenty District	Dwellings Consented
2025	18
2024	6
5 year average	8
10 year average	7
20 year average	7

Figure 36 Dwellings consented on Māori land, Western Bay of Plenty District, 2000-2025



Number of Storeys

Tauranga City

Table 23 shows that in the last three years, Tauranga City has experienced a shift in the vertical composition of dwellings being consented. In 2023, single storey dwellings dominated, accounting for 65% of all the dwellings consented. This dropped significantly to 56% in 2025.

This shift is reflected in the growing share of multi-storey dwellings. 2-storey dwellings have shown growth from 27% in 2023 to 32% in 2025. Similarly, 3-storey dwellings increased from 6% to 12% in the same period. The combined increase in 2- and 3-storey dwellings directly correlates with the reduced dominance of single storey homes.

In 2025, Wairakei had the biggest proportion of single level dwellings at 41% up from the previous year's 39% and followed by Tauranga infill areas at 18%. For double storey dwellings, Tauranga infill areas had the biggest share at 41%, followed by Wairakei at 23%. The 52 dwellings that make up the 12% of 3-storey dwellings were located in Tauranga infill areas (31% or 16 dwellings), Coastal Strip (67% or 35 dwellings) and 1 dwelling was in Pyes Pa West. Most or 44 of these dwellings were part of the MetLifeCare Retirement Village in Te Maunga North and the attached dwellings (triplex and quadruplex) in Yatton Street and Edgecumbe Road.

Figure 37 Number of storeys of dwellings consented, Tauranga City, 2025

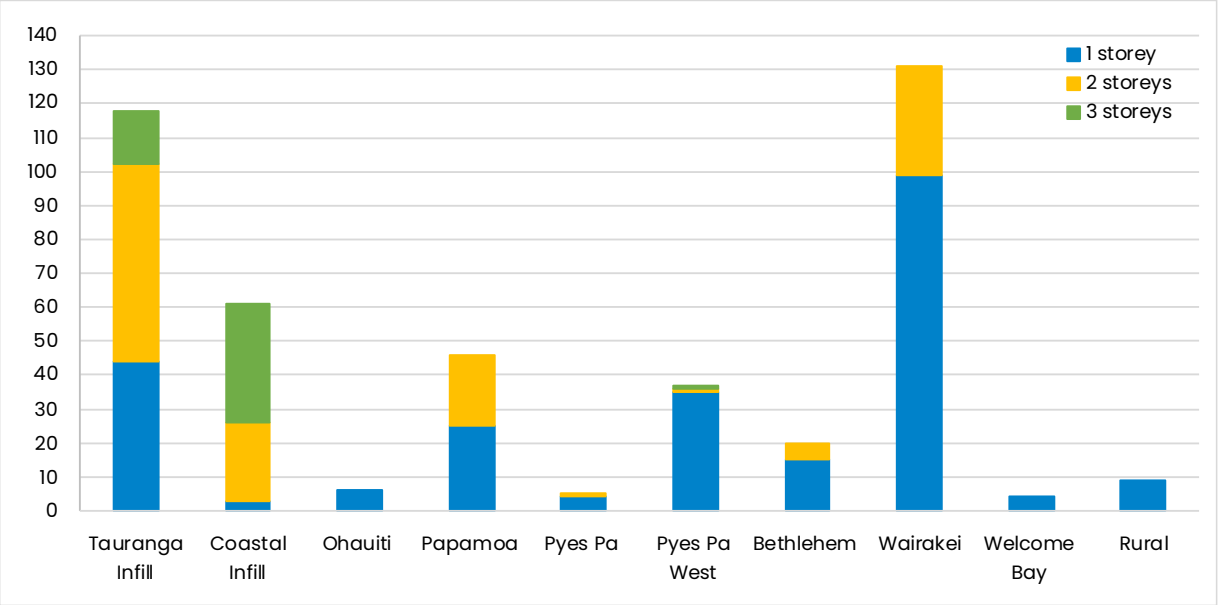


Table 23 Number of storeys of dwellings consented, Tauranga City, 2023 to 2025

Number of Storeys	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
1	544	65	210	42	244	56
2	225	27	222	44	141	32
3	50	6	15	13	52	12
4	20	2	53	11	0	0
Total	**839**	**100**	**500**	**100**	**437**	**100**

Western Bay of Plenty District

In 2025, single storey dwellings declined to 70% of all dwellings consented, yet 2-storey dwellings increased by only 1% to 26%. The increase in 3-storey dwellings up to 4% can be attributed to the multi-units built at Pip Way in Ōmokoroa by the New Zealand Housing Foundation. After only building single storey homes last year, Katikati consented 34 2-storey dwellings this year.

Figure 38 Number of storeys of dwellings consented, Western Bay of Plenty District, 2024 to 2025

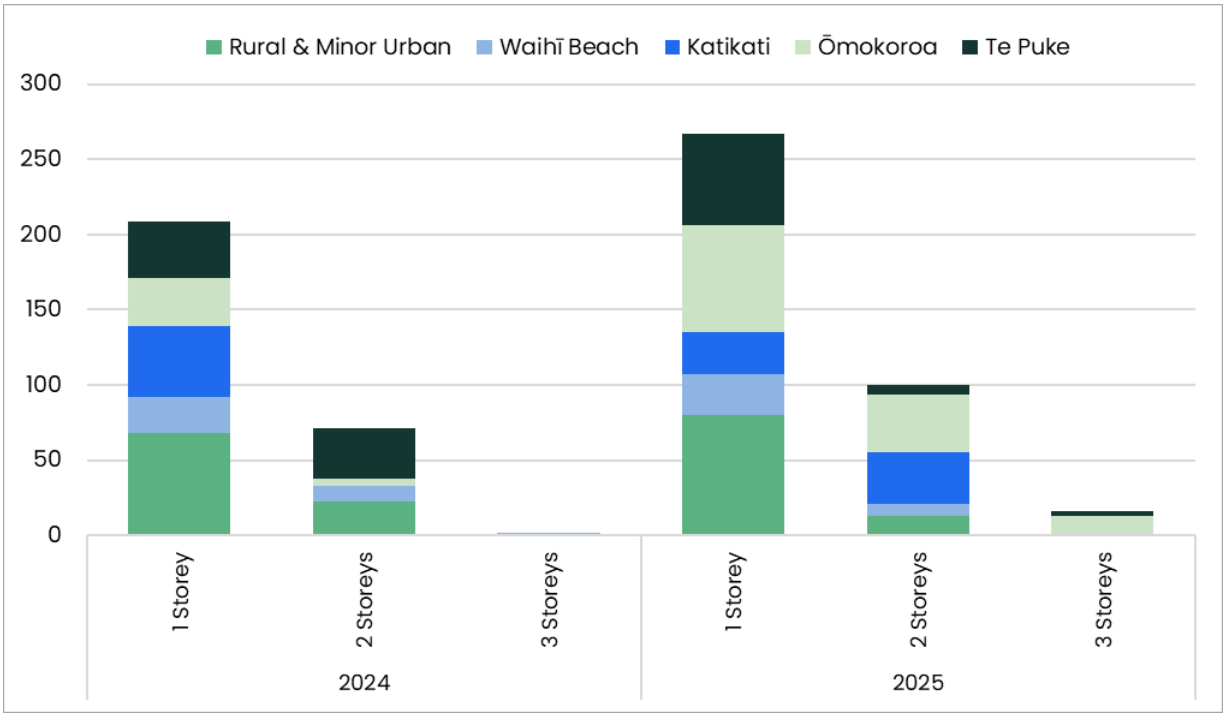


Table 24 Number of storeys of dwellings consented, Western Bay of Plenty District, 2023 to 2025

Number of Storeys	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
1	284	84	209	74	267	70
2	50	15	71	25	100	26
3	4	1	2	1	16	4
Total	**338**	**100**	**282**	**100**	**383**	**100**

Table 25 Number of storeys of dwellings consented, Western Bay of Plenty District Urban and Rural, 2025

Number of Storeys	Waihī Beach	Katikati	Ōmokoroa	Te Puke	Rural and Minor Urban
1	27	28	71	61	80
2	8	34	39	6	13
3	0	1	12	3	0
Total	**35**	**63**	**122**	**70**	**93**

Number of Bedrooms

In 2024, 2-bedroom dwellings became the most common type for the first time. However, in 2025 3-bedroom dwellings had regained dominance among the new dwellings consented in Tauranga City. This dominance highlights the versatility and appeal of these homes across a range of household types.

In Western Bay of Plenty District, proportion of 3-bedroom dwellings declined further to 42%, in favour of 1-2 bedroom dwellings which increased to 39%. 4-bedroom dwellings continued their ongoing decline to 15%, and 5+ bedroom homes remained in very low numbers at 3% of all dwellings consented.

Tauranga City

In 2025, more than half of the dwellings consented in Tauranga City had 3 bedrooms. Of these dwellings, Wairakei had the largest proportion at 44%, followed by Tauranga infill area at 15%.

The 2-bedroom dwellings made up 27% of all dwellings consented during the year, with almost 75% in the existing urban areas while the remaining 25% was spread across the UGAs.

Most (12 out of 14) of the 1-bedroom dwellings consented were located in the existing urban areas.

All of the areas had their share of 4+ bedroom dwellings, with the number of units ranging from 1 to 20 dwellings, and Wairakei recording the biggest number, followed by Pyes Pa West.

Figure 39 Number of bedrooms of dwellings consented, Tauranga City, 2025

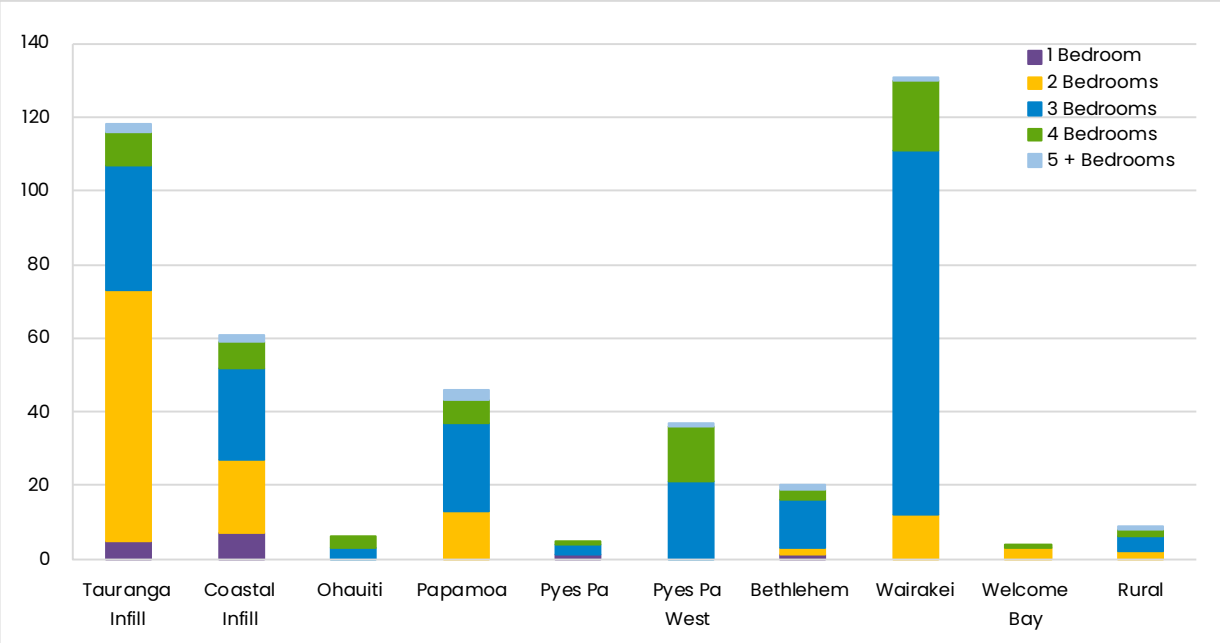


Table 26 Number of bedrooms of dwellings consented, Tauranga City, 2023 to 2025

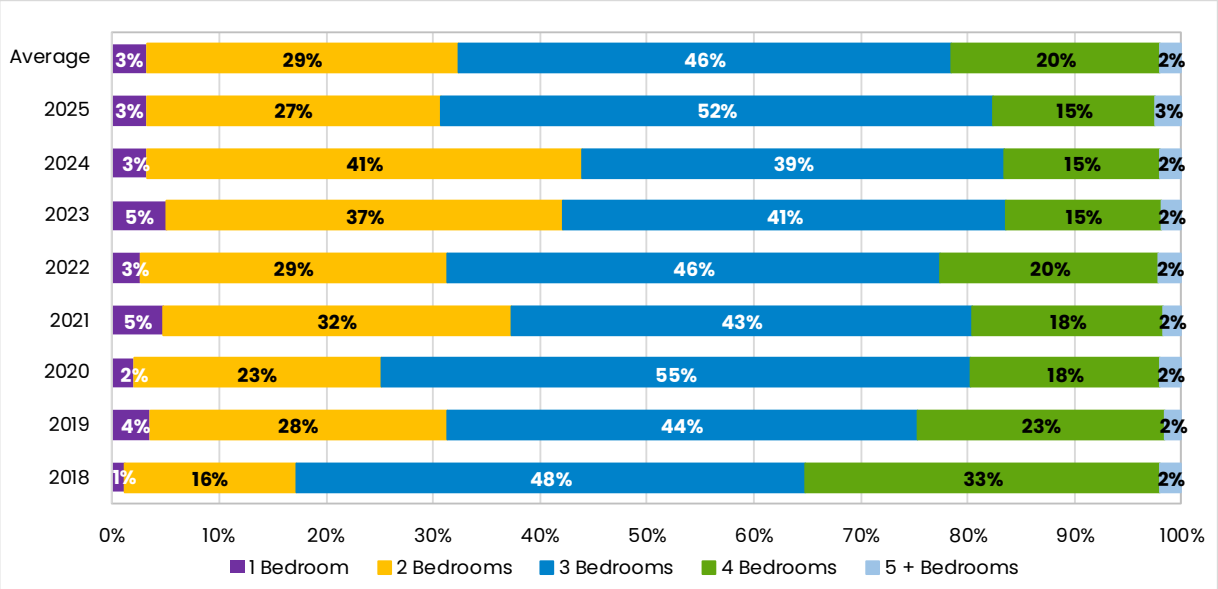
Number of Bedrooms	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
1	43	5	16	3	14	3
2	311	37	204	41	120	27
3	347	41	197	39	226	52
4	122	15	73	15	66	15
5 and above	16	2	10	2	11	3
Total	**839**	**100**	**500**	**100**	**437**	**100**

In 2023, 3-bedroom homes in Tauranga City made up the largest share of 41% (347), dipping slightly to 39% in 2024 (197), and increased to 52% (226) in 2025. Despite fluctuations in total dwelling numbers, 3-bedroom dwellings remained the most prominent typology, suggesting strong and stable demand for mid-sized homes.

2-bedroom dwellings were the second most common in 2024, when these dwellings accounted for 41% of all dwellings. However, the share dropped significantly to 27% in 2025. On average, these dwellings comprised 29% of all the dwellings consented in the last 8 years.

Other bedroom categories (1, 4 and 5) remained relatively minor in terms of contribution to housing development. 1-bedroom homes consistently made up just 3-5%, while 4-bedroom homes held a steady 15% each year. Dwellings with 5 or more bedrooms stayed below 3%, showing limited demand for very large homes.

Figure 40 Number of bedrooms of dwellings consented, Tauranga City, 2018 to 2025



Western Bay of Plenty District

The effects of MDRS and PC92 are clear in the last two years with 1-2 bedroom dwellings increasing from a mere 14% in 2023 to 39% in 2025. Due to the ongoing increase in 1- and 2- bedroom dwellings being consented, the proportion of 3-bedroom dwellings continued to decline to 42% from 58% two years ago, and 4-bedroom dwellings continued their decline also to 15% from 26% two years ago. 5+-bedroom homes remained in very low numbers at 13 for the year, with the majority in rural areas.

There are marked differences by urban growth areas, with Te Puke consenting 46 1-2 bedroom homes, 23 3-bedroom homes, and only 1 4-bedroom home. Katikati showed a similar profile with 32 1-2 bedroom homes, 29 3-bedroom homes and only 2 4+-bedroom homes. Whereas Ōmokoroa's dwellings in Te Awanui Waters and Harbour Ridge were largely 3-4 bedroom homes this year, with no 1-bedroom homes built at all in the area. Waihī Beach tended towards larger homes with 27 out of 35 being 3-5+ bedroom homes. Dwellings consented in rural and minor urban areas were a mix of different number of bedrooms.

Figure 41 Number of bedrooms of dwellings consented, Western Bay of Plenty District, 2024 to 2025

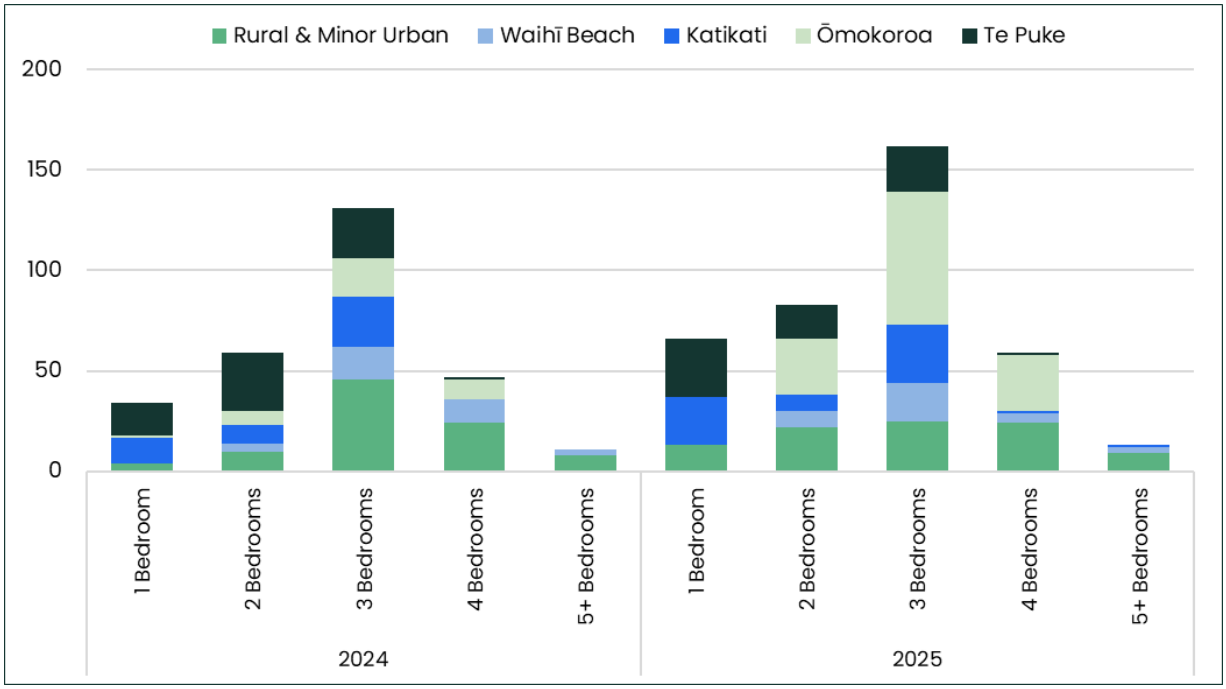


Table 27 Number of bedrooms of dwellings consented, Western Bay of Plenty District, 2023 to 2025

Number of Bedrooms	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
1	10	3	34	12	66	17
2	36	11	59	21	83	22
3	196	58	131	46	162	42
4	88	26	47	17	59	15
5+	8	2	11	4	13	3
Total	**338**	**100**	**282**	**100**	**383**	**100**

Table 28 Number of bedrooms of dwellings consented, Western Bay of Plenty District Urban and Rural, 2025

Number of Bedrooms	Waihī Beach	Katikati	Ōmokoroa	Te Puke	Rural and Minor Urban
1	0	24	0	29	13
2	8	8	28	17	22
3	19	29	66	23	25
4	5	1	28	1	24
5+	3	1	0	0	9
Total	**35**	**63**	**122**	**70**	**93**

Number of Bedrooms by Dwelling Typology

Tauranga City

The proportion of stand-alone dwellings increased from 48% in 2024 to 59% in 2025. Of these dwellings, 60% had 3-bedrooms while other bedroom categories have proportions of 2% to 24%. Attached dwellings were the second most common typology at 21%, with the majority (69%) having 2 bedrooms and 29% had 3 bedrooms. Duplexes were 10% of all dwellings consented, with the majority or 58% having 3 bedrooms. Larger homes having 4 or more bedrooms were predominantly stand-alone dwellings. The 30 apartments in MetLifeCare Retirement Village were spread across the 1, 2, and 3-bedroom categories.

Figure 42 Number of bedrooms by type of dwellings consented, Tauranga City, 2025

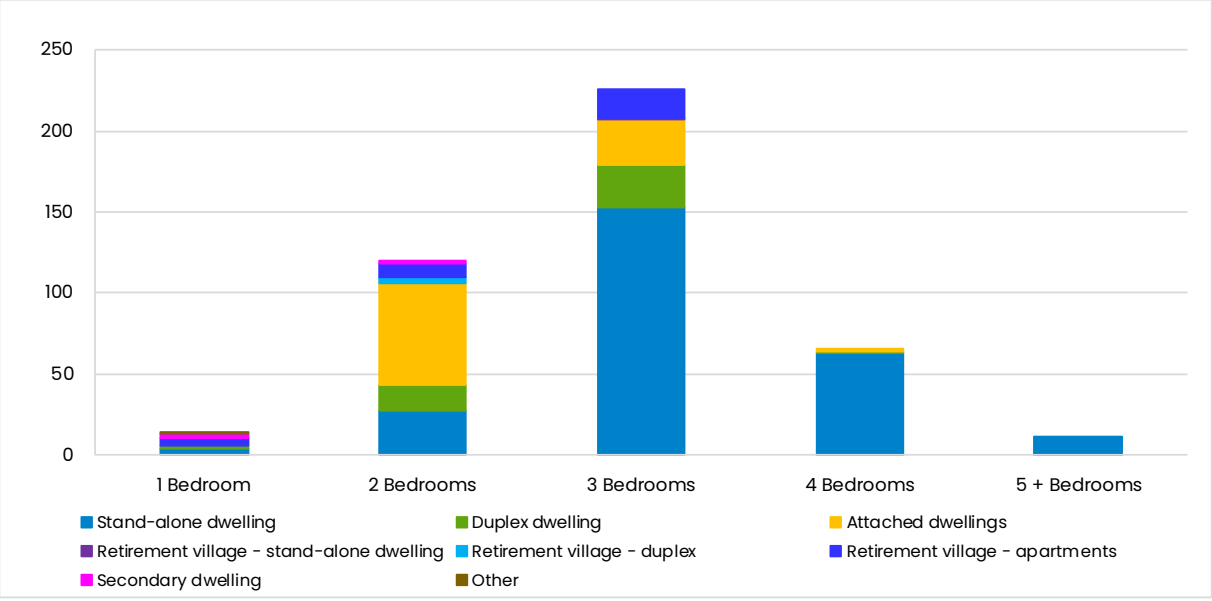


Table 29 Number of bedrooms by type of dwellings consented, Tauranga City, 2025

Type of Dwelling	Number of bedrooms					Total
	1	2	3	4	5+	
Stand-alone dwelling	4	27	155	63	11	260
Duplex dwelling	2	16	26	1	0	45
Attached dwellings	0	63	26	2	0	91
Secondary/minor dwelling/other	4	2	0	0	0	6
Subtotal	10	108	207	66	11	402
Retirement village unit – stand-alone dwelling	0	0	1	0	0	1
Retirement village unit – duplex	0	4	0	0	0	4
Retirement village unit – attached dwellings	0	0	0	0	0	0
Retirement village unit – apartment	4	8	18	0	0	30
Subtotal	4	4	19	0	0	35
Total	**14**	**120**	**226**	**66**	**11**	**437**

Floor Area of Dwellings

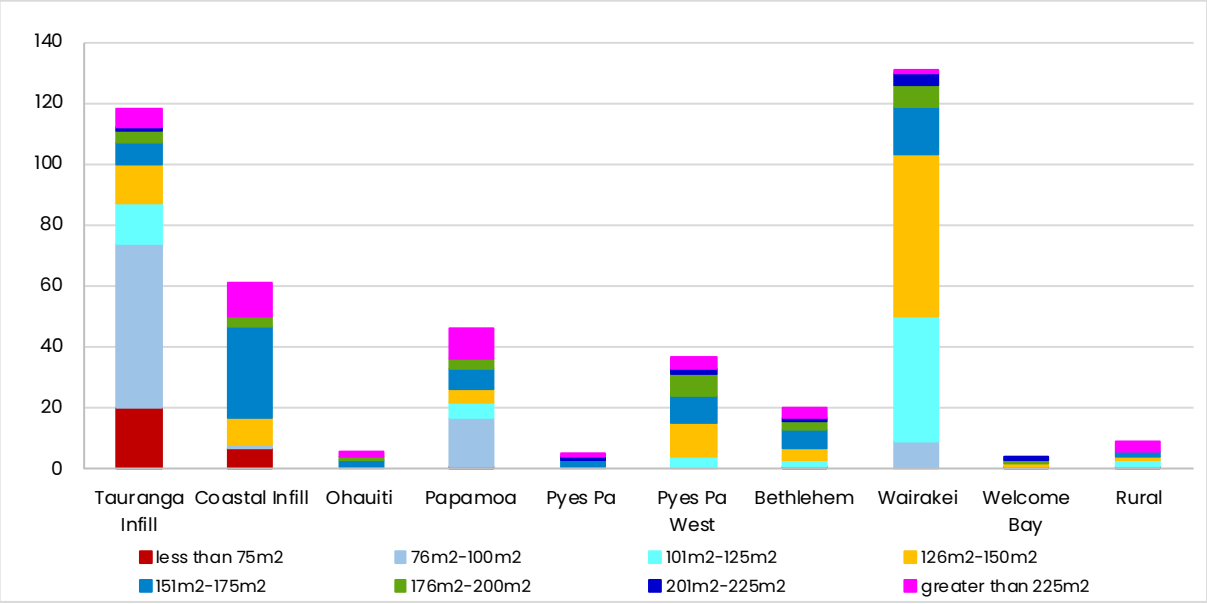
Tauranga City

In Tauranga City, smaller dwellings have become increasingly common over time, particularly those under 100m². The share of homes smaller than 75m² rose from just 2% in 2018 to a peak of 11% in 2023, dropping slightly to 7% in 2025. Similarly, the 76-100m² category increased significantly to 36% in 2024, its highest point, and dropped to 18% in 2025.

Medium-sized homes between 101m² and 150m² remained consistently popular, with the 101–125m² category peaking at 29% in 2023 and holding steady at 15% in 2025. Dwellings with 126-150m² floor areas fluctuated but returned to 22% in 2025, matching its 2022 level.

Larger homes over 150m² have substantially decreased from a combined 47% in 2018 to 18% in 2025.

Figure 43 Floor area of dwellings consented, Tauranga City, 2025

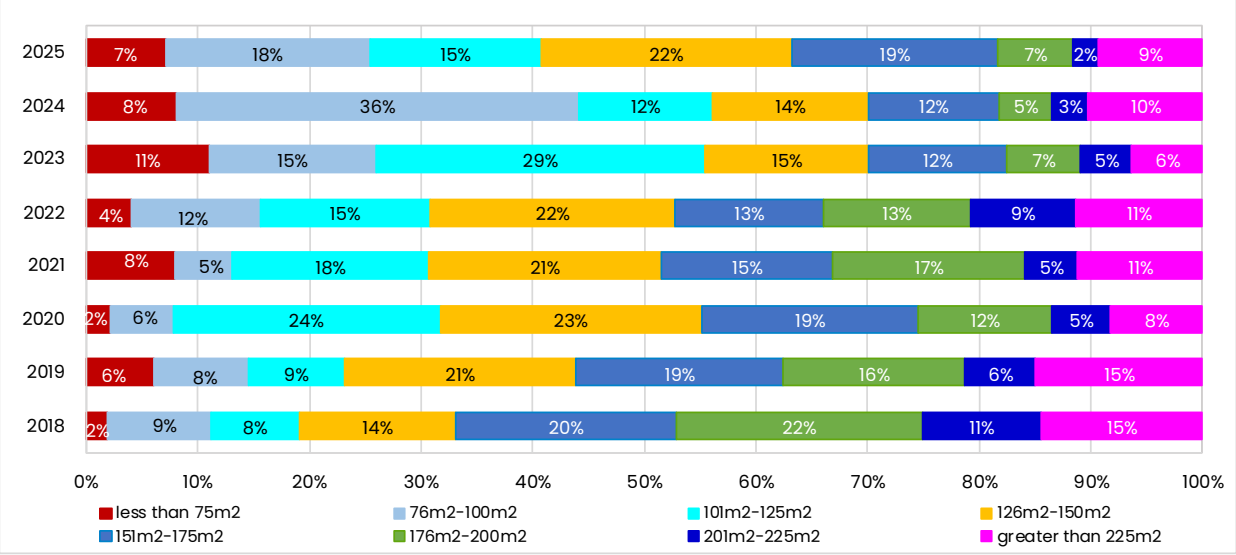


In 2025, the majority (74%) of the smaller homes were located in the existing urban areas and the remaining 26% were spread across Pāpāmoa, Bethlehem, Wairakei and Welcome Bay, each contributing between 1% to 15%. In contrast around 77% of the medium sized homes were consented in the UGAs, with Wairakei alone accounting for 57% of all dwellings in this category. Larger homes were evenly distributed in all areas, with Coastal Infill contributing 27% and all other areas ranging from 1% in Welcome Bay to 17% in Wairakei.

Table 30 Floor area of dwellings consented, Tauranga City, 2023 to 2025

Floor Area (m^2)	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
Less than 75	96	12	42	9	31	7
76-100	124	15	180	36	80	18
101-125	247	29	59	12	67	15
126-150	122	15	70	14	98	22
151-175	103	12	58	11	81	19
176-200	56	7	24	5	29	7
201-225	38	5	16	3	10	2
Greater than 225	53	6	51	10	41	9
Total	**839**	**100**	**500**	**100**	**437**	**100**

Figure 44 Proportion of dwellings consented by floor area in Tauranga City, 2018 to 2025



Western Bay of Plenty District

In line with the growth in number of smaller homes with 1-2 bedrooms, 27% of dwellings in 2025 had the smallest floor area of <50-75m^2, and a further 27% had the second smallest floor area of 76-125m^2. Combined to 54%, these reflect an increase of almost double from only 28% two years ago. Larger homes continue to decline over time. Katikati and Te Puke share a similar profile with almost all dwellings consented being smaller at <50-125m^2. Whereas in Ōmokoroa, 70% of dwellings were larger than 125m^2. Waihī Beach had a range of floor areas, as do rural and urban areas, with a tendency towards larger dwellings.

Figure 45 Floor area of dwellings consented, Western Bay of Plenty District, 2024 to 2025

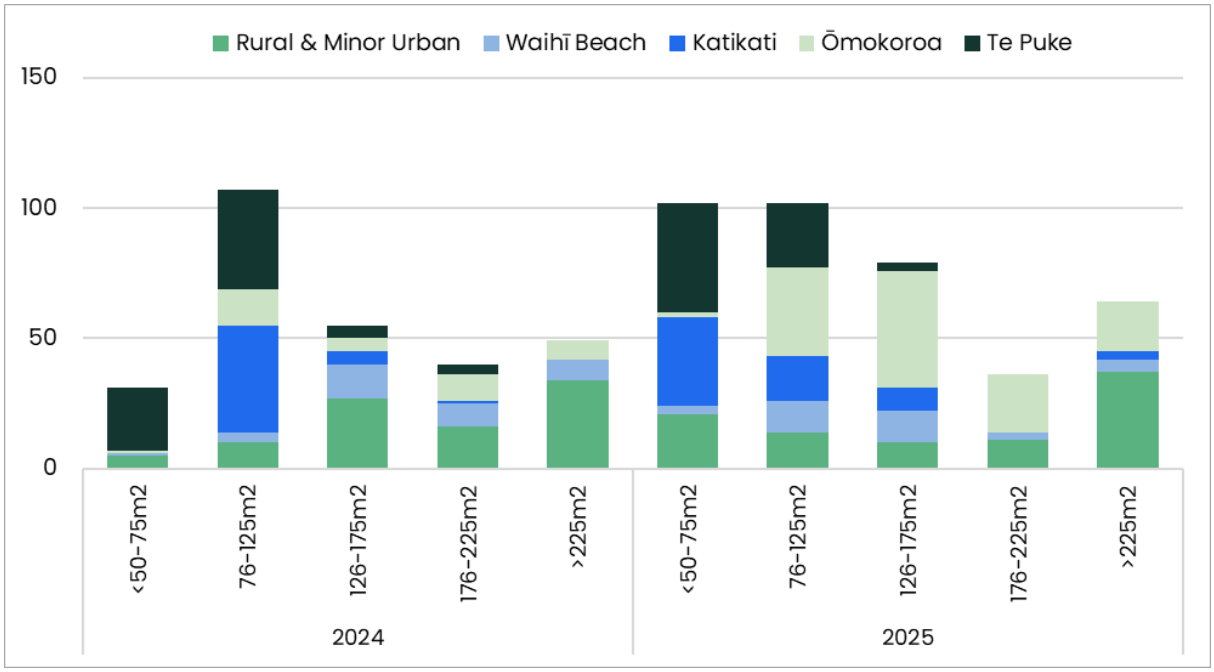


Table 31 Floor area of dwellings consented, Western Bay of Plenty District, 2023 to 2025

Floor Area (m²)	2023		2024		2025	
	Number	Percent	Number	Percent	Number	Percent
<50-75	15	4	31	11	102	27
76-125	80	24	107	38	102	27
126-175	80	24	55	20	79	21
176-225	74	22	40	14	36	9
>225	89	26	49	17	64	17
Total	**338**	**100**	**282**	**100**	**383**	**100**

Table 32 Floor area of dwellings consented, Western Bay of Plenty District Rural and Minor Urban, 2025

Floor Area (m²)	Waihī Beach	Katikati	Ōmokoroa	Te Puke	Rural and Minor Urban
<50-75	3	34	2	42	21
76-125	12	17	34	25	14
126-175	12	9	45	3	10
176-225	3	0	22	0	11
>225	5	3	19	0	37
Total	**35**	**63**	**122**	**70**	**93**

Historical Floor Area per Residential Building

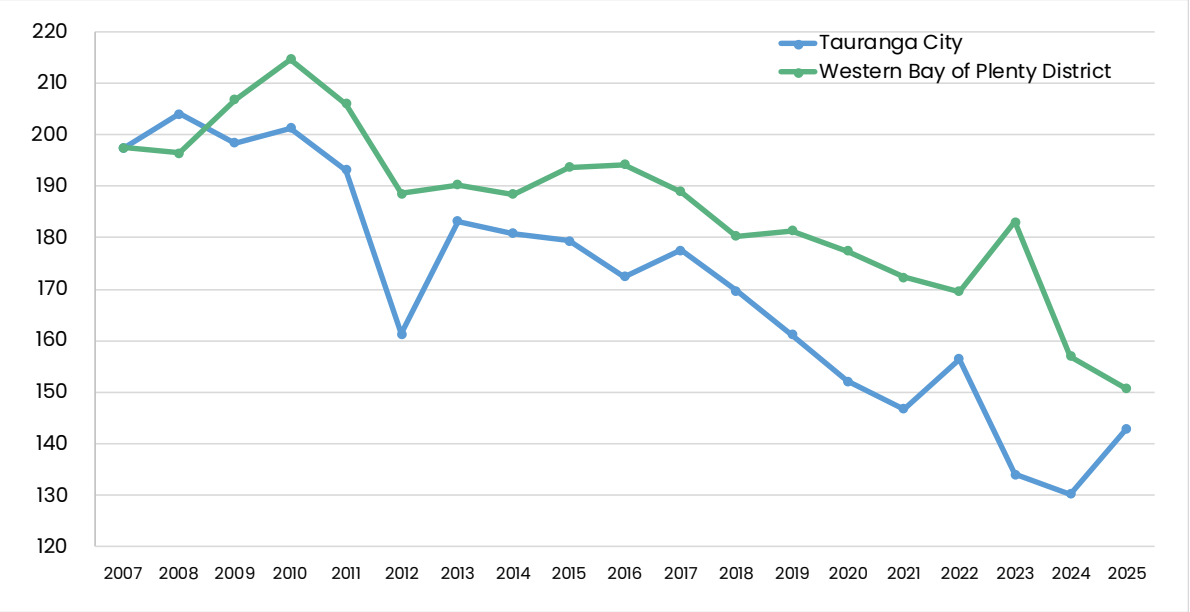
Residential statistics from Stats NZ show that homes in the sub-region have become smaller over time. In 2007, the average floor area in Tauranga City was 197 m², which decreased to 143 m² in 2025. Western Bay of Plenty District exhibited a similar trend, starting at the same average floor area of 197 m² in 2007 and reducing to 151m² in 2025.

The reduction in Tauranga City is largely driven by the increasing prevalence of multi-unit developments with smaller dwellings, particularly in the infill areas, as well as stand-alone homes built on compact sections such as those in Wairakei. A key factor is the rising construction cost which has led to the development of smaller homes to keep them affordable for buyers.

Despite the overall downward trend, Tauranga City's average floor area of 143m² in 2025 was 13m² larger than the previous year and just 1m² larger than 5 years ago. Compared to the last decade, however, it marked a cumulative reduction of 11m² indicating a shift toward denser housing preference/options among residents in the City.

In contrast, Western Bay of Plenty District's average floor area of 151m² reflected a reduction of 6m² from the previous year, 16m² in the last 5 years, and 25m² over the past decade.

Figure 46 Average floor area per residential building, Tauranga City and Western Bay of Plenty District, 2007 to 2025



Source: Stats NZ Infoshare

Table 33 Average floor area, Tauranga City and Western Bay of Plenty District

Average floor area (m²)		Trend	Change	% Change
Tauranga City				
This year	143			
Last year	130	↑	13	10%
Last 5 years (average)	142	↑	1	1%
Last 10 years (average)	154	↓	-11	-7%
Western Bay of Plenty District				
This year	151			
Last year	157	↓	-6	-4%
Last 5 years (average)	167	↓	-16	-10%
Last 10 years (average)	174	↓	-23	-13%

Source: Stats NZ Infoshare

Construction Value per Residential Dwelling

While residential buildings in the sub-region have become smaller, the average construction value behaved differently between the two local authorities.

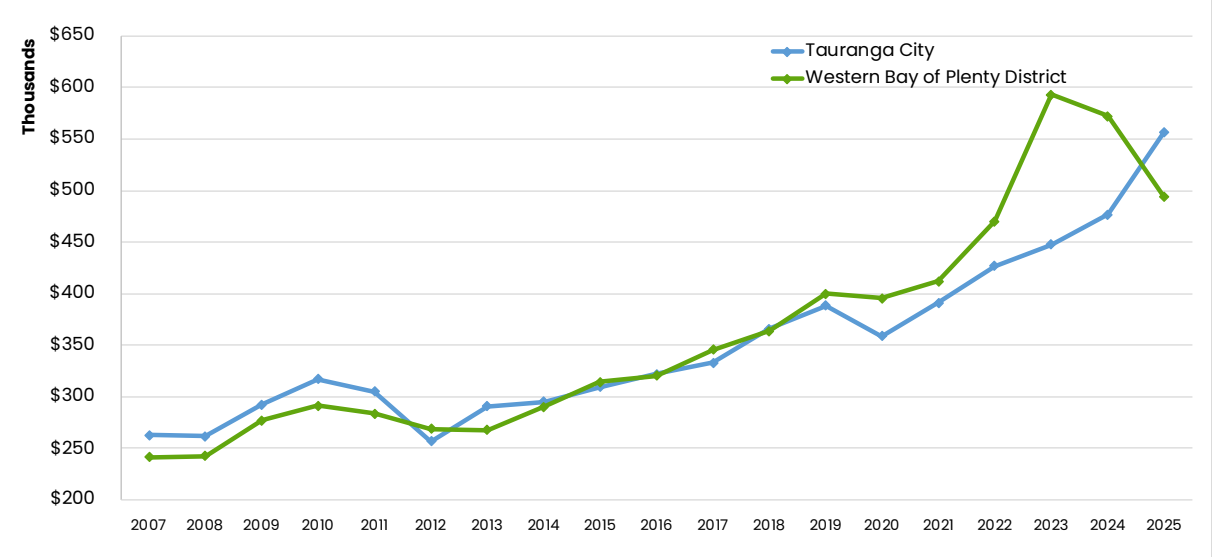
In 2025, Tauranga City's average construction value increased by 17%, nearly $80,000 more per residential building from the previous year and a significant 21% over the last 5 years. This rise in construction value is likely driven by several factors, including higher material and labour costs and broader inflationary pressures that continuously affect the construction industry as a whole.

In contrast, average construction value in Western Bay of Plenty District has decreased by 14% or a little over $72,000 per building and 3% or $14,000 cheaper than 5 years ago.

Average construction costs in Tauranga City steadily increased and reached more than $3,890 per square metre in 2025, 6% higher than the previous year. This average construction cost was heavily influenced by one development and drops to $3,736 per m^2 when the project is excluded.

In the Western Bay of Plenty District, the average construction cost was $3,280 per square metre, making it more affordable to build than the previous year. This represented a 10% decrease or $368 cheaper compared to the previous year, although it is still $213 more than the average 5 years ago.

Figure 47 Average construction value per residential building, Tauranga City and Western Bay of Plenty District, 2007 to 2025



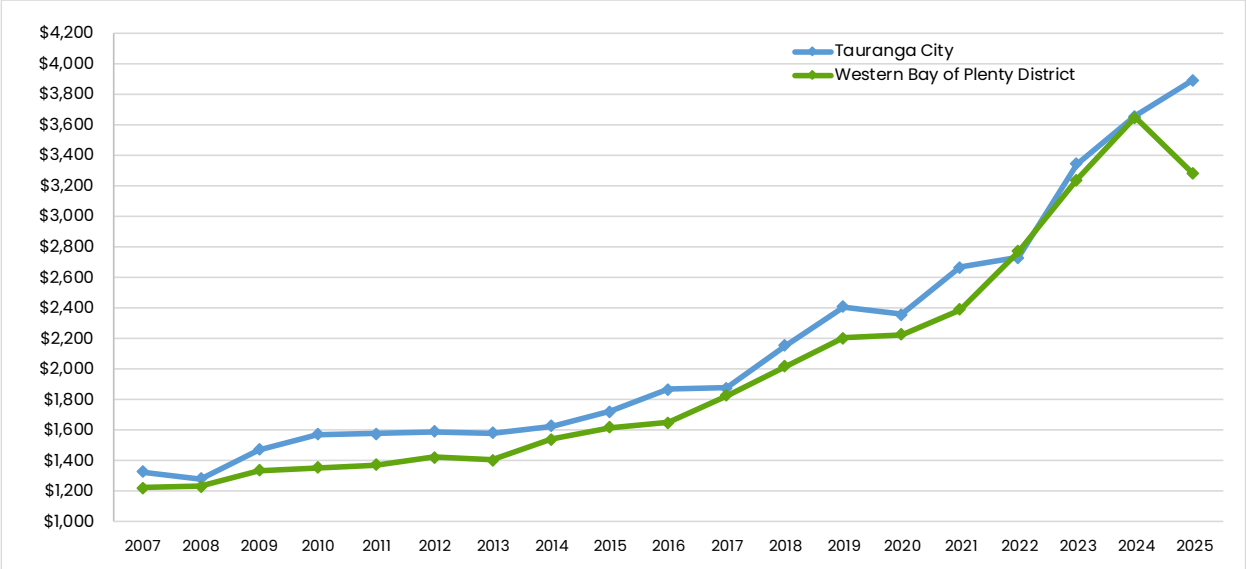
Source: Stats NZ Infoshare

Table 34 Average construction value, Tauranga City and Western Bay of Plenty District

Average construction value ($)		Trend	$ Change	% Change
Tauranga City				
This year	556,333			
Last year	476,474	↑	79,859	17%
Last 5 years (average)	459,757	↑	96,576	21%
Last 10 years (average)	406,658	↑	149,675	37%
Western Bay of Plenty District				
This year	494,176			
Last year	572,385	↓	-78,209	-14%
Last 5 years (average)	508,433	↓	-14,257	-3%
Last 10 years (average)	436,756	↑	57,420	13%

Source: Stats NZ Infoshare

Figure 48 Average construction cost per square metre, Tauranga City and Western Bay of Plenty District, 2007 to 2025



Source: Stats NZ Infoshare

Table 35 Average construction cost per square metre, Tauranga City and Western Bay of Plenty District

Average Construction Cost per m² ($)		Trend	$ Change	% Change
Tauranga City				
This year	3,892			
Last year	3,659	↑	233	6%
Last 5 years (average)	3,258	↑	634	19%
Last 10 years (average)	2,696	↑	1196	44%
Western Bay of Plenty District				
This year	3,280			
Last year	3,648	↓	-368	-10%
Last 5 years (average)	3,067	↑	213	7%
Last 10 years (average)	2,526	↑	754	30%

Source: Stats NZ Infoshare

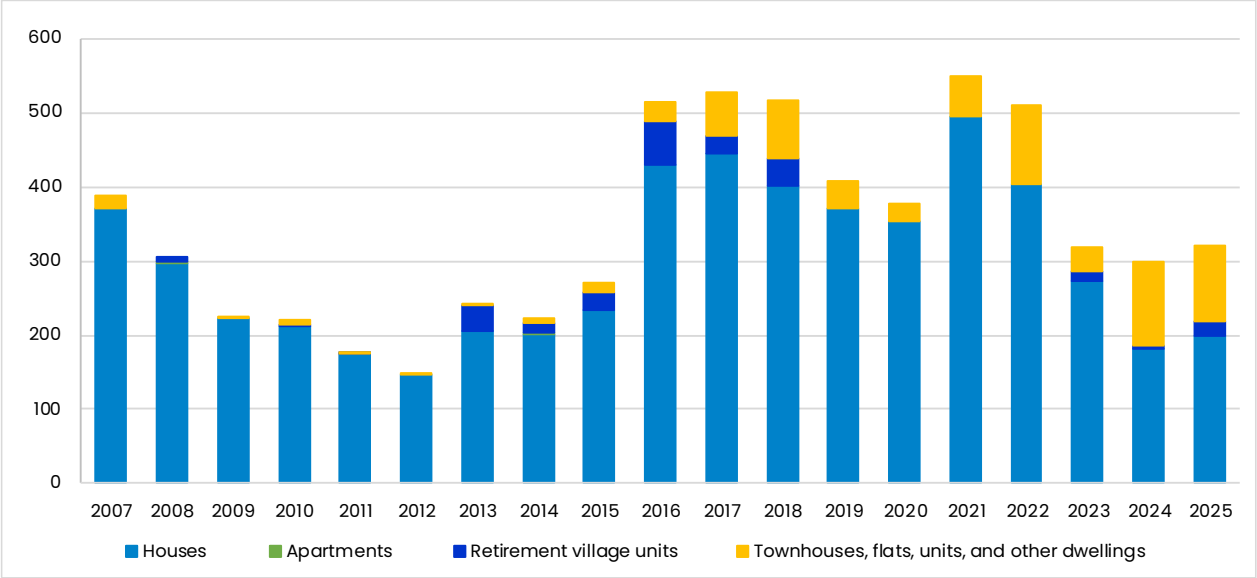
Residential Building Consents Issued by Type

Stats NZ classifies residential buildings into houses, apartments, retirement village units and townhouses, flats, units and other dwellings.[17] By this classification, stand-alone houses were the main type of dwelling consented in the sub-region in the last 17 years.

The sub-region's residential building sector has experienced a significant contraction with a combined drop of 47% in residential buildings consented from 2007 to 2025. Specifically, Tauranga City had a substantial reduction of 22% from 2024 to 2025. The trend was even more significant compared to the five and ten-year averages with reductions of 52% and 63%, respectively. Western Bay of Plenty District has an opposite trend with an increase of 7% in 2025 compared to the previous year. Compared to the previous 5 and 10 years, the District's residential sector had a reduction of 20% and 26%, respectively.

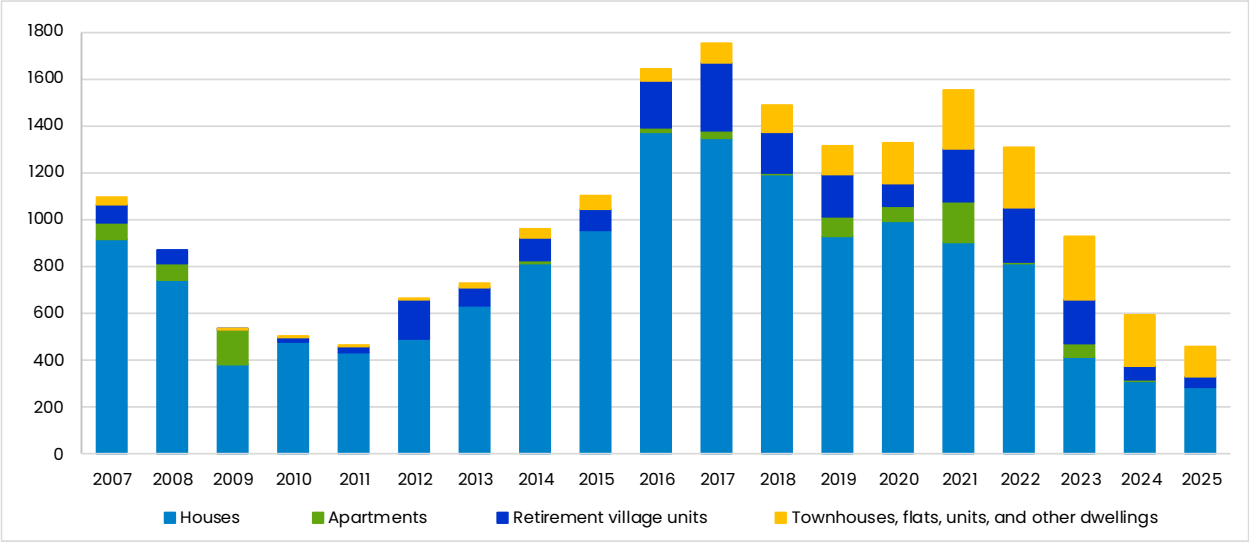
[17] Residential statistics from Stats NZ were included in addition to Figures 47 and 48 to provide time-series data from 2006.

Figure 49 Dwelling consents issued by type, Western Bay of Plenty District, 2007 to 2025



Source: Stats NZ Infoshare

Figure 50 Dwelling consents issued by type, Tauranga City, 2007 to 2025



Source: Stats NZ Infoshare

Table 36 All residential buildings, Tauranga City and Western Bay of Plenty District

All Residential Buildings		Trend	Change	% Change
Tauranga City				
This year	463			
Last year	593	↓	-130	-22%
Last 5 years (average)	969	↓	-506	-52%
Last 10 years (average)	1,237	↓	-774	-63%
Western Bay of Plenty District				
This year	321			
Last year	299	↑	22	7%
Last 5 years (average)	400	↓	-79	-20%
Last 10 years (average)	435	↓	-114	-26%

Western Bay of Plenty Sub-region				
This year	794			
Last year	892	↓	-98	-11%
Last 5 years (average)	1,369	↓	-575	-42%
Last 10 years (average)	1,672	↓	-878	-53%

Source: Stats NZ Infoshare

Over time, Tauranga City's residential building composition has moved away from a dominance of stand-alone houses toward a more diverse mix. While houses still make up a significant portion, its share has declined in recent years, the lowest being 45% in 2023. In contrast, apartments have steadily increased, reaching up to 27% in the mid 2000s, although its share has gone down to 5% in the last 5 years. Retirement village units and townhouses/flats/units have also grown, with the latter peaking at 36% in 2024, indicating a response to aging demographics and demand for more compact, accessible living options.

In Western Bay of Plenty District, the transition has been more gradual but still notable. Historically dominated by stand-alone houses, often exceeding 95% in the mid 2000s, the District has recently seen a decline to around 62% in 2025. While apartments remained non-existent, the share of townhouses, flats, and other dwellings has climbed significantly, reaching 37% in 2024. Retirement village units have progressed through the development pipeline, with a 26-unit development at Heron Crescent in Katikati accounting for 6% of new dwellings consented in 2025.

Table 37 Dwelling types, Tauranga City and Western Bay of Plenty District, 2025

Period	Territorial Authority	Houses	Apartments	Retirement Village Units	Townhouses, Flats, Units, and Other Dwellings
Last 12 months	Tauranga City	62%	-	10%	28%
	Western Bay of Plenty District	62%	-	6%	32%
Last 5 years	Tauranga City	57%	5%	15%	23%
	Western Bay of Plenty District	78%	-	2%	20%

Source: Stats NZ Infoshare

Table 38 Stand-alone dwellings, Tauranga City and Western Bay of Plenty District, 2025

Stand-alone Dwellings		Trend	Change	% Change
Tauranga City				
This year	286			
Last year	312	↓	-26	-8%
Last 5 years (average)	547	↓	-261	-48%
Last 10 years (average)	857	↓	-571	-67%
Western Bay of Plenty District				
This year	198			
Last year	182	↓	16	9%
Last 5 years (average)	311	↓	-113	-36%
Last 10 years (average)	356	↓	-158	-44%
Western Bay of Plenty Sub-region				
This year	484			
Last year	494	↓	-10	-2%
Last 5 years (average)	858	↓	-374	-44%
Last 10 years (average)	1,213	↓	-729	-60%

Source: Stats NZ Infoshare

8 Business Land Trends

SmartGrowth and the Regional Policy Statement (operative and proposed RPS) require that the business land area, uptake rates and land availability be monitored in the sub-region. This is done by using zoned land as the basis for assessment.

Commercial Zoned Land

Tauranga City

Tauranga City has 281.6 ha of Commercial zoned land as at July 2025. The two Parton Road commercial areas in Pāpāmoa combined provide the largest area of 'Commercial' zoning at 39.3 ha, 2.6 ha greater in area than the Central Business District (CBD) in Tauranga Central, refer to Table 39. Smaller neighbourhood centres include Cherrywood, Bureta, and Welcome Bay. Supermarket based neighbourhood shopping centres include Bayfair, Bethlehem, Brookfield and Gate Pa. The Tauriko commercial area near the State Highway 29/36 intersection (Tauranga Crossing) has full occupancy.

Future rezoning of land for commercial business activity is planned in Te Tumu in Pāpāmoa East. Te Tumu is proposed to be released for both business and residential development in the latter part of the 2033-2038 planning period. A map of Commercial zoned areas is provided in Appendix 7.

Table 39 Operative and future Commercial zoned land, Tauranga City, 2025

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

[1] The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 42 as Industrial will also provide for some commercial activity.

[2] Includes smaller parcels of Commercial zoned land which generally accommodate convenience type activities (dairies, takeaways, etc) such as those areas located on Cambridge and Ohauiti Roads.

Of Tauranga City's greenfield UGAs, vacant land was identified within the Bethlehem, Pāpāmoa (Palm Beach and Parton Road) and Pāpāmoa East (Wairakei) commercial zoned areas, refer to Table 40.

Table 40 Uptake of Commercial zoned land, Tauranga City, 2025

Urban Growth Area Commercial Centres[1]	Commercial Zoned land (ha)	Vacant Commercial Zoned Land (ha)	Percentage (%) Vacant
Bethlehem	12.57	0.38	3
Pāpāmoa - Palm Beach	8.55	1.07	12
Pāpāmoa - Parton Road[2]	39.28	3.39	9
Pyes Pa West – Tauriko	13.51	0	-
Pāpāmoa East - Wairakei	33.60	25.17	75
Total	**107.51**	**30.01**	**28**

[1] Areas of remaining vacant land in the Commercial zoned areas were identified and estimated using the GIS mapping tool based on aerial photographs taken in March 2025.

[2] The occupied area at Parton Road commercial area also includes a retirement home (7.4 ha), a stormwater pond (2.8 ha), a camp ground (1.2 ha) and a number of housing developments that have been completed and under construction.

Western Bay of Plenty District

Western Bay of Plenty District has a total of 52.37 ha of Commercial zoned land.

Te Puke has the largest area with 10.29 ha, closely followed by Ōmokoroa with 10.05 ha (plus 0.8 ha in the transition zone) and Katikati with 9.71 ha (plus 1.47 ha in the transition zone). Te Puna and Waihī Beach have similar amounts of commercial zoned land with 7.69 ha and 7.39 ha respectively, with an additional 1.54 ha in the transition zone at Waihī Beach.

Other settlements in the District such as Athenree, Island View/Pios Beach, Pahoia, Minden, Pukehina, Maketu and Paengaroa are serviced by comparatively small commercial areas up to 2.21 ha in size.

Table 41 Operative and future Commercial zoned land, Western Bay of Plenty District, 2025

Location	Commercial Land (ha)	
	Operative	Transitional
Waihī Beach	7.39	1.54
Athenree	0.40	
Island View-Pios Beach	0.12	
Katikati	9.71	1.47
Ōmokoroa	10.05	0.80
Pahoia	1.06	
Minden	2.21	
Te Puna	7.69	
Te Puke	10.29	
Pukehina	0.43	
Maketu	0.87	
Paengaroa	2.15	
Total	**52.37**	**3.01**

Industrial Zoned Land

Tauranga City

In Tauranga City, the largest area of industrial zoning is at Mount Maunganui, while the smallest area is at Sulphur Point, refer to Table 42 and Appendix 7.

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

Tauranga City Council approved Plan Change 35 in November 2024 that made Tauriko industrial land extension south of Belk Road operative. This provided an additional 108 ha of industrial land.

Table 42 Operative and future Industrial zoned land, Tauranga City, July 2025

Location	Industrial Land (Ha)	
	Operative	Future
Judea	23.7	
Mount Maunganui	268.1	
Greerton	12.2	
Oropi (Maleme St)	49.5	
Owens Place	6.1	
Sulphur Point	3.0	
Port Industrial	190.8	
Te Maunga	174.2	
Tauriko	237.0	
Wairakei	41.2	
Te Tumu[1]		60.3
Tauriko Extension[2]	108.0	
Total	**1,113.8**	**60.3**

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

[2] Element IMF - Developer of Tauriko Business Estate advised that Tauriko extension south of Belk Road in Tauriko is expected to yield approximately 108 ha of net industrial land.

Table 43 shows that as at July 2025, Tauranga City had 912.51 ha of general industrial zoned land, with approximately 28% (255.64 ha) remaining vacant. A significant share of this vacant land is concentrated in the Tauriko area, including 66 ha within the existing Tauriko industrial zone and 108 ha in the Tauriko extension south of Belk Road. Together, these areas account for around 68% of the City's total vacant general industrial land.

In the Port Industry zone, only 1.5% (or 2.9 ha) of the 190.5 ha of Port Industry zoned land was vacant as at July 2025.

Table 43 Uptake of Industrial zoned land, Tauranga City, July 2025

Area	Vacant (ha)[1]	Partially Vacant (ha)	Total Vacant	Vacant but Not Available (ha)	Partially Vacant but Not Available	Occupied (ha)	Total Occupied (ha)	Total Area (ha)[3]
General Industrial Zoned Land[2]								
Judea	0	0	0	0	3.26	20.46	23.73	23.73
Mount Maunganui	5.25	9.02	14.27	0.14	0	253.07	253.21	267.48
Oropi	0.89	0	0.89	0.59	5.28	42.72	48.58	49.47
Greerton	0	0.41	0.41	0.00	0	11.87	11.87	12.28
Sulphur Point	0	0	0	0.07	0	2.97	3.04	3.04
Te Maunga	35.64	0.19	35.83	8.42	25.33	104.61	138.36	174.19
Owens Place	0	0	0	0	0	6.13	6.13	6.13
Wairakei[4]	30.21	0.00	30.21	3.35	0	0	3.35	33.56
Tauriko	63.95	2.08	66.03	20.42	0	148.18	168.60	234.63
Tauriko Extension[5]	0	0	108.00	0.00	0	0.00	0.00	108.00
Total	**135.94**	**11.70**	**255.64**	**32.99**	**33.87**	**590.01**	**656.87**	**912.51**
Port Industry Zone[3]								
Within Port Security Fence	0.58	1.01	1.60	0	0	155.53	155.53	157.13
Outside Port Security Fence	0.07	1.29	1.35	0	0	32.00	32.00	33.35
Total	**0.65**	**2.30**	**2.95**	**0**	**0**	**187.53**	**187.53**	**190.48**

[1] "Vacant" - no structures and largely clear of plant and material. "Partially Vacant" - up to and including 50% of the land contains structures, plant or material. "Not available" - land that is unsuitable or not available for development, due to being on unusable terrain, or designated for reserves, stormwater or future wastewater treatment use. "Occupied" – over 50% of the land contains structures, plant or material, or construction is ongoing at the time of the survey.

[2] General Industrial zoned land includes land zoned Tauriko Industry, Industry, and Pāpāmoa East Employment.

[3] Port Industry Zone land is surveyed separately as the majority of this zone applies to the Port of Tauranga which is not accessible for survey, and its function varies from the general industrial areas.

[4] 3.35 ha balance of the Wairakei industrial land for Pāpāmoa East Interchange and classified "Vacant but not available."

[5] 108 ha of industrial land at Tauriko extension (south of Belk Road) as advised by Element IMF.

While there was 255.6 ha identified as vacant industrial land, it is estimated that this will decrease as certain areas are developed for industrial activity (e.g. as parts of industrial zoned land is used for road corridors and stormwater reserves, and steep or low-lying undevelopable land is deducted), see Table 44.

The 2025 Industrial Land Survey estimated 23.6 ha of zoned industrial land in Tauriko would be lost to escarpments, and future roads and stormwater ponds, leaving approximately 62.7 ha of vacant land in Tauriko industrial area. The survey also noted the ongoing subdivision in the area where a subsequent certificate of title is expected to be issued. Of the 66 ha of vacant land, approximately 55.8 ha was ready to be occupied for industrial activity (subdivided, earthworked, services in place). A few parcels have current or lapsed building consents for business or commercial purposes. More opportunities to purchase or lease land from new owners compared to the previous year's survey (August 2024) was observed during the July 2025 survey, with 40 properties with buildings and 14 vacant sites available for purchase or lease in Tauriko.

Table 44 Status of vacant industrial zoned land, Tauranga City, July 2025

General Industrial Zone	Gross (all vacant land)	Nett (estimate)[1]	Ready to go land[2]
Judea			
Mount Maunganui	14.27	14.27	14.27
Oropi	0.89	0.89	0.89
Greerton	0.41	0.41	0.41
Sulphur Point			
Te Maunga	35.83	27.98	2.59
Owens Place			
Wairakei	30.21	22.66	
Tauriko[3]	66.03	62.7	55.81
Tauriko extension[4]	108.00		
Subtotal	**255.64**	**128.94**	**73.97**
Port Industry Subtotal	**2.95**	**2.95**	**2.95**
Total	**258.59**	**131.89**	**76.92**

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

Of the vacant industrial land in Tauranga City, 74 ha of industrial land was assessed to be ready to be occupied for industrial activity, and 84 properties with buildings and 14 vacant sites were available for purchase or lease as at July 2025.

The extension of Tauriko Business estate south of Belk Road has been zoned for industrial use, adding approximately 108 ha to the City's industrial land supply. However, this land area is expected to reduce over time as land is developed for infrastructure such as roads, stormwater ponds, and as areas unsuitable for development are excluded.

Western Bay of Plenty District

Western Bay of Plenty District has 619.50 ha of operative industrial land in total.

Eastern areas have the largest amount of industrial land available in the District with 270.39 ha in Rangiuru, 187.42 ha in Te Puke, and 9.57 ha in Paengaroa.

In the western part of the District, Katikati has the largest area of industrial land at 65.95 ha. Te Puna Rural Business Zone contains 30.58 ha, with Ōmokoroa having a similar amount of 30.02 ha. Waihī Beach has an additional 25.57 ha of industrial land.

Table 45 Operative Industrial zoned land, Western Bay of Plenty District, 2025

Location	Industrial Land (ha) 2025[6]
	Operative
Waihī Beach	25.57
Katikati	65.95
Te Puna	30.58
Ōmokoroa	30.02
Te Puke	187.42
Rangiuru	270.39
Paengaroa	9.57
Total	**619.50**

In Western Bay of Plenty District, 82% or 503.64 ha of industrial zoned land is vacant, 15% or 92.61 ha is occupied, and 3% or 16.10 ha is allocated as reserve.

The largest areas of occupied industrial land are in Te Puke with 54.37 ha occupied, followed by Katikati with 24.49 ha. Smaller areas are occupied in Paengaroa, Rangiuru and Ōmokoroa. Vacant and partially vacant areas of available industrial land (able to be built on now) exist in Katikati and Te Puke, with partially vacant land available in Rangiuru and Ōmokoroa.

Of the total vacant industrial land of 503.64 ha, 273.16 ha is vacant but not yet available because more services like water connection and roading need to be added before the land is available, and 147.81 ha is partially vacant but not yet available.

Table 46 Uptake of Industrial zoned land, Western Bay of Plenty District, 2025

Industrial Zoned Land 2024[1]								
Area	**Vacant (ha)**	**Vacant but not yet available[2] (ha)**	**Partially Vacant (ha)**	**Partially vacant but not yet available (ha)**	**Total Vacant (ha)**	**Total Occupied (ha)**	**Reserve**	**Total Area (ha)**
Waihī Beach		25.57			**25.57**			25.57
Katikati	2.98	14.93	4.82	16.46	**39.19**	24.49	2.22	65.90
Te Puna				30.58	**30.58**			30.58
Ōmokoroa		18.53	5.82	3.56	**27.91**	2.09		30.00
Te Puke	5.62	38.93	26.41	42.72	**113.68**	54.37	13.77	181.82
Rangiuru		174.20	37.02	54.49	**265.71**	3.09		268.80
Paengaroa		1.00			**1.00**	8.57		9.57
Maketu							0.11	0.11
TOTAL	**8.60**	**273.16**	**74.07**	**147.81**	**503.64**	**92.61**	**16.10**	**612.35**
Percentage					**82%**	**15%**	**3%**	**100%**

[1] Uptake of industrial zoned land includes only vacant or non-vacant lots, and excludes roads and reserves.
[2] "Vacant but not yet available" is an industrial lot that is vacant but has not been developed for industrial use.
[3] "Partially vacant" is an industrial zoned lot that has been partially developed.
[4] "Partially vacant but not yet available" is an industrial zoned lot that may have a dwelling on it and has not been developed for industrial use.

Business Land Capacity

SmartGrowth completed the Housing and Business Capacity Assessment (HBA) as required by the NPS-UD in March 2023.[18] The HBA assesses the demand for housing and business land, and outlines the amount of development capacity needed to sufficiently meet that demand. Under the NPS-UD a Future Development Strategy (FDS) is also required to respond to the HBA. The FDS spatially sets out how and where the local authorities will meet long term growth requirements as identified in the HBA. An updated SmartGrowth Strategy, which incorporates the FDS requirements, was completed by SmartGrowth in 2024.[19]

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

- The sub-region has a total demand of 690 ha nett developable areas. An additional 20% is required to account for the land needed for roads, reserves and infrastructure corridors, in addition to the lot areas to be built upon.

[18] Housing and Business Capacity Assessment 2022, SmartGrowth, March 2023.
[19] SmartGrowth Strategy 2024-2074, SmartGrowth, July 2024.

- Tauranga City needs at least 320 ha of new greenfield industrial land to meet the demand requirements of employment, allowing for nett developable area and the required competitive margins.
- Western Bay of Plenty District has sufficient planned business land to meet demand which includes additional land at Rangiuru, Waihī Beach, Te Puke, Te Puna and Katikati.
- The industrial business land demand requirements are not able to be met within Tauranga City, which does not have suitable greenfield or brownfield land available.
- The sub-region has a latent demand for industrial land. A lead time of 7-10 years is needed to rezone suitable industrial land, provide the necessary infrastructure, and make the land available to build and use.
- Business land demand requirements are driven by the economic model prepared by Market Economics for SmartGrowth based on employment. The SmartGrowth partnership recognises the need to scale-up these demand requirements to provide sufficient land over the 30-year period and recognise current industrial land availability constraints.
- The business land requirements assume no existing industrial land resource is lost as a result of important matters such as reverse sensitivity, climate change or urban regeneration. New business land may be required for existing areas that may possibly need to relocate due to, for example, sea level rise etc. over the next 50-100 years. This is outside the 30 year window of the HBA.
- Critically, where business land is located is important for the sub-region. Demand for industrial land is highest within or close to Tauranga as the sub-regional hub, and can't easily be found with new business land areas further afield in the wider Western Bay of Plenty sub-region. Rangiuru Business Park and Tauriko Business Estate serve both local and sub-regional needs, however demand is dependent on location, with coolstores an example of needing to locate in close proximity to horticultural areas, and businesses servicing the Auckland and Waikato markets needing to locate in proximity to the key transport corridors to those regions.

In response to the 2022 HBA findings, the SmartGrowth Strategy 2024-2074 confirmed business land allocations and identified that in addition to the planned business land provision, a further 300 to 400 ha of greenfield land is required to support business (industrial) land uses within the sub-region over the next 30 years. Potential locations to provide for future business land demand needs in the northern and western growth corridors have been identified at Ōmokoroa/Apata, Upper Belk Road and Pukemapu. Potential business land locations in the Eastern growth corridor are not required within the period of the FDS.

Business Land to Population Ratio

SmartGrowth requires that the business land to population ratio be monitored, refer to Table 47. The 'business land' ratio has been split into Industrial and Commercial zoned land. Industrial zoned land is considerably higher in total than commercial zoned land, resulting in more industrial land per resident, and reflecting the more expansive nature of this type of business activity.

Table 47 Ratio of Industrial and Commercial zoned land per person, Western Bay of Plenty Sub-region, 2025

Territorial Authority	2025 Estimated Resident Population[1]	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
Tauranga City	161,000	1,174.10	0.0073	283.00	0.0018
Western Bay of Plenty District	60,100	619.50	0.0103	55.38	0.0009
Total	**221,100**	**1,793.60**	**0.0081**	**338.38**	**0.0015**

[1] Stats NZ population estimate as at October 2025

Industrial and Commercial Building Consents Issued

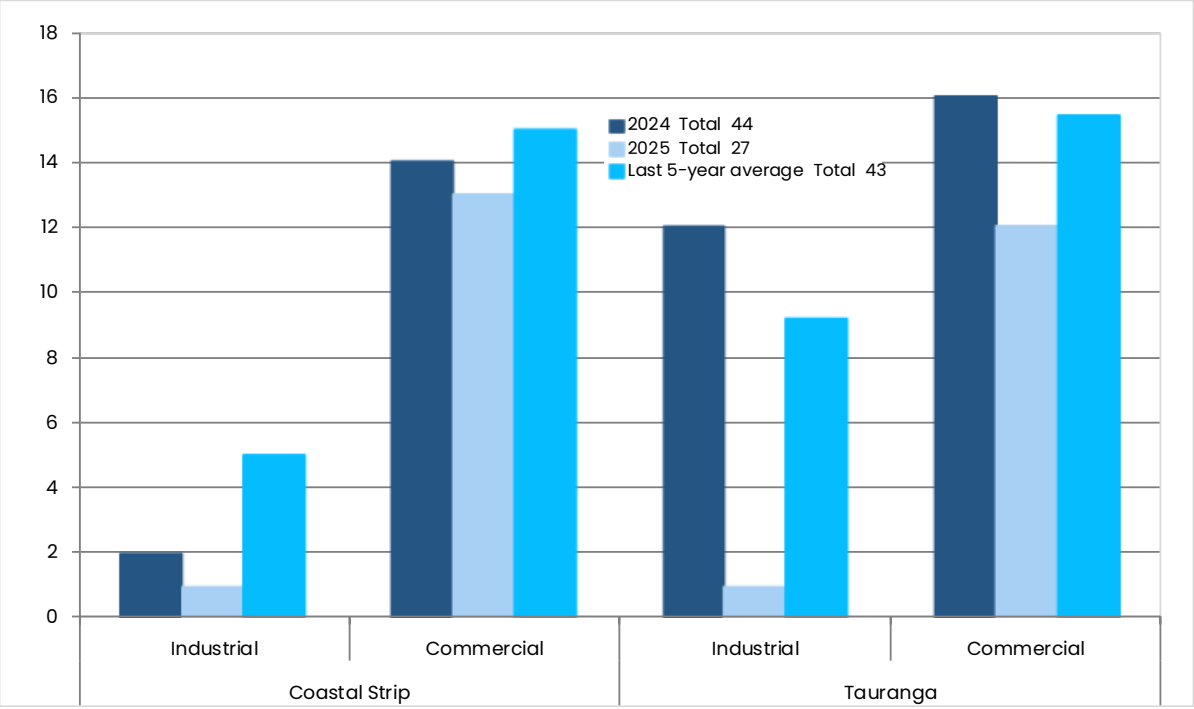
Tauranga City

In the past decade, the 2025 period marked the lowest level of business activity in Tauranga City, with only 27 new industrial and commercial buildings consented, 17 buildings fewer than the previous year's total of 44 buildings and 16 below the last 5 year average.

Of the 27 buildings, the Coastal Strip and Tauranga area had nearly equal shares, with the Coastal Strip recording just one more building than Tauranga. Both areas consented only one industrial building, while the Coastal Strip had a slight edge in commercial buildings with one more than Tauranga area.

Although these changes were evident, the overall number of new buildings in these categories remained relatively small, hence fluctuations should be considered within this context.

Figure 51 New industrial and commercial buildings, Tauranga City, 2023 to 2025



Western Bay of Plenty District

New Commercial buildings consented increased from 8 consents in 2024 to 10 in 2025. This year consents were for: Waihī Beach Library and service centre; a Lifeguard Hub and storage facility in Bowentown; visitor centre and ranger office for Omanawa Falls; a childcare centre in Ōmokoroa; a coolstore for EastPack in Te Puke; 2 coolstores for DMS Progrowers in Te Puke; accommodation for seasonal kiwifruit workers in Paengaroa; a carwash facility in Te Puke; and relocation of a farm building to be a rural museum in Paengaroa. The Industrial consent issued was for 6 Industrial units in Katikati.

Table 48 Consents for Industrial and Commercial buildings, Western Bay of Plenty District, 2014 to 2025

Year	Industrial Building Consents	Commercial Building Consents
2014	0	0
2015	0	0
2016	4	2
2017	6	5
2018	4	3
2019	0	8
2020	1	3
2021	1	3
2022	0	3
2023	0	10
2024	1	8
2025	1	10
5 Year Average	**0.6**	**6.8**

Non-Residential Building Consents Issued by Type

Stats NZ publishes non-residential consent statistics for all local authorities. It is important to note that "consents" refers not only to approvals for new buildings, but also to project stages and additions/alterations to existing buildings. For instance, the construction of 90 Devonport Road building involved multiple separate consents throughout its development.

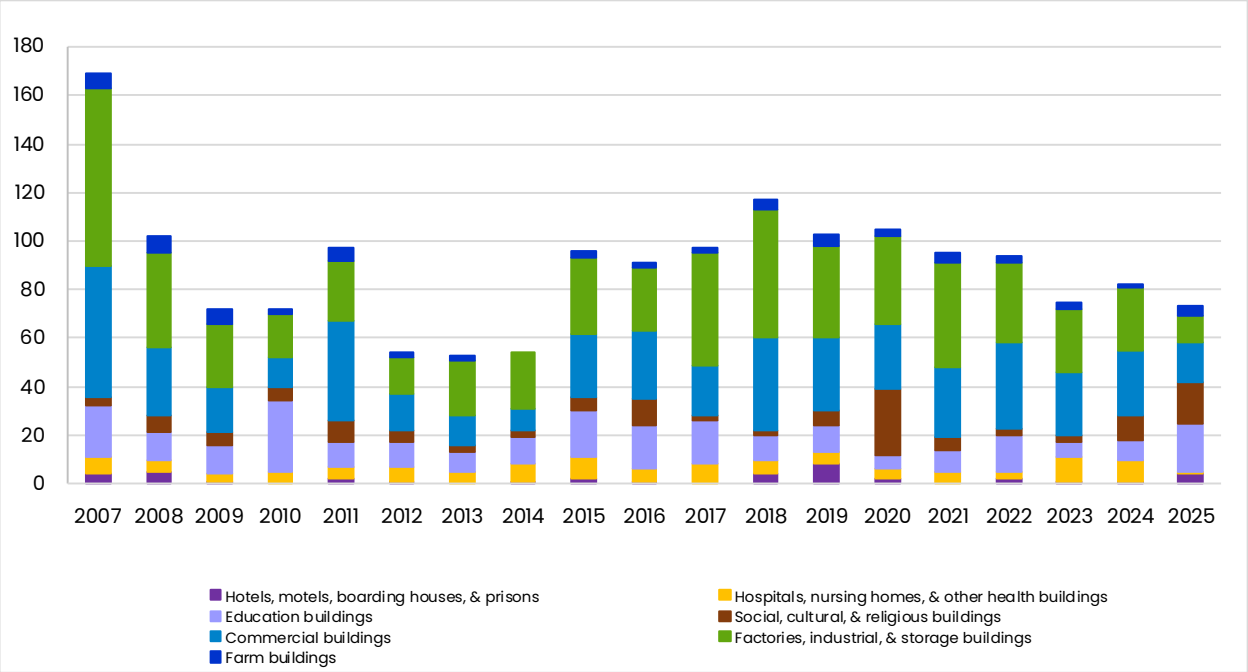
In the sub-region, the count of non-residential building consents varied notably between the Western Bay of Plenty District and Tauranga City, reflecting their distinct characteristics and economic activities.

Western Bay of Plenty District approved more consents related to farm buildings, given its predominantly rural landscape, while Tauranga City issued more consents for commercial, industrial, factory, and storage facilities. Between 2007 and 2025, these buildings comprised 62% to 86% of all non-residential building consents issued, with the lowest proportion recorded in 2025.

In 2025 the sub-region issued a total of 135 non-residential building consents, 7 less consents than the previous year. Tauranga City accounted for 73 of these consents and Western Bay of Plenty District had 62 consents.

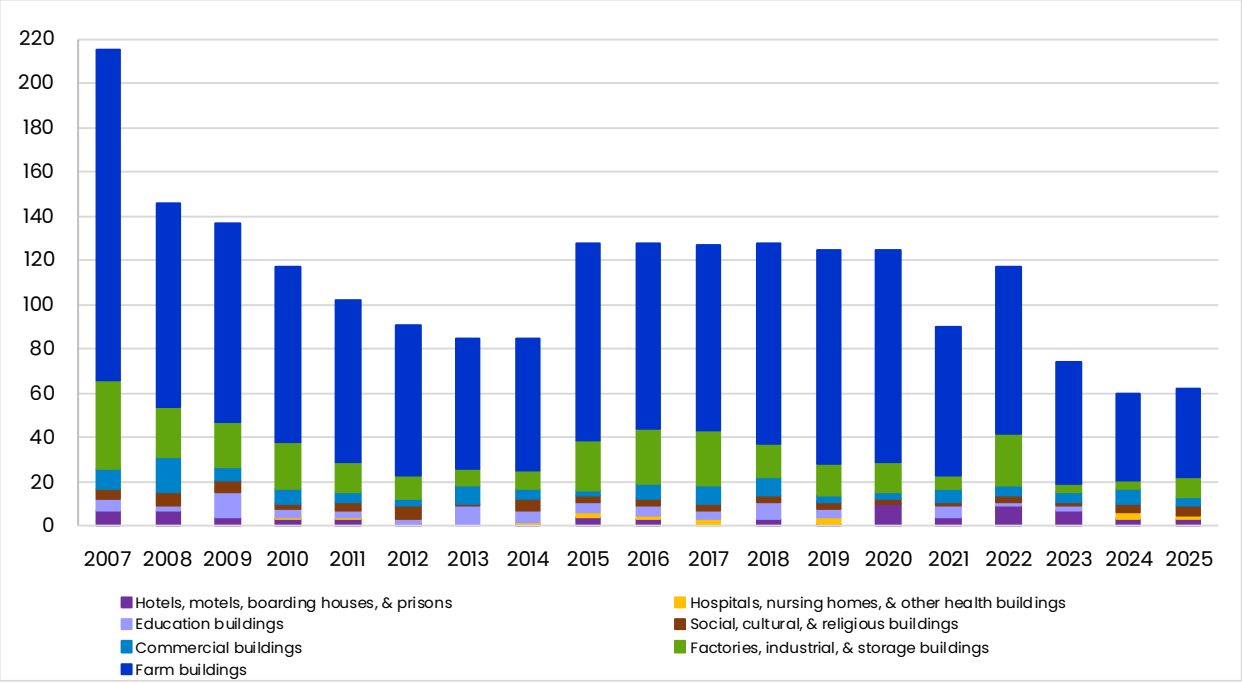
Of the 73 non-residential building consents issued in Tauranga City, 27 (37%) were for commercial, industrial, factory, and storage buildings. For Western Bay of Plenty District, 40 (65%) of the non-residential building consents were for farm buildings.

Figure 52 Non-residential building consents, Tauranga City, 2007 to 2025



Source: Stats NZ Infoshare

Figure 53 Non-residential building consents, Western Bay of Plenty District, 2007 to 2025



Source: Stats NZ Infoshare

Table 49 Non-residential building consents, Tauranga City and Western Bay of Plenty District

Non-residential building consents		Trend	Change	% Change
Tauranga City				
This year	73			
Last year	82	↓	-9	-11%
Last 5 years (average)	84	↓	-11	-13%
Last 10 years (average)	93	↓	-20	-22%
Western Bay of Plenty District				
This year	62			
Last year	60	↑	2	3%
Last 5 years (average)	81	↓	-19	-23%
Last 10 years (average)	104	↓	-42	-40%
Western Bay of Plenty Sub-region				
This year	135			
Last year	142	↓	-7	-5%
Last 5 years (average)	165	↓	-30	-18%
Last 10 years (average)	197	↓	-62	-31%

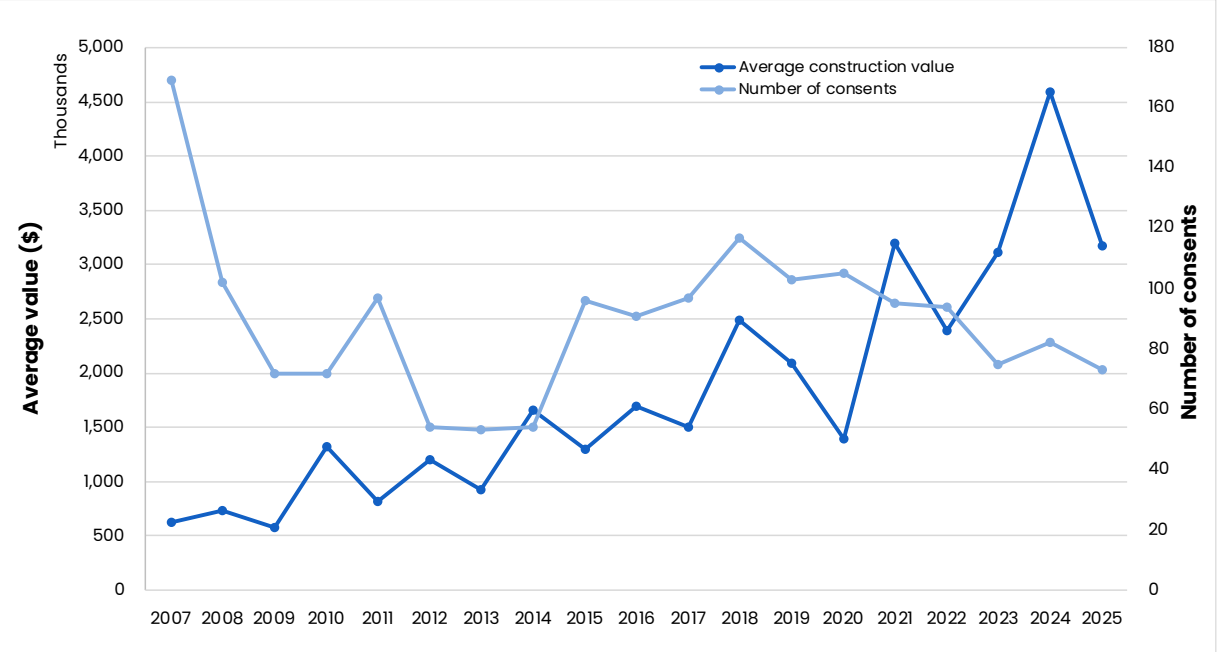
Source: Stats NZ Infoshare

Non-Residential Building Consents by Construction Value

In the last eight years, construction activity in the sub-region has declined significantly, dropping from a peak of 245 non-residential building consents in 2018 to just 135 consents in 2025. This represents a slump of 45% over the period, and a dip of 5% compared to the previous year.

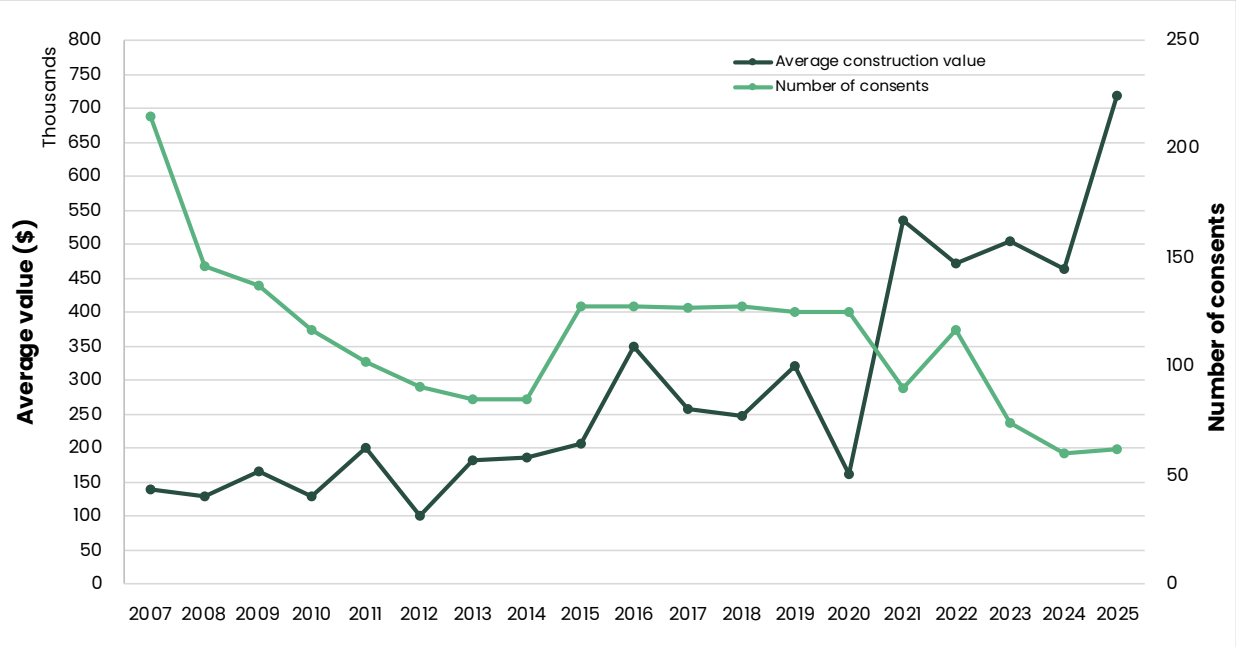
Changes in average construction values for non-residential consents from 2024 to 2025 showed a striking contrast between Tauranga City and Western Bay of Plenty District. While Western Bay of Plenty District experienced a sharp increase of 55%, Tauranga City posted a significant decline of 31%.

Figure 54 Non-residential building consents and average construction value, Tauranga City, 2007 to 2025



Source: Stats NZ Infoshare

Figure 55 Non-residential building consents and average construction value, Western Bay of Plenty District, 2007 to 2025



Source: Stats NZ Infoshare

Commercial and Industrial Building Consents

Commercial building consents in Tauranga City fluctuated considerably in terms of cost between 2007 and 2025. The lowest recorded cost was $5.7 million in 2009 during a period of subdued development activity. The highest cost was $169 million in 2024 when commercial projects also comprised a significant share of 45% to the total cost of non-residential consents issued in the City. However, this level of activity was not sustained and declined sharply the following year, with commercial consents falling to $60 million and accounting for just 26% of the total cost of non-residential consents issued.

Over the 18-year period from 2007 to 2025, the cost of factories, industrial and storage building consents in Tauranga City showed only modest growth, from $47 million to $53 million despite the considerable time elapsed. This relatively flat trend suggests a long-term consistency in industrial investments, with 2025 costs only slightly exceeding those recorded nearly two decades earlier. Within this steady pattern, the cost of consents surged to an unprecedented $229.2 million in 2021, which also accounted for 76% of the total non-residential consents cost. This may have been possibly driven by pandemic-related urgency and strong demand for logistics and warehousing infrastructure, an example being the Winstone Wallboards factory at Tauriko. The 2025 share of 23% of these building types to all non-residential buildings was several points below the long term average of 36%.

When combined, commercial and industrial building consents made up 49% of all non-residential building consents issued in 2025, well below the long term average share of 67%.

Table 50 Value and proportion of commercial and industrial building consents to all non-residential building consents, Tauranga City, 2007 to 2025

	Commercial building consents		Factories, industrial, and storage building consents	
Year	Value of consents (million $)	Percent of non-residential building consents	Value of consents (million $)	Percent of non-residential building consents
2007	40.7	39	46.7	45
2008	24.7	33	33.7	45
2009	5.7	14	23.7	57
2010	8.5	9	8.9	9
2011	40.5	51	19.0	24
2012	36.0	56	7.9	12
2013	8.5	18	22.4	46
2014	15.0	17	37.9	42
2015	48.8	39	47.8	38
2016	69.2	45	42.1	27
2017	28.9	20	46.8	32
2018	161.4	56	74.4	26
2019	62.8	29	94.6	44
2020	50.0	34	58.0	40
2021	27.0	9	229.2	76
2022	38.6	17	88.8	40
2023	101.0	43	62.0	27
2024	169.0	45	90.4	24
2025	59.7	26	53.0	23

Source: Stats NZ Infoshare

In Western Bay of Plenty District, the value of commercial building consents have remained relatively modest over the 18-year period, at $1.6 million in 2007 to $3.5 million in 2025. In terms of proportion, these were equivalent to 5% and 8% of all non-residential consents. The lowest value was recorded at $0.7 million in 2019 and the highest was $11.4 million in 2023.

The share of commercial consents within the total non-residential consents varied widely, with the lowest proportion recorded in 2019 at 2% of all non-residential consents issued. While the value was highest in 2023, its share of 31% during this time remained below from the highest recorded proportion of 44% in 2013.

From 2024 to 2025, the value of non-residential consents related to factories, industrial, and storage buildings increased from $6.3 million to $21.3 million. This marked a corresponding growth in share to all non-residential building consents from 23% to 48%, and a significant increase from its long term average share of 40%.

The recent growth in the combined share of commercial and industrial consents suggests strengthening focus on industrial and logistics infrastructure, reflecting broader economic priorities and interest toward production and service oriented development in the District.

Table 51 Value and proportion of commercial and industrial building consents to all non-residential building consents, Western Bay of Plenty District, 2007 to 2025

	Commercial building consents		Factories, industrial, and storage building consents	
Year	Value of consents (million $)	Percent of non-residential building consents	Value of consents (million $)	Percent of non-residential building consents
2007	1.6	5	18.0	60
2008	5.5	29	5.7	30
2009	0.8	4	14.0	62
2010	2.9	19	6.0	39
2011	6.8	33	6.4	32
2012	0.8	9	1.9	21
2013	6.8	44	1.2	8
2014	3.5	22	2.4	15
2015	1.1	4	12.6	48
2016	5.7	13	19.3	43
2017	5.3	16	17.5	53
2018	2.3	7	14.8	47
2019	0.7	2	11.6	29
2020	0.8	4	8.4	42
2021	5.5	12	32.7	68
2022	3.9	7	37.0	67
2023	11.4	31	7.8	21
2024	4.4	16	6.3	23
2025	3.5	8	21.3	48

Source: Stats NZ Infoshare

9 Current and Future Monitoring Reports

SmartGrowth continues to report on key SmartGrowth, Regional Policy Statement and NPS-UD indicators on an annual basis. Monitoring results, including housing and business indicators, are recorded either monthly or quarterly, depending on the frequency of release or availability of data from providers/sources.

With the NPS-UD 2020 minimum requirement of annual publication, the quarterly monitoring results are published annually and/or incorporated in the SmartGrowth Development Trends Report (DTR).

Both Tauranga City and Western Bay of Plenty District Councils started monitoring and reporting on residential section size, dwelling typology and number of bedrooms for dwellings consented six years ago, with results published in the Development Trends Report.

This year's report includes densities being achieved in the urban areas of the sub-region. Density mapping work in Western Bay of Plenty District started in 2023 and has been refined this year, while Tauranga City Council has been monitoring and reporting dwelling densities in the UGAs since 2019. This work will be continuously undertaken and results will be published in future reports. Future density mapping work in Tauranga City will include the established/infill parts of the City and assumed development areas.

Appendix 1

MHUD/MFE Indicators for the National Policy Statement on Urban Development[20]

Dwelling sale prices (actual) (Section 4.1)

Technical notes

Prices are presented in nominal terms, that is, they have not been adjusted for general inflation. Median prices are heavily influenced by the sale of existing stock, as new builds comprise a small proportion of total sales in any given period. They are also affected by the composition of sales, including the size and quality of dwellings, as well as type (houses, apartments, etc), which may vary by area and over time. This median price series is not adjusted for size and quality of dwellings.

Interpretation

This indicator shows the median prices of residential dwellings sold in each quarter. It provides a broad and recognisable picture of absolute price levels and is therefore a useful starting point for analysing price trends. Significant dwelling price growth can increase the feasibility of new developments (eg, suburban apartments). On the other hand, rapid price increases can fuel land banking, where landowners expect continued future increases.

In general, if dwelling prices are rising, we would expect to see dwelling building consent numbers rise in response. If prices are rising without evidence of growth in consents, it may indicate a constraint on supply and should motivate further investigation.

Variations in prices between different areas may reflect a range of factors, including differences in demand for housing due to different wage levels or different levels of consumer and natural amenities; or imbalances between demand and supply due to constraints on housing development. Where price differences persist over long periods of time and coincide with similar rates of housing supply, they are more likely to reflect differences in demand.

Price trends reflect many different forces acting in the market, including but not limited to the effect of urban planning policies. Developing a narrative about which factors are driving price trends is challenging but can provide useful insights for a local authority's planning response to these trends.

Nominal dwelling rents (Section 4.2)

Technical notes

This indicator reflects nominal mean rents as reported in bonds lodged with HUD, in dollars.
The data is for private bonds (private landlords) and hence excludes social housing.

The mean used is the geometric mean. The reason for using this mean is that rents cluster around round numbers, and tend to plateau for months at a time (spiking up by say $10 or $20 at a time). This makes analysis of time series difficult and using the geometric mean is a way of removing this clustering effect.

There are a number of caveats on these data series:

- Property type is self-reported so can be inconsistent, particularly the distinction between apartment and flat as there is no clear separation between these categories.
- It captures bonds at the time of lodging (typically at the start of a tenancy), so doesn't reflect subsequent changes in these rents. It will therefore tend to understate the rent over the term of a tenancy.

Interpretation

Like the median dwelling sale price, this measure provides a broad and recognisable picture of absolute rent levels, and should therefore be the starting point for analysing trends in rents. In general, strong

[20] National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment, June 2017

and persistent growth in rents indicates, even more strongly than house price increases, that housing supply is insufficient to meet demand.

This is because rents tend to be more sensitive to income levels than dwelling prices, and on average, renters also have lower incomes than homeowners. For this reason, rent increases tend to follow incomes more closely than house prices and are less volatile.

Estimates of mean rents at a local level may be affected by the composition of rental stock (ie the size and type of rental dwellings). This does not vary markedly between territorial authority areas. However, there may be significant differences between suburbs that may make a 'like for like' comparison difficult. For instance, the Auckland city centre has a high proportion of 1-bedroom apartments while other suburbs are dominated by 3-bedroom stand-alone houses. More disaggregated data on rent trends for different types of rental accommodation is available on the HUD website.

The rental stock is typically of lower quality and less well maintained than owner-occupied dwellings. This means that comparing average prices with average rents may be misleading as the characteristics of the average rental property are likely to be different than the characteristics of the average dwelling sale.

The chart above presents geometric median rents for five high-growth urban areas. It shows that:

- The cost of renting is highest in Auckland and lowest in Hamilton, which is consistent with differences in median sale prices between cities
- Rents in Christchurch rose rapidly after the 2011 Canterbury Earthquake, due to the shortage of housing resulting from earthquake damage, but they have fallen since the start of 2016.

To assist in interpreting data on rents, information on the share of households living in rented accommodation versus owner-occupied housing, and the characteristics of those households, is available on Stats NZ's website.

Ratio of dwelling sale prices to rents (Section 4.4)

Technical notes

This indicator shows the ratio of nominal median dwelling prices to nominal (geometric) mean rents. The geometric mean is used to help smooth the data by removing the "clustering effect" (where rents cluster at round number amounts).

House prices relate to the whole housing stock in the selected area, not just the rented stock. As owner-occupied housing tends to be of better quality and of higher value than rented stock, this ratio tends to over-state house prices (relative to the median price for rented housing only).

This relationship between rents and house prices is often expressed as a rental yield to investors using the same data, which is calculated by mean rents divided by the median house price.

Interpretation

This indicator reflects the relationship between median house prices and mean rents in the same geographical area.

The higher the house price/rent ratio:

- *The greater the gap between renting and buying*. A ratio of 30 indicates that the price of a median house is 30 times the mean annual rent paid. High ratios will tend to reduce home ownership rates due to it being more attractive or affordable for many to rent than to buy a dwelling.
- *The lower the average yield to an investor from renting out a dwelling*. Investors vary in their motivations for purchasing rental properties, and in the types of properties they are interested in owning. Income-focused investors will seek to maximise rental yields while others may be more motivated by the expectation of capital gains over the longer term. When increases in rents don't keep pace with house prices, investors increasingly rely on capital growth as a source of returns rather than rental yield.

Further analysis of trends in home buyers may assist the interpretation of this measure. CoreLogic has a "buyer classification" that disaggregates sales according to whether the purchasers are first home buyers, existing owner 'movers', or investors. This data also records where investors are based or movers are from, so is a useful indicator of the impacts of one local area on another.

Appendix 2

Housing Affordability Indicators

Rental Affordability Index

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

Deposit Affordability Index

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

Mortgage Affordability Index

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

Data Sources

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

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

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

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

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

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

Appendix 3

Development Terms

Urban Refers to subdivisions or dwelling consents in:

Western Bay of Plenty District – Waihī Beach-Bowentown/Athenree, Katikati, Ōmokoroa, Te Puke.
Tauranga City – Medium Density Residential, High Density Residential, Pāpāmoa East Employment, Wairakei Town Centre (Core), Wairakei Town Centre (Fringe), Urban Marae Community, Rural-residential, Commercial and Industry zones.

Rural Refers to subdivisions or dwelling consents in:

Western Bay of Plenty District - Waiau, Tahawai, Aongatete, Pahoia, Te Puna, Minden, Matakana Island, Kopurererua, Kaimai, Waiorohi, Kaitemako-Waitao, Otawa, Rangiuru, Pongakawa-Paengaroa.
Tauranga City – Rural, Rural Marae Community, and Te Tumu Future Urban zones.

Western Bay of Plenty District – Minor urban areas

Refers to minor urban areas such as Maketu, Pukehina Beach and Paengaroa.

Tauranga City – Coastal Strip

Refers to Mount Maunganui-Pāpāmoa, specifically the area units of Mount Maunganui North, Mount Maunganui Central, Mount Maunganui South, Omanu Beach, Matapihi, Arataki North, Arataki South, Te Maunga North, Te Maunga South, Pacific Lakes, Pacific View, Palm Beach North, Palm Beach South-Gravatt, Pāpāmoa Beach North, Pāpāmoa Beach South, Baypark-Kairua, Doncaster, Wairakei West, Wairakei Central, Motiti and Wairakei East-Te Tumu. "Tauranga" refers to all other area units in Tauranga City.

Greenfield UGA Greenfield Urban Growth Area.

SP Structure Plan.

Subdivision Process

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

Stage 1 **Subdivision Plan**

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

Stage 2 **Survey Plan**

This is approved under section 223 of the RMA, with a legal life of up to 3 years.

Stage 3 **Final Approval**

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

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

A more accurate indicator of growth is additional lots created at Section 224 approval stage. For monitoring purposes, this figure is used to interpret land uptake rates (along with dwelling consent data) and vacant land supply. In the Western Bay of Plenty District the ratio of urban land uptake in greenfield UGAs to rural subdivision is expected to increase as infrastructure is improved at Waihī Beach, Katikati, Ōmokoroa and Te Puke.

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

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

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

Building Consents Issued for Dwellings

Tauranga City

Building consents issued for new dwellings make up about 23% of all building consents issued. New dwellings include relocated dwellings and conversions of existing buildings to dwellings; it does not include additions or alterations to existing dwellings. Where dwellings are demolished or removed from a site, or changed in use to a non-residential activity, they are deducted from the "new dwelling" count to produce an "additional dwelling" count for comparison with the SmartGrowth dwelling projections in Section 3.3 of this report.

Western Bay of Plenty District

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

Residential Growth Areas

Tauranga City

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

The other significant areas of urban development is infill development in established residential areas, and residential intensification (currently limited to the Mount Maunganui High Density Residential zoned area northwest of Banks and Salisbury avenues, and the City Living zoned areas surrounding the Tauranga CBD) within established residential areas of Tauranga. Plan Change 33: Enabling Housing Choice to the Tauranga City Plan enables higher density in key residential and commercial areas across the City.

Western Bay of Plenty District

The settlements of Waihī Beach (including Bowentown, Athenree and Pios Beach), Katikati, Ōmokoroa and Te Puke have been identified as the urban growth centres for the Western Bay of Plenty District.

The Western Bay of Plenty District Plan contains different subdivision standards in recognition of the ability of areas to accommodate future growth:

Section 12 - Subdivision and Development

Section 13 – Residential

Section 14 - Medium Density Residential

Section 15 - Future Urban

Vacant Land

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

Tauranga City

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

High Density Areas	this classification is applied to development within the high density areas of Mount Maunganui North, City Centre and Commercial Business zones. Also includes the areas zoned "High Density" under the Operative Tauranga City Plan (via PC33).
Residential infill/Intensification	existing urban areas zoned High Density residential in Mount Maunganui, Te Papa (Gate Pa, Greerton, Tauranga South, Tauranga Central, Tauranga Hospital, Yatton Park), and Tauranga West (Bellevue, Brookfield, Judea, Matua, Otumoetai, Te Reti). Also includes Medium Density residential zoned areas where a land parcel is 650 m^2 or with the potential to enable subdivision.
Rural Infill	Areas of Tauranga City with Rural zoning outside the Greenfield UGAs
Residential Greenfield UGAs	any land parcel which is subdivided within greenfield UGAs (constituting "traditional" rezoning of rural land to residential, and subdivision and development for residential purposes).

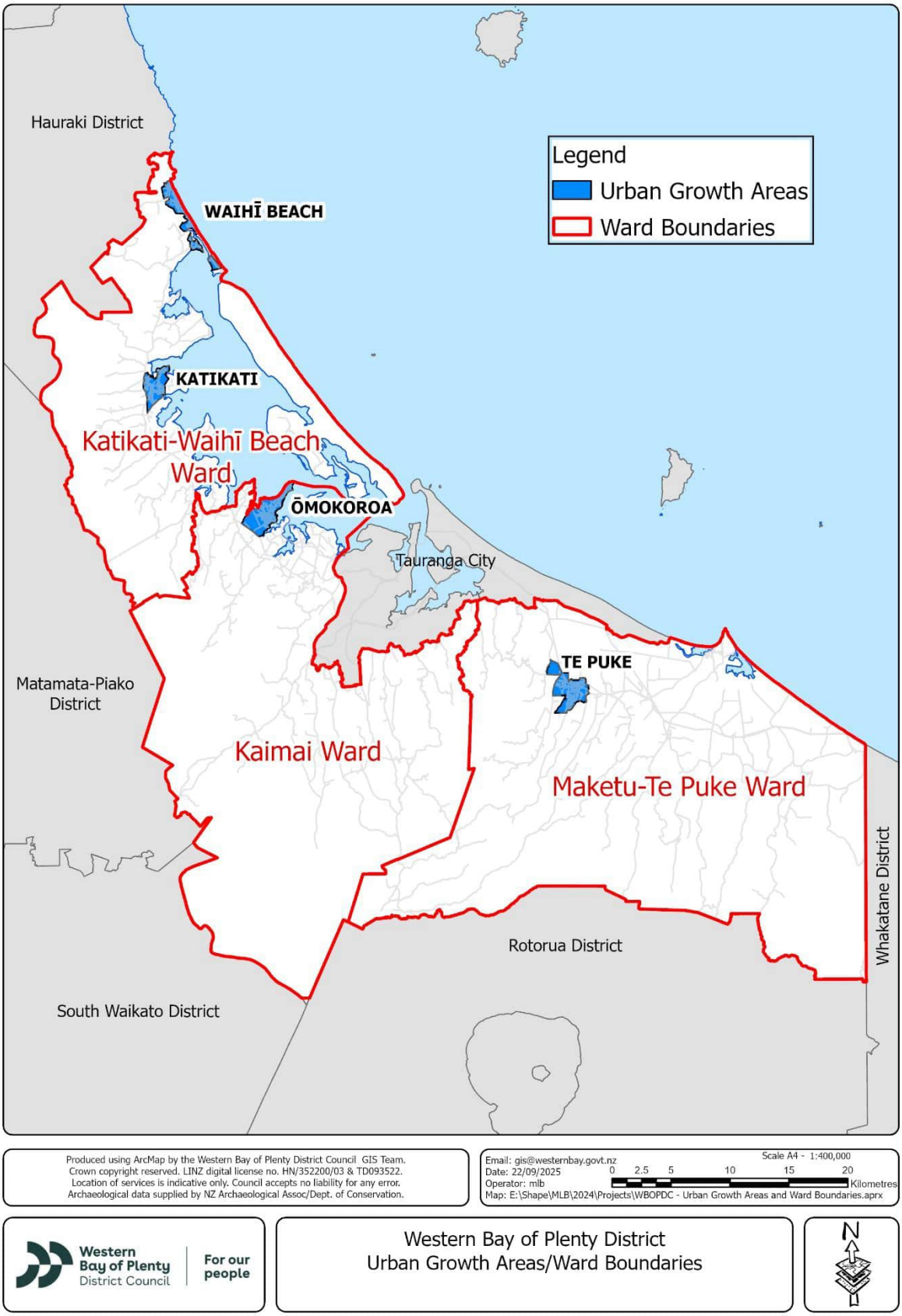
Western Bay of Plenty District

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

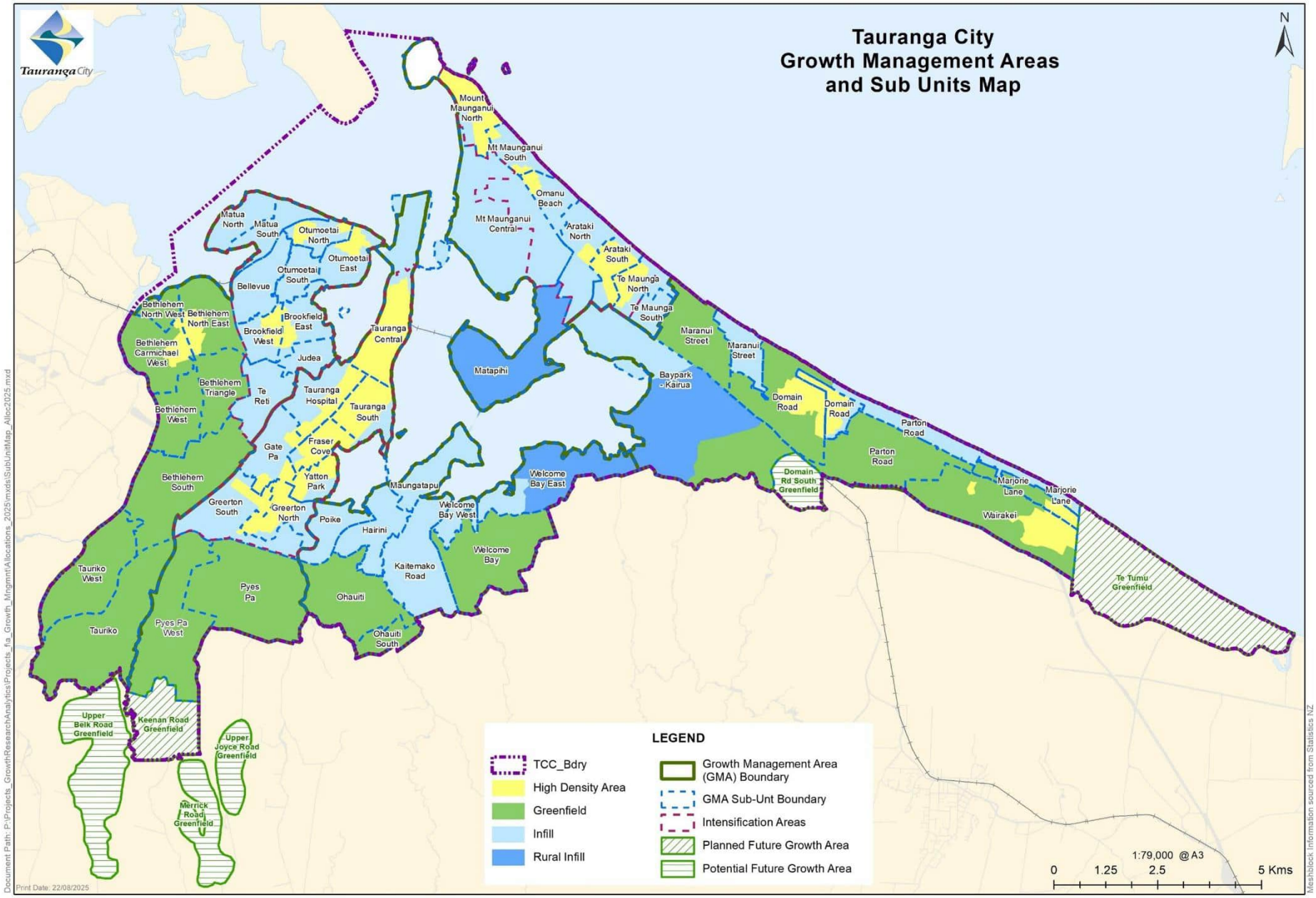
Appendix 4

Development Maps

Western Bay of Plenty District



Tauranga City



Appendix 5

Dwelling Occupancy by Census 2023 SA2

Tauranga City

Statistical Area 2	Population	Occupied Dwellings	Unoccupied Dwellings	Total Dwellings	Unoccupied Total Ratio (%)
Keenan Road	222	78	3	84	4
Matua North	3,024	1,134	84	1,221	7
Inlet Tauranga Harbour South	51	12	0	12	
Mount Maunganui North	3,204	1,440	894	2,343	38
Matua South	2,604	948	75	1,023	7
Bethlehem North	3,645	1,542	105	1,707	6
Bellevue	3,852	1,305	60	1,368	4
Otumoetai North	2,223	942	69	1,014	7
Otumoetai East	3,699	1,452	117	1,569	7
Otumoetai South	2,415	885	57	945	6
Brookfield West	3,129	1,128	54	1,185	5
Bethlehem Central	4,392	1,680	111	1,803	6
Brookfield East	2,895	1,011	63	1,074	6
Mount Maunganui South	2,844	1,086	255	1,347	19
Tauranga Central	2,679	1,230	156	1,392	11
Mount Maunganui Central	225	99	27	129	21
Judea	2,691	1,038	66	1,104	6
Te Reti	1,944	639	21	657	3
Bethlehem South	1,119	360	18	378	5
Omanu Beach	2,982	1,107	183	1,302	14
Tauranga Hospital	2,118	792	90	882	10
Tauriko	291	96	18	111	16
Gate Pa	3,843	1,299	72	1,377	5
Greerton South	672	270	24	294	8
Tauranga South	4,110	1,668	147	1,821	8
Fraser Cove	1,269	426	36	459	8
Arataki North	3,201	1,212	168	1,383	12
Matapihi	837	219	15	234	6
Pyes Pa North West	2,550	912	45	960	5
Pyes Pa West	4,254	1,329	66	1,407	5
Greerton North	3,600	1,452	105	1,557	7
Yatton Park	2,712	864	45	912	5
Pyes Pa North	3,846	1,320	63	1,383	5
Arataki South	3,063	1,083	144	1,233	12
Pyes Pa South	2,919	1,044	39	1,089	4
Poike	1,062	342	27	399	7
Te Maunga North	3,354	1,446	210	1,668	13
Maungatapu	2,883	1,047	102	1,155	9
Hairini	3,246	1,260	72	1,335	5
Pyes Pa East	666	204	9	216	4
Te Maunga South	2,163	843	75	918	8
Pacific Lakes	2,931	1,260	123	1,383	9
Kaitemako	1,554	528	30	558	5
Ohauiti	4,020	1,494	72	1,599	5

Statistical Area 2	Population	Occupied Dwellings	Unoccupied Dwellings	Total Dwellings	Unoccupied Total Ratio (%)
Baypark-Kairua	753	231	27	258	10
Welcome Bay West	2,865	948	51	999	5
Welcome Bay East	2,658	879	45	924	5
Pacific View	3,111	1,116	60	1,176	5
Welcome Bay South	3,978	1,242	78	1,329	6
Palm Beach North	3,270	1,068	57	1,125	5
Palm Beach South-Gravatt	3,786	1,479	144	1,623	9
Pāpāmoa Beach North	2,763	978	114	1,092	10
Doncaster	3,477	1,146	57	1,230	5
Pāpāmoa Beach South	2,685	1,041	147	1,191	12
Motiti	3,354	1,137	198	1,338	15
Wairakei West	3,072	1,056	96	1,206	8
Wairakei Central	1,719	594	45	729	6
Wairakei East-Te Tumu	4,356	1,503	108	1,629	7
Total	**152,844**	**55,929**	**5,430**	**61,842**	**9**

Western Bay of Plenty District

Statistical Area 2	Population	Occupied Dwellings	Unoccupied Dwellings	Total Dwellings	Unoccupied Total Ratio (%)
Waihī Beach-Bowentown	2,550	1,200	1,437	2,661	54
Waiau	330	108	30	138	22
Athenree	906	345	111	453	24
Tahawai	1,839	726	123	849	14
Katikati	5,580	2,334	207	2,556	8
Aongatete	3,519	1,356	132	1,491	9
Matakana Island	306	132	39	168	23
Ōmokoroa	5,451	2,151	213	2,448	9
Pahoia	3,297	1,143	96	1,251	8
Te Puna	3,024	1,059	99	1,164	8
Minden	2,367	807	72	888	8
Kaimai	2,148	705	63	768	8
Kopurererua	777	276	12	294	4
Waiorohi	2,739	909	51	963	5
Kaitemako/Waitao	1,824	639	45	684	7
Otawa	2,130	693	72	768	9
Te Puke	9,108	2,967	183	3,165	6
Rangiuru	2,832	870	108	978	11
Maketu	1,311	441	108	549	20
Pukehina Beach	885	339	318	663	48
Pongakawa	3,261	1,038	147	1,191	12
TOTAL	**56,184**	**20,238**	**3,669**	**23,907**	**15**

Appendix 6

Statistical Area 2 Maps

Western Bay of Plenty District

Produced using ArcMap by the Western Bay of Plenty District Council GIS Team.
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Location of services is indicative only. Council accepts no liability for any error.
Archaeological data supplied by NZ Archaeological Assoc/Dept. of Conservation.

Email: gis@westernbay.govt.nz
Date: 16/09/2025
Operator: mlb
Map: E:\Shape\MLB\2025\Projects\Statistics Area 2 Map - 2025.aprx

Scale A3 - 1:252,000
0 1 2 4 6 8 10 12 14 16 18 20
Kilometers

Western Bay of Plenty District Council | For our people

SA2 Areas-2025

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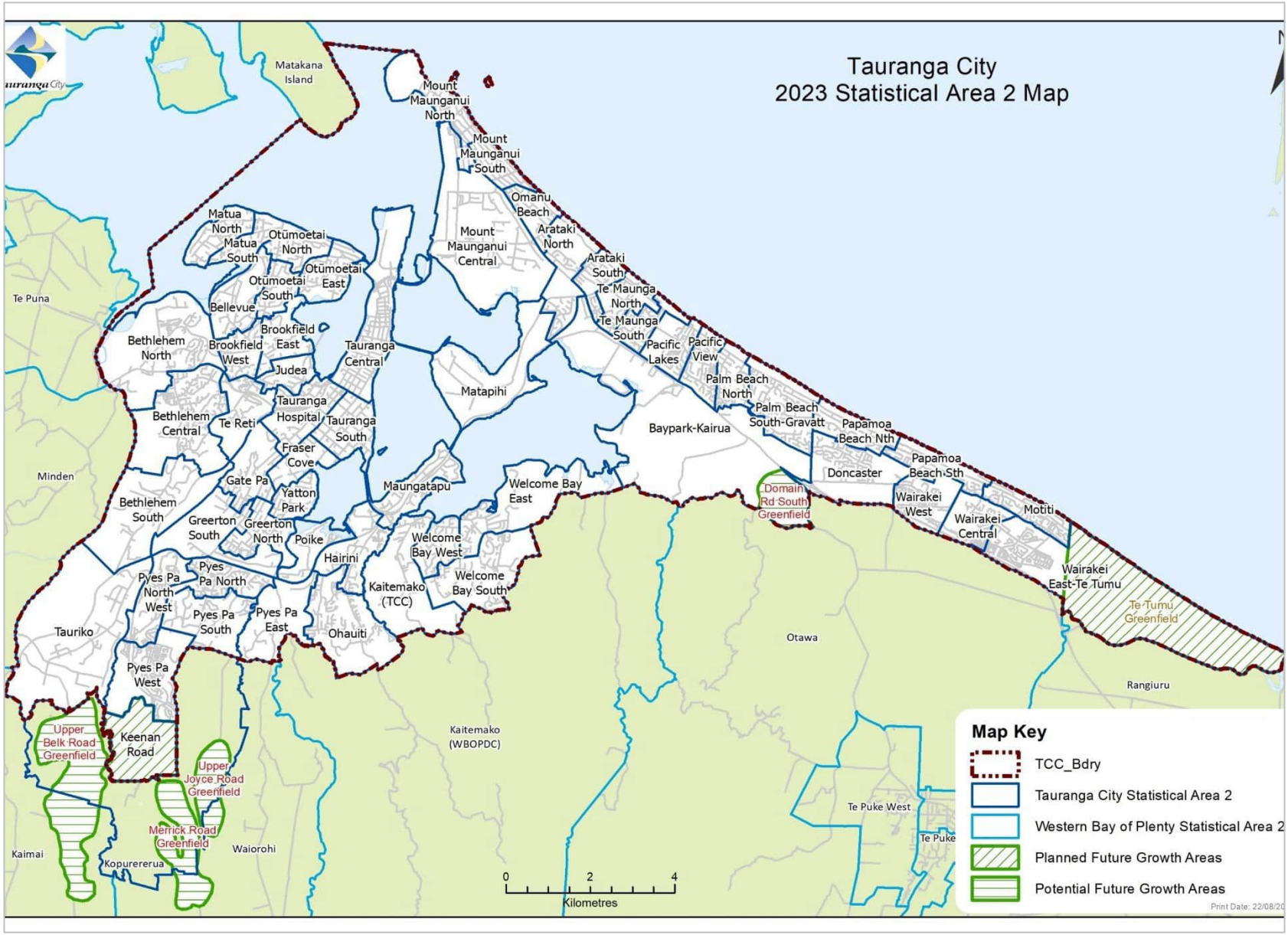
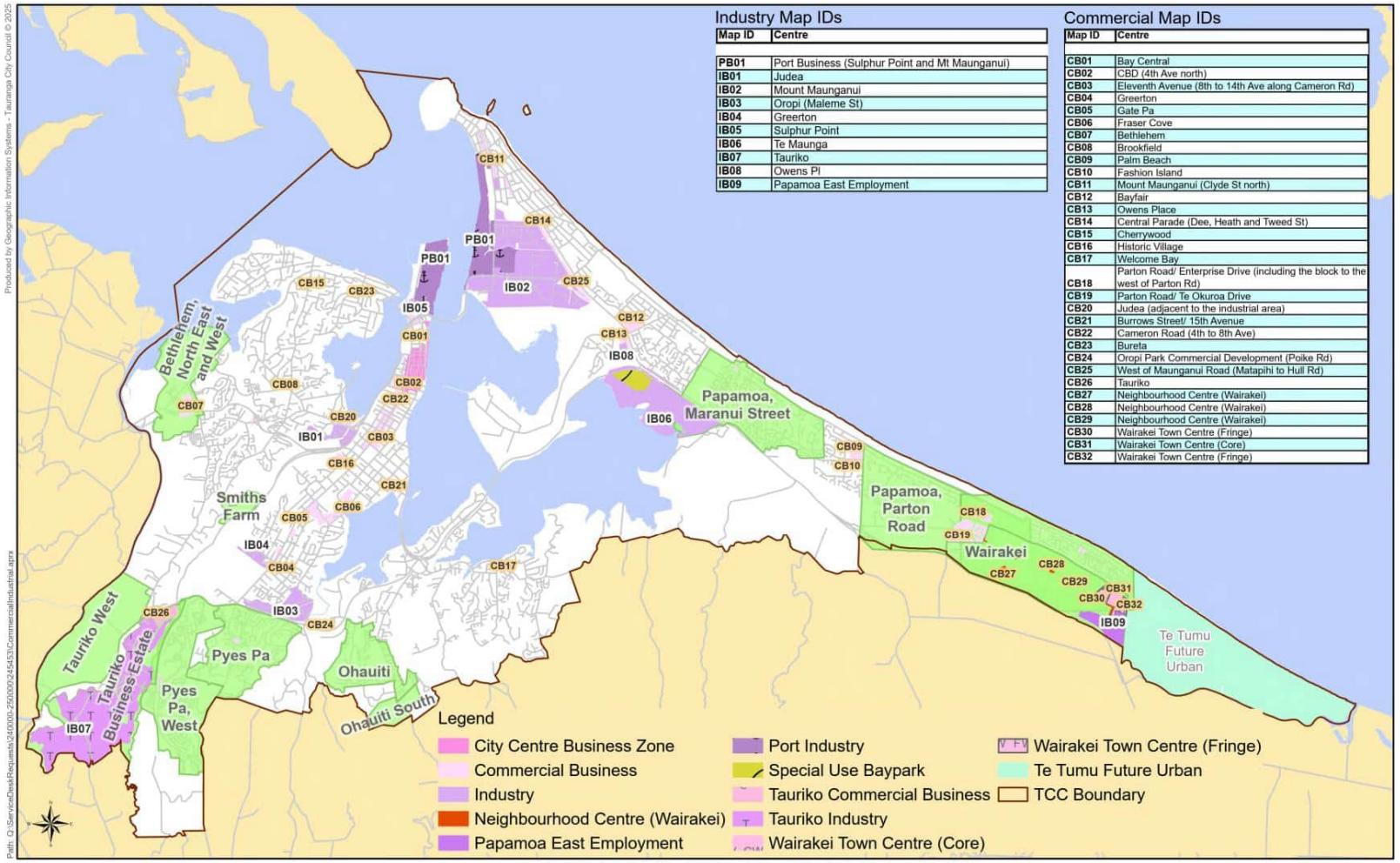
Tauranga City



Appendix 7

Commercial and Industrial Zoned Areas

Tauranga City



COMMERCIAL AND INDUSTRIAL AREAS

- Tauranga City Council -

0 1.25 2.5 5 7.5 10 Kilometers

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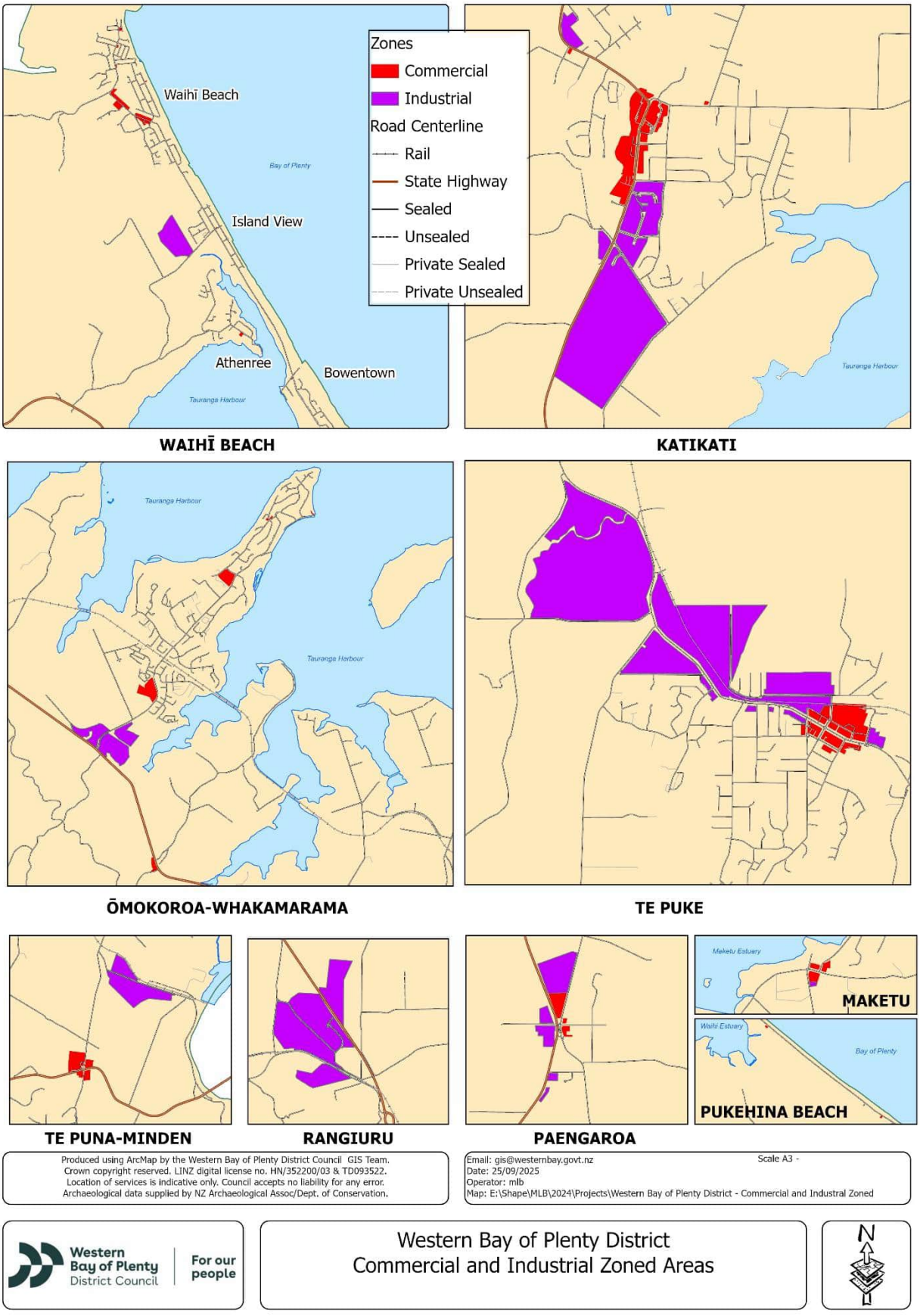
Western Bay of Plenty District



Appendix 8

Dwelling Density Maps

Tauranga City Plan Definition of Nett Area

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

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

Calculation of dwelling density

$$\textbf{Dwelling density} = \frac{\sum_{i=1}^{n} Xi + Yi}{\sum_{i=1}^{n} Zi}$$

where:

X = number of dwellings in developed areas

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

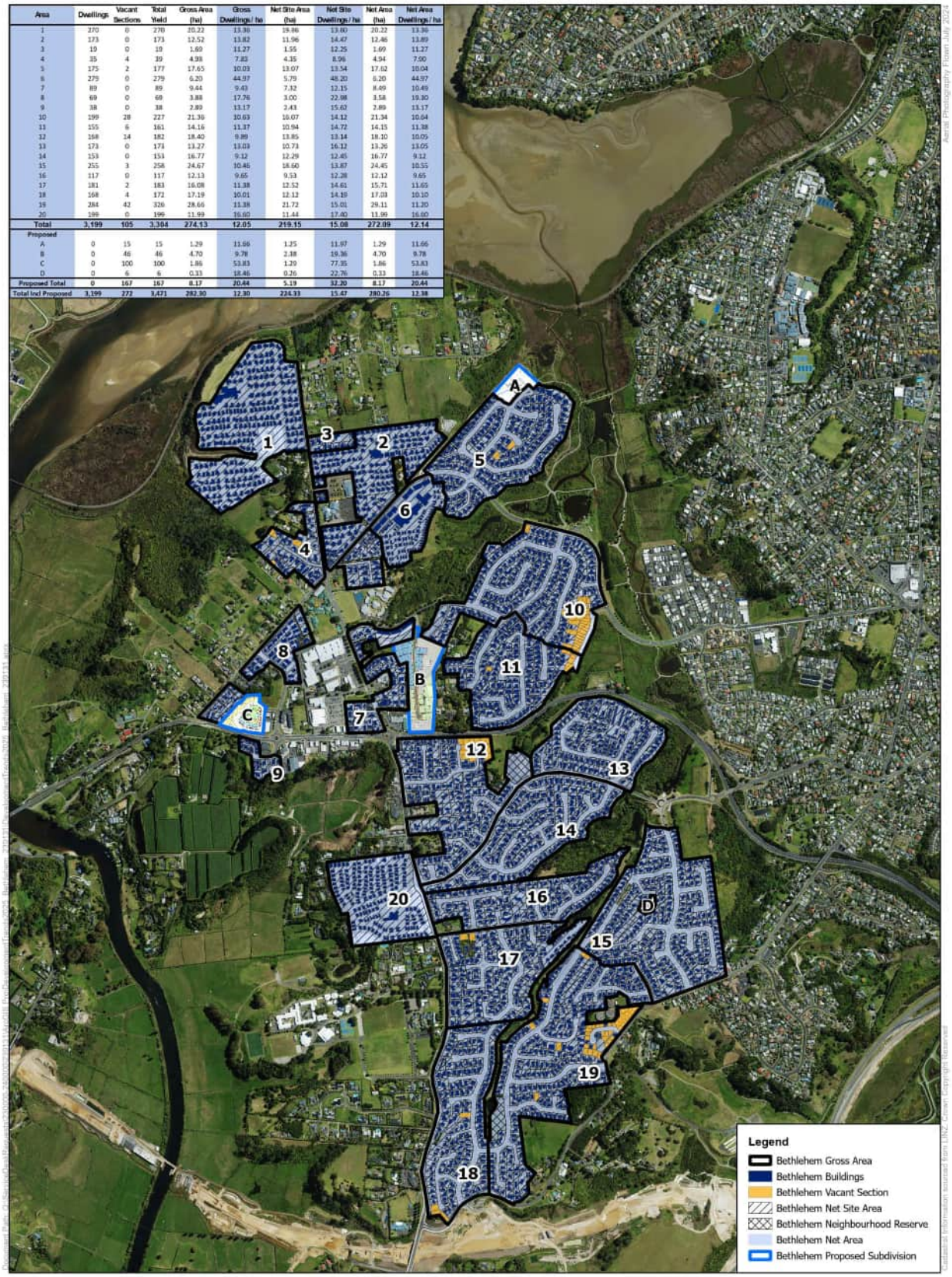
Z = area in ha

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

Tauranga City Urban Growth Area Density Maps

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

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	270	0	270	20.22	13.36	19.86	13.60	20.22	13.36
2	173	0	173	12.52	13.82	11.96	14.47	12.46	13.89
3	19	0	19	1.69	11.27	1.55	12.25	1.69	11.27
4	35	4	39	4.98	7.83	4.35	8.96	4.94	7.90
5	175	2	177	17.65	10.03	13.07	13.54	17.62	10.04
6	279	0	279	6.20	44.97	5.79	48.20	6.20	44.97
7	89	0	89	9.44	9.43	7.32	12.15	8.49	10.49
8	69	0	69	3.88	17.76	3.00	22.98	3.58	19.30
9	38	0	38	2.89	13.17	2.43	15.62	2.89	13.17
10	199	28	227	21.36	10.63	16.07	14.12	21.34	10.64
11	155	6	161	14.16	11.37	10.94	14.72	14.15	11.38
12	168	14	182	18.40	9.89	13.85	13.14	18.10	10.05
13	173	0	173	13.27	13.03	10.73	16.12	13.26	13.05
14	153	0	153	16.77	9.12	12.29	12.45	16.77	9.12
15	255	3	258	24.67	10.46	18.60	13.87	24.45	10.55
16	117	0	117	12.13	9.65	9.53	12.28	12.12	9.65
17	181	2	183	16.08	11.38	12.52	14.61	15.71	11.65
18	168	4	172	17.19	10.01	12.13	14.19	17.03	10.10
19	284	42	326	28.66	11.38	21.72	15.01	29.11	11.20
20	199	0	199	11.99	16.60	11.44	17.40	11.99	16.60
Total	**3,199**	**105**	**3,304**	**274.13**	**12.05**	**219.15**	**15.08**	**272.09**	**12.14**
Proposed									
A	0	15	15	1.29	11.66	1.25	11.97	1.29	11.66
B	0	46	46	4.70	9.78	2.38	19.36	4.70	9.78
C	0	100	100	1.86	53.83	1.29	77.35	1.86	53.83
D	0	6	6	0.33	18.46	0.26	22.76	0.33	18.46
Proposed Total	0	167	167	8.17	20.44	5.19	32.20	8.17	20.44
Total incl Proposed	3,199	272	3,471	282.30	12.30	224.33	15.47	280.26	12.38



Bethlehem Dwelling Density 2025

0 100 200 400 600 m

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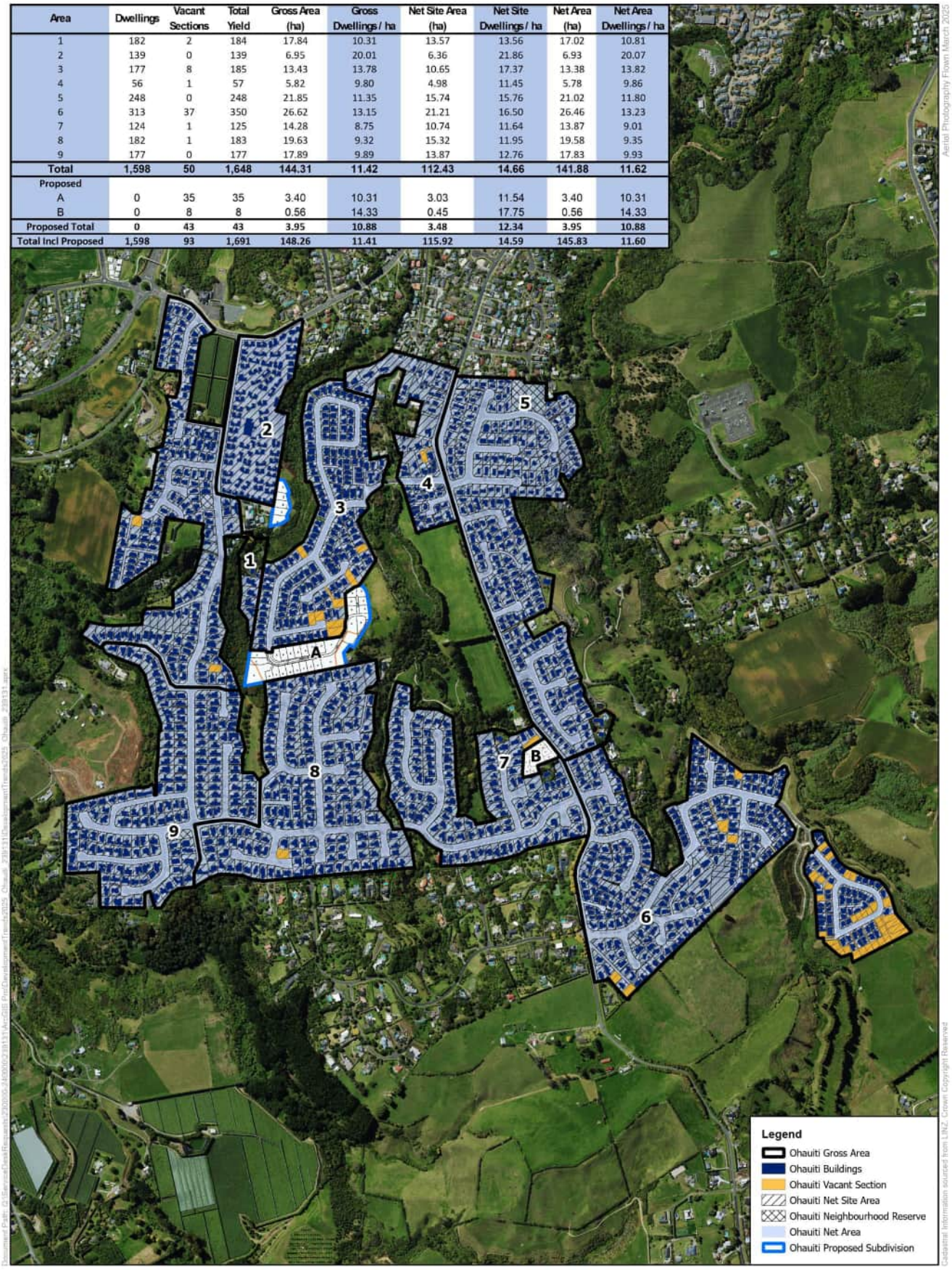
Tauranga City

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	182	2	184	17.84	10.31	13.57	13.56	17.02	10.81
2	139	0	139	6.95	20.01	6.36	21.86	6.93	20.07
3	177	8	185	13.43	13.78	10.65	17.37	13.38	13.82
4	56	1	57	5.82	9.80	4.98	11.45	5.78	9.86
5	248	0	248	21.85	11.35	15.74	15.76	21.02	11.80
6	313	37	350	26.62	13.15	21.21	16.50	26.46	13.23
7	124	1	125	14.28	8.75	10.74	11.64	13.87	9.01
8	182	1	183	19.63	9.32	15.32	11.95	19.58	9.35
9	177	0	177	17.89	9.89	13.87	12.76	17.83	9.93
Total	**1,598**	**50**	**1,648**	**144.31**	**11.42**	**112.43**	**14.66**	**141.88**	**11.62**
Proposed									
A	0	35	35	3.40	10.31	3.03	11.54	3.40	10.31
B	0	8	8	0.56	14.33	0.45	17.75	0.56	14.33
Proposed Total	**0**	**43**	**43**	**3.95**	**10.88**	**3.48**	**12.34**	**3.95**	**10.88**
Total Incl Proposed	**1,598**	**93**	**1,691**	**148.26**	**11.41**	**115.92**	**14.59**	**145.83**	**11.60**



Ohauiti Dwelling Density 2025

0 100 200 400 m

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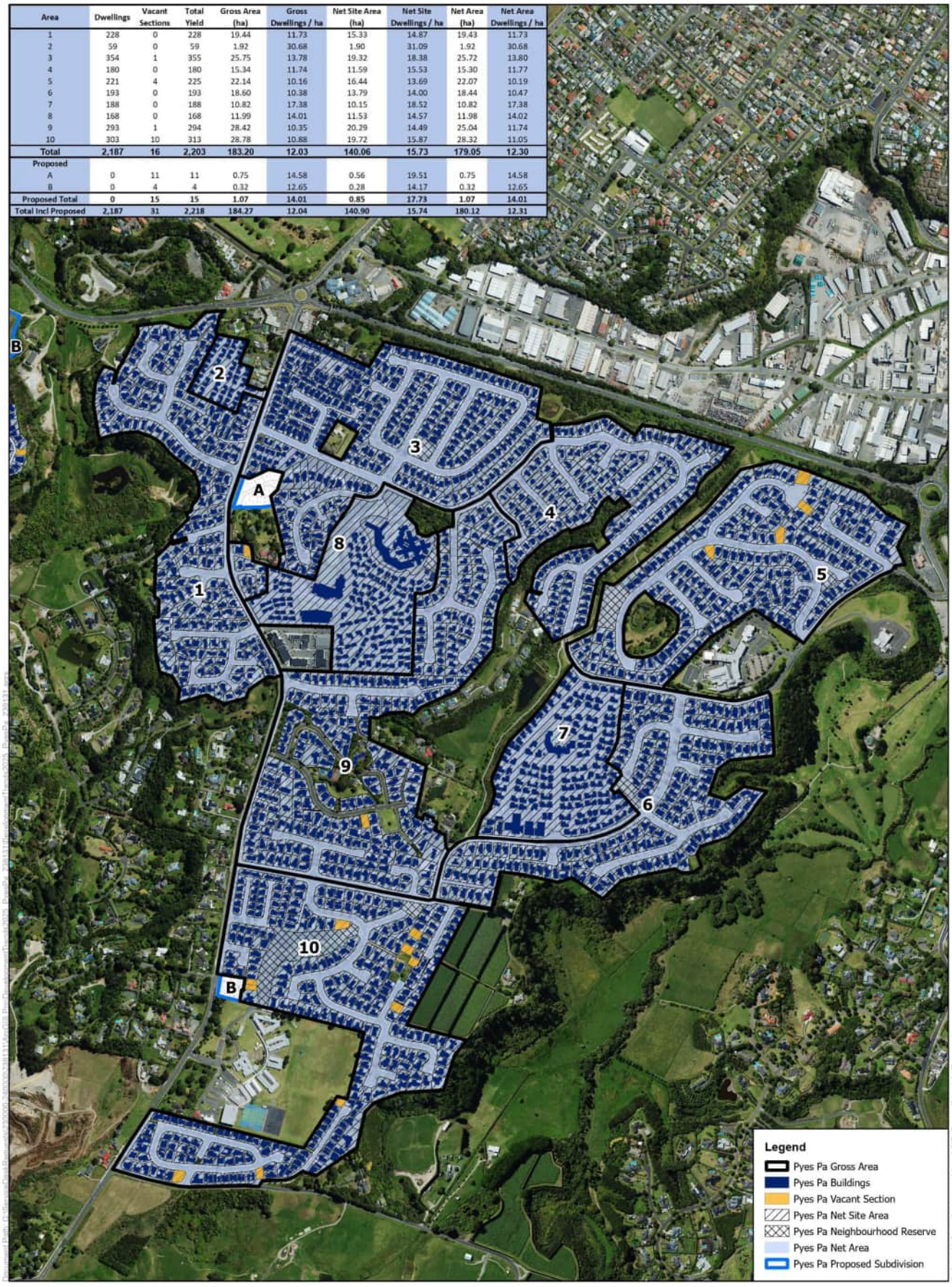
Tauranga City

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	228	0	228	19.44	11.73	15.33	14.87	19.43	11.73
2	59	0	59	1.92	30.68	1.90	31.09	1.92	30.68
3	354	1	355	25.75	13.78	19.32	18.38	25.72	13.80
4	180	0	180	15.34	11.74	11.59	15.53	15.30	11.77
5	221	4	225	22.14	10.16	16.44	13.69	22.07	10.19
6	193	0	193	18.60	10.38	13.79	14.00	18.44	10.47
7	188	0	188	10.82	17.38	10.15	18.52	10.82	17.38
8	168	0	168	11.99	14.01	11.53	14.57	11.98	14.02
9	293	1	294	28.42	10.35	20.29	14.49	25.04	11.74
10	303	10	313	28.78	10.88	19.72	15.87	28.32	11.05
Total	**2,187**	**16**	**2,203**	**183.20**	**12.03**	**140.06**	**15.73**	**179.05**	**12.30**
Proposed									
A	0	11	11	0.75	14.58	0.56	19.51	0.75	14.58
B	0	4	4	0.32	12.65	0.28	14.17	0.32	12.65
Proposed Total	**0**	**15**	**15**	**1.07**	**14.01**	**0.85**	**17.73**	**1.07**	**14.01**
Total Incl Proposed	**2,187**	**31**	**2,218**	**184.27**	**12.04**	**140.90**	**15.74**	**180.12**	**12.31**



Pyes Pa Dwelling Density 2025

0 100 200 400 m

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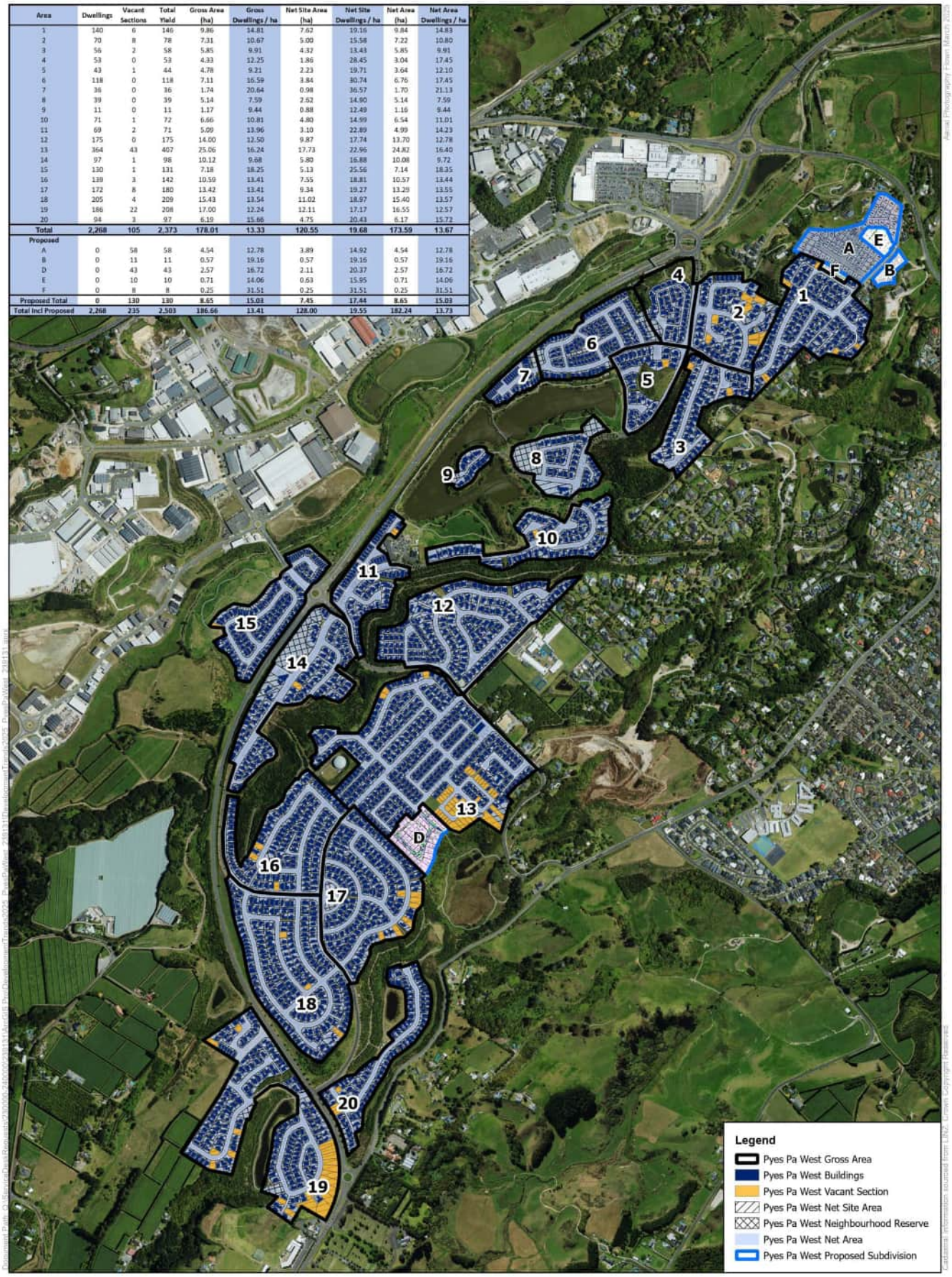
TaurangaCity

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	140	6	146	9.86	14.81	7.62	19.16	9.84	14.83
2	70	8	78	7.31	10.67	5.00	15.58	7.22	10.80
3	56	2	58	5.85	9.91	4.32	13.43	5.85	9.91
4	53	0	53	4.33	12.25	1.86	28.45	3.04	17.45
5	43	1	44	4.78	9.21	2.23	19.71	3.64	12.10
6	118	0	118	7.11	16.59	3.84	30.74	6.76	17.45
7	36	0	36	1.74	20.64	0.98	36.57	1.70	21.13
8	39	0	39	5.14	7.59	2.62	14.90	5.14	7.59
9	11	0	11	1.17	9.44	0.88	12.49	1.16	9.44
10	71	1	72	6.66	10.81	4.80	14.99	6.54	11.01
11	69	2	71	5.09	13.96	3.10	22.89	4.99	14.23
12	175	0	175	14.00	12.50	9.87	17.74	13.70	12.78
13	364	43	407	25.06	16.24	17.73	22.96	24.82	16.40
14	97	1	98	10.12	9.68	5.80	16.88	10.08	9.72
15	130	1	131	7.18	18.25	5.13	25.56	7.14	18.35
16	139	3	142	10.59	13.41	7.55	18.81	10.57	13.44
17	172	8	180	13.42	13.41	9.34	19.27	13.29	13.55
18	205	4	209	15.43	13.54	11.02	18.97	15.40	13.57
19	186	22	208	17.00	12.24	12.11	17.17	16.55	12.57
20	94	3	97	6.19	15.66	4.75	20.43	6.17	15.72
Total	**2,268**	**105**	**2,373**	**178.01**	**13.33**	**120.55**	**19.68**	**173.59**	**13.67**
Proposed									
A	0	58	58	4.54	12.78	3.89	14.92	4.54	12.78
B	0	11	11	0.57	19.16	0.57	19.16	0.57	19.16
D	0	43	43	2.57	16.72	2.11	20.37	2.57	16.72
E	0	10	10	0.71	14.06	0.63	15.95	0.71	14.06
F	0	8	8	0.25	31.51	0.25	31.51	0.25	31.51
Proposed Total	**0**	**130**	**130**	**8.65**	**15.03**	**7.45**	**17.44**	**8.65**	**15.03**
Total Incl Proposed	**2,268**	**235**	**2,503**	**186.66**	**13.41**	**128.00**	**19.55**	**182.24**	**13.73**



Pyes Pa West Dwelling Density 2025

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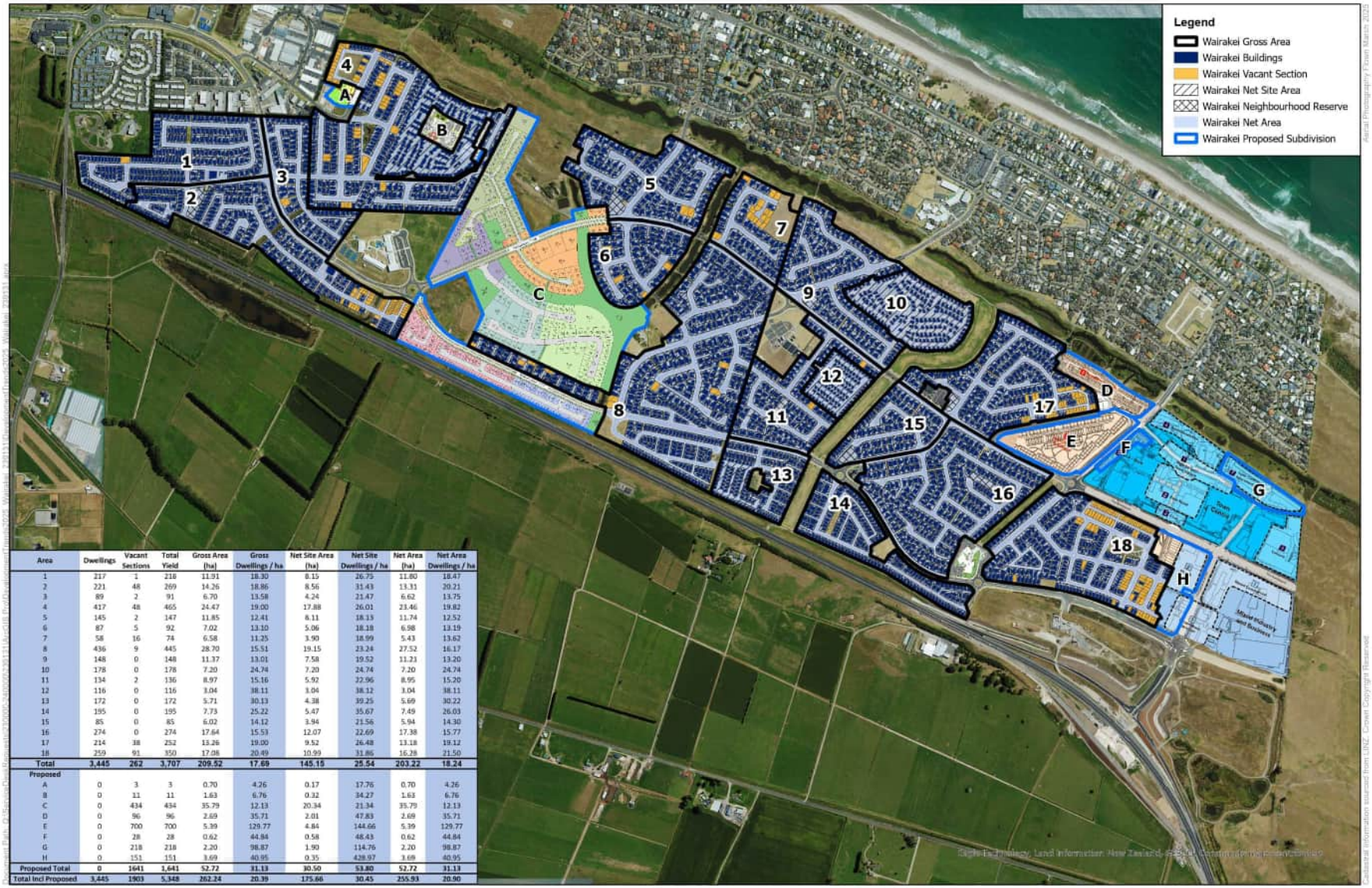

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	217	1	218	11.91	18.30	8.15	26.75	11.80	18.47
2	221	48	269	14.26	18.86	8.56	31.43	13.31	20.21
3	89	2	91	6.70	13.58	4.24	21.47	6.62	13.75
4	417	48	465	24.47	19.00	17.88	26.01	23.46	19.82
5	145	2	147	11.85	12.41	8.11	18.13	11.74	12.52
6	87	5	92	7.02	13.10	5.06	18.18	6.98	13.19
7	58	16	74	6.58	11.25	3.90	18.99	5.43	13.62
8	436	9	445	28.70	15.51	19.15	23.24	27.52	16.17
9	148	0	148	11.37	13.01	7.58	19.52	11.23	13.20
10	178	0	178	7.20	24.74	7.20	24.74	7.20	24.74
11	134	2	136	8.97	15.16	5.92	22.96	8.95	15.20
12	116	0	116	3.04	38.11	3.04	38.12	3.04	38.11
13	172	0	172	5.71	30.13	4.38	39.25	5.69	30.22
14	195	0	195	7.73	25.22	5.47	35.67	7.49	26.03
15	85	0	85	6.02	14.12	3.94	21.56	5.94	14.30
16	274	0	274	17.64	15.53	12.07	22.69	17.38	15.77
17	214	38	252	13.26	19.00	9.52	26.48	13.18	19.12
18	259	91	350	17.08	20.49	10.99	31.86	16.28	21.50
Total	**3,445**	**262**	**3,707**	**209.52**	**17.69**	**145.15**	**25.54**	**203.22**	**18.24**
Proposed									
A	0	3	3	0.70	4.26	0.17	17.76	0.70	4.26
B	0	11	11	1.63	6.76	0.32	34.27	1.63	6.76
C	0	434	434	35.79	12.13	20.34	21.34	35.79	12.13
D	0	96	96	2.69	35.71	2.01	47.83	2.69	35.71
E	0	700	700	5.39	129.77	4.84	144.66	5.39	129.77
F	0	28	28	0.62	44.84	0.58	48.43	0.62	44.84
G	0	218	218	2.20	98.87	1.90	114.76	2.20	98.87
H	0	151	151	3.69	40.95	0.35	428.97	3.69	40.95
Proposed Total	**0**	**1641**	**1,641**	**52.72**	**31.13**	**30.50**	**53.80**	**52.72**	**31.13**
Total Incl Proposed	**3,445**	**1903**	**5,348**	**262.24**	**20.39**	**175.66**	**30.45**	**255.93**	**20.90**

Wairakei Dwelling Density 2025

0 100 200 400 600 m

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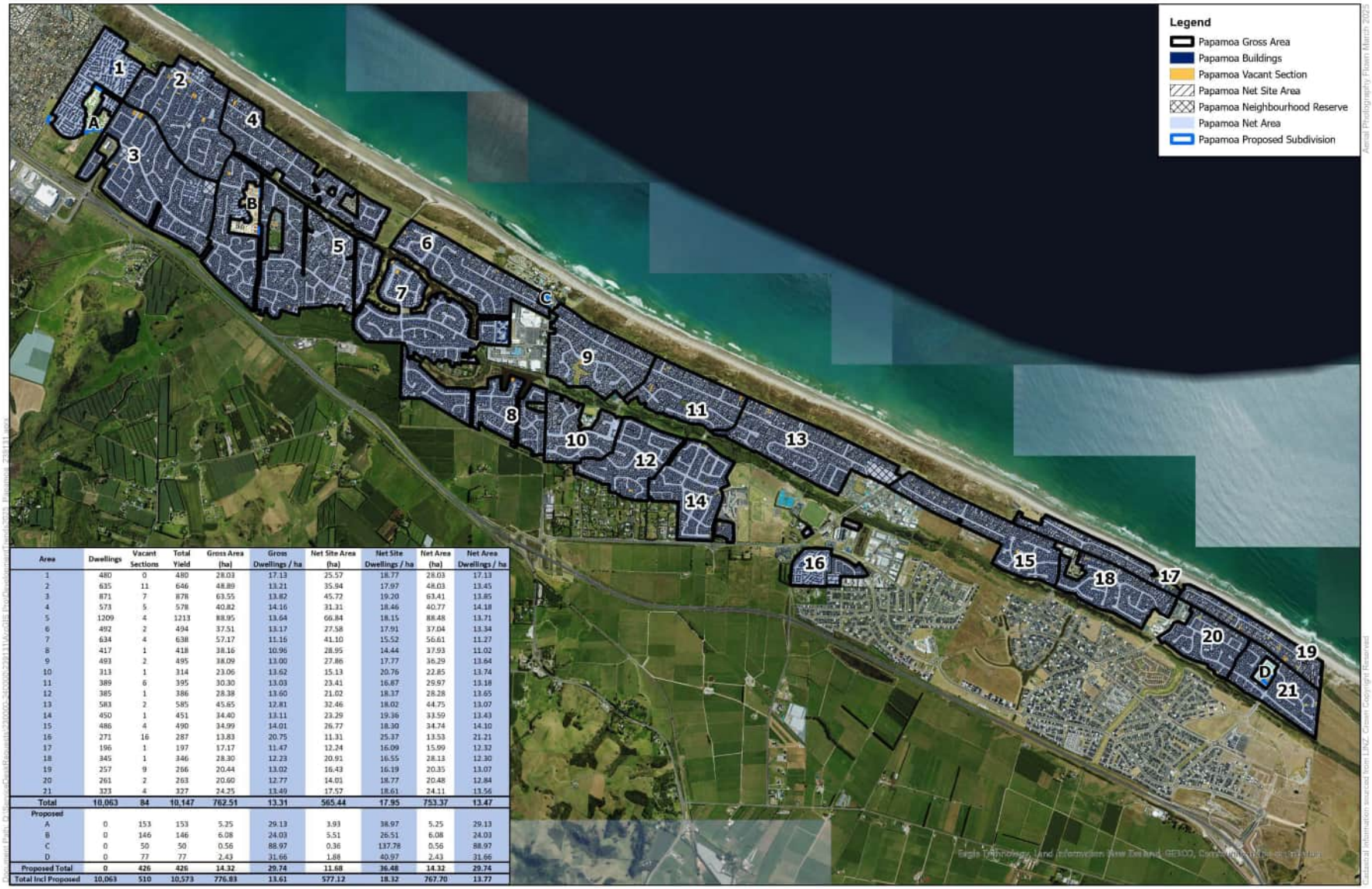
Tauranga City



Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	480	0	480	28.03	17.13	25.57	18.77	28.03	17.13
2	635	11	646	48.89	13.21	35.94	17.97	48.03	13.45
3	871	7	878	63.55	13.82	45.72	19.20	63.41	13.85
4	573	5	578	40.82	14.16	31.31	18.46	40.77	14.18
5	1209	4	1213	88.95	13.64	66.84	18.15	88.48	13.71
6	492	2	494	37.51	13.17	27.58	17.91	37.04	13.34
7	634	4	638	57.17	11.16	41.10	15.52	56.61	11.27
8	417	1	418	38.16	10.96	28.95	14.44	37.93	11.02
9	493	2	495	38.09	13.00	27.86	17.77	36.29	13.64
10	313	1	314	23.06	13.62	15.13	20.76	22.85	13.74
11	389	6	395	30.30	13.03	23.41	16.87	29.97	13.18
12	385	1	386	28.38	13.60	21.02	18.37	28.28	13.65
13	583	2	585	45.65	12.81	32.46	18.02	44.75	13.07
14	450	1	451	34.40	13.11	23.29	19.36	33.59	13.43
15	486	4	490	34.99	14.01	26.77	18.30	34.74	14.10
16	271	16	287	13.83	20.75	11.31	25.37	13.53	21.21
17	196	1	197	17.17	11.47	12.24	16.09	15.99	12.32
18	345	1	346	28.30	12.23	20.91	16.55	28.13	12.30
19	257	9	266	20.44	13.02	16.43	16.19	20.35	13.07
20	261	2	263	20.60	12.77	14.01	18.77	20.48	12.84
21	323	4	327	24.25	13.49	17.57	18.61	24.11	13.56
Total	10,063	84	10,147	762.51	13.31	565.44	17.95	753.37	13.47
Proposed									
A	0	153	153	5.25	29.13	3.93	38.97	5.25	29.13
B	0	146	146	6.08	24.03	5.51	26.51	6.08	24.03
C	0	50	50	0.56	88.97	0.36	137.78	0.56	88.97
D	0	77	77	2.43	31.66	1.88	40.97	2.43	31.66
Proposed Total	0	426	426	14.32	29.74	11.68	36.48	14.32	29.74
Total Incl Proposed	10,063	510	10,573	776.83	13.61	577.12	18.32	767.70	13.77

Papamoa Dwelling Density 2025

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0 0.5 1 1.5 2 Kms

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

Tauranga City

Area	Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings / ha	Net Site Area (ha)	Net Site Dwellings / ha	Net Area (ha)	Net Area Dwellings / ha
1	234	1	235	19.35	12.14	14.96	15.71	19.18	12.25
2	169	4	173	17.28	10.01	12.95	13.35	17.23	10.04
3	320	2	322	31.48	10.23	22.70	14.19	31.14	10.34
4	173	1	174	14.17	12.28	10.72	16.23	14.10	12.34
5	69	1	70	7.29	9.60	5.63	12.44	7.27	9.63
6	207	14	221	23.54	9.39	18.62	11.87	23.17	9.54
7	271	9	280	27.17	10.31	21.14	13.24	26.42	10.60
Total	**1,443**	**32**	**1,475**	**140.28**	**10.51**	**106.72**	**13.82**	**138.50**	**10.65**
Proposed									
A	0	47	47	2.85	16.52	2.07	22.68	2.85	16.52
Proposed Total	**0**	**47**	**47**	**2.85**	**16.52**	**2.07**	**22.68**	**2.85**	**16.52**
Total Incl Proposed	**1,443**	**79**	**1,522**	**143.13**	**10.63**	**108.79**	**13.99**	**141.35**	**10.77**

Welcome Bay Dwelling Density 2025

0 100 200 400 m

1:8,000 @ A3

N

Tauranga City

Western Bay of Plenty District Definition of Net Area

Gross Area refers to all Residential zoned land in an urban area and includes land used for:

a. Residential activity purposes, including all open space and on-site parking associated with dwellings;
b. Local roads, collector roads and roading corridors, including pedestrian and cycleways, and excluding expressways, motorways, strategic roads and arterial roads;
c. Collector roads and roading corridors where direct access from allotments is obtained;
d. Neighbourhood reserves.

Gross Area excludes land zoned Rural Residential.

Net Area refers to Gross Area less land that is:

a. For stormwater ponds and detention areas;
b. Geotechnically constrained as unstable;
c. Set aside to protect significant ecological, cultural, heritage or landscape values;
d. Set aside for non-local recreation, esplanade reserves or access strips that form part of a larger regional, sub-regional, or district network;
e. Identified for business use, or for schools, network utilities, hospitals or other district, regional or sub-regional facilities.

Net Site Area refers to Net Area less land that is:

a. For local and collector roads;
b. For neighbourhood reserves.

Calculation of dwelling density

$$\textit{Dwelling density} = \frac{\sum_{i=1}^{n} Xi + Yi}{\sum_{i=1}^{n} Zi}$$

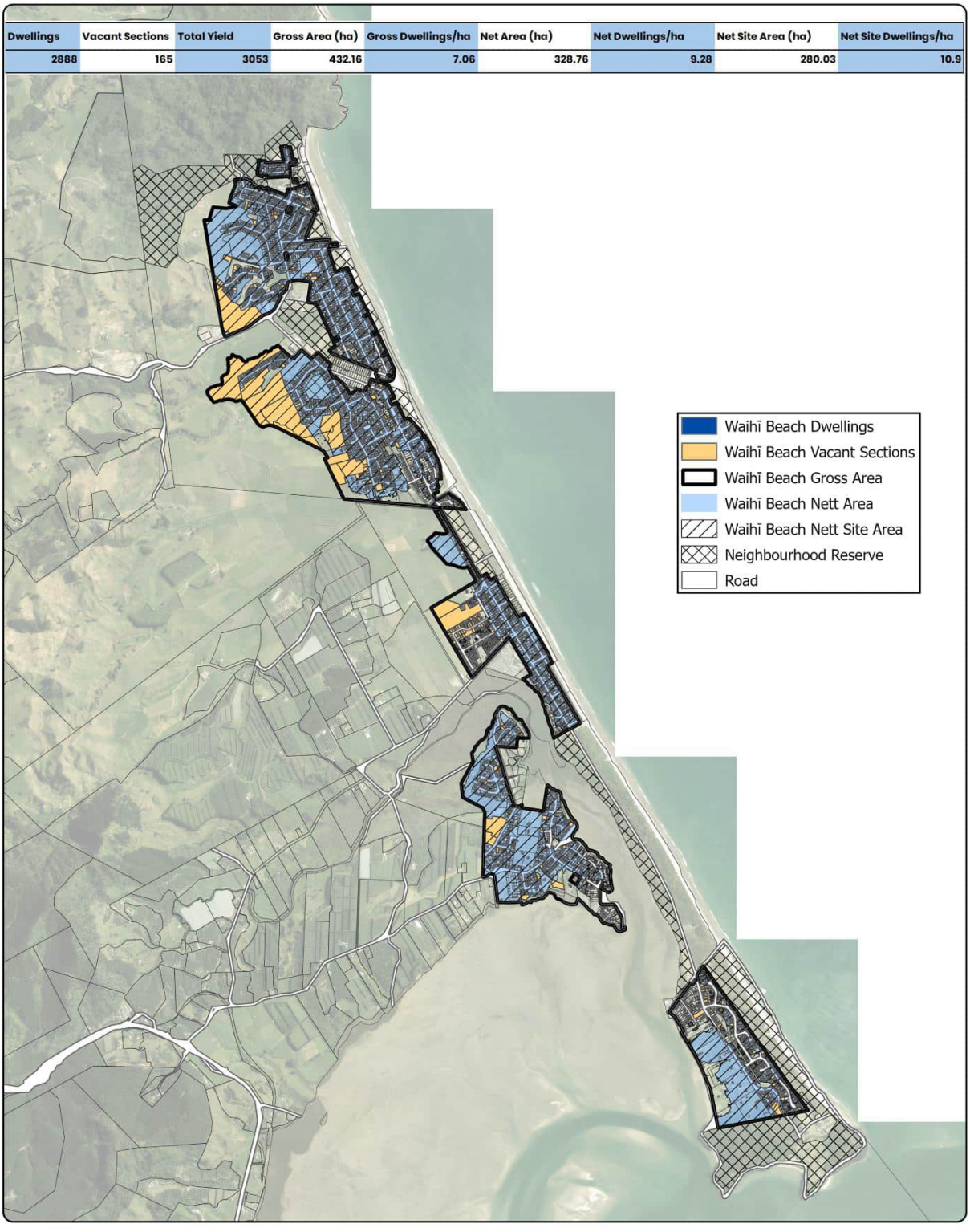
Where:

X = number of dwellings in developed areas
Y = number of vacant sections (in both developed areas and proposed development)
Z = area in ha

Change the divisor (area) to get dwelling density for Gross Area, Net Area or Net Site Area.

Western Bay of Plenty District Growth Area Density Maps

Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings/ha	Net Area (ha)	Net Dwellings/ha	Net Site Area (ha)	Net Site Dwellings/ha
2888	165	3053	432.16	7.06	328.76	9.28	280.03	10.9



Email: gis@westernbay.govt.nz
Date: 22/10/2025
Operator: mlb
Map: E:\Shape\MLB\2024\Projects\Urban Density Project 2024.aprx

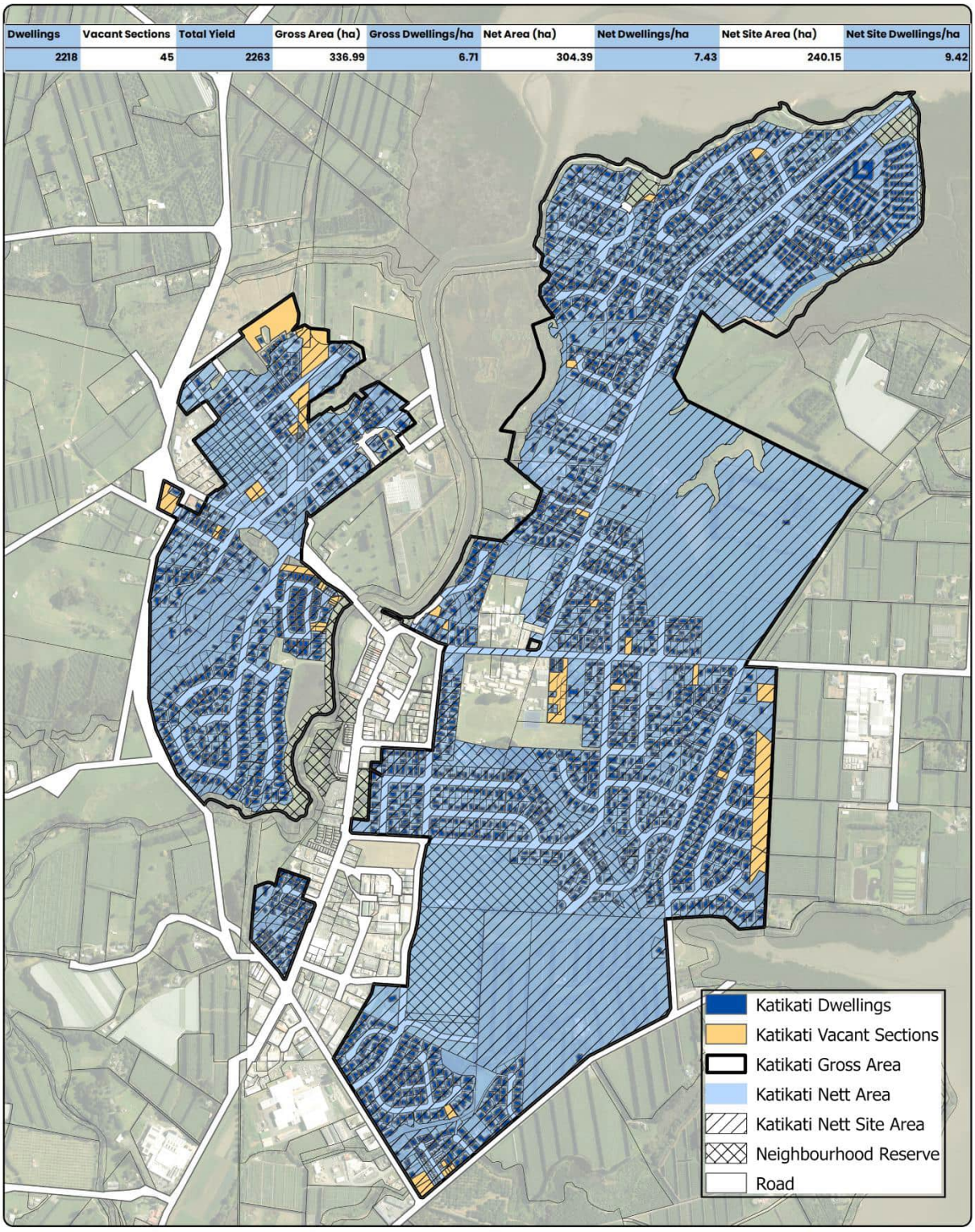
Scale A4 - 1:40,000
0 250 500 1,000 1,500 2,000 Metres

Western Bay of Plenty District Council | For our people

Waihī Beach Dwelling Density 2025

N

Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings/ha	Net Area (ha)	Net Dwellings/ha	Net Site Area (ha)	Net Site Dwellings/ha
2218	45	2263	336.99	6.71	304.39	7.43	240.15	9.42



Email: gis@westernbay.govt.nz
Date: 22/10/2025
Operator: mlb
Map: E:\Shape\MLB\2024\Projects\Urban Density Project 2024.aprx

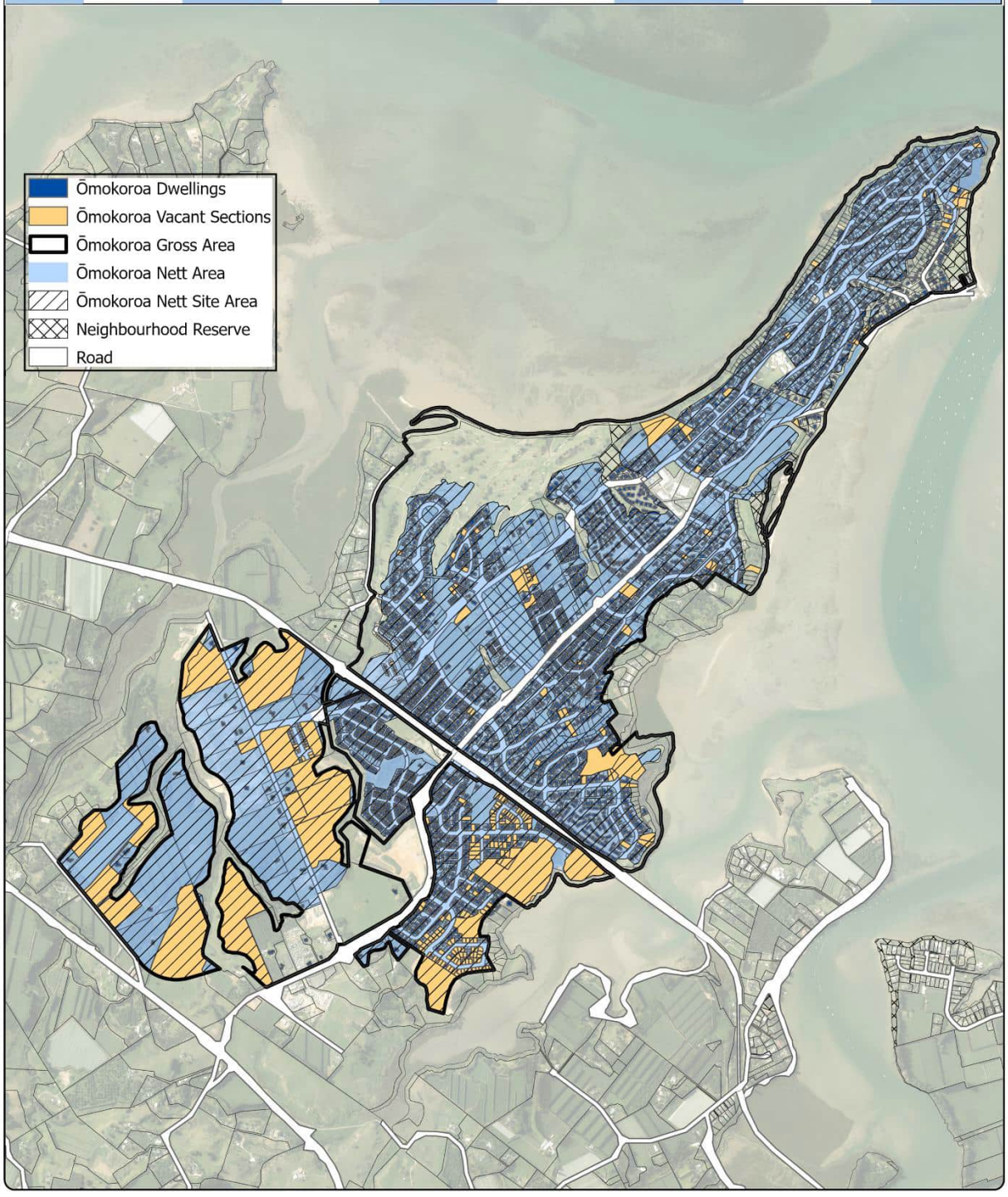
Scale A4 - 1:15,000
0 100 200 400 600 800
Metres

Western Bay of Plenty District Council | For our people

Katikati Dwelling Density 2025

N

Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings/ha	Net Area (ha)	Net Dwellings/ha	Net Site Area (ha)	Net Site Dwellings/ha
2438	207	2645	530.07	4.98	402.75	6.56	336.92	7.85



Email: gis@westernbay.govt.nz
Date: 22/10/2025
Operator: mlb
Map: E:\Shape\MLB\2024\Projects\Urban Density Project 2024.aprx

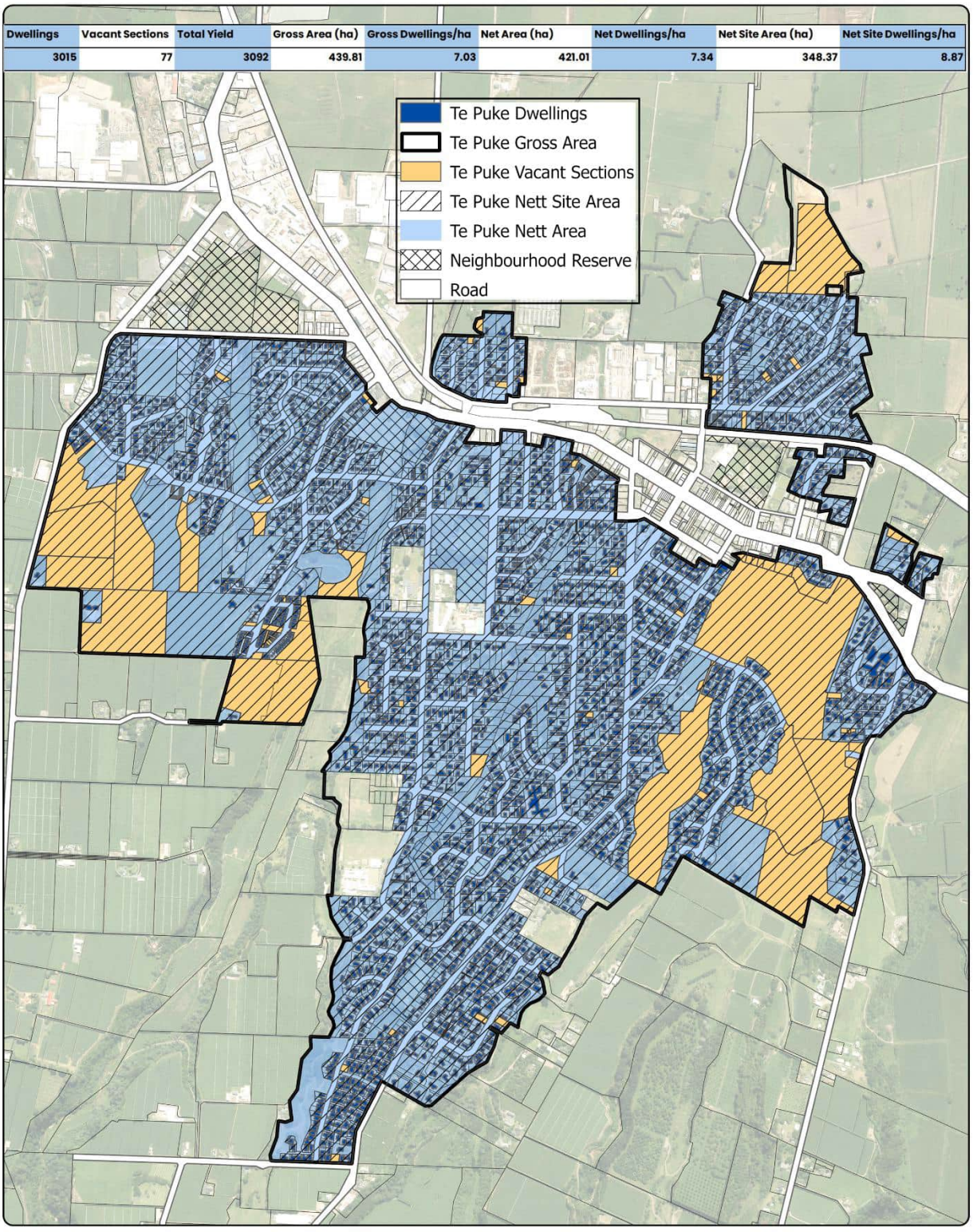
Scale A4 - 1:24,000
0 100 200 400 600 800 1,000
Metres

Western Bay of Plenty District Council | For our people

Ōmokoroa Dwelling Density 2025

N

Dwellings	Vacant Sections	Total Yield	Gross Area (ha)	Gross Dwellings/ha	Net Area (ha)	Net Dwellings/ha	Net Site Area (ha)	Net Site Dwellings/ha
3015	77	3092	439.81	7.03	421.01	7.34	348.37	8.87



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Date: 22/10/2025
Operator: mlb
Map: E:\Shape\MLB\2024\Projects\Urban Density Project 2024.aprx

Scale A4 - 1:17,000
0 100 200 400 600 800
Metres

Western Bay of Plenty District Council | For our people

Te Puke Dwelling Density 2025

N

Appendix 9

Western Bay of Plenty District New Lots and Dwelling Consents

New Lots New Dwellings Number of Storeys	NEW LOTS	DWELLING CONSENTS	1 Storey	2 Storeys	3 Storeys
Waihī Beach-Bowentown	10	33	25	8	
Athenree	32	2	2		
Katikati	8	63	28	34	1
Ōmokoroa	164	122	71	39	12
Te Puke	9	70	61	6	3
URBAN GROWTH AREAS	**223**	**290**	**187**	**87**	**16**
Maketu		1	1		
Pukehina Beach	3	2	2		
MINOR URBAN AREAS	**3**	**3**	**3**	**0**	**0**
Waiau		1		1	
Tahawai		13	12	1	
Aongatete	5	8	7	1	
Matakana Island					
Pahoia	2	4	3	1	
Te Puna	1	6	5	1	
Minden	2	17	15	2	
Kaimai	2	5	4	1	
Kopurererua		5	5		
Waiorohi		7	7		
Kaitemako-Waitao	5	12	11	1	
Otawa	4	7	5	2	
Rangiuru	4	2	2		
Pongakawa-Paengaroa	25	3	1	2	
RURAL AREAS	**50**	**90**	**77**	**13**	**0**
DISTRICT TOTAL	**276**	**383**	**267**	**100**	**16**

Dwelling Typology	Stand-alone Dwelling	Duplex Dwellings	Multi Unit Dwellings	Minor Dwelling	Retirement Village Unit
Waihī Beach-Bowentown	31	2			
Athenree	2				
Katikati	22		15		26
Ōmokoroa	76	22	24		
Te Puke	22		48		
URBAN GROWTH AREAS	**153**	**24**	**87**	**0**	**26**
Maketu	1				
Pukehina Beach	2				
MINOR URBAN AREAS	**3**	**0**	**0**	**0**	**0**
Waiau	1				
Tahawai	13				
Aongatete	8				
Matakana Island					
Pahoia	2			2	
Te Puna	5			1	
Minden	14			3	
Kaimai	4			1	

Dwelling Typology	Stand-alone Dwelling	Duplex Dwellings	Multi Unit Dwellings	Minor Dwelling	Retirement Village Unit
Kopurererua	3			2	
Waiorohi	6			1	
Kaitemako-Waitao	10			2	
Otawa	6			1	
Rangiuru	1			1	
Pongakawa-Paengaroa	3				
RURAL AREAS	**76**	**0**	**0**	**14**	**0**
DISTRICT TOTAL	**232**	**24**	**87**	**14**	**26**

Number of Bedrooms	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms
Waihī Beach-Bowentown		6	19	5	3
Athenree		2			
Katikati	24	8	29	1	1
Ōmokoroa		28	66	28	
Te Puke	29	17	23	1	
URBAN GROWTH AREAS	**53**	**61**	**137**	**35**	**4**
Maketu				1	
Pukehina Beach		1	1		
MINOR URBAN AREAS	**0**	**1**	**1**	**1**	**0**
Waiau			1		
Tahawai		8	5		
Aongatete	1	3	2		2
Matakana Island					
Pahoia	2			2	
Te Puna		1	3	1	1
Minden	2	5	4	6	
Kaimai	1	1	1		2
Kopurererua	1	1	2		1
Waiorohi	2		1	3	1
Kaitemako-Waitao	2		2	7	1
Otawa	1		1	4	1
Rangiuru		1	1		
Pongakawa-Paengaroa	1	1	1		
RURAL AREAS	**13**	**21**	**24**	**23**	**9**
DISTRICT TOTAL	**66**	**83**	**162**	**59**	**13**

Dwelling Floor Area	<50-75m² Floor Area	76-125m² Floor Area	126-175m² Floor Area	176-225m² Floor Area	>225m² Floor Area
Waihī Beach-Bowentown	3	11	11	3	5
Athenree		1	1		
Katikati	34	17	9		3
Ōmokoroa	2	34	45	22	19
Te Puke	42	25	3		
URBAN GROWTH AREAS	**81**	**88**	**69**	**25**	**27**
Maketu			1		
Pukehina Beach	1	1			
MINOR URBAN AREAS	**1**	**1**	**1**	**0**	**0**
Waiau					1
Tahawai	10	1		1	1

Dwelling Floor Area	<50-75m² Floor Area	76-125m² Floor Area	126-175m² Floor Area	176-225m² Floor Area	>225m² Floor Area
Aongatete	2	3	1		2
Matakana Island					
Pahoia	1	1			2
Te Puna	1				5
Minden	2	3	2	2	8
Kaimai				1	4
Kopurererua		2		1	2
Waiorohi	2	1		2	2
Kaitemako-Waitao	1	1	4		6
Otawa		1	1	2	3
Rangiuru	1		1		
Pongakawa-Paengaroa				2	1
RURAL AREAS	**20**	**13**	**9**	**11**	**37**
DISTRICT TOTAL	**102**	**102**	**79**	**36**	**64**

Parcel Land Area	50-175m² Land Area	176-325m² Land Area	326-500m² Land Area	501-750m² Land Area	751-1,000m² Land Area	>1,000m² Land Area
Waihī Beach-Bowentown			11	9	8	5
Athenree				1	1	
Katikati		12	8		31	12
Ōmokoroa		6	33	9	2	72
Te Puke		3	7	3	10	47
URBAN GROWTH AREAS	**0**	**21**	**59**	**22**	**52**	**136**
Maketu				1		
Pukehina Beach					1	1
MINOR URBAN AREAS	**0**	**0**	**0**	**1**	**1**	**1**
Waiau						1
Tahawai						13
Aongatete						8
Matakana Island						
Pahoia						4
Te Puna						6
Minden						17
Kaimai						5
Kopurererua						5
Waiorohi						7
Kaitemako-Waitao						12
Otawa						7
Rangiuru						2
Pongakawa-Paengaroa						3
RURAL AREAS	**0**	**0**	**0**	**0**	**0**	**90**
DISTRICT TOTAL	**0**	**21**	**59**	**23**	**53**	**227**

Western Bay of Plenty District
1 July 2024 – 30 June 2025


SMITH
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