matamata piako district council






Town Strategies
2013 - 2033

Land Budgets:

Matamata • Morrinsville • Te Aroha

May 2013

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Introduction

The Matamata-Piako District Plan is currently undergoing a "rolling review" whereby different sections of the Plan are updated on a priority basis.

Since the now Operative Plan was first notified in 1996, there has been no comprehensive review of planning for the future development of the District's three main towns of Morrinsville, Matamata, and Te Aroha. Yet, all three towns have shown population growth, land-use change, and a change in demographics towards an ageing population. In addition, the Waikato Regional Policy Statement (RPS) is being reviewed, directing (amongst other provisions), that district plans ensure the integration of land-use with transport and other infrastructure.

Given that our towns continue to grow and that we have to ensure that our urban growth meets the sustainability purpose of the RMA and the new policy direction signalled by the RPS, the next priority for the Council is to review the District Plan provisions for our three main towns. However, before the District Plan's urban provisions can be reviewed, it is considered necessary to prepare twenty-year urban development strategies for the main towns of Matamata, Morrinsville, and Te Aroha.

The purpose of the strategies is to determine, with input from the community, the overarching land-use, transport, and infrastructure "frameworks" for the future development of our towns. The "frameworks" for the three towns, once adopted by Council, will then serve to guide subsequent related District Plan reviews.

While the town strategies will ultimately inform the District Plan review for the urban areas, the project itself is not a plan change process under Schedule 1 of the RMA. Rather, the project will be undertaken in terms of the Local Government Act 2002 (LGA).

The scope of "Project Town Strategies" has been described in a prior Report (Reference: 031012). In summary, the methodology that is being used to prepare urban development strategies for the towns of Morrinsville, Matamata, and Te Aroha can be described as follows:

- **Demographic studies**
  At the outset, demographic studies will be undertaken to determine the likely size, and the age composition of the future population, as well as the number of additional households that needs to be accommodated in each of the three towns.

- **Land uses/ Land budgets**
  Based on the likely population growth, a "land budget", comparing the supply and demand of zoned land, will be prepared for each of the towns. The "land budget" will calculate the current supply of vacant zoned land for the various land uses, the likely growth in demand for zoned land over time, and the resulting need (or otherwise) for more zoned land. The analysis will include assumptions regarding the proportion of the demand for respectively "brownfields" (i.e. intensification), as opposed to "greenfields" (i.e. new) development.

- **Infrastructure and transport**
  Next, studies will be undertaken to determine the future demand for infrastructure services (water, wastewater, and stormwater), and the future demands on the transportation systems.

- **Alternative development options**
  With the demand for additional zoned land, infrastructure, and transport known, the next step will entail the preparation of alternative development options for the three towns.

- **Consultation**
  Consultation with Councillors and the community will then follow.

- **Town strategies**
  Feedback from the consultation process will then be used to prepare final Town Strategies for each of the towns which will ultimately be formally notified for submissions under the LGA. As part of the town strategies, the District Plan's urban zoning structure will be reviewed and appropriate zonings that will meet the future needs of the community will be determined.

- **Adoption**
  In the final instance, and after hearing submissions, the Council will consider whether it wants to adopt the recommended Town Strategies, with or without amendments.

This Report provides an overview of the demand and supply of zoned land in the District's three main towns of Morrinsville, Matamata, and Te Aroha. As such, the Report completes that part of the work outlined in "Stage III (Land Uses/ Land Budgets)" of the Scoping Report for "Project Town Strategies".

A Morrinsville Growth Projections

1.0 RESIDENTIAL LAND

1.1 Demand for residential land

Morrinsville is the District's largest town with a current (2013) population of approximately 7,066 people, representing 2,782 households. The population of the town is estimated to increase by approximately 80 – 100 persons per year, to a total of 8,817 by 2033. By comparison, the number of households is predicted to increase by approximately 40 – 55 per year to 3,768 in 2033.

The projected growth in population and households for five-year intervals during 2013 – 2033, and the changes in age composition are shown in Tables 1 – 2 and Figure 1, below. The majority of the increase in population will occur in the population groups older than 50 years, with the population in the younger age groups remaining relatively stable, as shown in Table 3.

TABLE 1: MORRINSVILLE - PROJECTED POPULATION 2013 – 2033

YEAR	POPULATION									
	0 – 4 YEARS	5 – 19 YEARS	20 – 34 YEARS	35 – 49 YEARS	50 – 64 YEARS	65 – 79 YEARS	+ 80 YEARS	TOTAL	INCREASE	% INCREASE
2013	493	1,468	1,118	1,219	1,260	1,017	491	**7,066**		
2018	490	1,483	1,208	1,145	1,364	1,183	594	**7,467**	**401**	**5.68**
2023	502	1,509	1,254	1,161	1,374	1,377	715	**7,892**	**425**	**5.69**
2028	518	1,558	1,258	1,256	1,324	1,578	849	**8,341**	**449**	**5.69**
2033	536	1,590	1,259	1,388	1,250	1,753	1,041	**8,817**	**476**	**5.71**
INCREASE 2013 - 2033	**43**	**122**	**141**	**169**	**-10**	**736**	**550**	**1,751**	**1,751**	**24.78**
% INCREASE	**8.72**	**8.31**	**12.61**	**13.86**	**-0.79**	**72.37**	**112.02**	**24.78**	**24.78**	

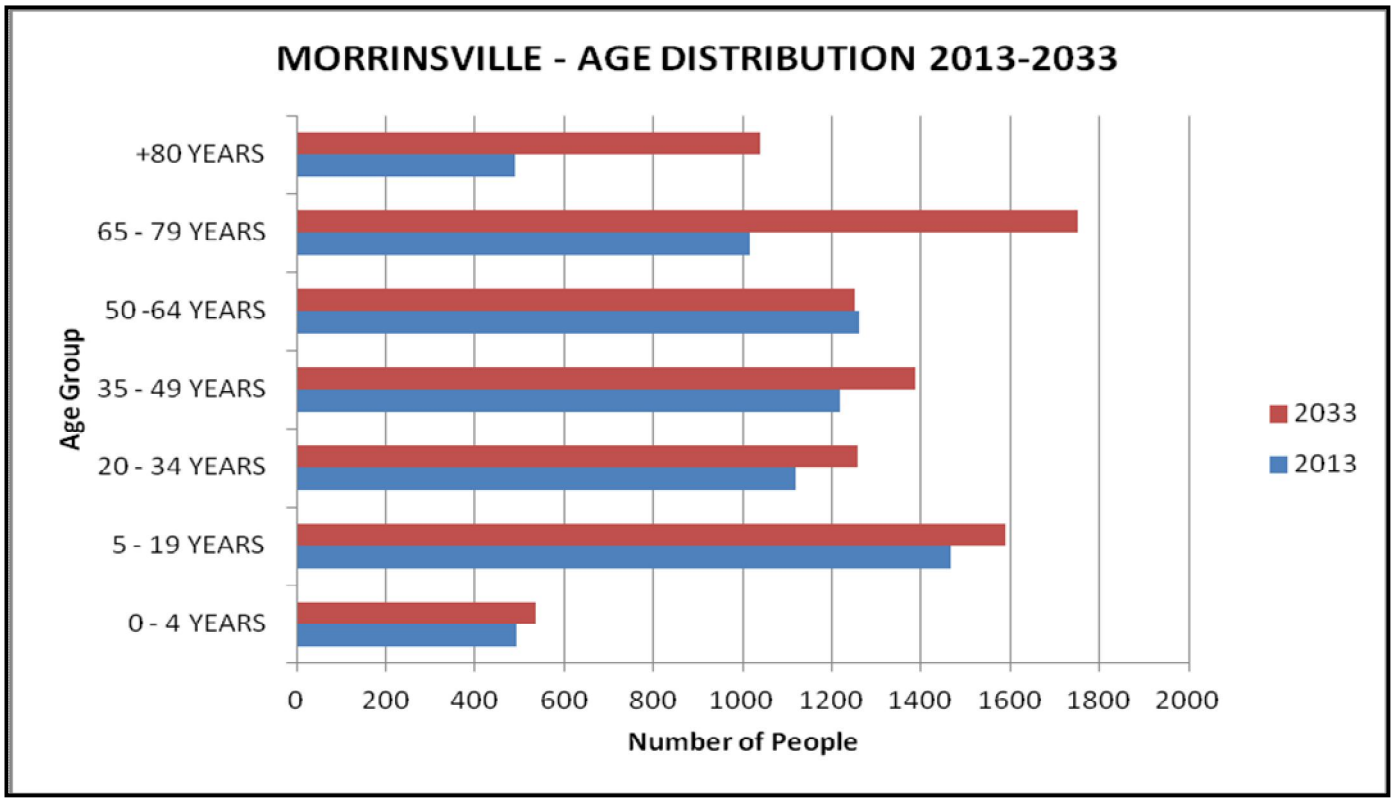
TABLE 2: MORRINSVILLE - PROJECTED NUMBER OF HOUSEHOLDS 2013 – 2033

YEAR	HOUSEHOLD SIZE	NUMBER OF HOUSEHOLDS	INCREASE IN NUMBER OF HOUSEHOLDS	% INCREASE IN NUMBER OF HOUSEHOLDS
2013	2.54	2,782		
2018	2.49	2,999	217	7.80
2023	2.44	3,234	236	7.86
2028	2.39	3,490	256	7.91
2033	2.34	3,768	278	7.95
TOTAL			**987**	**35.44**

TABLE 3: MORRINSVILLE - CHANGE IN POPULATION BY AGE GROUP 2013 – 2033

AGE GROUP	POPULATION				
	2013 - 2018	2018 – 2023	2023 – 2028	2028 - 2033	TOTAL
0 – 4 Years	-3	12	16	18	**43**
5 – 19 Years	15	26	49	32	**122**
20 – 34 Years	90	46	4	1	**141**
35 – 39 Years	-74	16	95	132	**169**
50 – 64 Years	104	10	-50	-74	**-10**
65 – 79 Years	166	194	201	175	**736**
+80 Years	103	121	134	192	**550**
TOTAL	**401**	**425**	**449**	**476**	**1,751**

FIGURE 1: MORRINSVILLE – AGE DISTRIBUTION 2013 AND 2033



The above analysis indicates a demand for approximately 40 – 60 new dwelling units per year (200 – 300 units per five year period), or a total of approximately 1,000 units over the next 20 years. Table 4 below indicates the projected demand for residential land to accommodate the projected 1,000 new units, based on the following assumptions:

- 10% of the demand will be satisfied by "infill" ("brownfield") development with the remaining 90% being new ("greenfield") development;
- Average lot size is 750 m^2 (net);
- Net developable land is 60%, with the remaining 40% being roads and open space.

TABLE 4: MORRINSVILLE – PROJECTED RESIDENTIAL LAND DEMAND 2013 - 2033

PERIOD	INCREASE IN NUMBER OF HOUSEHOLDS	NUMBER OF HOUSEHOLDS RESIDENT IN:		GROSS LAND DEMAND ("GREENFIELDS") (ha)
		INFILL AREAS "BROWNFIELDS"	NEW AREAS "GREENFIELDS"	
2013 – 2018	217	22	195	24.38 ha
2018 – 2023	236	24	212	26.50 ha
2023 – 2028	256	26	230	28.75 ha
2028 – 2033	278	28	250	31.25 ha
TOTAL	**987**	**100**	**887**	**110.88 ha**

1.2 Supply of residential land

Table 5 below shows the current supply of residentially and rural-residentially zoned land in Morrinsville.

TABLE 5: MORRINSVILLE – SUPPLY OF RESIDENTIAL AND RURAL-RESIDENTIAL ZONED LAND (2013)

ZONING	Developed (ha)	Vacant Serviced (ha)	Vacant Un-serviced (ha)	TOTAL (ha)
Residential	282 ha	38 ha	80 ha	**400 ha**
Rural-Residential	25 ha	20 ha	160 ha	**205 ha**
TOTAL	**307 ha**	**58 ha**	**240 ha**	**605 ha**

There is a total of 605 ha of residential and rural-residential land in Morrinsville, of which 307 ha is currently already developed, 58 ha is serviced but not yet built on, and 240 ha is still vacant.

1.3 Demand for additional residential land

The graphs below show the growth in demand for residential land over the next 20 years, compared to:

- Figure 2.1 - The current supply of residentially zoned land.
- Figure 2.2 – The current supply of residentially and rural-residentially zoned land.

The comparison shows that the demand for residential land will outstrip the current supply of land zoned residential by 2033 (Figure 2.1). However, when land zoned for residential and rural-residential land is considered jointly (Figure 2.2), there is still an excess supply of land by 2033.

It needs to be noted that the demand-curve and the supply-line in Figures 2.1 and 2.2 consider only the actual demand and supply of land whereas additional capacity needs to be provided to cater for a range of complex circumstances that will ultimately determine the availability of developed land.

These circumstances include, on the demand side, individual preferences in terms of price, size, location, and amenity of available residential offerings. To accommodate individual preference more land needs to be made available than indicated by the actual demand-curves shown in Figures 2.1 and 2.2.

The supply side, on the other hand, will be influenced by factors such as the land owners' predisposition towards selling or developing the land, and timing of sale or development. To accommodate these factors, more land needs to be made available to ensure an adequate supply of readily available development opportunities.

The size of the land "buffer" required to ensure a balance between supply and demand, cannot be calculated and remains a decision that the Council needs to make. As a guideline, it is recommended that the supply of land available for residential and rural-residential development should at least be equal to double the demand.

In the case of Morrinsville, the actual demand is for an additional 110 ha of land for residential and rural-residential use over the next 20 years. Therefore, it is suggested that the supply of residential land should be in the order of 220 ha. Allowance for such a land "buffer" is illustrated by the "demand plus buffer"-curves in Figures 2.1 and 2.2.

FIGURE 2.1: MORRINSVILLE –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL 2013 – 2033

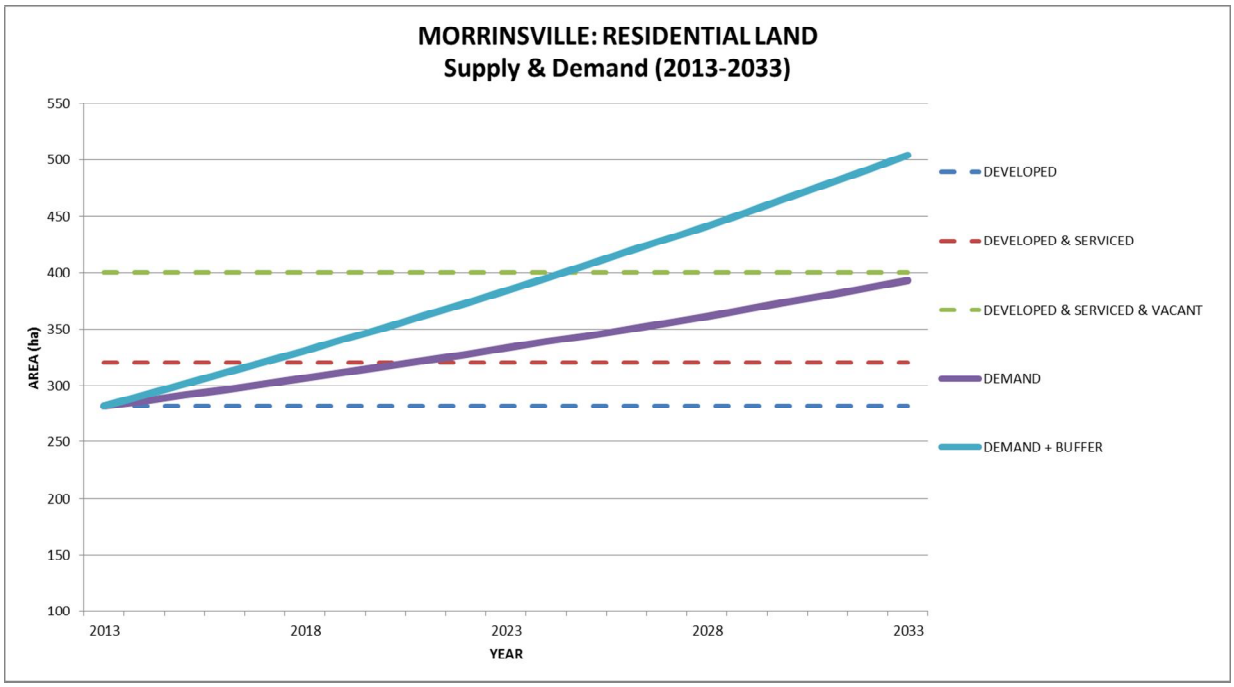
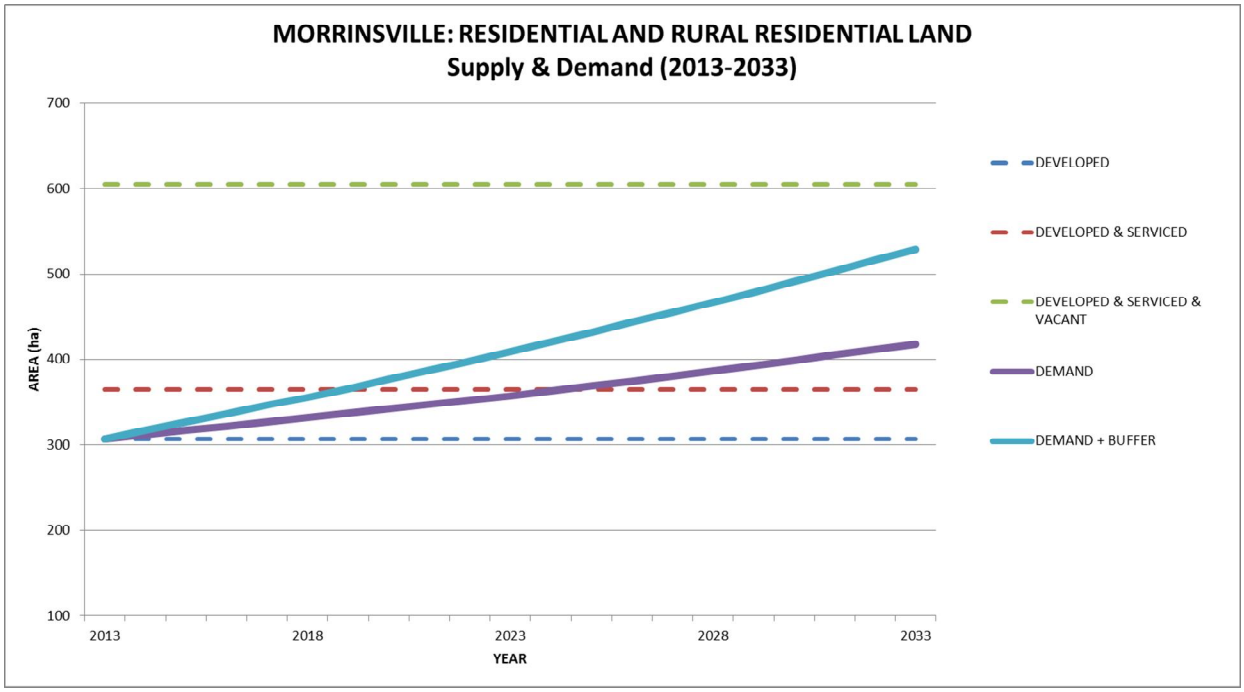


FIGURE 2.2: MORRINSVILLE –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL AND RURAL-RESIDENTIAL 2013 - 2033



2.0 NON-RESIDENTIAL LAND

2.1 Demand for non-residential land

Table 6 below shows the floor area of new non-residential buildings consented in the Town of Morrinsville over the last 22 years (1990/91 – 2011/12) obtained from Statistics New Zealand. The figures include only new buildings, and are exclusive of alterations and additions to existing structures. The data is split into three categories "Business", "Industrial" and "Social".

TABLE 6: MORRINSVILLE – NEW NON-RESIDENTIAL CONSTRUCTION 1990/1 – 2011/12

YEAR	FLOOR AREA OF NEW BUILDINGS CONSENTED				
	BUSINESS PREMISES (m^2)	INDUSTRIAL PREMISES (m^2)	SOCIAL PURPOSES (m^2)	TOTAL (m^2)	CUMULATIVE TOTAL (m^2)
1990/91	196	1,782	197	2,175	2,175
1991/92	0	63	0	63	2,238
1992/93	59	76	288	423	2,661
1993/94	75	1,205	155	1,435	4,096
1994/95	1,875	1,525	410	3,810	7,906
1995/96	179	1,137	0	1,316	9,222
1996/97	707	780	2,036	3,523	12,745
1997/98	2,878	558	265	3,701	16,446
1998/99	602	3,015	90	3,707	20,153
1999/00	254	579	330	1,163	21,316
2000/01	750	1,900	108	2,758	24,074
2001/02	189	293	10	492	24,566
2002/03	124	531	67	722	25,288
2003/04	520	299	200	1,019	26,307
2004/05	774	2,027	1,298	4,099	30,406
2005/06	0	255	130	385	30,791
2006/07	783	1,696	0	2,479	33,270
2007/08	105	360	0	465	33,735
2008/09	3,098	5,303	0	8,401	42,136
2009/10	1,256	270	628	2,154	44,290
2010/11	1,496	1,406	0	2,902	47,192
2011/12	848	2,835	150	3,833	51,025
TOTAL	**16,768**	**27,895**	**6,362**	**51,025**	
Average/Year	**762**	**1,268**	**289**	**2,319**	

The "Business" category includes hotels and short-term accommodation, shops, restaurants, taverns, offices and administration buildings.

The “Industrial” category includes storage buildings, factories, and industrial buildings. The “Social” category includes social, cultural, and religious buildings, hostels, boarding houses, hospitals, nursing homes, education buildings and other miscellaneous structures.

The Table shows that on average; approximately 2,300 m^2 of non-residential building area has been constructed per year in Morrinsville. More than half of the new building area (1,268 m^2 per year) was for industrial use, approximately one-third (762 m^2) for business use, and the rest (289 m^2) for social purposes.

Figures 3 – 5 below show the moving average in annual non-residential construction. There is an upward trend in the annual average construction of business premises. For new industrial construction, the trend has remained fairly constant from 1996 onwards. Construction of buildings for social purposes has trended downwards since 1996/7.

FIGURE 3: MORRINSVILLE – FLOOR AREA CONSENTED FOR BUSINESS USE 1990/91 – 2011/12

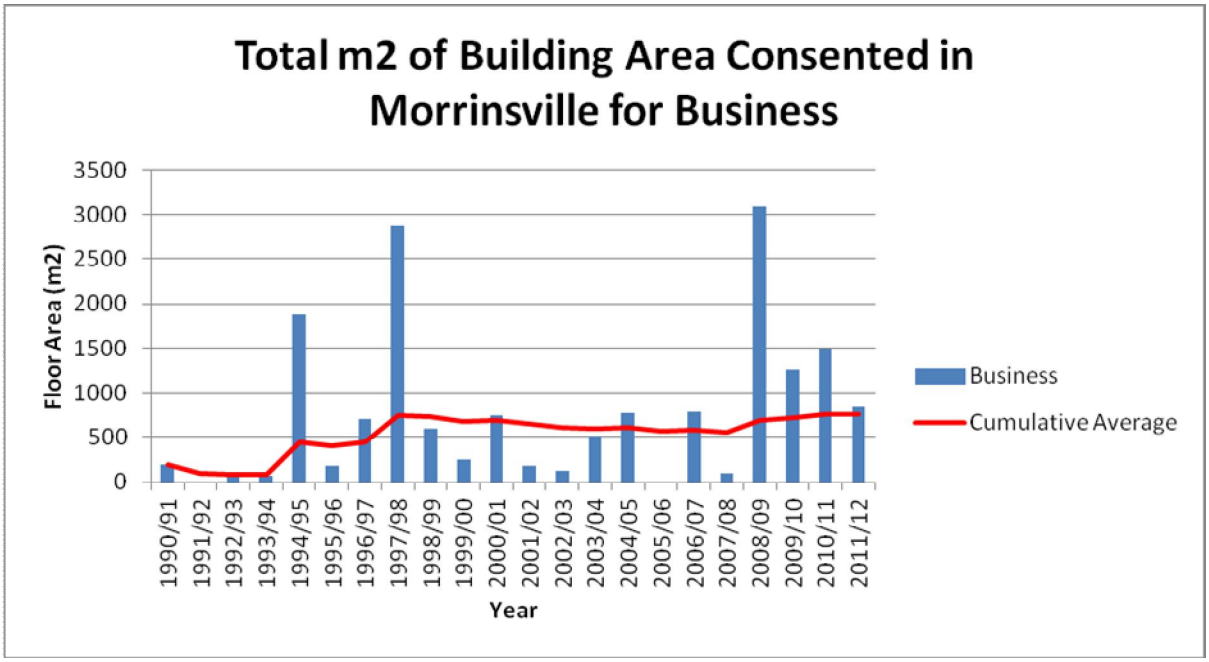


FIGURE 4: MORRINSVILLE – FLOOR AREA CONSENTED FOR INDUSTRIAL USE 1990/91 – 2011/12

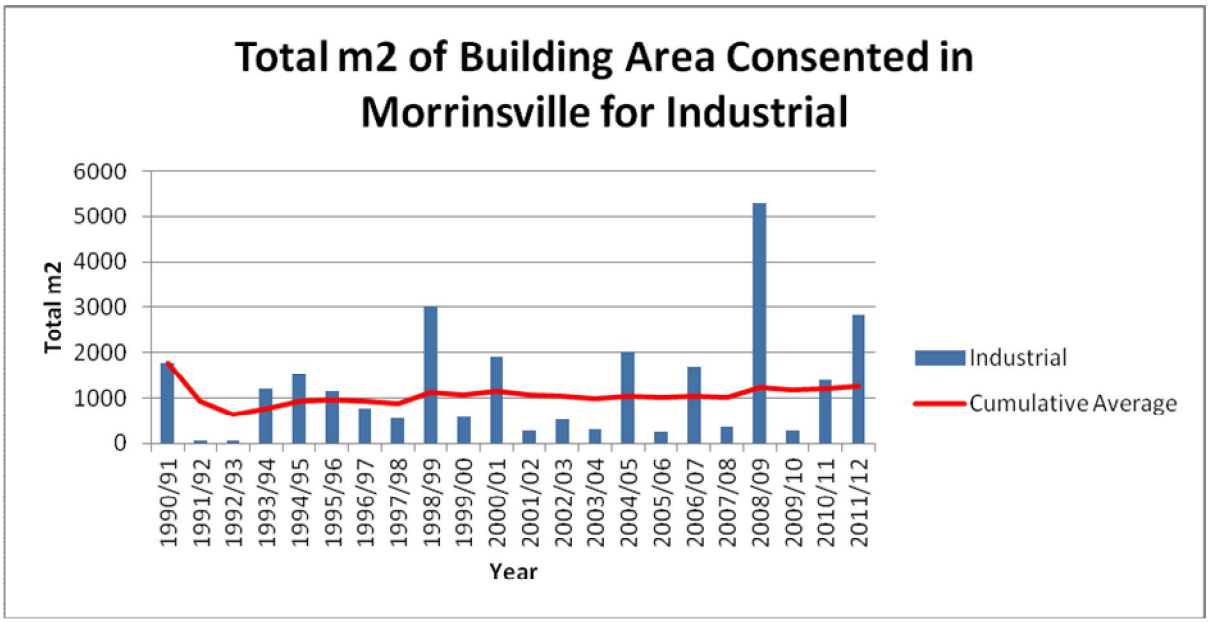
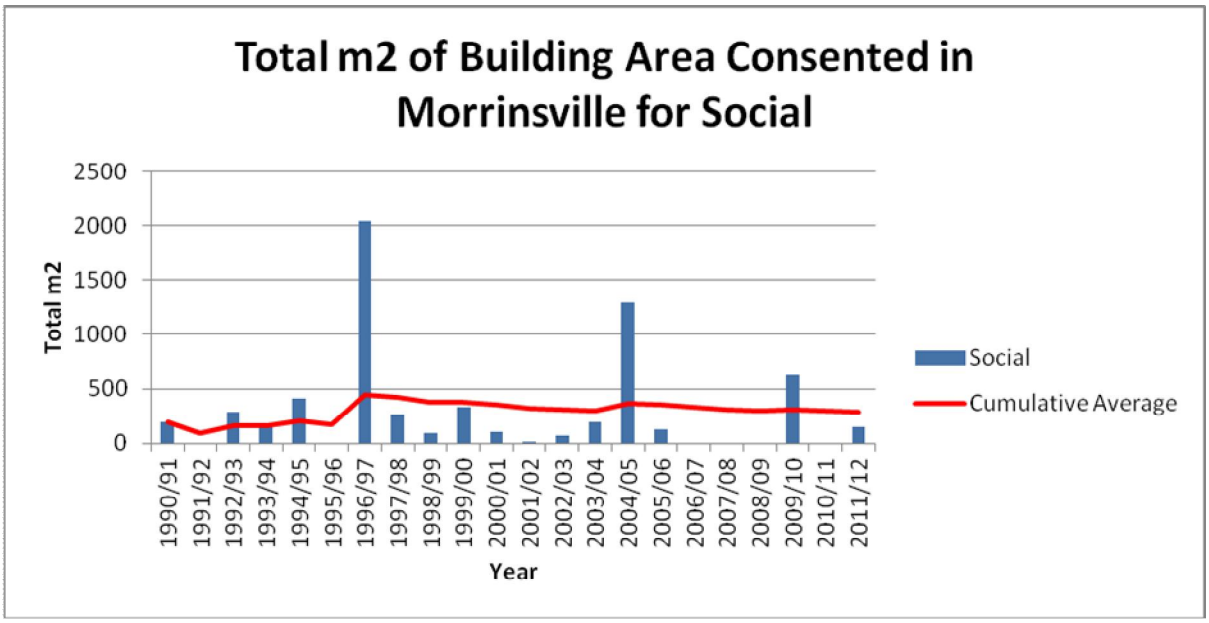


FIGURE 5: MORRINSVILLE – FLOOR AREA CONSENTED FOR SOCIAL PURPOSES 1990/91 – 2011/12



Assuming that non-residential growth will take place at the average historical growth for the period 1990/91 – 2011/12, and assuming a 40% average site coverage, Table 7 below shows that, over the next 20 years, approximately 11.6 ha of land will be required to accommodate non-residential growth in Morrinsville.

TABLE 7: MORRINSVILLE – PROJECTED NON-RESIDENTIAL LAND DEMAND 2012 - 2033

PERIOD	GROSS FLOOR AREA (m^2)				SITE AREA (ha)			
	Business (m^2)	Industrial (m^2)	Social (m^2)	Total (m^2)	Business (ha)	Industrial (ha)	Social (ha)	Total (ha)
2013 – 2018	3,810	6,340	1,445	11,595	0.9525	1.5850	0.3612	2.8987
2018 – 2023	3,810	6,340	1,445	11,595	0.9525	1.5850	0.3612	2.8987
2023 – 2028	3,810	6,340	1,445	11,595	0.9525	1.5850	0.3612	2.8987
2028 – 2033	3,810	6,340	1,445	11,595	0.9525	1.5850	0.3612	2.8987
TOTAL	**15,240**	**25,360**	**5,780**	**46,380**	**3.8100**	**6.3400**	**1.4448**	**11.5948**

2.2 Supply of non-residential land

Table 8 below shows the current supply of Business and Industrial zoned land in Morrinsville.

TABLE 8: MORRINSVILLE – BUSINESS AND INDUSTRIAL ZONED LAND (2013)

ZONING	Developed (ha)	Vacant Serviced (ha)	Vacant Un-serviced (ha)	TOTAL (ha)
Business	54 ha	0 ha	5 ha	**59 ha**
Industrial	53 ha	0 ha	37 ha	**90 ha**
TOTAL	**107 ha**	**0 ha**	**42 ha**	**149 ha**

There is approximately 149 ha of land zoned for Industrial and Business purposes in Morrinsville of which 107 ha has already been developed, with 42 ha still vacant.

In addition to Business and Industrial zoned land shown in the Table above, approximately 90 ha of land within the Town of Morrinsville is designated for non-residential uses including schools, reserves, and roads.

2.3 Demand for additional non-residential land

Figures 6 and 7 below show the growth in demand for business and industrial land over the next 20 years, compared to the current land supply.

The comparison shows that there is a sufficient supply of industrial and business zoned land to accommodate the projected demand over the next 20 years. However, as in the case of residential land, an additional “buffer” needs to be provided to ensure a balance between the supply and demand for industrial and business land.

For planning purposes, a “buffer” of twice the actual demand is recommended.

FIGURE 6: MORRINSVILLE – SUPPLY AND DEMAND FOR BUSINESS LAND 2013 - 2033

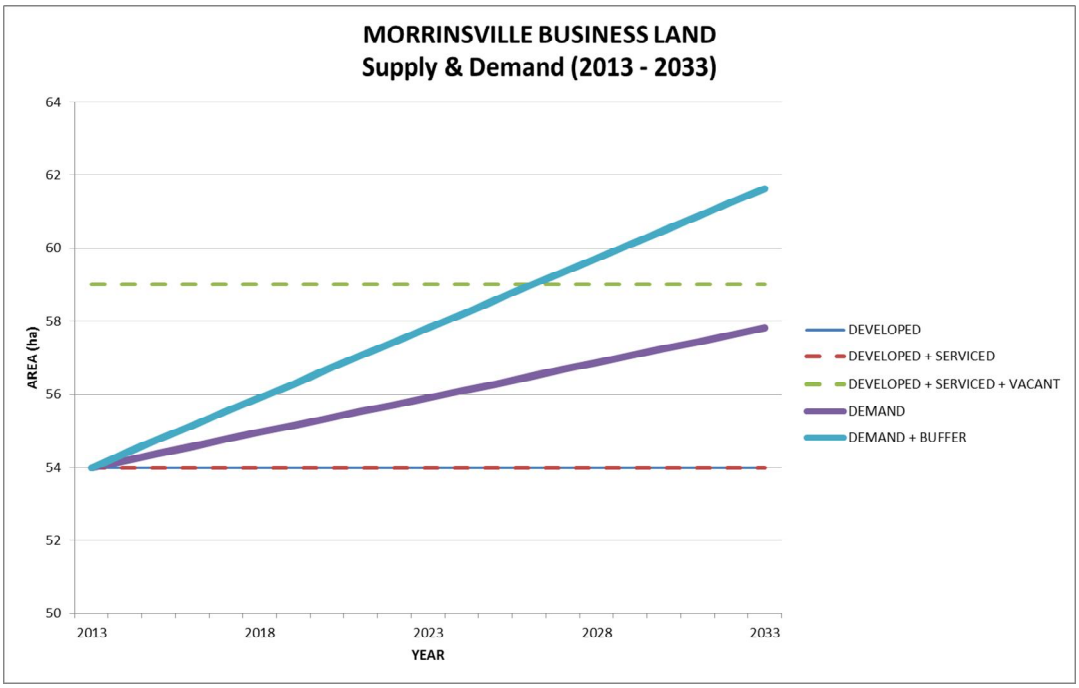
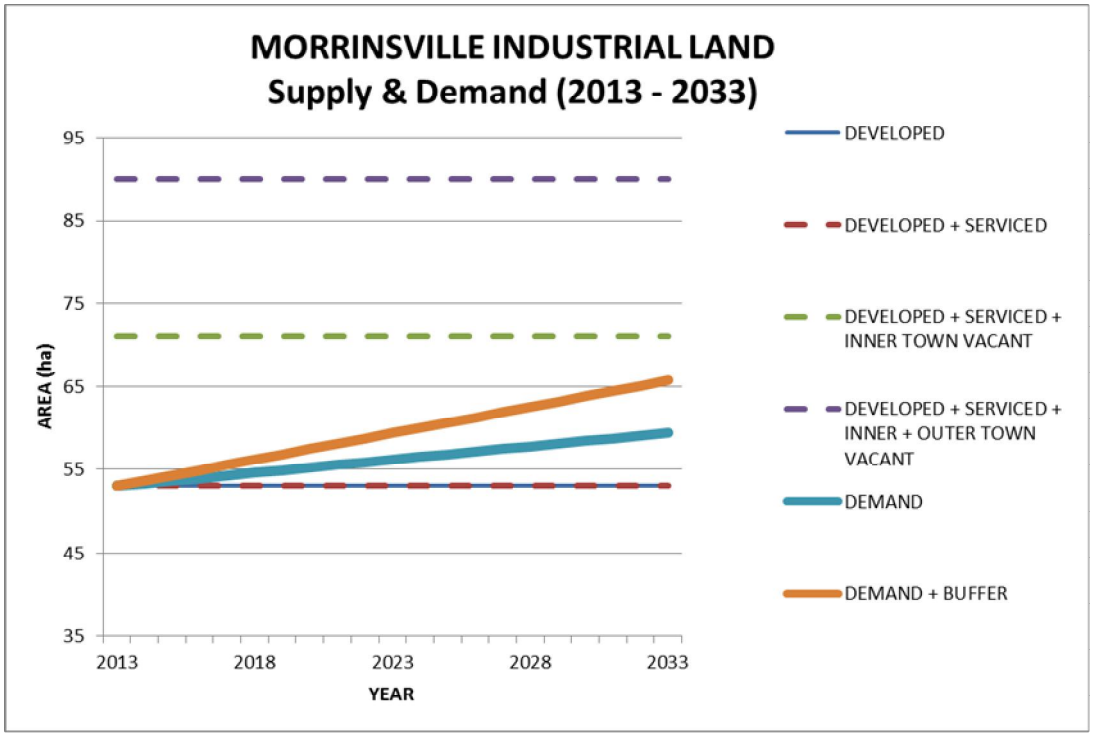


FIGURE 7: MORRINSVILLE – SUPPLY AND DEMAND FOR INDUSTRIAL LAND 2013 – 2033



3.0 OPEN SPACE STRUCTURE

In 1874 Thomas and Samuel Morrin purchased an estate, setting up a sheep and cattle station which led to the development of Morrinsville. The town was surveyed in 1882 and the first plan was deposited.

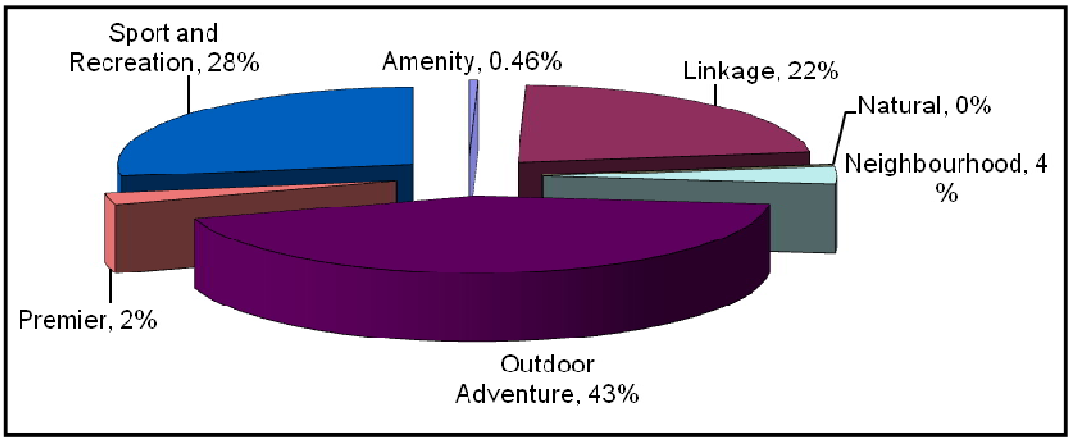
The town was the service centre for Morrin's Lockerbie Estate. The railway line to Morrinsville was opened on 1st October 1884, giving a further boost to the fledgling township increasing the population from 115 in 1881 to 633 in 1886. With the improvements to the dairy industry in the early 1900s, Morrinsville continued to prosper and grow. The dairy industry is still an important part of life in Morrinsville, who has taken the slogan "Cream of the Country."

Morrinsville's parks and open spaces reflect the town's history with names like Lockerbie Park and Thomas Park.

TABLE 9: MORRINSVILLE – SUMMARY OF PARKS AND OPEN SPACES PROVISION BY PARK CATEGORY

Park Category	Total Area (hectares)	Provision (ha per 1,000 residents)
Amenity	0.40	0.06
Linkage	19.50	2.76
Natural	-	-
Neighbourhood	3.30	0.47
Outdoor Adventure	37.83	5.35
Premier	2.06	0.29
Sport and Recreation	23.95	3.39
Total	87.04	12.32

FIGURE 8: MORRINSVILLE – PROPORTIONS OF PARK TYPES THAT MAKE UP PARK NETWORK



3.1 Morrinsville park provision by category.

Morrinsville's provision of park land (12.32 hectares per 1,000 residents) is lower than the national average (21.44 hectares per 1,000 residents), and that of the average for Matamata-Piako District (16.18 ha/1,000 residents).

The provision of park land can be divided into the categories below. A description of the categories can be found in the Open Space Strategy document.

Amenity Parks

Morrinsville has a total provision of Amenity Parks of 0.06 hectares per 1,000 residents. Other areas may also serve as Amenity Parks, such as the gardens at Morrinsville Area Office and Library.

Linkage Parks

Morrinsville has a total provision of Linkage Parks of 2.76 ha/1,000 residents. This should be increased to approximately 3.01 ha/1,000 residents to meet the recommended level of service of Linkage Park land. Areas to investigate for future Linkage Parks include the areas between Morrinsville River Walk, Holmwood Park and Parkwood to complete a loop walking track around town.

The Open Space Strategy provides further analysis of future requirements for Linkage Parks in Morrinsville.

Neighbourhood Parks

There are seven Neighbourhood Parks in Morrinsville with a provision of 0.47 ha/1,000 residents. This is a higher provision than the recommended provision of 0.25ha/1,000 residents.

There is however an area of Morrinsville near Bank/Coronation Street where there are no nearby parks. However, this area is well provided for if the surrounding schools are taken into account. Should any of the local schools be disposed of, consideration should be given to acquiring part of the site for a Neighbourhood Park (3,000 to 5,000m^2). Otherwise there are sufficient Neighbourhood Parks or surrogate parks located in Morrinsville.

An analysis of playground distribution in Morrinsville shows that most areas are catered for. The only area which could be considered for siting of a playground would be at Holmwood Park, with some of the adjacent residential properties falling outside an 800m radius of a playground – the closest playgrounds are located at Lindale Reserve and Howie Park.

Premier Parks

There is one Premier Park in Morrinsville, Howie Park, with a provision of 0.29 ha/1,000 residents.

There is no need at this stage to acquire new, or expand existing, Premier Parks in Morrinsville.

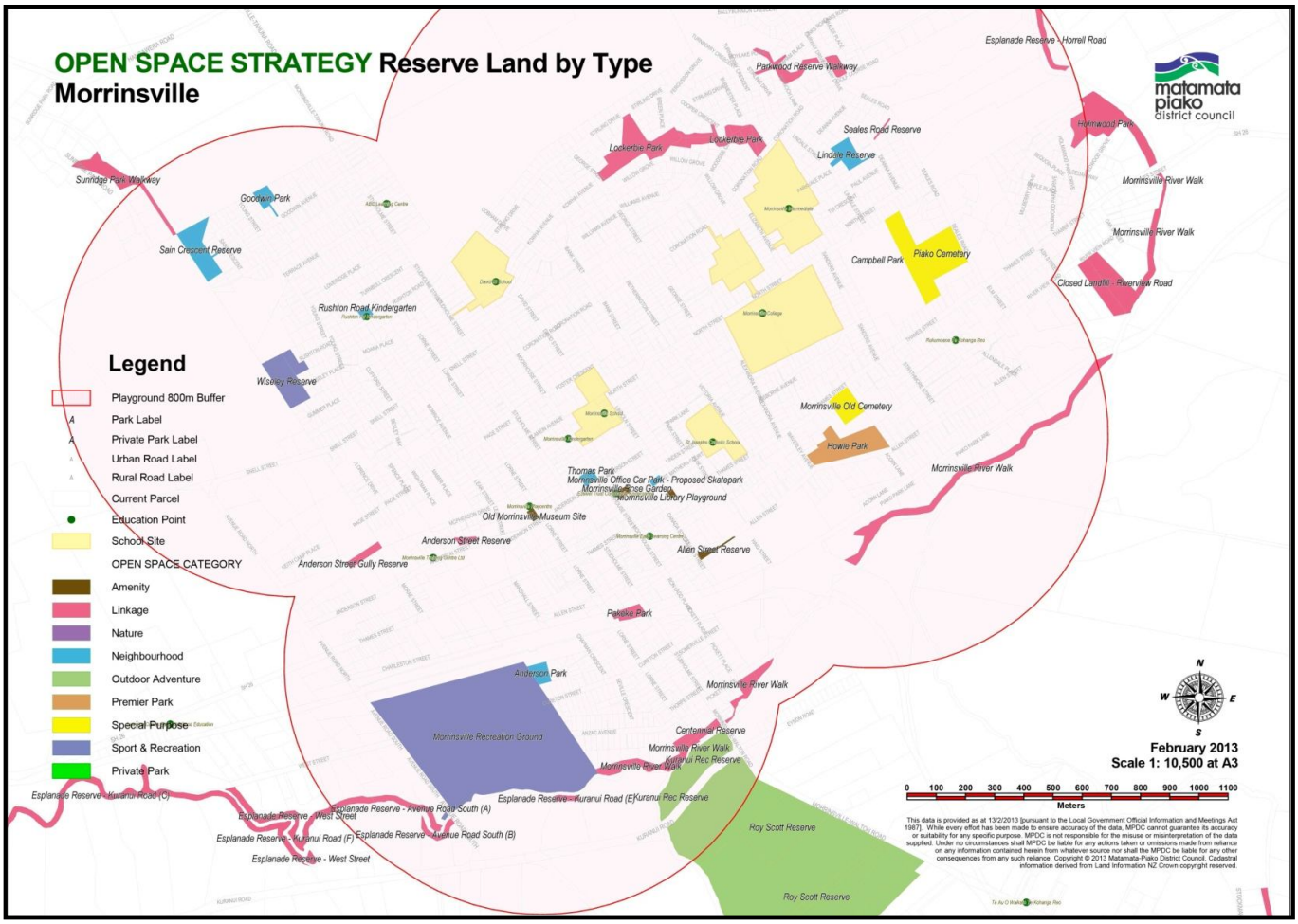
Sports and Recreation Parks

Morrinsville has two Sports and Recreation Parks, providing 23.95 hectares of land, or 3.89 ha/1,000 residents. This provision is considerably higher than the "yardstick" national average (2.34 ha/1,000 residents) and the Matamata-Piako District average of 3.06 ha/1,000.

However, it should be noted that 9.03 hectares (1.28ha/1,000 residents) of the Morrinsville Recreation Ground is used for Polo, a sport normally not provided for by local councils.

In addition to Council's Sport and Recreation land, the Matamata-Piako District Council has an agreement for public use of Campbell Park (5.95 ha), which provides an additional 0.84 ha/1,000 residents.

FIGURE 9: MORRINSVILLE OPEN SPACE PROVISION



B. Matamata Growth Projections

1.0 RESIDENTIAL LAND

1.1 Demand for residential land

Matamata is our second largest town with a current (2013) population estimated to be approximately 6,821 people, representing 2,966 households. The population of the town is estimated to increase by approximately 50 persons per year, to a total of 7,831 by 2033. By comparison, the number of households is predicted to increase by approximately 35 – 40 per year to 3,729 in 2033.

The projected growth in population and households for five-year intervals during 2013 – 2033, and the changes in age composition are shown in Tables 10 – 11 and Figure 10, below. The majority of the increase in population will occur in the population groups older than 50 years, with the population in the younger age groups remaining relatively stable, as shown in Table 12.

TABLE 10: MATAMATA - PROJECTED POPULATION 2013 – 2033

YEAR	POPULATION									
	0 – 4 YEARS	5 – 19 YEARS	20 – 34 YEARS	35 – 49 YEARS	50 – 64 YEARS	65 – 79 YEARS	+ 80 YEARS	TOTAL	INCREASE	% INCREASE
2013	444	1,198	975	1,098	1,235	1,249	622	**6,821**		
2018	427	1,190	1,023	1,027	1,302	1,376	715	**7,060**	**239**	**3.50**
2023	429	1,208	1,016	994	1,327	1,496	837	**7,307**	**247**	**3.50**
2028	435	1,227	995	1,053	1,259	1,634	962	**7,565**	**258**	**3.53**
2033	435	1,214	1,000	1,155	1,193	1,741	1,093	**7,831**	**266**	**3.52**
INCREASE	-9	16	25	57	-42	492	471	**1,010**	**1,010**	**14.81**
% INCREASE	**-2.03**	**1.34**	**2.56**	**5.19**	**-3.40**	**39.39**	**75.72**	**14.81**	**14.81**	

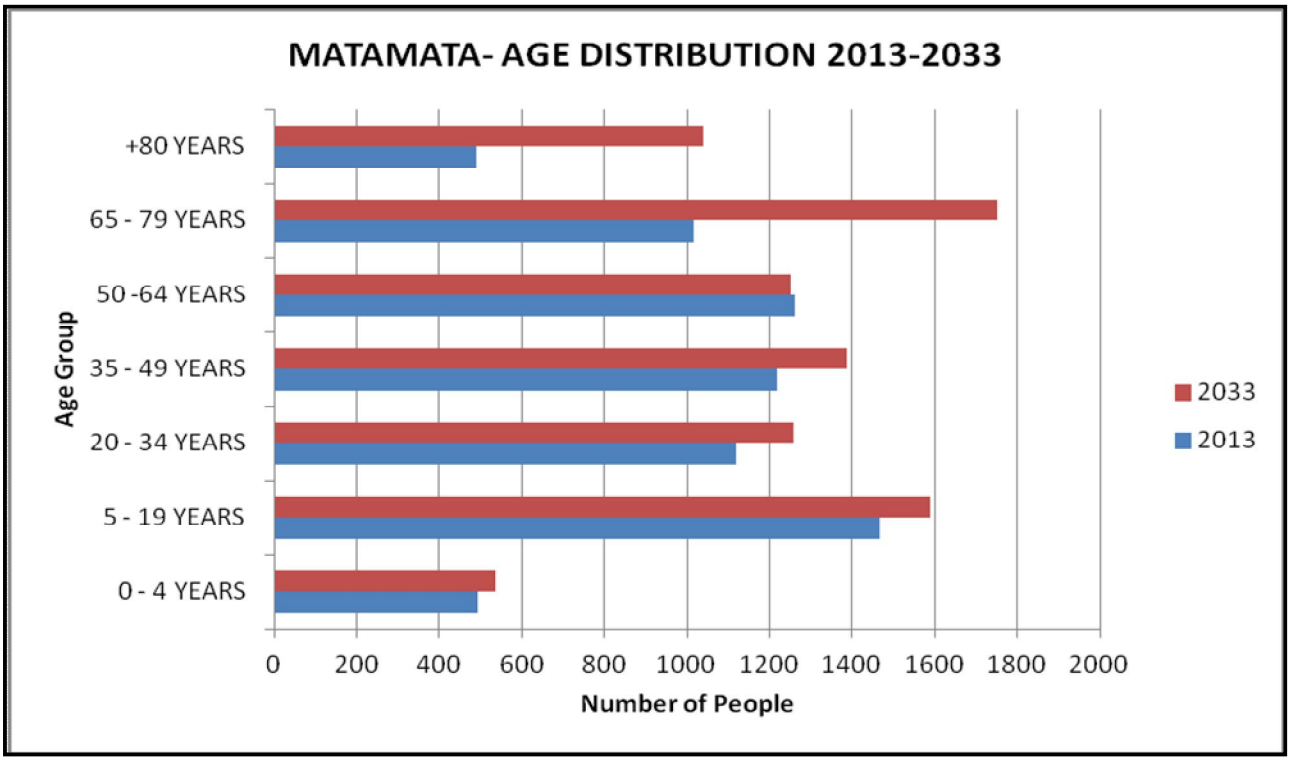
TABLE 11: MATAMATA - PROJECTED NUMBER OF HOUSEHOLDS 2013 – 2033

YEAR	HOUSEHOLD SIZE	NUMBER OF HOUSEHOLDS	INCREASE IN NUMBER OF HOUSEHOLDS	% INCREASE IN NUMBER OF HOUSEHOLDS
2013	2.30	2,966		
2018	2.25	3,138	**172**	**5.80**
2023	2.20	3,322	**184**	**5.86**
2028	2.15	3,518	**197**	**5.93**
2033	2.10	3,729	**211**	**5.99**
TOTAL			**764**	**25.74**

TABLE 12: MATAMATA - CHANGE IN POPULATION BY AGE GROUP 2013 – 2033

AGE GROUP	POPULATION				
	2013 - 2018	2018 – 2023	2023 – 2028	2028 - 2033	TOTAL
0 – 4 Years	-17	2	6	0	**-9**
5 – 19 Years	-8	18	19	-13	**16**
20 – 34 Years	48	-7	-21	5	**25**
35 – 39 Years	-71	-33	59	102	**57**
50 – 64 Years	67	25	-68	-66	**-42**
65 – 79 Years	127	120	138	107	**492**
+80 Years	93	122	125	131	**471**
TOTAL	**239**	**247**	**258**	**266**	**1,010**

FIGURE 10: MATAMATA – AGE DISTRIBUTION 2013 AND 2033



The above analysis indicates a demand for approximately 35 – 45 new dwelling units per year (175 – 225 units per five year period), or a total of approximately 750 units over the next 20 years. Table 13 below indicates the projected demand for residential land to accommodate the projected 750 new units, based on the following assumptions:

- 10% of the demand will be satisfied by "infill" ("brownfield") development with the remaining 90% being new ("greenfield") development;
- Average lot size is 750 m^2 (net);
- Net developable land is 60%, with the remaining 40% being roads and open space.

TABLE 13: MATAMATA – PROJECTED RESIDENTIAL LAND DEMAND 2013 - 2033

PERIOD	INCREASE IN NUMBER OF HOUSEHOLDS	NUMBER OF HOUSEHOLDS RESIDENT IN:		GROSS LAND DEMAND ("GREENFIELDS") (ha)
		INFILL AREAS "BROWNFIELDS"	NEW AREAS "GREENFIELDS"	
2013 – 2018	172	17	155	19.375 ha
2018 – 2023	184	18	166	20.750 ha
2023 – 2028	197	20	177	22.125 ha
2028 – 2033	211	21	190	23.750 ha
TOTAL	**764**	**76**	**688**	**86.000 ha**

1.2 Supply of residential land

Table 14 below shows the current supply of residentially and rural-residentially zoned land in Matamata.

TABLE 14: MATAMATA – SUPPLY OF RESIDENTIAL AND RURAL-RESIDENTIAL ZONED LAND (2013)

ZONING	Developed	Vacant Serviced	Vacant Un-serviced	TOTAL
Residential	312	33	124	**469**
Rural-Residential	56	18	141	**215**
TOTAL	**368**	**51**	**265**	**684**

There is a total of 684 ha of land zoned residential and rural-residential in Matamata, of which 368 ha is currently already developed, 51 ha is serviced but not yet built on, and 265 ha is still vacant.

1.3 Demand for additional residential land

The graphs below show the growth in demand for residential land over the next 20 years, compared to:

- Figure 11.1 – The current supply of residentially zoned land.
- Figure 11.2 – The current supply of residentially and rural-residentially zoned land.

The comparison shows that there is sufficient residential and rural-residential land to meet the demand over the next 20 years.

It needs to be noted that the demand-curve and the supply-line in Figures 11.1 and 11.2 consider only the actual demand and supply of land whereas additional capacity needs to be provided to cater for a range of complex circumstances that will ultimately determine the availability of developed land.

These circumstances include, on the demand side, individual preferences in terms of price, size, location, and amenity of available residential offerings. To accommodate individual preference more land needs to be made available than indicated by the actual demand-curves shown in Figures 11.1 and 11.2.

The supply side, on the other hand, will be influenced by factors such as the land owners' predisposition towards selling or developing the land, and timing of sale or development. To accommodate these factors, more land needs to be made available to ensure an adequate supply of readily available development opportunities.

The size of the land "buffer" required to ensure a balance between supply and demand, cannot be calculated and remains a decision that the Council needs to make. As a guideline, it is recommended that the supply of land available for residential and rural-residential development should at least be equal to double the demand.

In the case of Matamata, the actual demand is for an additional 86 ha of land for residential and rural-residential use over the next 20 years. Therefore, it is suggested that the supply of residential land should be in the order of 180 ha. Allowance for such a land "buffer" is illustrated by the "demand plus buffer"-curves in Figures 11.1 and 11.2.

FIGURE 11.1: MATAMATA –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL 2013 – 2033

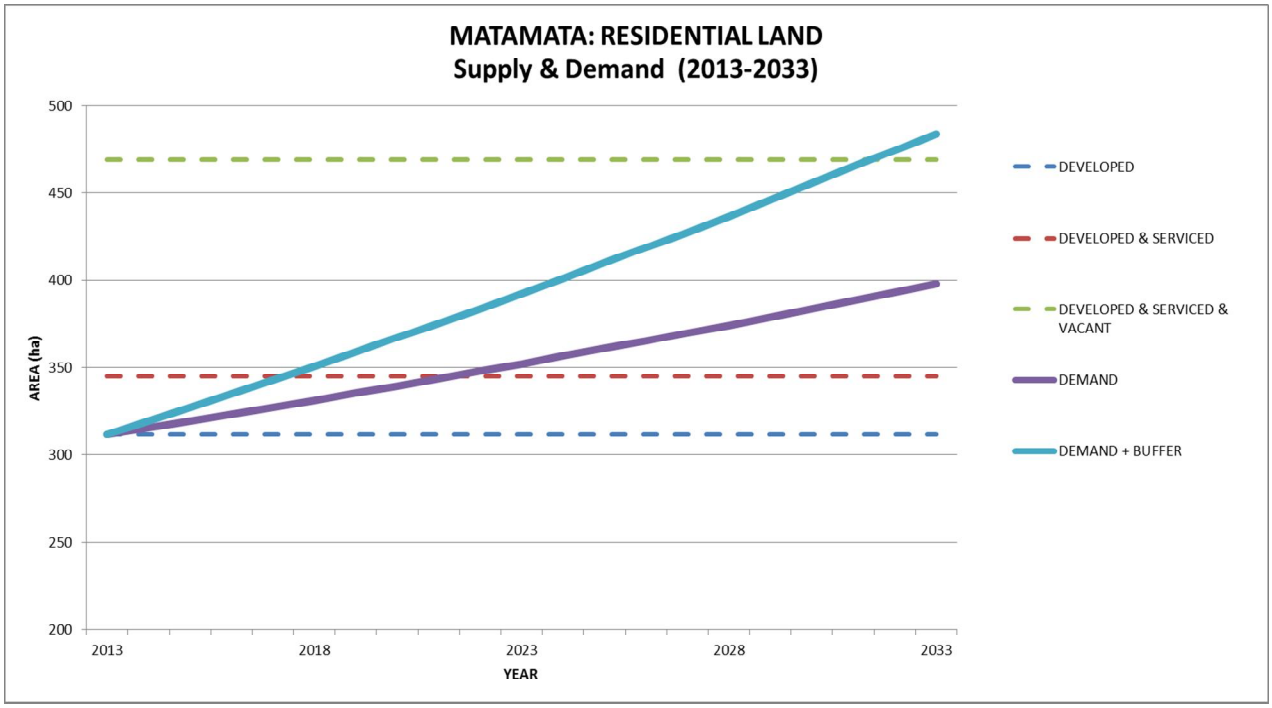
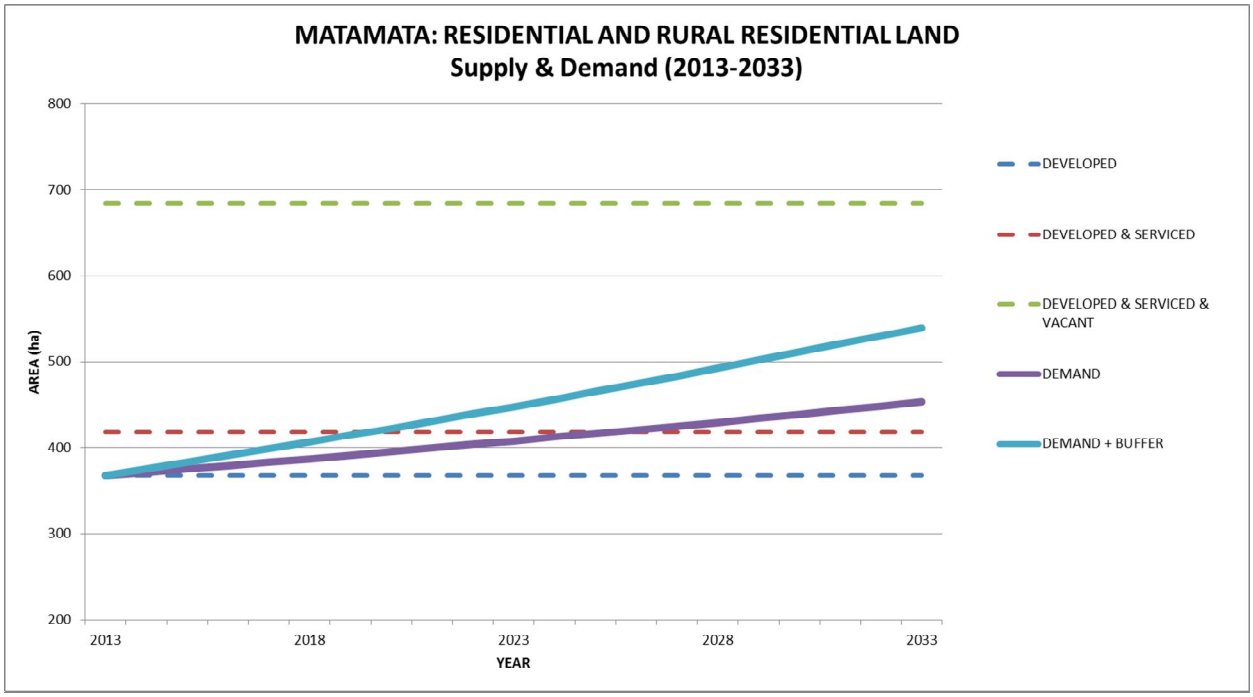


FIGURE 11.2: MATAMATA –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL AND RURAL-RESIDENTIAL 2013 – 2033



2.0 NON-RESIDENTIAL LAND

2.1 Demand for non-residential land

Table 15 below shows the floor area of new non-residential buildings consented in the Town of Matamata over the last 22 years (1990/91 – 2011/12) obtained from Statistics New Zealand. The figures include only new buildings, and are exclusive of alterations and additions to existing structures. The data is split into three categories "Business", "Industrial" and "Social".

TABLE 15: MATAMATA – NEW NON-RESIDENTIAL CONSTRUCTION 1990/1 – 2011/12

YEAR	FLOOR AREA OF NEW BUILDINGS CONSENTED				
	BUSINESS PREMISES (m^2)	INDUSTRIAL PREMISES (m^2)	SOCIAL PURPOSES (m^2)	TOTAL (m^2)	CUMULATIVE TOTAL (m^2)
1990/91	0	192	70	262	262
1991/92	6	188	0	194	456
1992/93	423	372	0	795	1,251
1993/94	319	1,389	21	1,729	2,980
1994/95	550	1,155	1,250	2,955	5,935
1995/96	149	2,256	145	2,550	8,485
1996/97	620	371	138	1,129	9,614
1997/98	737	2,066	1,904	4,707	14,321
1998/99	0	2,449	3,872	6,321	20,642
1999/00	0	1,234	248	1,482	22,124
2000/01	1,980	1,288	336	3,604	25,728
2001/02	0	890	171	1,061	26,789
2002/03	178	5,156	103	5,437	32,226
2003/04	6,157	3,394	115	9,666	41,892
2004/05	263	5,048	414	5,725	47,617
2005/06	1,828	6,322	0	8,150	55,767
2006/07	1,379	3,549	606	5,534	61,301
2007/08	413	7,860	2,202	10,475	71,776
2008/09	1,109	659	657	2,425	74,201
2009/10	263	23	665	951	75,152
2010/11	88	0	7,148	7,236	82,388
2011/12	550	200	1,485	2,235	84,623
TOTAL	**17,012**	**46,061**	**21,550**	**84,623**	
Average/Year	**773**	**2,094**	**980**	**3,847**	

The "Business" category includes hotels and short-term accommodation, shops, restaurants, taverns, offices and administration buildings.

The “Industrial” category includes storage buildings, factories, and industrial buildings.

The “Social” category includes social, cultural, and religious buildings, hostels, boarding houses, hospitals, nursing homes, education buildings and other miscellaneous structures.

The Table shows that on average; approximately 3,850 m^2 of non-residential building area has been constructed per year in Matamata. More than half of the new building area (2,094 m^2 per year) was for industrial use, approximately one-quarter (980 m^2) for social purposes, and the rest (773 m^2) for business use.

Figures 12 – 14 below show the moving average in annual non-residential construction.

The annual average construction of business premises has remained fairly constant since 2003/4.

For new industrial construction, the trend has been upwards since 2001/2, peaked in 2007/8, and is trending downwards but still well above pre-2001/2 levels.

Construction of buildings for social purposes has remained fairly constant since 1998/9.

FIGURE 12: MATAMATA – FLOOR AREA CONSENTED FOR BUSINESS USE 1990/91 – 2011/12

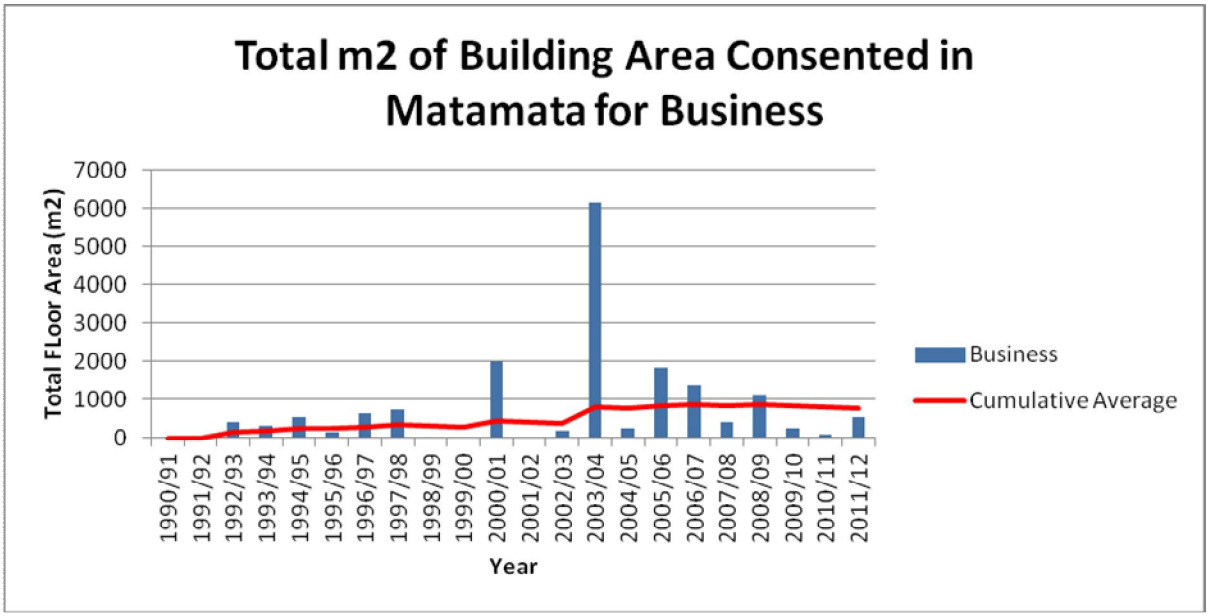


FIGURE 13: MATAMATA – FLOOR AREA CONSENTED FOR INDUSTRIAL USE 1990/91 – 2011/12

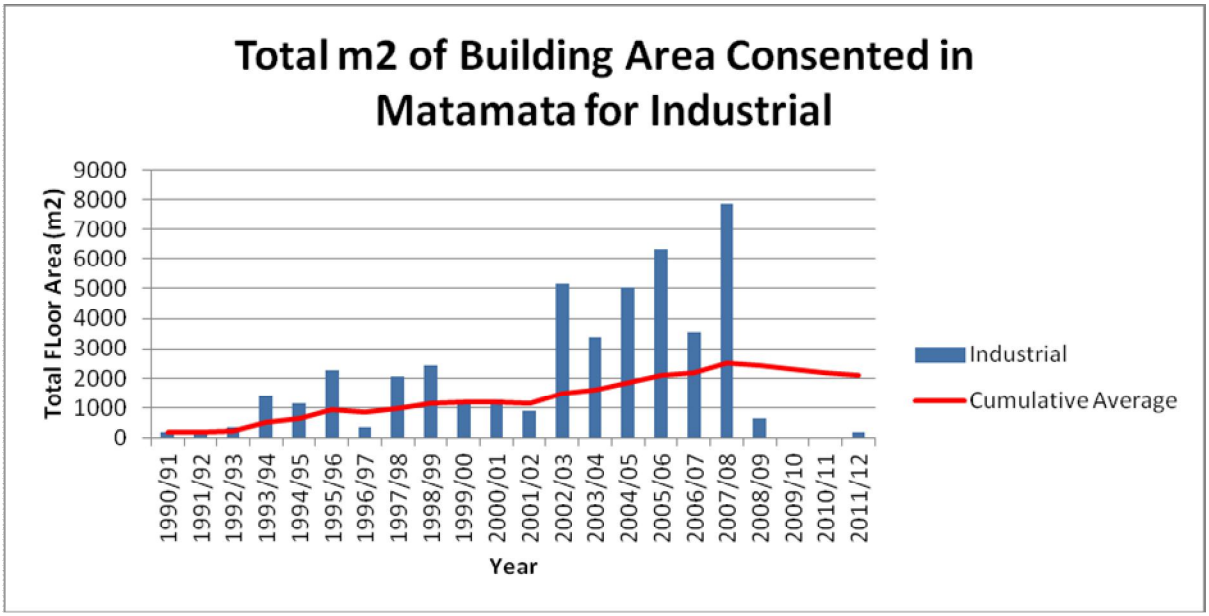
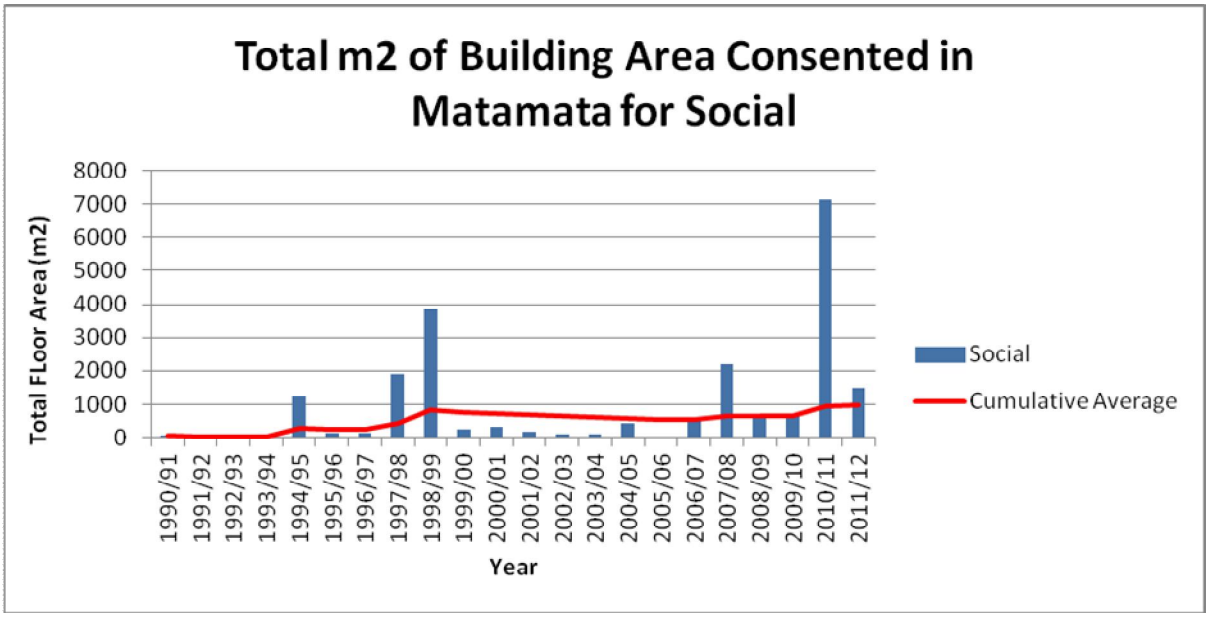


FIGURE 14: MATAMATA – FLOOR AREA CONSENTED FOR SOCIAL PURPOSES 1990/91 – 2011/12



Assuming that non-residential growth will take place at the average historical growth for the period 1990/91 – 2011/12, and assuming a 40% average site coverage, Table 16 below shows that approximately 19 ha of land will be required over the next 20 years to accommodate non-residential growth in Matamata.

TABLE 16: MATAMATA – PROJECTED NON-RESIDENTIAL LAND DEMAND 2012 - 2033

PERIOD	GROSS FLOOR AREA (m^2)				SITE AREA (ha)			
	Business (m^2)	Industrial (m^2)	Social (m^2)	Total (m^2)	Business (ha)	Industrial (ha)	Social (ha)	Total (ha)
2013 – 2018	3,865	10,470	4,900	19,235	0.9662	2.6175	1.2250	4.8087
2018 – 2023	3,865	10,470	4,900	19,235	0.9662	2.6175	1.2250	4.8087
2023 – 2028	3,865	10,470	4,900	19,235	0.9662	2.6175	1.2250	4.8087
2028 – 2033	3,865	10,470	4,900	19,235	0.9662	2.6175	1.2250	4.8087
TOTAL	**15,460**	**41,880**	**19,600**	**76,940**	**3.8648**	**10.4700**	**4.9000**	**19.2348**

2.2 Supply of non-residential land

Table 17 below shows the current supply of Business and Industrial zoned land in Matamata.

TABLE 17: MATAMATA – BUSINESS AND INDUSTRIAL ZONED LAND (2013)

ZONING	Developed (ha)	Vacant Serviced (ha)	Vacant Un-serviced (ha)	TOTAL (ha)
Business	31 ha	0 ha	0 ha	**31 ha**
Industrial	24 ha	12 ha	0 ha	**36 ha**
TOTAL	**55 ha**	**12 ha**	**0 ha**	**67 ha**

There is approximately 67 ha of land zoned for Industrial and Business purposes in Matamata of which 55 ha has already been developed, 12 ha has been serviced but is not yet built on, while there is currently no vacant un-serviced land available.

In addition to Business and Industrial zoned land, approximately 89 ha of land within the Town of Matamata is designated for non-residential uses including schools, reserves, and roads.

2.3 Demand for additional non-residential land

Figures 15 and 16 below show the growth in demand for business and industrial land over the next 20 years, compared to the current land supply.

The comparison shows that there is a sufficient supply of industrial land to accommodate the projected demand over the next 20 years. Additional land is required to meet the need for business land. As in the case of residential land, an additional “buffer” needs to be provided to ensure a balance between the supply and demand for industrial and business land.

For planning purposes, a “buffer” of twice the actual demand is recommended.

FIGURE 15: MATAMATA – SUPPLY AND DEMAND FOR BUSINESS LAND 2013 - 2033

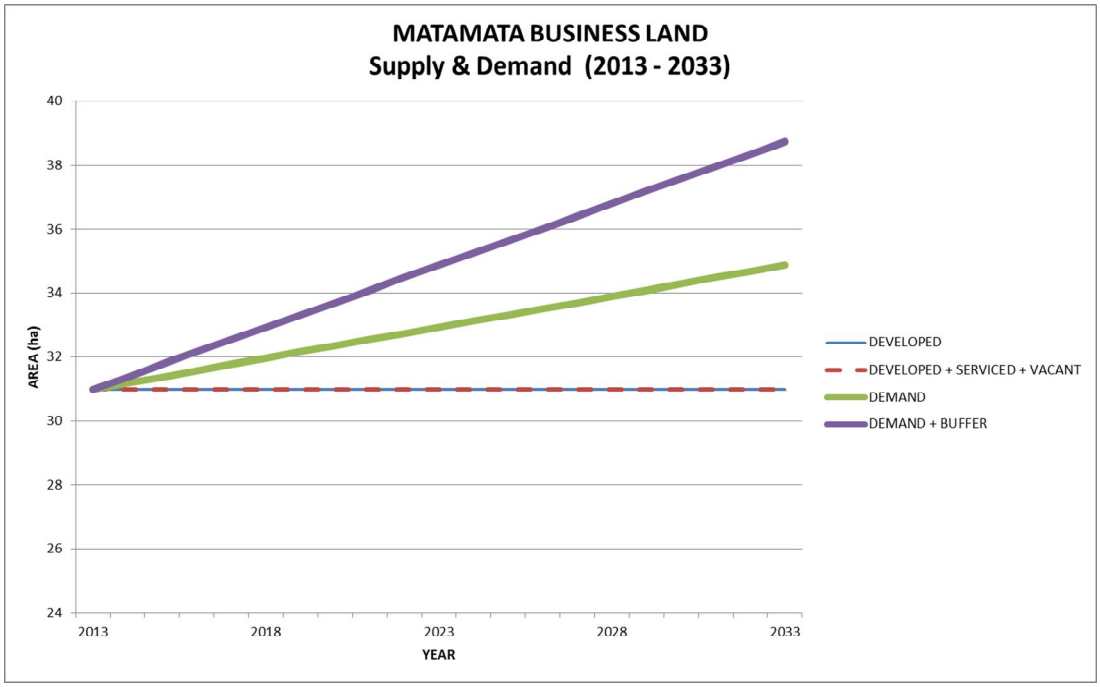
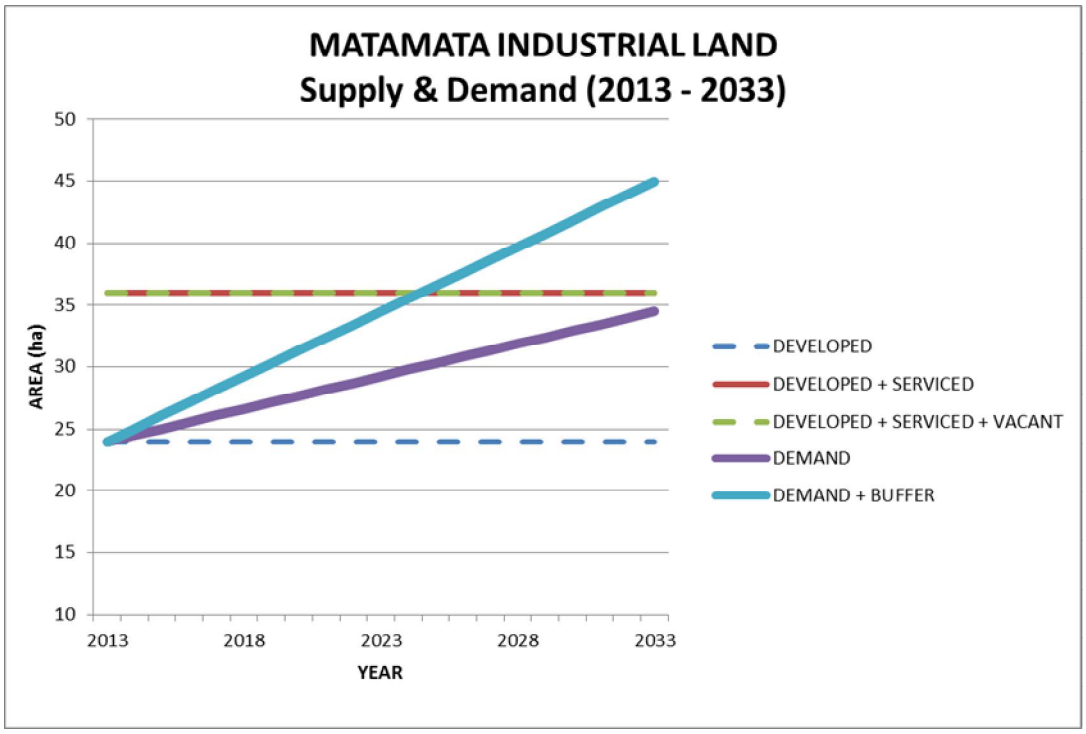


FIGURE 16: MATAMATA – SUPPLY AND DEMAND FOR INDUSTRIAL LAND 2013 - 2033



3.0 OPEN SPACE STRUCTURE

The township of Matamata was first surveyed in 1904 into town sections with provision for wide streets and a recreational area at the central domain. The surveyors enclosed the new settlement on two sides with a 40 metre wide plantation reserve which over the years has developed into the Matamata Centennial Drive (and subsequently extended by Tom Grant Drive), now a botanical park with a wide variety of trees from all over the world.

Matamata's green image is further emphasised through the parks and reserves located within the central business district, as well as streetscapes and walkways.

- The Hetana Street Railway Oak Tree plantation originates from when the Thames Valley Railway line was first commissioned in 1885, and is today the sole survivor of railway plantations in this area.

- Founders Memorial Park was dedicated to the memory of Wiremu Tamihana, Rev Alfred Brown and Josiah Firth, who were all connected to the early history of the town.

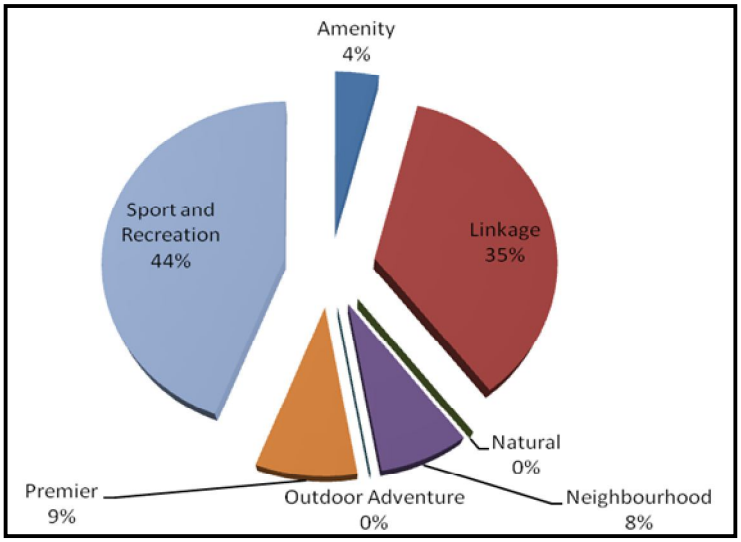
- Broadway, Matamata's main street, is for many the landmark of Matamata with its centre islands planted with weeping elms, oaks, limes and chestnuts as well as annual flower displays and sculptures.

- Tower Road Walkway provides an avenue of English Oak trees which creates a pleasant environment to walk or cycle.

TABLE 18: MATAMATA SUMMARY OF PARKS AND OPEN SPACES PROVISION BY PARK CATEGORY

Park Category	Total Area (hectares)	Provision (ha per 1,000 residents)
Amenity	1.68	0.25
Linkage	15.01	2.20
Natural	-	-
Neighbourhood	3.24	0.48
Outdoor Adventure	-	-
Premier	3.69	0.54
Sport and Recreation	18.58	2.72
Total	42.2	6.19

FIGURE 17: MATAMATA – PROPORTIONS OF PARK TYPES THAT MAKE UP PARK NETWORK



3.1 Matamata park provision by category.

Matamata's provision of park land (6.19 ha/1,000 residents) is lower than the national average (21.44 hectares per 1,000 residents), and that of the average for Matamata-Piako District (16.18 ha/1,000 residents). This is mainly due to the lack of Natural and Outdoor Adventure Parks within the town.

Amenity Parks

Matamata has a total provision of Amenity Parks of 0.25 hectares per 1,000 residents. The recommended level of provision of Amenity Parks is 0.53 ha/1000 residents.

Other areas may also serve as Amenity Parks, such as the streetscape within Matamata CBD, with the picnic areas along the Broadway centre island and the Peterson Fountain outside Matamata Memorial Hall.

Acting in some cases as Neighbourhood Parks, Amenity Parks can serve an important function as play space and picnic areas in the township e.g. Founders Park.

Linkage Parks

Matamata has a total provision of Linkage Parks of 2.2 ha/1,000 residents. This should be increased to approximately 3.95 ha/1,000 residents or approximately an extra 11 hectares of Linkage Park land to meet the recommended level of service.

Ideally Council should look to acquire additional Linkage Park land to support the establishment of a Matamata Inner and Outer walkway circuit. There may also be opportunities to establish further Linkage Parks within what is known as Precinct F.

Other areas may also serve the purpose of Linkage Parks. These areas include the Tower Road walkway and Peria Road walkway.

Neighbourhood Parks

There are five Neighbourhood Parks in Matamata with a provision of 0.48 ha/1,000 residents. This is a higher provision than the recommended provision of 0.28 ha/1000 residents.

However, there appears to be two areas of Matamata which are not well provided for, and which are separated from the rest of the township by relatively busy roads which form a barrier for access by younger children. These areas include the houses around Kaimai Drive and Matipo Street. Assuming that two 5,000m^2 parks were acquired, this would increase the provision of Neighbourhood Parks in Matamata to 0.62 ha per 1,000 residents.

Playgrounds are reasonably well distributed across the town, with most urban residential properties being within approximately 800m of a playground. In addition to playgrounds, some of the local schools also provide children's play areas available to the general public outside school hours. Figure 18 illustrates the distribution of playgrounds across Matamata, including both Council owned playgrounds and schools.

Premier Parks

There are two Premier Parks in Matamata, Firth Tower and Hetana Street Reserve, with a provision of 0.54 ha/1,000 residents.

There is no need at this stage to acquire new, or expand existing, Premier Parks in Matamata.

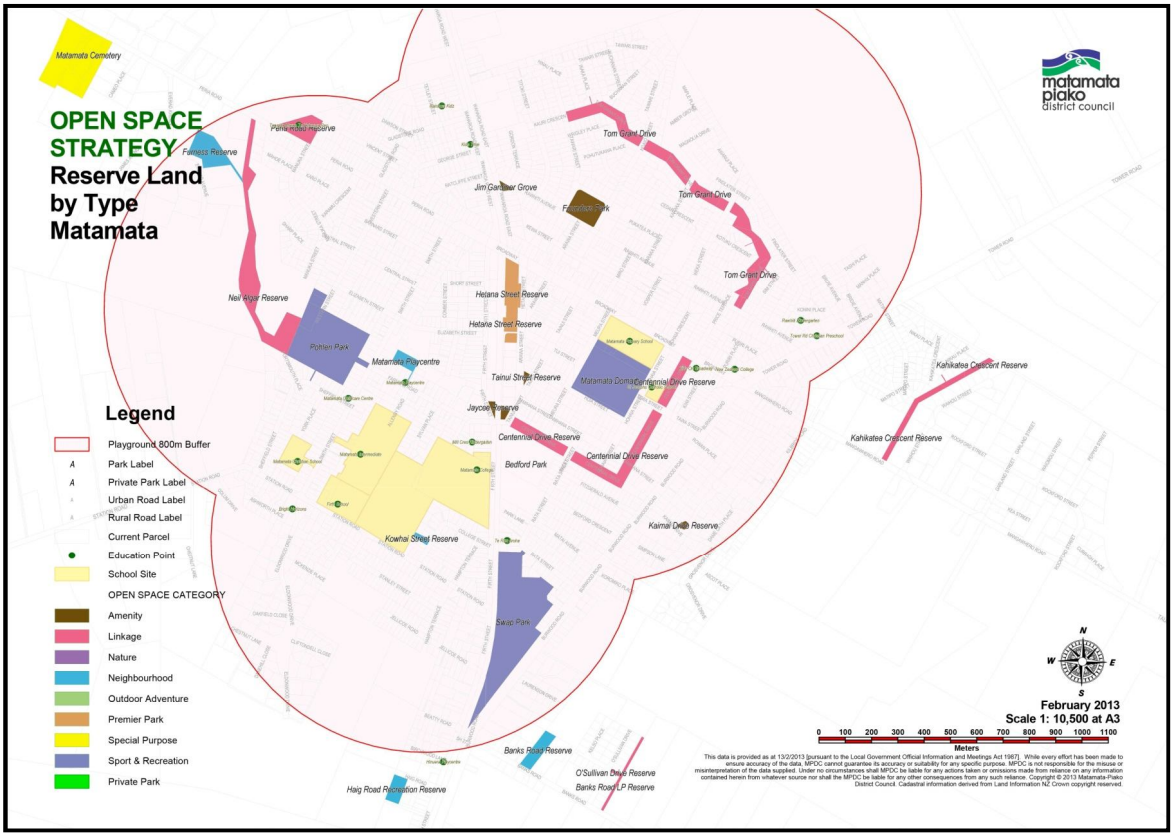
Sports and Recreation Parks

Matamata has three Sports and Recreation Parks, providing 18.58 hectares of land, or 2.72 ha/1,000 residents. This provision is slightly higher than the "yardstick" national average (2.34 ha/1,000 residents).

However, it should be noted that Swap Park, at 7.77 hectares, while being classified as a Sport and Recreation Park, is land "banked" for this purpose and is currently being maintained as an Amenity Park.

In addition to Council's Sport and Recreation land, the Matamata-Piako District Council has an agreement for public use of Bedford Park (4.81 ha), which provides additional 0.76 ha/1,000 residents.

FIGURE 18: MATAMATA OPEN SPACE PROVISION



C. Te Aroha Growth Projections

1.0 RESIDENTIAL LAND

1.1 Demand for residential land

Te Aroha is the smallest of our three main towns. The current (2013) population is estimated to be approximately 4,048 people, representing 1,768 households. The population of the town is estimated to increase by approximately 20 persons per year, to a total of 4,403 by 2033. By comparison, the number of households is predicted to increase by approximately 15 per year to 2,107 in 2033.

The projected growth in population and households for five-year intervals during 2013 – 2033, and the changes in age composition are shown in Tables 19 – 20 and Figure 19, below. The majority of the increase in population will occur in the population groups older than 50 years, with the population in the younger age groups remaining relatively stable, as shown in Table 21.

TABLE 19: TE AROHA - PROJECTED POPULATION 2013 – 2033

YEAR	POPULATION									
	0 – 4 YEARS	5 – 19 YEARS	20 – 34 YEARS	35 – 49 YEARS	50 – 64 YEARS	65 – 79 YEARS	+ 80 YEARS	TOTAL	INCREASE	% INCREASE
2013	247	665	543	692	827	740	334	**4,048**		
2018	245	659	554	622	859	816	378	**4,133**	**85**	**2.10**
2023	241	681	505	614	852	894	435	**4,222**	**89**	**2.15**
2028	228	712	444	653	807	965	502	**4,311**	**89**	**2.11**
2033	210	708	427	698	742	1032	586	**4,403**	**92**	**2.13**
INCREASE	**-37**	**43**	**-116**	**6**	**-85**	**292**	**252**	**355**	**355**	**8.77**
% INCREASE	**-14.98**	**6.47**	**-21.36**	**0.87**	**-10.28**	**39.46**	**75.45**	**8.77**	**8.77**	

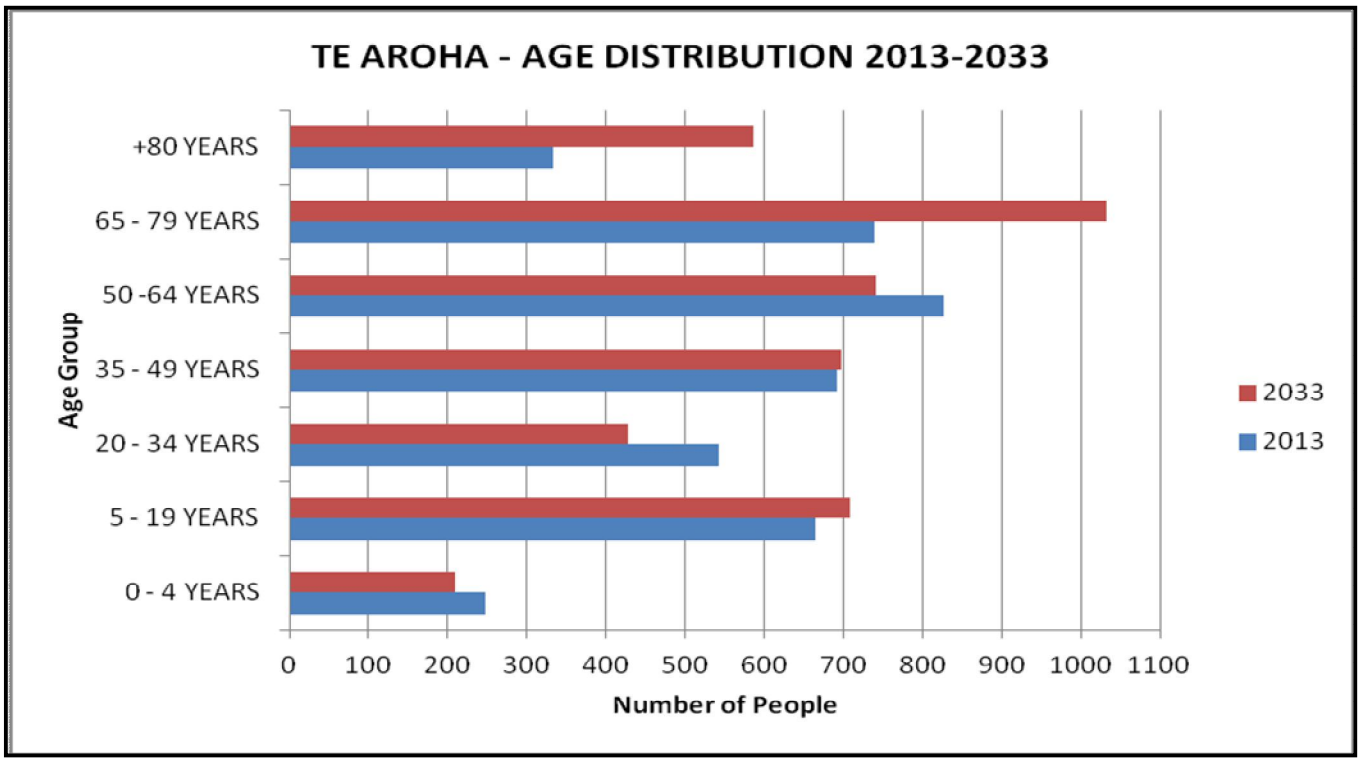
TABLE 20: TE AROHA - PROJECTED NUMBER OF HOUSEHOLDS 2013 – 2033

YEAR	HOUSEHOLD SIZE	NUMBER OF HOUSEHOLDS	INCREASE IN NUMBER OF HOUSEHOLDS	% INCREASE IN NUMBER OF HOUSEHOLDS
2013	2.29	1,768		
2018	2.24	1,845	**77**	**4.38**
2023	2.19	1,928	**83**	**4.48**
2028	2.14	2,015	**87**	**4.51**
2033	2.09	2,107	**92**	**4.57**
TOTAL			**339**	**19.17**

TABLE 21: TE AROHA - CHANGE IN POPULATION BY AGE GROUP 2013 – 2033

AGE GROUP	POPULATION				
	2013 - 2018	2018 – 2023	2023 – 2028	2028 - 2033	TOTAL
0 – 4 Years	-2	-4	-13	-18	**-37**
5 – 19 Years	-6	22	31	-4	**43**
20 – 34 Years	11	-49	-61	-17	**-116**
35 – 39 Years	-70	-8	39	45	**6**
50 – 64 Years	32	-7	-45	-65	**-85**
65 – 79 Years	76	78	71	67	**292**
+80 Years	44	57	67	84	**252**
TOTAL	**85**	**89**	**89**	**92**	**355**

FIGURE 19: TE AROHA – AGE DISTRIBUTION 2013 AND 2033



The above analysis indicates a demand for approximately 15 – 20 new dwelling units per year (75 – 100 units per five year period), or a total of approximately 340 units over the next 20 years. Table 22 below indicates the projected demand for residential land to accommodate the projected 340 new units, based on the following assumptions:

- 10% of the demand will be satisfied by "infill" ("brownfield") development with the remaining 90% being new ("greenfield") development;
- Average lot size is 750 m^2 (net);
- Net developable land is 60%, with the remaining 40% being roads and open space.

TABLE 22: TE AROHA – PROJECTED RESIDENTIAL LAND DEMAND 2013 - 2033

PERIOD	INCREASE IN NUMBER OF HOUSEHOLDS	NUMBER OF HOUSEHOLDS RESIDENT IN:		GROSS LAND DEMAND ("GREENFIELDS") (ha)
		INFILL AREAS "BROWNFIELDS"	NEW AREAS "GREENFIELDS"	
2013 – 2018	77	8	69	8.625 ha
2018 – 2023	83	8	75	9.375 ha
2023 – 2028	87	9	78	9.750 ha
2028 – 2033	92	9	83	10.375 ha
TOTAL	**339**	**34**	**305**	**38.125 ha**

1.2 Supply of residential land

Table 23 below shows the current supply of residentially and rural-residentially zoned land in Te Aroha.

TABLE 23: TE AROHA – SUPPLY OF RESIDENTIAL AND RURAL-RESIDENTIAL ZONED LAND (2013)

ZONING	Developed	Vacant Serviced	Vacant Un-serviced	TOTAL
Residential	223	10	26	**259**
Rural-Residential	11	14	254	**279**
TOTAL	**234**	**24**	**280**	**538**

There is a total of 538 ha of land zoned residential and rural-residential in Te Aroha, of which 234 ha is currently already developed, 24 ha is serviced but not yet built on, and 280 ha is still vacant.

1.3 Demand for additional residential land

The graphs below show the growth in demand for residential land over the next 20 years, compared to:
Figure 20.1 – The current supply of residentially zoned land;
Figure 20.2 – The current supply of residentially and rural-residentially zoned land.

The comparison shows that there is sufficient residential and rural-residential land to meet the demand over the next 20 years.

It needs to be noted that the demand-curve and supply-line in Figures 20.1 and 20.2 consider only the actual demand and supply of land whereas additional capacity needs to be provided to cater for a range of complex circumstances that will ultimately determine the availability of developed land.

These circumstances include, on the demand side, individual preferences in terms of price, size, location, and amenity of available residential offerings. To accommodate individual preference more land needs to be made available than indicated by the actual demand-curves shown in Figures 20.1 and 20.2.

The supply side, on the other hand, will be influenced by factors such as the land owners' predisposition towards selling or developing the land, and timing of sale or development. To accommodate these factors, more land needs to be made available to ensure an adequate supply of readily available development opportunities.

The size of the land "buffer" required to ensure a balance between supply and demand, cannot be calculated and remains a decision that the Council needs to make. As a guideline, it is recommended that the supply of land available for residential and rural-residential development should at least be equal to double the demand.

In the case of Te Aroha, the actual demand is for an additional 40 ha of land for residential and rural-residential use over the next 20 years. Therefore, it is suggested that the supply of residential land should be in the order of 80 ha. Allowance for such a land "buffer" is illustrated by the "demand plus buffer"-curves in Figures 20.1 and 20.2.

FIGURE 20.1: TE AROHA –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL 2013 – 2033

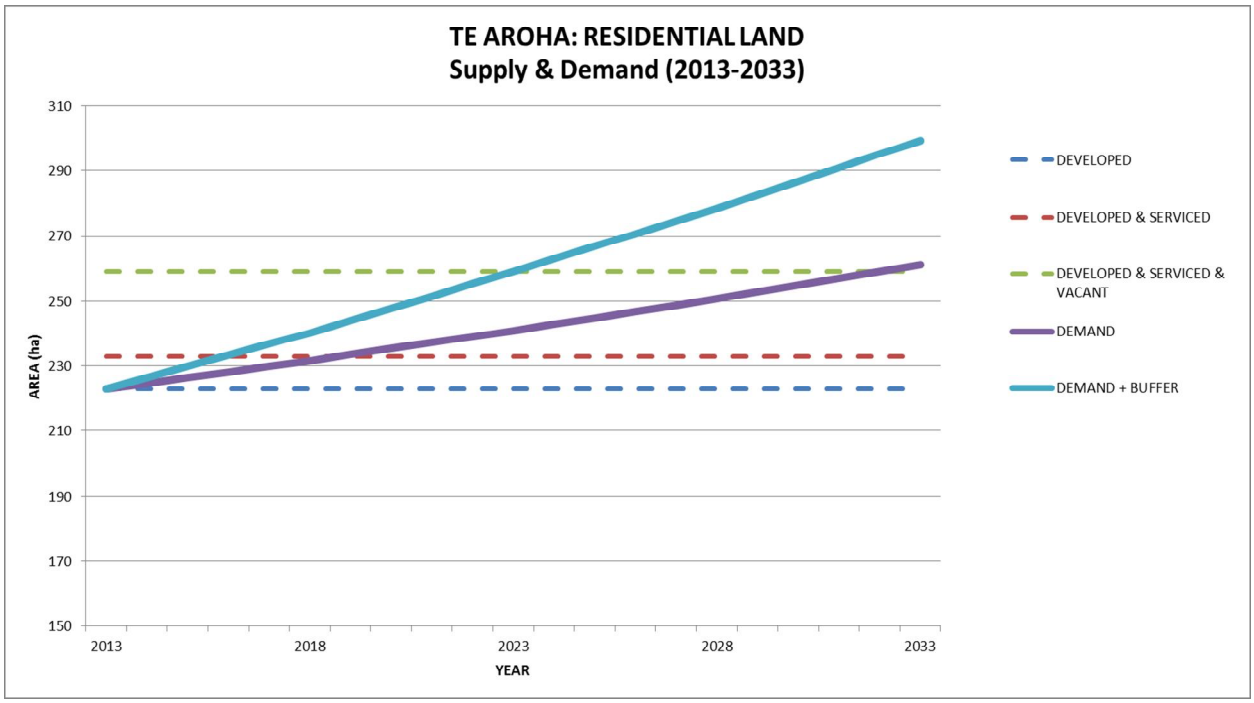
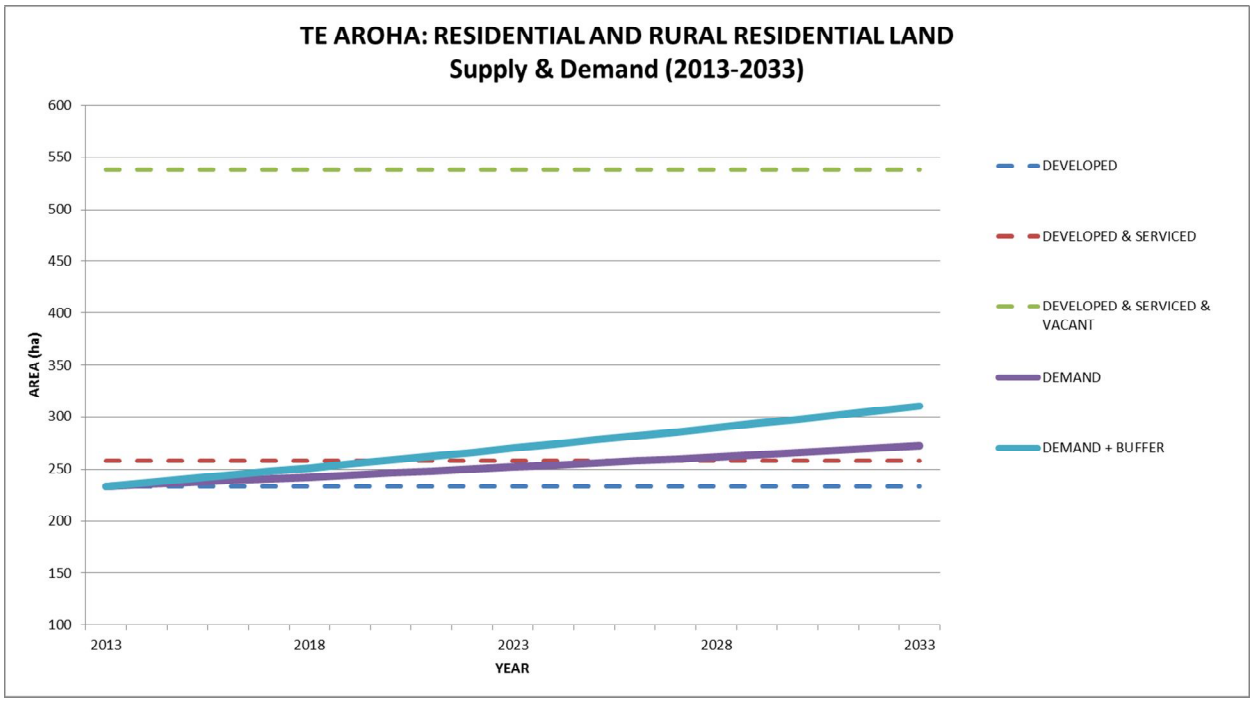


FIGURE 20.2: TE AROHA –DEMAND FOR RESIDENTIAL LAND COMPARED TO CURRENT SUPPLY OF LAND ZONED RESIDENTIAL AND RURAL-RESIDENTIAL 2013 - 2033



2.0 NON-RESIDENTIAL LAND

2.1 Demand for non-residential land

Table 24 below shows the floor area of new non-residential buildings consented in the Town of Te Aroha over the last 22 years (1990/91 – 2011/12) obtained from Statistics New Zealand. The figures include only new buildings, and are exclusive of alterations and additions to existing structures. The data is split into three categories "Business", "Industrial" and "Social".

TABLE 24: TE AROHA – NEW NON-RESIDENTIAL CONSTRUCTION 1990/1 – 2011/12

YEAR	FLOOR AREA OF NEW BUILDINGS CONSENTED				
	BUSINESS PREMISES (m^2)	INDUSTRIAL PREMISES (m^2)	SOCIAL PURPOSES (m^2)	TOTAL (m^2)	CUMULATIVE TOTAL (m^2)
1990/91	-	101	-	**101**	101
1991/92	-	-	-	**-**	101
1992/93	-	250	61	**311**	412
1993/94	840	-	-	**840**	1,252
1994/95	800	524	512	**1,836**	3,088
1995/96	-	130	3	**133**	3,221
1996/97	-	483	164	**647**	3,868
1997/98	-	-	152	**152**	4,020
1998/99	-	614	460	**1,074**	5,094
1999/00	-	72	-	**72**	5,166
2000/01	936	129	55	**1,120**	6,286
2001/02	-	-	21	**21**	6,307
2002/03	-	-	258	**258**	6,565
2003/04	-	226	13	**239**	6,804
2004/05	160	559	-	**719**	7,523
2005/06	-	774	135	**909**	8,432
2006/07	92	413	-	**505**	8,937
2007/08	-	474	-	**474**	9,411
2008/09	36	73	264	**373**	9,784
2009/10	-	112	-	**112**	9,896
2010/11	-	-	-	**-**	9,896
2011/12	-	-	356	**356**	10,252
TOTAL	**2,864**	**4,934**	**2,454**	**10,252**	
Average/Year	**130**	**224**	**112**	**466**	

The “Business” category includes hotels and short-term accommodation, shops, restaurants, taverns, offices and administration buildings.

The “Industrial” category includes storage buildings, factories, and industrial buildings.

The “Social” category includes social, cultural, and religious buildings, hostels, boarding houses, hospitals, nursing homes, education buildings and other miscellaneous structures.

The Table shows that on average; approximately 466 m^2 of non-residential building area has been constructed per year in Te Aroha.

Approximately half of the new building area (224 m^2 per year) was for industrial use, and approximately one-quarter each for business use (130 m^2) and social purposes (112 m^2).

Figures 21 – 23 below show the moving average in annual non-residential construction.

Annual average construction of business premises has trended down since the mid 1990’s.

For new industrial construction, the trend has remained fairly constant since 1998/9.

Construction of buildings for social purposes has been constant since the mid-1990’s.

FIGURE 21: TE AROHA – FLOOR AREA CONSENTED FOR BUSINESS USE 1990/91 – 2011/12

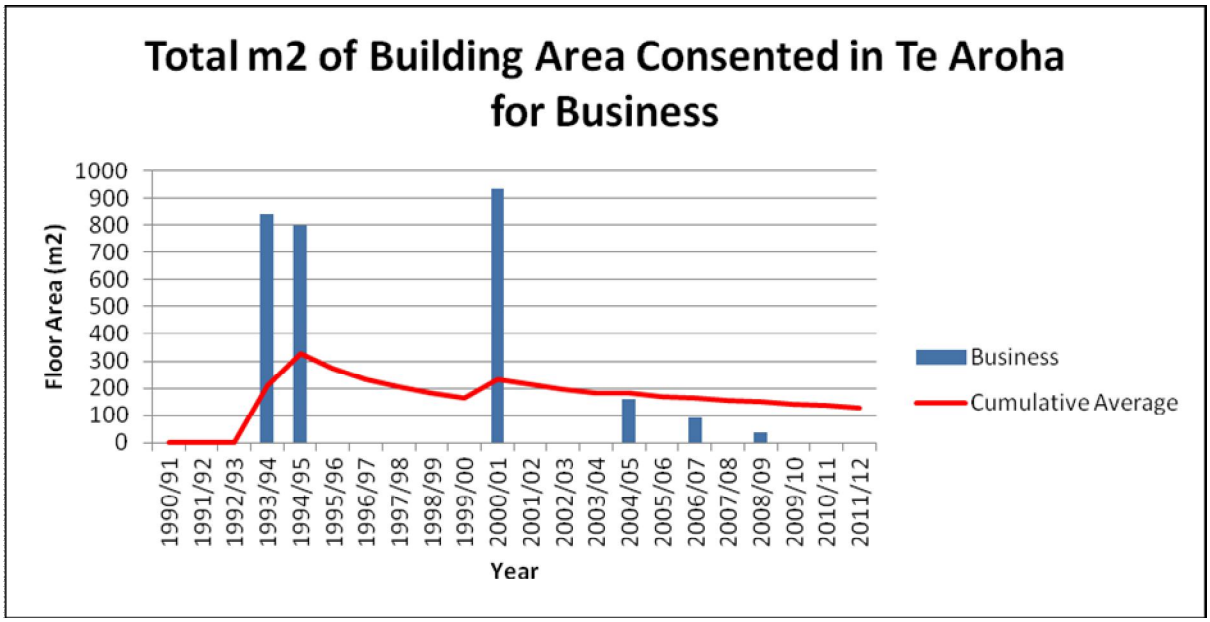


FIGURE 22: TE AROHA – FLOOR AREA CONSENTED FOR INDUSTRIAL USE 1990/91 – 2011/12

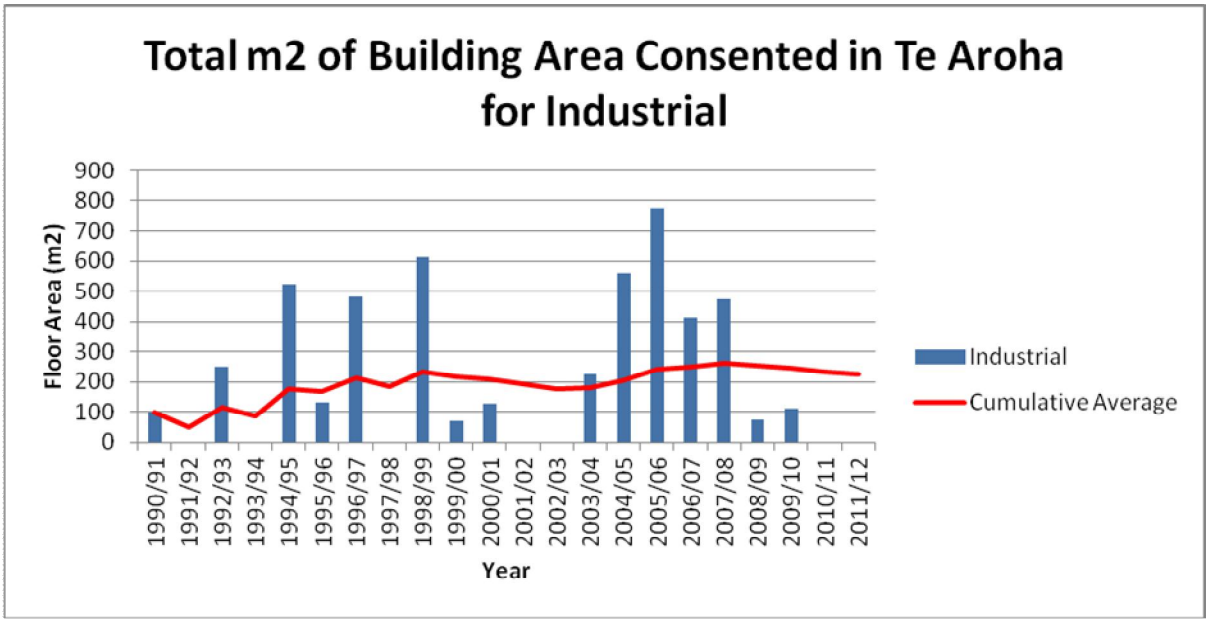
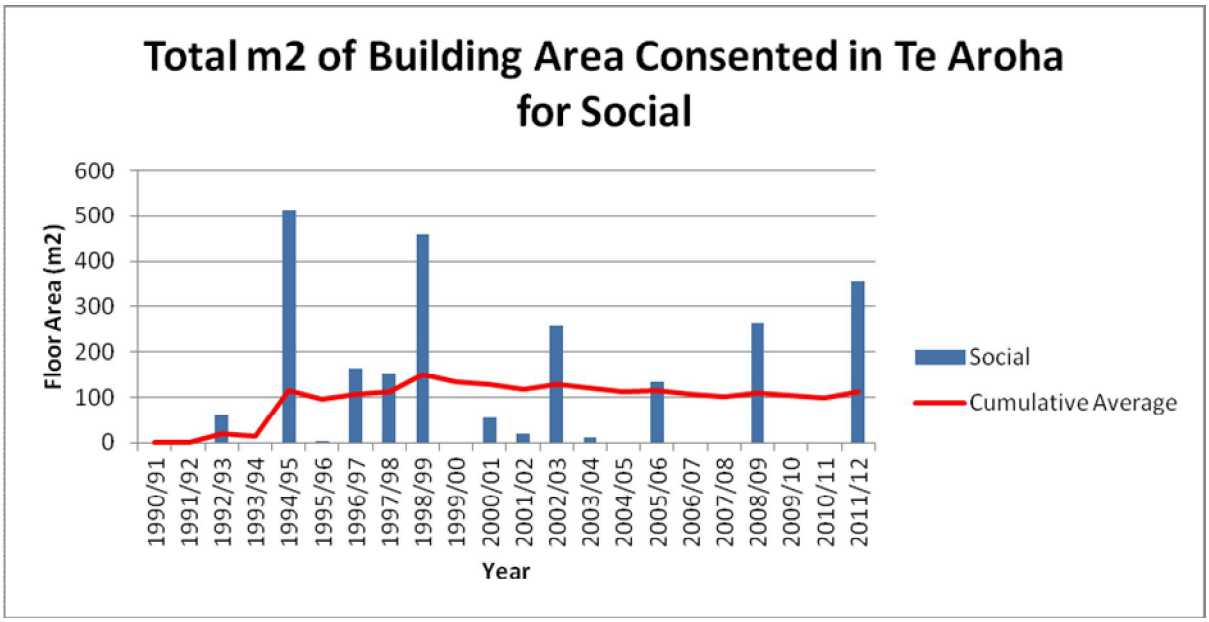


FIGURE 23: TE AROHA – FLOOR AREA CONSENTED FOR SOCIAL PURPOSES 1990/91 – 2011/12



Assuming that non-residential growth will take place at the average historical growth for the period 1990/91 – 2011/12, and assuming a 40% average site coverage, Table 25 below shows that approximately 2.33 ha of land will be required to accommodate non-residential growth in Te Aroha.

TABLE 25: TE AROHA – PROJECTED NON-RESIDENTIAL LAND DEMAND 2013 - 2033

PERIOD	GROSS FLOOR AREA (m^2)				SITE AREA (ha)			
	Business (m^2)	Industrial (m^2)	Social (m^2)	Total (m^2)	Business (ha)	Industrial (ha)	Social (ha)	Total (ha)
2013 – 2018	650	1,120	560	2,330	0.1625	0.2800	0.1400	0.5825
2018 – 2023	650	1,120	560	2,330	0.1625	0.2800	0.1400	0.5825
2023 – 2028	650	1,120	560	2,330	0.1625	0.2800	0.1400	0.5825
2028 – 2033	650	1,120	560	2,330	0.1625	0.2800	0.1400	0.5825
TOTAL	**2,600**	**4,480**	**2,240**	**9,320**	**0.6500**	**1.1200**	**0.5600**	**2.3300**

2.2 Supply of non-residential land

Table 26 below shows the current supply of Business and Industrial zoned land in Te Aroha.

TABLE 26: TE AROHA – BUSINESS AND INDUSTRIAL ZONED LAND (2013)

ZONING	Developed (ha)	Vacant Serviced (ha)	Vacant Un-serviced (ha)	TOTAL (ha)
Business	18 ha	0 ha	6 ha	**24 ha**
Industrial	2 ha	0 ha	0 ha	**2 ha**
TOTAL	**20 ha**	**0 ha**	**6 ha**	**26 ha**

There is approximately 26 ha of land zoned for Industrial and Business purposes in Te Aroha of which 20 ha has already been developed with 6 ha still vacant.

In addition to Business and Industrial zoned land, approximately 121 ha of land within the Town of Te Aroha is designated for non-residential uses including schools, reserves, and roads.

2.3 Demand for additional non-residential land

Figures 24 and 25 below show the growth in demand for business and industrial land over the next 20 years, compared to the current land supply.

The comparison shows that there is a sufficient supply of business land to accommodate the projected demand over the next 20 years. Additional land is required to meet the need for industrial land. As in the case of residential land, an additional “buffer” needs to be provided to ensure a balance between the supply and demand for industrial and business land.

For planning purposes, a “buffer” of twice the actual demand is recommended.

FIGURE 24: TE AROHA – SUPPLY AND DEMAND FOR BUSINESS LAND 2013 - 2033

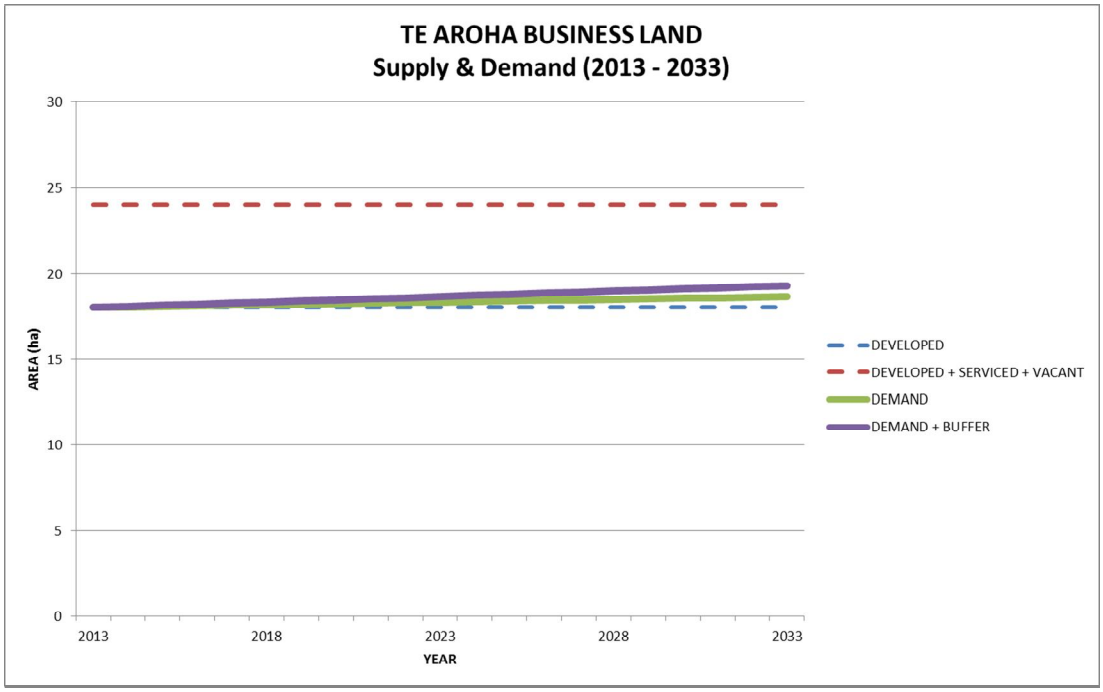
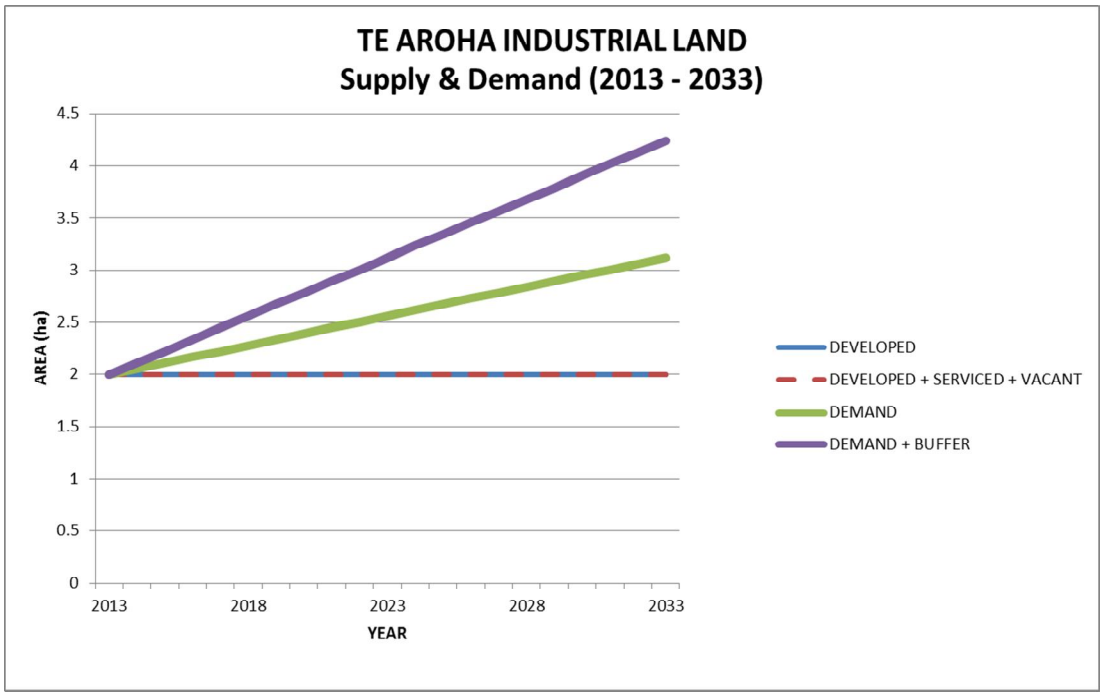


FIGURE 25: TE AROHA – SUPPLY AND DEMAND FOR INDUSTRIAL LAND 2013 - 2033



3.0 OPEN SPACE STRUCTURE

The land known today as the Te Aroha Hot Springs Domain was made a public reserve under the Public Domains Act in December 1882. After the opening of the Thames Goldfield in 1867, Thames became a booming gold mining town with a population of between 15,000 and 20,000. Visitors from Thames travelled up the Waihou (or "River Thames") using the area for recreation: duck shooting, picnicking, and visiting the hot springs at Te Aroha.

The discovery of gold-bearing quartz on Bald Spur at Te Aroha in 1880 occurred at a time when the Thames Goldfield was beginning to show a decline. As a result, the township of Te Aroha was "suddenly invaded from all parts." Further gold fields were discovered in Wairongomai in 1881 and the population boom continued.

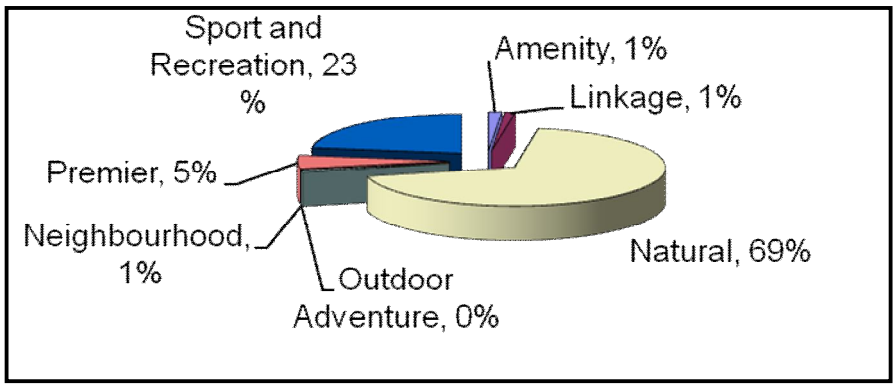
As the gold fields dried out, focus was again turned to the development of the Hot Springs. The construction of the first permanent Bath Houses began in 1883. By this time the hot springs were becoming well known as a tourist resort. The Te Aroha Domain Hot Springs and Spa still attracts visitors from all over the world, as well as providing locals with a pleasant park to play, swim, walk or picnic.

The railway from Hamilton to Te Aroha was opened in March 1886 completing the link from Auckland and greatly increasing its accessibility and popularity for visitors. In 1889 the railway link from Thames to Te Aroha was completed giving visitors from Auckland two travel options to the spa: by rail through Hamilton, or by boat from Auckland to Thames and from there by rail. The last train to travel to Te Aroha was in 1991. Today, the railway land between Te Aroha and Paeroa provides a scenic cycleway which forms part of the national cycleway network, continuing to bring visitors to town.

TABLE 27: TE AROHA SUMMARY OF PARKS AND OPEN SPACES PROVISION BY PARK CATEGORY

Park Category	Total Area (hectares)	Provision (ha per 1,000 residents)
Amenity	2.16	0.53
Linkage	1.62	0.40
Natural	102.02	25.20
Neighbourhood	0.95	0.23
Outdoor Adventure	-	-
Premier	8.09	2.00
Sport and Recreation	33.75	8.34
Total	148.59	36.70

FIGURE 27: TE AROHA – PROPORTIONS OF PARK TYPES THAT MAKE UP THE PARK NETWORK



3.1 Te Aroha park provision by category.

Te Aroha's provision of parks and open space (36.70 ha/1,000 residents) is substantially higher than the national average (21.44 hectares per 1,000 residents), and that of the average for Matamata-Piako District (21.78 ha/1,000 residents). This is mainly made up of Tui Park, which covers an area of 93.44 hectares (23.08 ha/1,000 residents). The majority of Tui Park is covered by natural bush, and the remaining 16.76 hectares are leased out for grazing purposes. Excluding the unmaintained natural areas of Tui Park, the total provision of maintained park land in Te Aroha is 13.62 ha/1,000 residents.

Amenity Parks

Te Aroha has a total provision of Amenity Parks of 0.53 hectares per 1,000 residents.

Other areas may also serve as Amenity Parks, such as the streetscape along Whitaker Street and the War Memorial at the top of Kenrick Street.

Linkage Parks

Te Aroha has a relatively low provision of Linkage Parks, with a total provision of 0.40 ha/1,000 residents. However, other parks also serve as linkages, such as Te Aroha Boat Ramp Reserve across the old Railway bridge and through Howarth Memorial Wetlands (partially owned by Fish and Game) and the Tui Domain Track from Te Aroha Domain to Hamilton Street and Tui Road. The Hauraki Rail Trail, which is operated by a Hauraki Rail Trail Trust, also provides good linkage from the CBD out to Tui Pa Road and beyond.

Council should be looking to acquire additional Linkage Park land to support the establishment of a Te Aroha walkway circuit. This could potentially be linked in with the Hauraki Rail Trail Cycleway, which currently finishes at the old Railway Station at Burgess Street.

Natural Parks

The Aroha has a relatively high provision of Natural Parks, with a provision of 102.02 hectares or 25.20 ha/1,000 residents. Tui Park makes up most of this land with 93.44 hectares of natural bush land.

In addition, Fish and Game manages 10.18 hectares of natural wetland as part of the Howarth Memorial Wetland. Department of Conservation also manages large areas of natural bush along the Kaimai Ranges, which provides popular walking tracks for residents and visitors to Te Aroha.

Neighbourhood Parks

There are six Neighbourhood Parks in Te Aroha with a provision of 0.24 ha/1,000 residents. This is close to the recommended provision of 0.25 ha/1000 residents.

While most of these sites are relatively small, there are larger surrogate parks nearby to cater for activities such as informal ball play, kite flying etc.

All areas of the Te Aroha's Residential Zone have access to a playground within 800 meters.

Premier Parks

There is one Premier Park in Te Aroha, Te Aroha Domain, with a provision of 2.00 ha/1,000 residents.

There is no need at this stage to acquire new, or expand existing, Premier Parks in Te Aroha.

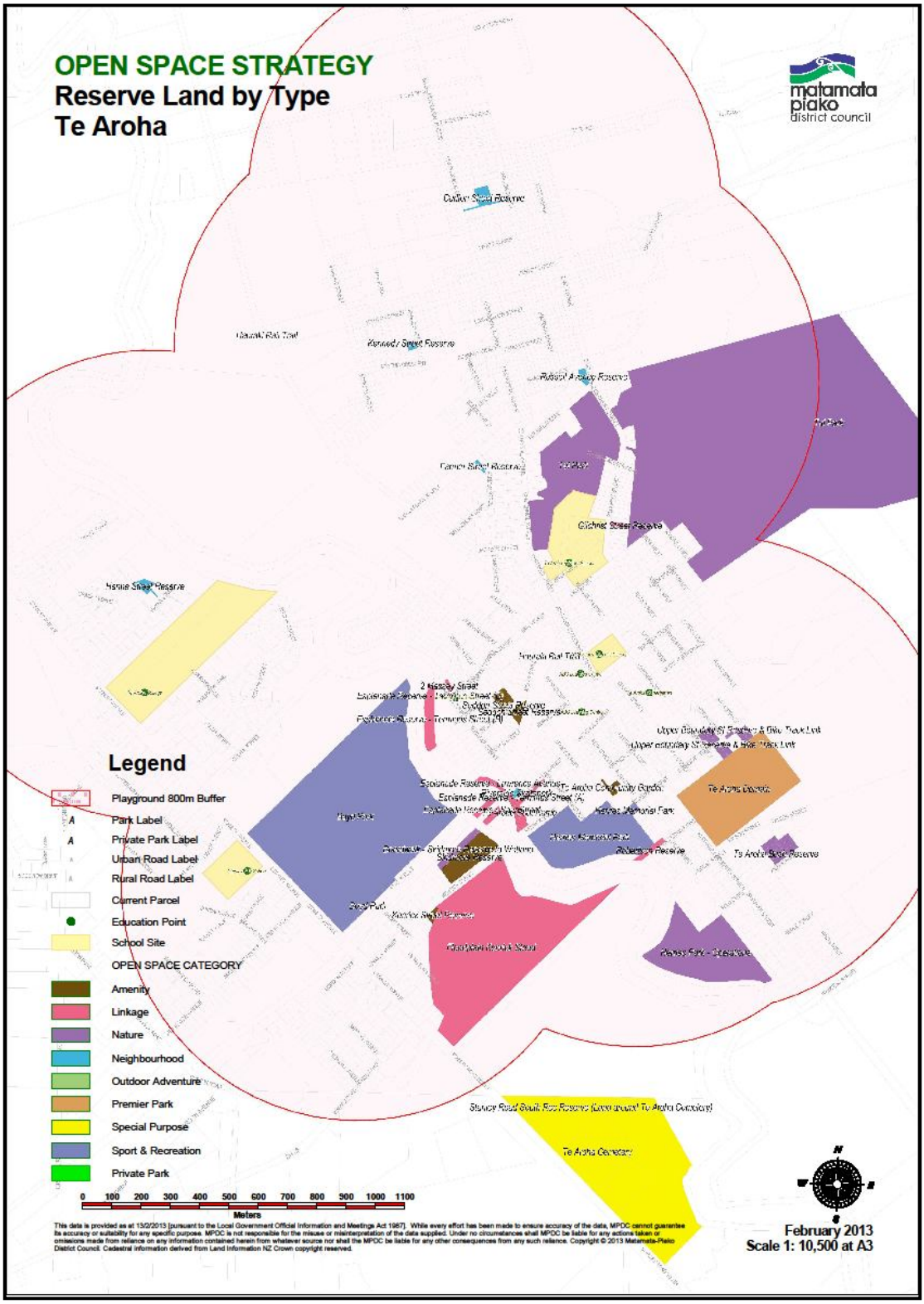
Sports and Recreation Parks

Te Aroha has two Sports and Recreation Parks, providing 33.75 hectares of land, or 8.34 ha/1,000 residents. This provision is slightly higher than the "yardstick" national average (2.34 ha/1,000 residents) and the Matamata-Piako District average of 3.06 ha/1,000 residents.

It should be noted that 17.15 hectares of Boyd Park is natural wetlands, while only 2 hectares of Herries Memorial Park is currently used for sport. The remainder is relatively undeveloped and is a flood prone area. The provision of Sport and Recreation Park land in Te Aroha, with these areas taken out, is 3.14ha/1,000 residents.

There is no need to acquire additional Sport and Recreation land within Te Aroha in the next 20 years.

FIGURE 28: TE AROHA – OPEN SPACE PROVISION

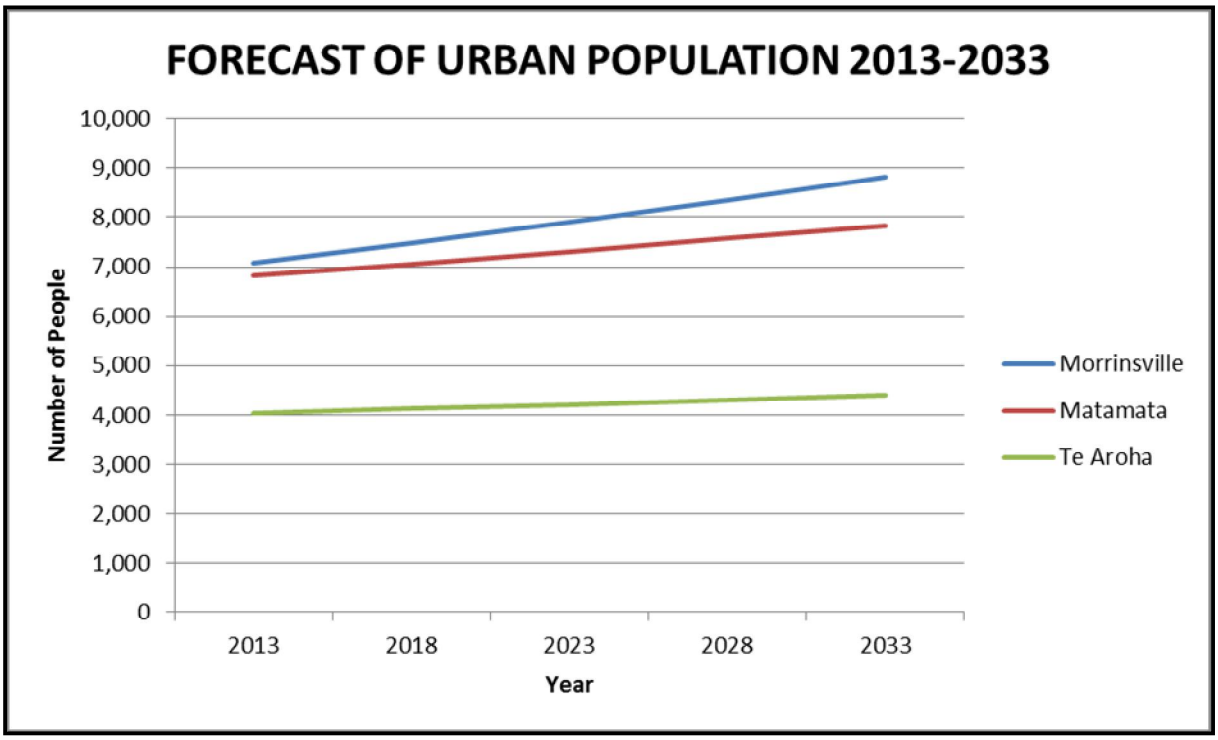


D Comparison of Growth in the Three Main Towns

1.0 RESIDENTIAL GROWTH

Figure 29 below shows a comparison of the projected population growth of our three main towns.

FIGURE 29: MPDC – FORECAST OF URBAN POPULATION 2012 - 2033



In line with the above projection, the demand for additional residential land for development will be highest in Morrinsville (111 ha), as opposed to Matamata (86 ha), and Te Aroha (38 ha).

2.0 NON-RESIDENTIAL GROWTH

2.1 Demand for non-residential land

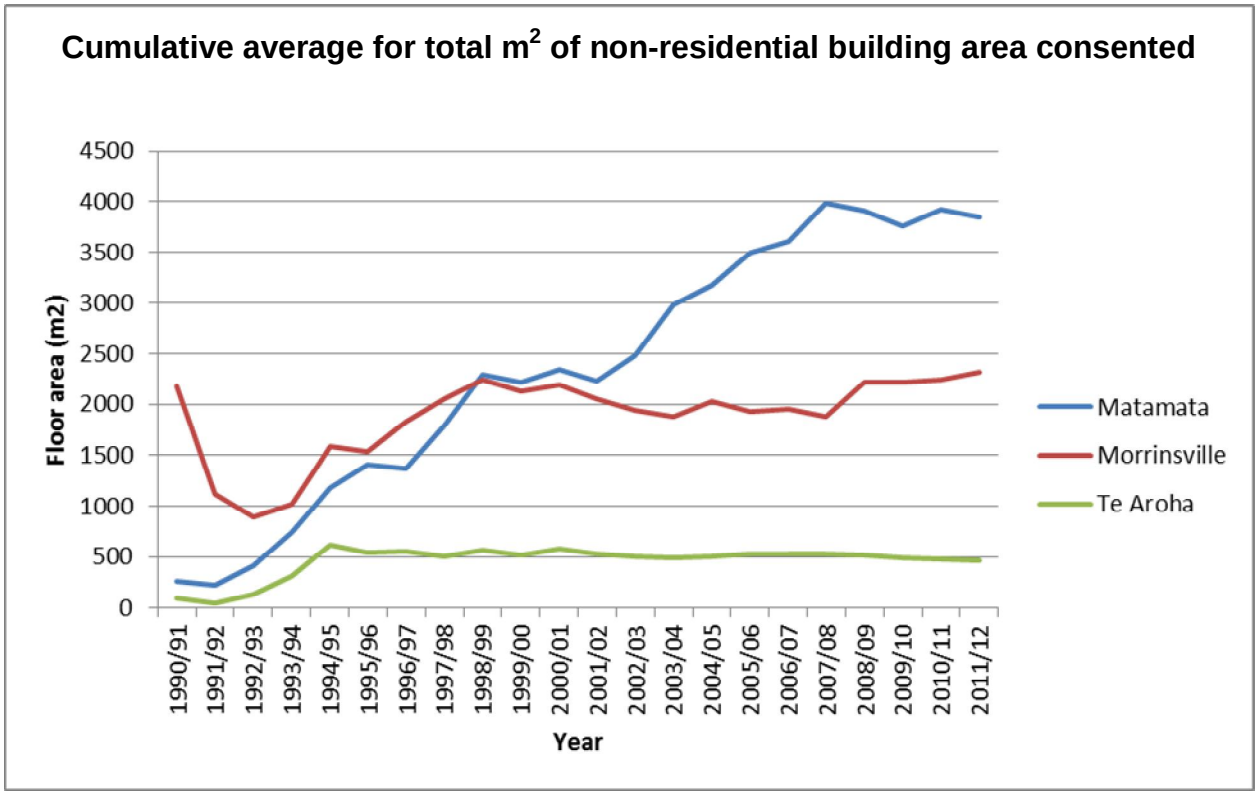
Figure 30 below shows the floor area of new non-residential buildings consented in the Towns of Morrinsville, Matamata, and Te Aroha over the last 22 years (1990/91 – 2011/12).

Average annual development of non-residential premises in Te Aroha has remained fairly constant since the mid-1990's.

Average annual non-residential development in Morrinsville has trended upwards between the early to late 1990's, but has since remained fairly constant.

Matamata's average annual non-residential development has continued to trend upwards since the early-1990's, and overtook Morrinsville's annual average from 1999 onwards.

FIGURE 30: COMPARISON OF AVERAGE NON-RESIDENTIAL URBAN DEVELOPMENT 1990/91 – 2011/12



A comparison of the three components of non-residential development ("Business", "Industrial", and "Social") shown in Figures 31 – 33 below, indicates that the reasons for Matamata's higher annual average non-residential growth in recent years, are comparatively higher average rates of development in premises for industrial and social purposes, rather than business uses.

FIGURE 31: COMPARISON OF AVERAGE BUSINESS DEVELOPMENT 1990/91 – 2011/12

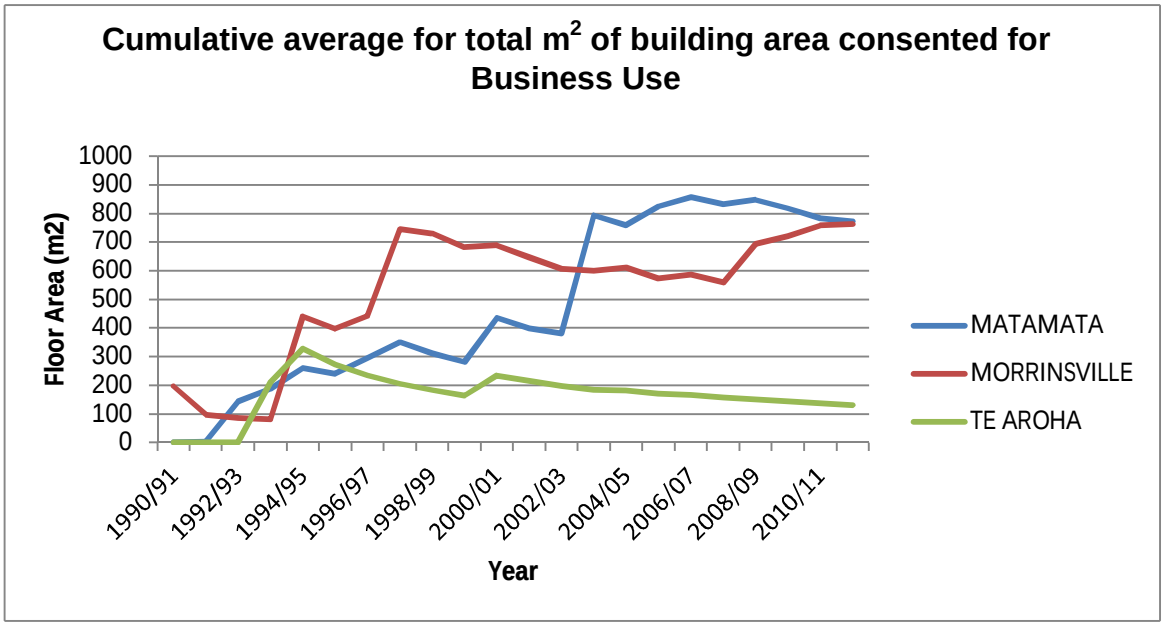


FIGURE 32: COMPARISON OF AVERAGE INDUSTRIAL DEVELOPMENT 1990/91 – 2011/12

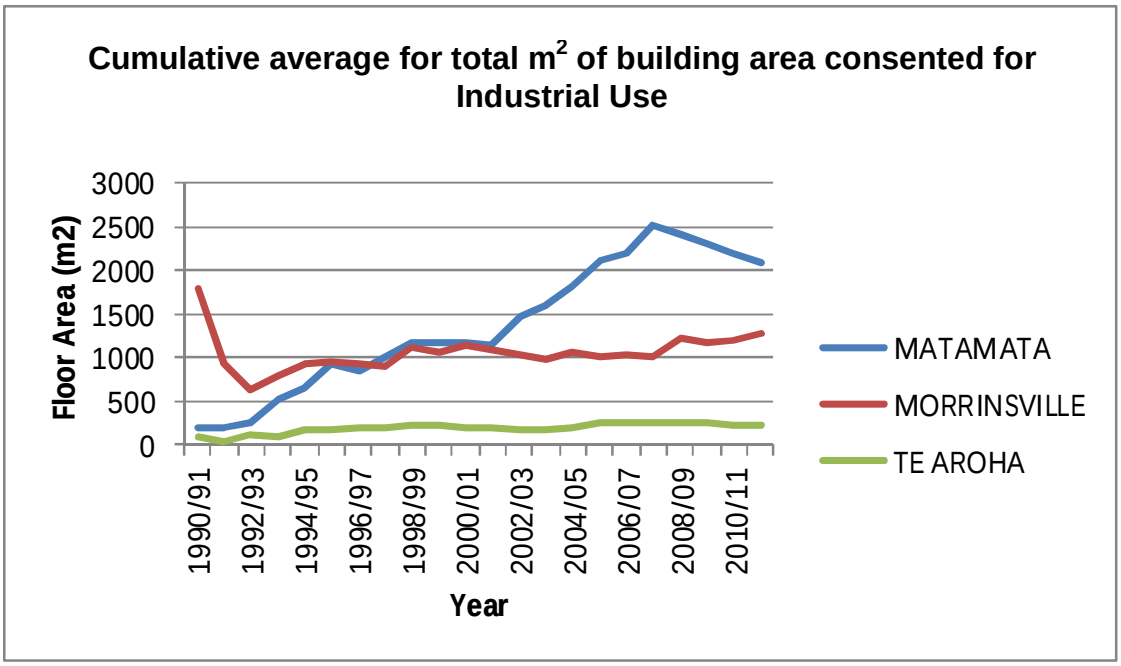
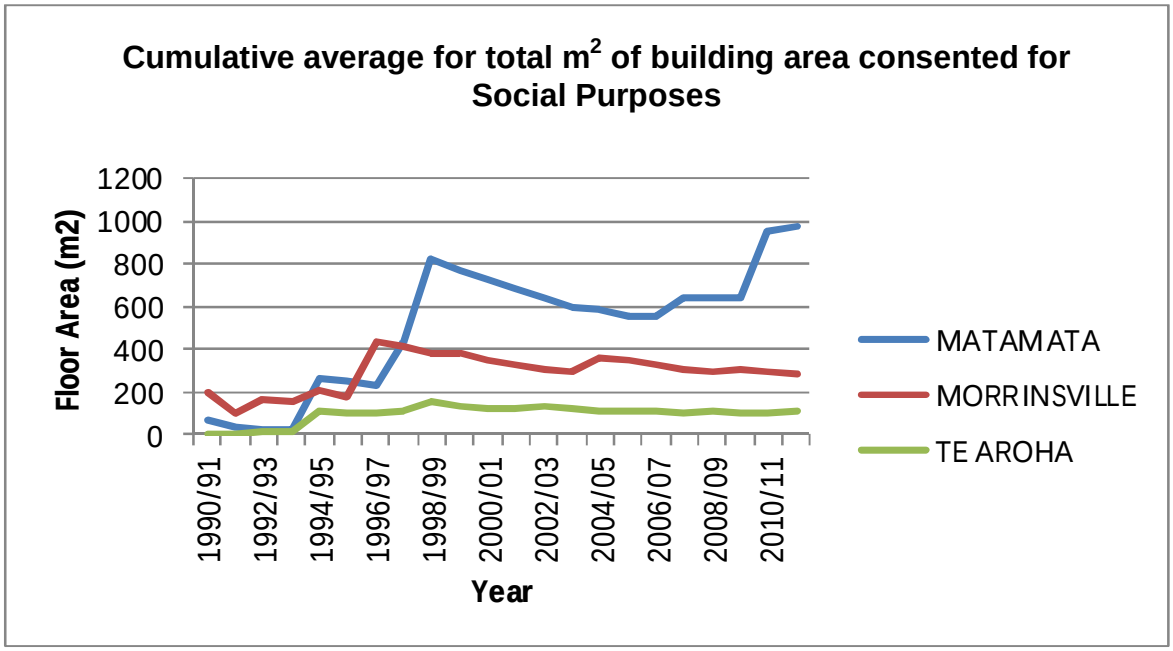


FIGURE 33: COMPARISON OF AVERAGE DEVELOPMENT OF BUILDINGS FOR SOCIAL PURPOSES 1990/91 – 2011/12



Conclusion

This Report includes analysis of the historic development trends and projected residential and non-residential growth for Morrinsville, Matamata, and Te Aroha.

The Report has considered the demand for additional land to accommodate future residential, business, and industrial development, and for premises to serve the community's social needs.

Separate land budgets have been prepared for residential, business, and industrial development.

It is envisaged that new premises to meet the community's social needs will locate on already designated land, or within residential areas. For this reason, a separate land budget for social premises has not been prepared.

The analysis shows that, while the characteristics and growth-drivers are different, there is a demand for additional land to accommodate future development in all three towns.

When considering the combined land area zoned for all urban uses, there is currently an adequate supply of zoned land in all three towns. However, there is a need to make adjustments between the proportion of land zoned for residential, rural-residential, business, and industrial purposes in each of the towns.

Appendix A: Methodology

The methodology used to predict the residential and non-residential growth in the District as shown in this Report, is as follows:

i. The information for number and type of non-residential building consents were extracted from Statistics New Zealand's "Number, value and floor area by building type, nature and territorial authority"

ii. The annual total floor area was then recorded for each of the sub-categories for building consents for each of the towns:
   a. *Te Aroha*
   b. *Matamata (Matamata North + Matamata South)*
   c. *Morrinsville (Morrinsville East + Morrinsville West)*

iii. The categories were then grouped as follows:
   a. Business
      i. *Hotels & other short-term accommodation*
      ii. *Shops, restaurants, taverns*
      iii. *Offices, administration buildings*
   b. Industrial
      i. *Storage buildings*
      ii. *Factories and industrial buildings*
   c. Social
      i. *Social, cultural, religious buildings*
      ii. *Hostels, boarding houses*
      iii. *Hospitals, nursing homes*
      iv. *Education buildings*
      v. *Miscellaneous buildings*

iv. Next, the average m^2/year was calculated for the period 1990 – 2011 and projected through to 2033 in 5 year intervals.

v. The annual average floor area was converted to total land area by using an assumption of total building coverage of 40%.

vi. The analysis does not include total gross floor area for building alterations (i.e. "brownfields" development).

vii. Future residential land demand is based on the projected increase in households, assuming:
   a. 10% "brownfields" development/ 90% "greenfields" development;
   b. Net average lot size of 750 m^2;
   c. Net residential area is 60% of gross "greenfields" sites.

viii. The supply of zoned land was obtained from the MPDC Growth Strategy 2008, updated to include changes between 2008 – 2012.