



Future Proof
Te Tau Tītoki

Future Proof Industrial Land Study

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Output 1

Prepared by GMD Consultants Ltd for the Future Proof Partners

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1.1 Introduction

This report is the first output of the Future Proof Industrial Land Study, a project which will provide an up-to-date overview of industrial land supply in the sub-region, update the current 2017 baseline data and the Future Proof industrial land supply table. This project will also help to inform the policy approach to be taken in the Regional Policy Statement review.

The report will provide Future Proof partners with information about the uptake of industrial land over the period since 2017 and an overview of the current amount of vacant industrial land available in the sub-region.

The report will assist Future Proof partners in their reporting obligations under the National Policy Statement – Urban Development Capacity which requires regular monitoring to inform councils about development capacity for, in this case, industrial land.

1.1.1 Project Scope

The project terms of reference were agreed through the Future Proof Technical Implementation Group and the Future Proof Chief Executives' Group. Consultants, GMD Limited were engaged by the Future Proof partners to lead work on the project, with partner councils providing a key role in updating monitoring data in their respective areas of the sub-region.

1.1.2 Structure of the report

The report is structured as follows:

- Background
- Sub-regional results
- Results for each TLA
- Conclusions
- Recommendations

1.2 Background

1.2.1 Requirement for monitoring - National Policy Statement-Urban Development Capacity (NPS-UDC)

The NPS-UDC came into effect on 1 December 2016, with an overarching purpose to ensure that territorial authorities enable development through providing sufficient development capacity for residential and business activity over the next 10 to 30 years. Provision for Industrial use is an important component of the business development capacity.

The NPS-UDC identifies the Future Proof sub-region as a high growth urban area. As such, the Future Proof councils are required to meet all the requirements in the NPS-UDC, including the production of a housing and business development capacity assessment (HBA).

Future Proof partners produced their first housing and business assessment in 2017 to meet the NPS-UDC requirements. The findings of this 2020 industrial land study will be utilised to help inform the next Future Proof NPS-UDC assessment due in 2020.

Policy PA1 of the NPS-UDC requires that local authorities ensure sufficient business development land and describes capacity requirements for the short, medium and long term as follows.

- Short term development capacity must be feasible, zoned and serviced with development infrastructure.
- Medium term development capacity must be feasible, zoned and either serviced with development infrastructure or the funding for the development infrastructure required to service that development capacity must be identified in a Long Term Plan required under the Local Government Act 2002.
- Long term development capacity must be feasible, identified in relevant plans and strategies, and the development infrastructure required to service it must be identified in the relevant Infrastructure Strategy required under the Local Government Act 2002.

The above categories have been utilised for the purpose of this report with the addition of a “developer ready” category to capture vacant land immediately available for development.

1.2.2 Business Development Capacity Assessment 2017

The first Future Proof Business Development Capacity Assessment report 2017 (BDCA), was prepared for the sub-region by Market Economics Limited (M.E). At the same time a separate residential capacity assessment – the 2017 Housing Development Capacity Assessment (HDCA) – was also prepared by Market Economic Economics for the Future Proof Partners. The results of both of these assessments are summarised in the *Housing and Business Development Capacity Assessment – Summary Report 2017*.

The BDCA found that the total amount of industrial land required for the subregion in the period 2017-2047 was 881 hectares. The study found that there was a supply of 1,190 ha of industrial land available in the sub-region in 2017 (including land that was in a deferred zoning or identified on a structure plan for future industrial use).

The BDCA noted there was also potential capacity in underutilised sites which was unable to be measured but would provide additional capacity to meet a portion of short-term demand. Redevelopment of currently underutilised/partly used and older built sites would also provide additional capacity not captured in the above figures.

Since the capacity in the BDCA was urban capacity, rural capacity was likely to also provide additional capacity not discussed in the report.

As part of the BDCA, M.E. then tested the feasibility of the identified capacity using a Multi-Criteria Analysis (MCA). The MCA showed there was a close alignment between where the Future Proof partners have provided capacity and the sites that score highly under the MCA framework. This correlation meant that most areas would be acceptable to the market (i.e. meet the needs of the market), for example in terms of the location and type of industrial land offering.

M.E. concluded that there was sufficient capacity for industrial land in the Future Proof subregion. However, they noted that this will need to be closely monitored. M.E also noted that large format retail often looks to industrial land due to its relatively low cost which can result in significant adverse outcomes as trade is drawn away from traditional centres impacting on their ability to function and deliver amenity to the city.

M.E. note that it will be important to continue to monitor:

- Uptake of industrial land;
- Development typologies – what is being built on the land;
- Occupiers and use – who are the final occupiers of the land and what do they do/what sector do they belong to?
- How much employment is being achieved on the developed land; and
- Market trends in locational choice and usage – what is coming down the pipeline and what are the developers and real estate agents saying about the near and far future?

Growth projections in the M.E. work (based on NIDEA population projections and the Economic Futures Model) indicate that there will be relatively strong growth over the next 5 years across the Future Proof area, but which they expect will then taper off over the subsequent medium and long term time steps.

Drivers of growth include:

- Household consumption
- International exports
- Inter-regional exports
- Gross fixed capital formation (GFKF) – future increases in investment demand
- Changes in inventory

For the Waikato other specific drivers of growth include:

- Dairy Farming
- Population Growth (including migration)
- Waikato Tainui aspirations
- Waikato Expressway and other transport links
- Proximity to Auckland both for demand and displacement.¹

¹ Recent work undertaken by BERL for the Metro Spatial Plan (*Hamilton Future, roles, function and purpose, BERL 2019*) provides further information about drivers associated with Hamilton's proximity to Auckland. It identifies that Auckland and the Waikato have somewhat complementary and somewhat competing functions. Auckland depends on Hamilton to conduct services (predominately business and social services) for its provincial area so as to provide for primary sector functions. Hamilton relies upon Auckland for high value business and social services. BERL conclude that there are opportunities for Hamilton to complement Auckland's functions. BERL

Recent work undertaken by BERL for the Metro Spatial Plan (BERL 2019) also identifies that Auckland and the Waikato have somewhat complementary and somewhat competing functions. Auckland depends on Hamilton to conduct services (predominately business and social services) for its provincial area so as to provide for primary sector functions. Hamilton relies upon Auckland for high value business and social services. BERL conclude that there are opportunities for Hamilton to complement Auckland's functions. BERL also note that by encouraging Hamilton urban areas to also develop as a well-planned city with intensive economic activity, the prospect of higher value sectors locating there and experiencing agglomeration benefits also increases.

1.2.2.1 Summary of demand projections from the BCDA:

From the BCDA work, the amount of industrial land demand projected for the sub-region is summarised as follows:

- For Hamilton City Council, 110ha of industrial land was required in the over 3 years from 2017 and 318 over 10 years (medium term) from 2017. In total 524 ha of industrial land was required in Hamilton over the 30 years.
- For Waikato District 22.8ha of industrial land was required in the short term, 77.1ha in the medium term and 209ha in the long term. Most of the demand is in the north.
- For Waipa District 22.3ha of industrial land was required in the short term, 58.6 ha in the medium term and 147.2 ha in the long term.

These figures do not include provision for a margin above projected demand (20% in the short and medium term and 15% over the long-term) – this is discussed further in subsequent sections of this report below.

1.2.3 Future Proof Housing and Business Market Indicator Monitoring Reports:

Several brief reports which provide an overview of housing and business movement over specified time periods have been prepared for the Future Proof partners since the BCDA was finalised. Between June 2017 and May 2019 monitoring was reported to Future Proof on a quarterly basis.

Moving forward Future Proof partners have expressed the intention that this reporting will be updated on a triannual basis, with a more comprehensive version published mid-year. The mid-year report will focus on long-term trends and include further detail on wider range of indicators, with two brief reports being provided twice-yearly in addition to the mid-year reporting. This will assist Future Proof partners to meet their monitoring requirements under the NPS-UDC.

1.2.4 BERL Upper North Island Industrial Land Demand Study - 2015

Further relevant background information is available in the Upper North Island Industrial Land Demand study which BERL undertook a for the Upper North Island Strategic Alliance (UNISA) in 2015. This report looked at the trends influencing industrial land demand in the upper North Island.

The study came to a number of conclusions which can be usefully applied to the industrial land monitoring currently being undertaken by the Future Proof partners.

also note that by encouraging Hamilton urban areas to develop as a well-planned city with intensive economic activity, the prospect of higher value sectors locating there and experiencing agglomeration benefits also increases.

Key findings included:

- Across the sub-region, measured since the mid-1990s, indicators such as the area of vacant industrial land, the area of utilised industrial land, the land value of industrial land all show that there is likely to be reasonably priced vacant industrial land available for development in the upper North Island. Whether this land is in the right place is a matter for more localised study.
- Factors that influence where an industry/business locates include:
 - o Suitable land use zoning with certainty of operation (including zoning provisions that limit other types of use such as non-industrial uses which can drive up the price of land or limit operations of industrial businesses);
 - o Market, including suppliers and customers
 - o Transport infrastructure
 - o Access to a skilled workforce
 - o Telecommunications provision
 - o Primary, processing and heavy industries also need to be close to suppliers but suitably distanced from non-industrial areas, and have access to low cost land. Heavy industries also often require large sites and typically require access to rail.
 - o Transport and storage firms are typically attracted to purpose-built greenfield developments.
 - o Light industries are often attracted to premises which are close to the owner's residence.
- In locations where growth is high, permissive zoning (which allows for non-industrial uses) is a significant issue as it results in increased prices for land available to industry. A widely observed effect of permissive zoning of areas intended for industrial activity is that other types of land use will emerge and will crowd out the industrial activity.
- Regulatory costs (such as fees, charges and development contributions) do matter to firms and developers but are significantly less influential than the pricing effect from permissive zoning.

The report also devised a standardised model for undertaking industrial land demand modelling. This is less relevant to the current work, as Market Economics have already undertaken land demand modelling for the sub-region.

1.2.4.1 Comparison of BERL UNISA 2015 findings with Market Economics Business Capacity 2017 findings

There is broad alignment between the findings of the BERL Industrial Land Demand Study and the M.E. BCDA report.

Both the BERL and the Market Economics projections both indicate that the fastest growing broad sector is the transportation and storage sector which is projected to increase employment by 78% over the 30-year period. This is the employment type that the Future Proof councils need to be able to accommodate through planning provisions and the land they apply to. As found in the BERL report, this sector typically is attracted to purpose-built greenfield developments so there is a need to ensure that this type of land is available for these industries in suitable locations.

Another important observation made by both M.E. and BERL is that protecting industrial land resource for industrial activities is important to ensure market failure is avoided and an overall efficient economy results.

1.2.5 Other Industrial and business land monitoring and reporting in the subregion

Other market-based monitoring and reporting in the Sub Region, includes that carried out by the following companies, and is further described in *Appendix 1*:

- CBRE NIA Harcourts
- Bayleys
- Colliers International
- Telfer Young

Whilst this monitoring covers varying spatial scales and measures, it provides a valuable insight and commentary on broader market availability, leasing trends (average rents), investment trends (yield and land value) and vacancy rates.

1.3 Methodology

The methodology undertaken in late 2019 and early 2020 for this first Future Proof Industrial Land Study output is as follows:

- Spatial data on vacant industrial land from the 2017 BCDA forms the baseline data to monitor and report against.
- Hamilton City Council (HCC) refined the mapping approach to include a break down timing of availability in line with NPS-UDC monitoring requirements being:
 - Green – Available now (serviced, zoned and development ready)
 - Yellow – Available in short term (1 to 3 years)
 - Orange – Available in medium term (4 to 10 years)
 - Black – Available in long term (11 to 30 years)
- In 2019 HCC updated the 2017 BCDA baseline mapping based on the above breakdown.
- HCC, the New Zealand Transport Agency (NZTA), Waipa District Council (Waipa DC) and Waikato District Council (Waikato DC) met to go over the existing data captured in Hamilton and to provide progress updates. HCC provided a presentation and Waikato DC and Waipa DC provided verbal updates on their towns.
- Waikato DC and Waipa DC provided spatial data for their respective districts. For Waikato DC this was also informed by a ground-truthing assessment of the towns in the District carried out in July and August 2019. Of note the approach taken by Waipa DC and Waikato DC varied to that of HCC in that Waipa DC and Waikato DC focused on particular industrial nodes whereas Hamilton have undertaken a comprehensive review across the whole city. This means that the Waipa and Waikato data possibly underestimates the current vacant industrial land supply in their districts because there is likely to be other industrial supply, for example in smaller towns in those districts, which has not been counted in the current monitoring data.
- Waikato DC and Waipa DC undertook further work to break down timing of availability in line with NPS-UDC monitoring requirements of ‘available now’, ‘available in short term’, ‘available in medium term’ and ‘available in long term’.
- Narratives were compiled for each precinct/town area, which in addition to the known available supply, captured future thinking (i.e. large-scale industrial developments not currently anticipated for Operative or Proposed District Plans).
- The spatial data was analysed and compared against the BCDA demand projections in order to establish whether there is sufficient supply available to meet demand and demand inclusive margins of 20% in the short and medium term and 15% in the long-term

1.4 Monitoring results - Sub-regional overview

1.4.1 Sub-regional overview – uptake of industrial land and estimate of total industrial land availability

A sub-regional overview of the monitoring results shows the uptake of industrial land over the period from June 2017 to June 2019. The results are set out in Table 1 below. This shows that there was a total uptake of 34.5 ha of industrial land in Hamilton City this uptake was primarily in Rotokauri (13.9ha) and Te Rapa (13.3) and Frankton (3.1ha) over that time period. Meanwhile, there was an uptake of 33.4 ha in the Waikato District, primarily in Horotiu and Pokeno. For Waipa there was approximately 52 ha of land taken up. This comprises of 35ha at Hautapu (including Bardowie), 7ha in Te Awamutu and 10ha at Hamilton Airport. However, the figure in Table 1 below indicates an additional 165.00 ha has been added to the total supply. This is predominantly because of the additional land that has been zoned or identified as future industrial land in that period at Hautapu.

Table 1: Sub-regional overview: Change in Vacant Industrial Land between June 2017 and June 2019

	Change between June '17 and June '19 (ha)	Total Vacant Land (ha) as at June 2019
Hamilton	-34.5	659.3
Waikato	-33.4	265.9
Waipa	165.0	358.2
Future Proof Total	97.1	1,283.4

For Waipa and Waikato the 2019 monitoring results relating to uptake of industrial land, shown in Table 1 above, are not comparable with the 2017 baseline data for the following reasons:

- 2019 Vacant land monitoring captures only main industrial areas and as such doesn't capture vacant land in outlying industrial zoned areas or smaller villages and towns. For example, the Waikato vacant land reporting doesn't capture vacant industrial land at Rotowaro and Raglan (Nau Mai Industrial Zone) and the Waipa reporting doesn't capture vacant industrial land in Kihikihi.
- 2019 vacant land monitoring is on a town basis rather than by Ward or Census Area Unit (CAU).
- For Waikato District the monitoring involved ground truthing which identified underutilised or disused sites. These feature as vacant industrial land for the purpose of this report. Waipa DC also identified disused industrial sites, in addition to the M.E. data.

Given the above for Waikato and Waipa, and the sub-regional uptake cannot be compared with the 2017 baseline. In Section 1.7 below, recommendations for future monitoring reiterate the need for capturing data consistently to allow a sub-regional comparison to be undertaken.

1.4.2 Sub-regional overview – Total Available Land Capacity and availability in short, medium and long term

In order to determine whether the vacant industrial land supply is available to meet the needs of the market in the short, medium and long term, as required by the NPS-UDC, the vacant industrial land has been assessed as to its availability.

This takes into account matters such as the ability to service the land for wastewater, water and stormwater, the availability of transport connections, and the planning and zoning provisions that are in place or planned.

Table 2 summarises the availability of industrial land across the short, medium and long-term timeframes, as required by the NPS-UDC. In Table 2:

- Land that is available now is noted as being 'developer-ready' which means that the only requirements needed for this land to be utilised for industrial purposes are those things which the developer will provide e.g. site works.
- Land that is available in the short term has been assessed by Council staff as having zoning and servicing available within 1-3 years.
- Land that is available in the medium term (years 4-10) has either existing or planned zoning, and servicing that will be available within the 10-year period, through the period of the relevant long term plan.
- Land that is available in the long term (years 11-30) is land that is identified, such as through the RPS strategic industrial nodes, through existing or planned zoning, and for which infrastructure would need to be provided in the longer-term. This servicing may be shown or indicated in the relevant 30-year infrastructure strategy for example.

Table 2 shows that Hamilton, Waikato and Waipa have land that is developer-ready and/or available in the short-term (1-3 years). For Hamilton, 297ha is available now or in the short-term. For Waikato 34.7ha is available either now or in the short-term, and for Waipa there is 98.5ha of land available now or in the short-term. In the medium term, for Hamilton 81.7ha of land will become available. For Waikato an additional 100.4ha of land will become available in the medium term, whilst in Waipa there will be an additional 74.2ha of land available in the medium term. In the long term, an additional 280.6ha of land in Hamilton, 130.8ha in Waikato and 185.6ha of land in Waipa will become available.

Overall, factoring in margins above projected demand (20% in the short and medium term and 15% over the long term) there is an anticipated surplus of industrial land supply in the sub-region of 270.3ha of industrial land over the 30-year time period when compared with projected demand.

Table 3 in the following section provides a summary of how this meets the projected demand over the short, medium and long-term.

Table 2: Estimate of Total Available Industrial Land Capacity (vacant hectares) across Future Proof Sub Region: Land that is developer-ready or in pipeline (Years 1 to 3, 4 to 10 and 11 to 30)

	Total Vacant Land (ha) as at June 2017 Baseline	Developer ready (ha)	Available in Short Term (Years 1 ² to 3) – ha	Available in Medium Term (Years 4 to 10) – ha	Available in long term (Years 11 to 30) – ha	Total vacant supply over short medium and long term as at June 2019	Total projected demand 2017 to 2047 (ha)
Hamilton	697.4	197.5	99.5	81.7	280.6	659.3	524 Including Margin ³ : 603.0
Waikato	299.2	0 ⁴	34.7	100.4	130.8	265.9	209 Including Margin ³ : 240.8
Waipa	193.2	60.1	38.3	74.2	185.6	358.2	147 Including Margin ³ : 169.3

1.4.3 Sub-regional overview - estimate of available industrial land supply compared with projected demand

In order to establish whether the supply of industrial land meets the projected demand at a TLA level, the results have been summarised by TLA across the timeframes of ‘developer ready’, ‘short-term’, ‘medium-term’ and ‘long-term’ in Table 3 below.

The supply figures in Table 3 indicate the amount of land that is planned to be made available in the short, medium and long-term timeframes. A cumulative total provides for comparisons to be made to the projected demand in the corresponding time period.

The results show that at a TLA level:

- For Hamilton City, there is sufficient land available to meet the short term projected demand with 297ha available to meet a projected demand of 110.1ha (132.1ha including margin). In the medium term there is sufficient supply with 378.1ha to meet a projected demand of 318ha (exclusive of margin). In the long-term there is sufficient supply with 659.3ha to meet a projected demand of 524.4 (603ha including margin)

² Year 1 commences June 2019

³ Short and medium term demand margin is 20%, long-term demand margin is 15%

⁴ Waikato District developer-ready sites are included in the short-term availability column

- For the Waikato District, there is sufficient land available to meet the projected short-term demand with 34.69ha available to meet a projected demand of 22.8ha (27.3ha including margin). In the medium-term there is sufficient supply with 135.04ha to meet a projected demand of 77.1ha (92.5ha including margin). In the long-term there is sufficient supply with 265.8 ha to meet demand of 209.4ha (240.8ha including margin).
- For the Waipa District, there is sufficient land available to meet the projected short-term demand with 98.5 ha to meet a projected demand of 22.3 ha (26.7ha including margin). In the medium-term there is sufficient supply with 172.6ha to meet a projected demand of 58.6ha (70.3ha including margin). In the long-term there is sufficient supply, with 358.2ha supply to meet the projected demand of 147.2ha (169.3ha)

Table 3: Estimate of Available Industrial land supply and projected demand in the Future Proof sub-region across the short, medium and long term

	Total Vacant Land (ha) as at June 2017 Baseline	Developer ready (Year 0) – ha	Available Supply in Short Term (Years 1 ⁵ to 3) – ha	Projected short term demand (0 ⁶ to 3 years) - ha	Available in Medium Term (Years 3 to 10) - ha	Projected Medium term demand (cumulative 0 ⁶ to 10 years) - ha	Available in long term (Years 11 to 30) – ha	Projected Long term demand (cumulative 0 ⁶ to 30 years) - ha	Total vacant supply over short, medium and long term as at June 2019 – ha
Hamilton	697.4	197.5	99.5 Cumulative Years 0-3 = 297	110.1 Including Margin: 132.1	81.7 Cumulative Years 0-10 = 378.7	318.0 Including Margin: 381.6	280.6 Cumulative Years 0-30 = 659.3	524.4 Including Margin: 603.0	659.3
Waikato	299.2	⁷	34.7 Cumulative Years 0-3 = 34.7	22.8 Including Margin:27.3	100.4 Cumulative Years 0-10 = 135.1	77.1 Including Margin: 92.5	130.8 Cumulative Years 0-30 = 265.9	209.4 Including Margin: 240.8	265.9
Waipa	193.2	60.1	38.3 Cumulative Years 0-3 = 98.5	22.3 Including Margin:26.7	74.2 Cumulative Years 0-10 = 172.6	58.6 Including Margin:70.3	185.6 Cumulative Years 0-30 = 358.2	147.2 Including Margin:169.3	358.2
Future Proof Total	1,189.8	257.7	172.5 Cumulative Years 0-3 = 430.2	155.2 Including Margin:186.2	256.2 Cumulative Years 0-10 = 686.4	453.7 Including Margin:544.4	597.0 Cumulative Years 0-30 = 1,283.4	881.0 Including Margin:1,013.1	1,283.4

⁵ Year 1 supply commences 2019

⁶ Year 0 demand commences 2016

⁷ Waikato District developer-ready supply accounted for in short term supply

1.5 Monitoring results for each TLA

This section provides an overview of monitoring results by each TLA in the Future Proof sub-region.

1.5.1 Hamilton City

As at June 2019 there was a total of 659.3ha of vacant industrial land across the city. Approximately 15% (197.5ha) of the vacant industrial land in the City is developer ready. An additional 99.5ha is available in the short term, 81.7ha in the medium term and 280.6ha in the long term.

Of the vacant industrial land in the city, 96% is located in four locations – Te Rapa, Te Rapa North, Rotokauri and Ruakura, the latter three being Future Proof Strategic Industrial Nodes. The largest area of vacant industrial land in the city is at Ruakura which has 49% of the vacant industrial land. Te Rapa North comprises 28% of the vacant industrial land and Te Rapa comprises 5%. Rotokauri to the west contains 14% of the vacant industrial land. The remaining 4% of industrial land is shared evenly between Frankton and other unspecified areas across the city such as Riverlea.

It is estimated that about 50% of the vacant industrial land in the city is owner-occupied and 50% is leasehold. Whilst there is no obligation in the NPS-UDC to provide freehold land, it is worth noting that Ruakura would be leasehold, which may impact on its attractiveness to future industrial tenants.

Projections out to 2024 show a steady increase in the total annual build value of factory buildings. Analysis of building consent and development contributions data shows that there has been an increase in use of non-vacant industrial land. It is further anticipated that there is up to 10% of available land within the existing non-vacant industrial areas (e.g. those with existing industrial use).

Table 4 below summarises the availability of industrial land across Hamilton City alongside the projected demand. This shows there is sufficient land in each of the main industrial precincts to meet the projected demand, including taking into account the margin, in all areas of the City except in Frankton and Rotokauri which are identified as having less supply than the required demand in the medium to long-term. For Rotokauri, this situation may be remedied in the future as and when infrastructure constraints to bringing forward land in Rotokauri are resolved. For Frankton projected demand exceeds supply in the long term. Cumulatively, for “other” local areas not included in the 4 main precincts there appears to be a short, medium and long-term shortage of supply to cater for demand. However not captured in this supply is those underutilised sites and redevelopment sites that also provide some further capacity, as identified by M.E.

Table 4: Estimate of Total Available Industrial Land Capacity in Hamilton City Council by precinct: Developer ready and in pipeline (Years 1 to 3, 4 to 10 and 11 to 30)

Industrial Precinct	Developer ready (ha)	Available in Short Term (Years 1 ⁸ to 3) – ha	Projected short term demand (0 ⁹ to 3 years) – ha	Available in Medium Term (Years 4 to 10) – ha	Projected Medium term demand (cumulative 0 to 10 years) – ha	Available in long term (Years 11 to 30) – ha	Projected Long term demand (cumulative 0 to 30 years) – ha	Total Vacant Land (ha) over short, medium and long term as @ June 2019
Te Rapa North ¹⁰	0.3	14.6 Cumulative Years 0-3 = 14.9	0	15.0 Cumulative Years 0-10= 29.9	0	156.6 Cumulative Years 0-30= 186.5	0	186.5
Te Rapa	33.5	- Cumulative Years 0-3 =33.5	6.5 Including Margin: 7.8	- Cumulative Years 0-10= 33.5	15.9 Including Margin: 19.1	- Cumulative Years 0-30= 33.5	25.4 Including Margin: 29.2	33.5
Rotokauri ¹⁰	92.7	- Cumulative Years 0-3 = 92.7	47.2 Including Margin: 56.7	- Cumulative Years 0-10= 92.7	175.7 Including Margin: 210.8	- Cumulative Years 0-30= 92.7	243.1 Including Margin: 279.6	92.7
Frankton	12.6	- Cumulative Years 0-3 = 12.6	0.4 Including Margin: 0.5	- Cumulative Years 0-10 = 12.6	6.7 Including Margin: 8.0	- Cumulative Years 0-30 = 12.6	23.5 Including Margin: 27	12.6
Ruakura ¹⁰	46.1	84.9 Cumulative Years 0-3 = 131	4.9 Including Margin: 5.9	66.7 Cumulative Years 0-10 = 197.7	4.5 Including Margin: 5.3	124.0 Cumulative Years 0-30= 321.7	14.2 Including Margin: 16.3	321.7
Other ¹¹	12.3	- Cumulative Years 0-3 = 12.3	51 Including Margin: 61.2	- Cumulative Years 0-10= 12.3	115.3 Including Margin: 138.4	- Cumulative Years 0-30= 12.3	218.2 Including Margin: 250.9	12.3
Total	197.5	99.5 Cumulative Years 0-3 = 297	110.1 Including Margin: 132.1	81.7 Cumulative Years 0-10 = 378.7	318.0 Including Margin: 381.6	280.6 Cumulative Years 0-30 = 659.3	524.4 Including Margin: 603	659.3

⁸ Year 1 supply commences 2019.

⁹ Year 0 demand commences 2016

¹⁰ Future Proof Strategic Industrial Node

¹¹ Other includes the rest of the Hamilton urban area -

As shown in Table 5, observed uptake in Hamilton between June 2017 and December 2018 was 30.4ha. Between December 2018 and June 2019, the observed uptake was considerably lower totalling only 4.1ha. Overall, this observed uptake is tracking considerably lower than the anticipated total projected demand of 132.1ha in the short-term (June 2017 to June 2020), and lower over this period than the average annual projected a demand (44ha).

Table 5: Supply and uptake of industrial land in Hamilton City Council area as at June 2019 showing change since June 2017:

	Total Vacant Land (ha) as at June 2017 Baseline	Projected total Demand 2017 to 2047 (ha) plus margin ¹²	Uptake between June 2017 and Dec 2018 (ha)	Uptake of industrial land between Dec 2018 and June 2019 (ha)
Te Rapa North¹³	193.6	0.0	0	0
Te Rapa	42.5	25.4 Including Margin: 29.2	9.8	3.5
Rotokauri¹³	106.8	243.1 Including Margin: 279.6	13.9	0
Frankton	13.9	23.5 Including Margin: 27	3.1	0
Ruakura¹³	325.2	14.2 Including Margin: 16.3	0	0.6
Other¹⁴	15.4	218.2 Including Margin: 250.9	3.6	0
Hamilton Total	697.4	524.4 Including Margin: 603	30.4	4.1

1.5.1.1 Te Rapa North (Future Proof Strategic Industrial Node)

The Waikato Regional Policy Statement allocates 85 ha of industrial land in the Te Rapa North area between 2010-2061.

There is 186.5ha of vacant industrial land in the Te Rapa North area. This is characterised primarily by land that will come on board in the long term (156.6ha). There is limited developer ready land available at Te Rapa North (0.3ha), meanwhile 14.6ha is available in the short term and 15ha comes on board in the medium term.

¹² Note demand margin is 15% over the long-term.

¹³ Future Proof Strategic Industrial Node

¹⁴ Other includes the rest of the Hamilton urban area

Connectivity to wastewater is a constraint, as vacant sites are currently not connected to reticulated wastewater. A rising main services current business and industrial sites including Fonterra and the Te Rapa Expressway Service Centre.

Future wastewater infrastructure upgrades include the northern interceptor which is subject to future decision-making as to timing. A new bulk main is required in order to service the Te Rapa North area, which is identified in the 30-year Infrastructure Strategy. There is no investment programmed in the 2018-28 Long Term Plan to service Te Rapa North.

As the Te Rapa North Area had not been identified as a growth area in the Hamilton Urban Growth Strategy 2010 there is currently very limited investment programmed in the 10 Year Plan 2018 - 2028 or the 30 year Infrastructure Strategy 2018 – 2048 to service additional development within the Te Rapa North area.

It is anticipated that any additional funding needed for the servicing of the structure plan area (including investigation work) will require cost sharing arrangements and private developer funding. Further work will be required to assess any financial implications for Council and an infrastructure funding plan prepared detailing how any additional infrastructure would be funded.

In terms of stormwater, a catchment management plan is being developed for Te Rapa North and this is scheduled to be completed in early 2021.

Much of the land in the Te Rapa North area is owned by one party, with no plans that Council is aware of to develop the land or bring it forward as an industrial use.

The stream network will reduce the feasible development capacity in the long term. This can be considered in future updates to monitoring reports.

Porters / Delegate applicants are seeking industrial use in this location but currently it is a non-complying activity under the Operative Hamilton City District Plan due to deferred zoning.

With the exception of the Fonterra Dairy Factory the entirety of this precinct is zoned deferred industrial. The Waikato Regional Policy Statement allocates 85 ha of industrial land in the area between 2010-2061. The District Plan currently stages the timing of growth in this node to give effect to the RPS zoning allocation. There is also an additional 191 ha of 'deferred industrial' land which would come on board after the 2061 timeframe or if circumstances were to require the land earlier.

A plan change is currently being investigated, which would rezone land currently zoned deferred industrial. The proposed plan change area excludes:

- The Te Rapa Dairy Manufacturing Site;
- The existing Service Centre containing the BP, café, cycle park and retail shops on the Hamilton side of the Te Rapa Bypass (known as the Stage 1b Service Centre in the Hamilton District Plan);
- The Te Awa Lakes Private Plan Change area.

Development proposals for Te Awa Lakes, a mixed-use residential development are well underway. Proposals were developed through a Special Housing Area proposal, which did not gain approval of the Minister. The proposal is now the subject of a private plan change to the Operative Hamilton City District Plan with hearings having concluded in December 2019. The Te Awa Lakes proposal would mean the loss of 51 ha of industrial-zoned land to housing, if approved.

1.5.1.2 Te Rapa

Te Rapa is an established industrial precinct which is zoned Industrial in the Operative Hamilton City District Plan. It is not allocated as a Future Proof Strategic Industrial Node because it was an existing industrial area rather than a future proposed area. It is characterised by developer-ready sites which comprise around 33.5 ha of available supply in the area. Overall the precinct contributes only 5% of the total available industrial supply, which has decreased from 6% as at the June 2017 baseline. The total uptake since the June 2017 baseline has been 13.3ha, being over a third of the total uptake across the City during the period.

Vacant land in Te Rapa tends to be made up of scattered smaller sites as well as a larger developer ready sections including partially vacant Business Zone land at The Base.

There are some constraints such as small lots, poor access in some cases, and existing erosion and reverse sensitivity effects from non-industrial uses.

There are existing cumulative effects of non-industrial uses occurring in Te Rapa with some business park, café and retail gaining consents in the industrial zone. There is also the application for a Pak n Save opposite The Base which is provided for in industrial zoning. Such uses have the effect of reducing the amount of industrial-zoned land available for industrial uses. However, the Operative Hamilton City District Plan has a focus on ensuring industrial land is available for industrial uses and as such the availability of industrial land for industrial uses is further protected.

1.5.1.3 Rotokauri (Future Proof Strategic Industrial Node)

The Waikato Regional Policy Statement allocates 265ha ha of industrial land in Rotokauri between 2010-2061.

Vacant industrial land at Rotokauri totals 92.7ha, 14% of the Hamilton total. This comprises much of the land in Stage 1 of Rotokauri Structure plan – land between the Main Trunk Rail Line and the Waikato Expressway (State Highway 1). In addition to the vacant land captured in Tables 4 and 5 above, on the western side of the Waikato Expressway there is further greenfield land. This comprises of land in various district plan zones. Land zoned Industrial includes 36.2ha being available in the short term. There is a further 6.2ha land identified as available in the medium-term and 24.6ha in the long-term, both areas being identified as an employment area in Stage 2 of the Rotokauri Structure Plan.

Services are already available to parts of the Rotokauri Stage 1 cell, with industrial land already developed in the southern part of the cell. Further stormwater infrastructure is required, via the Rotokauri swale, in order to allow further development to occur. Funding for the stormwater swale is set to begin in year 7 of the LTP (2024/5), with land purchases occurring in 2024 and construction beginning in 2028 under the current LTP. Upgrading of water mains, increasing capacity of the wastewater network are also planned, along with construction of an arterial roading network.

In terms of constraints, it is anticipated that approximately 10ha of land featuring in the total available vacant land capacity will be taken up by the Rotokauri stormwater swale designation which aids to facilitate industrial growth in Te Rapa.

A Special Housing Area which has been gazetted for land in the northern part of Rotokauri (Stage 2). A consent for 150 dwellings has been submitted to council. Beyond this, up to 2,000 dwellings could be built but are dependent on a private developer agreement (PDA) and infrastructure agreements.

A future plan change (in 2020) for the wider Rotokauri growth cell will ensure that the infrastructure obligations from the PDA are embedded into policies and rules for. This is will ensure there is provision for servicing to bring forward infrastructure in the north west of the Rotokauri growth cell.

1.5.1.4 Frankton

Vacant land at Frankton comprises 2% of the City total vacant land with a total of 12.6ha of vacant land. Frankton is not identified as a Future Proof Strategic Industrial Node due to it being an existing industrial area. There was an uptake of 3.1ha observed between June 2017 and December 2018. Between December 2018 and June 2019 there was no further overall uptake of industrial land observed in the Frankton precinct. Available land is zoned industrial, however small site sizes coupled with narrow dimensions tend to limit the potential use of sites. This leads to many sites having low MCA scores in the NPS-UDC Housing and Business Assessment.

Vacant industrial land in this precinct is likely to be reduced by residential development. In particular 3.8ha of vacant industrial land off Quentin Drive forms part of the Special Housing Area. It is expected that further parts of Frankton may play more of a role in serving the residential needs of Hamilton in the long term.

1.5.1.5 Ruakura (Future Proof Strategic Industrial Node)

The Waikato Regional Policy Statement allocates 405ha of industrial land at Ruakura between 2010-2061.

Vacant industrial land at Ruakura totals 321.7ha. 46.1ha are currently serviced and available (developer ready). A further 84.9ha are available in the short term. 66.7ha are available in the medium term and an additional 124ha in the long term subject to provision of key infrastructure including a spine/arterial road, wastewater, stormwater and water infrastructure.

There are existing investments in strategic wastewater and transport infrastructure in this cell. Private investment will largely enable the rest of the infrastructure that is required to develop this cell. There is some limited funding set aside in the Council's 10-year Plan to work with the developer. A spine road through the middle of the cell is a major enabling piece of enabling infrastructure, the timing of which is currently uncertain.

In the Ruakura Industrial Zone, 244 ha of the total 325 ha zoned for industrial purposes is owned by Tainui Group Holdings. Whilst not currently available for industrial uses, when developed it will be available only as leasehold land. On 27 February 2020 Tainui Group Holdings announced a 50:50 joint venture with Port of Tauranga (including a 50-year lease) to develop the 30ha Ruakura Inland Port and be operational within two years.

There is the potential for 136 ha of land currently zoned for industrial uses to be rezoned for residential. This may then result in land to the east of the Expressway being considered for industrial use as a replacement. To this end a rezoning request has been made by Tainui Group Holdings Ltd through submissions on the Proposed Waikato District plan for a special purpose industrial zone between the express way designation and Ruakura Road, extending north to Holland Road and south to Davidson Road. Determination of those requests is expected in 2020. Future land use in this area will be further examined as part of the Hamilton-Waikato Metro Plan investigations currently underway.

1.5.2 Waikato District

As of June 2019, the Waikato District has a total of 265.9ha of vacant industrial land. Much of the vacant industrial land in the District has been available under the Operative District Plan for some time. A notable exception to this is zoned land at Meremere (63.36ha), which is subject to contamination and requires remediation. This equates to 23.84% of the total vacant industrial land in the Waikato District. Vacant industrial land in the north of the District is located in Tuakau (130.77ha), Pokeno (1.24ha) and Te Kauwhata (18.45ha). Meanwhile in the towns of Huntly and Horotiu in the south of the District, vacant industrial land is generally comprised of small and disused parcels.

The notified version of the Proposed Waikato District Plan did not introduce significant changes to the overall amount of industrial land available within the district. It is noted that there are a number of submissions on the Proposed Waikato District Plan requesting to rezone sites to Industrial, particularly at Horotiu and Ohinewai. Some of these submissions are related to specific properties, and other submissions relate to broader areas. The nature and extent of these will be clarified during hearings in 2020.

Summary of Uptake:

Table 6 below provides a summary of the total vacant land in the Waikato District by township (industrial precinct), broken down by availability over short, medium and long-term time periods. For Waikato district, 'developer-ready' land is included in the 'short-term' supply, meaning that all of this supply is currently available and ready to be developed.

Table 7 compares the supply data with the projected demand data from M.E. It shows whether or not the available land is sufficient to meet demand. Table 7 is broken down by ward rather than township due to the scale at which the M.E. data was available.

Table 6: Estimate of Total Available Industrial Land Capacity in Waikato District by town: Developer ready and in pipeline (Years 1 to 3, 4 to 10 and 11 to 30)

Industrial Precinct	Available in Short Term (Years 1 to 3) – ha	Available in Medium Term (Years 1 to 10) – ha (cumulative)	Available in long term (Years 1 to 30) – ha (cumulative)	Total Vacant Land (ha) over short, medium and long term as @ June 2019 (cumulative)
Pokeno ¹⁵	1.2	1.2	1.2	1.2
Tuakau ¹⁵	0	0	130.8	130.8
Meremere	0	63.4	63.4	63.4
Te Kauwhata	18.5	18.5	18.5	18.5
Ohinewai	0	9.2	9.2	9.2
Huntly ¹⁵	3.8	3.8	3.8	3.8
Horotiu	13.7	25.3	39.0	39.0
Total	34.7	120.1	265.9	265.9

¹⁵ Future proof strategic industrial node

Table 7 shows sufficient supply across the Waikato District at a district level. At a ward level, in the short-term there is around a 3.7ha shortfall and an approximate 19.8ha medium term shortfall in the Awaroa Ki Tuakau Ward despite there being sufficient land in the long term. This implies that servicing needs to be looked at in Tuakau, including options such as public/private partnerships. It may also need to be re-looked at by ME in the next update report.

In the long term in Huntly there is a shortfall of around 6 ha. This needs to be considered alongside additional industrial land not captured in tables 6 and 7, at Rotowaro, which is part of the RPS Strategic Industrial node for Huntly. addressed in terms of land located in Huntly township as Rotowaro is shown in FP table. It is unclear why this is not considered as part of the long-term supply.

Table 7: Estimate of available Industrial land supply and projected demand in the Waikato District across the short, medium, and long term (by Ward)

Ward	Available in Short Term (Years 1 to 3) – ha	Projected Short term demand by ward (Year 0 to 3) (ha)	Available in Medium Term (Years 4 to 10) - ha	Projected medium term demand by ward (cumulative year 0 to 10) (ha)	Available in long term (Years 11 to 30) – ha	Projected long term demand by ward (cumulative year 0 to 30) (ha)	Total Vacant Land (ha) over short, medium and long term as @ June 2019
Awaroa ki Tuakau (includes Pokeno and Tuakau)	1.2	4.1 Including Margin: 4.9	0 (Cumulative 0-10 years = 1.2)	17.5 Including Margin: 21.0	130.8 (Cumulative 0-30 years = 132.0)	65.4 Including Margin: 75.2	132.0
Whangamarino (includes Meremere and Te Kauwhata)	18.5	1.3 Including Margin: 1.6	63.4 (Cumulative 0-10 years = 81.9)	4.7 Including Margin: 5.7	0 (Cumulative 0-30 years = 81.9)	12.7 Including Margin: 14.6	81.9
Huntly	3.8	2.4 Including Margin: 2.9	9.2 (Cumulative 0-10 years = 13.0)	6.5 Including Margin: 7.8	0 (Cumulative 0-30 years = 13.0)	16.6 Including Margin: 19.1	13.0
Ngaruawahia	13.7	1.1 Including Margin: 1.3	25.3 (Cumulative 0-10 years = 39.0)	4.1 Including Margin: 4.9	0 (Cumulative 0-30 years = 39.0)	10.1 Including Margin: 11.6	39.0
Rest of district ¹⁶	*	13.9 Including Margin: 16.7	*	44.3 Including Margin: 53.2	*	104.6 Including Margin: 120.3	**
Total	34.7	22.8 Including Margin: 27.3	100.4 (Cumulative 0-10 years = 135.1)	77.1 Including Margin: 92.5	130.8 (Cumulative 0-30 years = 265.8)	209.4 Including Margin: 240.8	265.8

¹⁶ No Waikato DC monitoring data available for these wards which includes townships of Raglan, Te Kowhai, Whatawhata and other rural villages

Note: demand margins for the short and medium-term are 20%. For the long-term these are 15%.

Note: for Huntly it has been assumed that land that is made up of disused sites is available now.

Note: the ability for existing services in Huntly and at Horotiu to service additional industrial, particularly heavy industrial, is subject to an infrastructure review

1.5.2.1 Future Industrial Land – Draft Waikato Growth and Economic Development Strategy (Waikato 2070)

The Waikato District Council have identified areas for future urban growth and intensification in the Draft Waikato Growth and Economic Development Strategy (“Waikato 2070”), including areas for additional industrial activities. That document will be informed by economic and population growth analysis and will take a broad and inclusive approach by considering economic, social, environmental, cultural and physical aspirations and infrastructural constraints, that will indicate appropriate locations for industrial land uses best suited to support the District.

Waikato 2070 was released for public consultation in November 2019 and is expected to be adopted in early 2020. This document addresses the staging of future growth areas, which will depend on the availability and capacity of infrastructure. The Waikato District Council is also in the process of developing an Infrastructure Strategy, however it will not be completed prior to the adoption of the Waikato 2070 document.

Land areas noted below in Table 8 in relation to the Draft Waikato 2070 are indicative only and subject to change.

Note that all of the areas in Table 8 are over and above the existing industrial land as set out in tables 6 and 7 above. The areas in Table 8 are therefore also over and above the demand projects from M.E. for the short, medium and long term.

Table 8: Future industrial and business park land identified in the Draft Waikato 2070 (above and beyond existing zoned areas)

Location	Indicative Timing (Years)	Indicative and approximate area (ha)
Pokeno East Commercial	10 to 30	55
Mangatawhiri Future Employment Zone (West)	30+	100
Mangatawhiri Future Employment Zone (East)	30+	200
Mercer Industrial	Unspecified	10
Te Kauwhata Road North	10 to 30	20
Te Kauwhata Road South	30+	30
Ohinewai North Industrial Cluster	10 to 30	365
Ohinewai South Industrial Cluster	3 to 10	200
Huntly North (East Mine Business Park)	3 to 10	80
Taupiri West Industrial Cluster	3 to 10	110

Taupiri East Industrial Cluster	10 to 30	55
Hopuhopu Business Park	10 to 30	75
Horotiu Industrial Park	3 to 10	200
Total	-	1,500

1.5.2.2 Pokeno (Future Proof Strategic Industrial Node)

The Regional Policy Statement allocates 92ha of industrial land in Pokeno for the period 2010-2061. Many of the industrial sites within Pokeno have been developed, however a small area of industrial land is available (1.2ha), located to the south-west of the town centre. The vacant industrial sites as set out in Table 7 consist of flat bare land which is only accessible by crossing an at-level rail crossing. It is noted that the vacant industrial sites are provided for under the Operative Waikato District Plan and are available for development in the short term.

The vacant sites have the ability to connect to reticulated wastewater and water supply, however the network capacity cannot cater for further wet industry. A review of future infrastructure upgrades required is currently being undertaken.

Vacant sites in Pokeno face few constraints to development in regard to natural features, with the exception of stream and drainage networks.

The Proposed Waikato District Plan does not seek additional industrial land within Pokeno beyond that which was provided for in the Operative District Plan.

Rezoning requests sought in Proposed Waikato District Plan submissions include a request for the rezoning of Lot 2 DP 463893 (27.4ha) from Rural Zone to Heavy Industrial Zone (located south of McDonald Road and north of Bluff Road)

The Draft Waikato 2070 identifies an area of approximately 55ha of commercial on the eastern side of State Highway 1 and south of State Highway 2. Indicative timing is for this to be brought on board within 10 to 30 years.

1.5.2.3 Tuakau (Future Proof Strategic Industrial Node)

Approximately 130.8ha of Industrial Zoned land is vacant within Tuakau. The vacant industrial land is located south-east of the town centre and primarily utilised for horticultural activities. The available industrial sites captured in Table 7 are provided for under the Operative Waikato District Plan, however these may not necessarily be developer-ready due to infrastructure constraints. Therefore, the industrial land within Tuakau will not be developable within the short term. Significant capacity upgrades will be required to support the development of the industrial sites within the medium to long-term. Given this constraint all sites in Tuakau have been allocated with a long-term development timing.

The industrial sites within Tuakau may have the ability to connect to reticulated wastewater and water supply networks, however there is a question of the available capacity of the existing infrastructure network that supports Tuakau. The available network capacity and potential upgrades required is being investigated.

Vacant sites in Tuakau have been modified and utilised primarily for horticultural activities, and therefore face few constraints to development in regard to natural features, with the exception of stream and drainage networks.

The Proposed Waikato District Plan does seek additional industrial land within Tuakau beyond that which was provided for in Operative District Plan. The existing Industrial Zoned area along Whangarata Road is expanded and rezoned land parcels from Rural Zone to Industrial Zone. A further cluster of properties located south of Tuakau along River Road (2584 – 2608 River Road) have been rezoned from Business Zone to Industrial Zone under the Proposed Waikato District Plan.

A submission on the Proposed District Plan seeks the rezoning of the occupied Industrial Zoned site at 24 Ryders Road from Industrial Zone to Business Zone and Village Zone.

In Tuakau the Draft Waikato 2070 does not identify additional industrial land beyond that which is zoned in the Operative District Plan or Proposed District Plan.

1.5.2.4 Meremere and Mercer

Vacant industrial land at Meremere (63.4ha) comprises land at the former Meremere power station site. This site is known to be contaminated and would require remediation to accommodate future industrial uses.

Meanwhile, for Mercer the Draft Waikato 2070 identifies an additional 10ha of industrial land.

1.5.2.5 Te Kauwhata

The available industrial land (18.5ha) within Te Kauwhata is located within both urban and rural areas along the southern boundaries adjoining Lake Waikare. The vacant industrial sites are provided for under the Operative Waikato District Plan, and those located within the urban environment are available for development in the short term, however the industrial sites within the rural environment will require additional works to ensure they can support industrial activities.

Whilst the vacant urban sites have the ability to connect to reticulated wastewater and water supply, the network capacity may not be able to cater for further industry. A review of future infrastructure upgrades required is currently being undertaken.

The boundaries of the vacant industrial land are located in close proximity to Lake Waikare. Lake Waikare is considered a Site of Significance and is a Landscape Policy Area in the Operative District Plan, and is subject to Outstanding Natural Feature and Significant Natural Area overlays under the Proposed Waikato District Plan. Therefore, development and provision of industrial activities within the vacant Industrial Zoned sites will require significant consideration of the natural features of Lake Waikare.

The Proposed Waikato District Plan does not seek additional industrial land within Te Kauwhata beyond that which was provided for in Operative District Plan – Waikato Section. The Proposed Waikato District Plan seeks the rezoning of Industrial Zoned sites at 15, 17, 20, 40 and 52 Scott Road, an area totalling 6.5ha, to Residential Zone and rezones the Industrial Zoned area at 75 Te Kauwhata Road (8.4ha) from Industrial Zone to Reserve Zone.

Rezoning requests sought in Proposed Waikato District Plan submissions:

- Seeking the rezoning of part of 17 Scott Road (0.8ha) from Residential Zone as notified in the Proposed Waikato District Plan to Industrial Zone.

- Seeking the rezoning of 52 Scott Road (0.6ha) from Residential Zone as notified in the Proposed Waikato District Plan to Light Industrial Zone.

In addition to the existing vacant supply, Waikato 2070 identifies approximately 50ha of industrial land on Te Kauwhata Road adjacent to State Highway 1. Of this 50 ha, 20 ha is located on the northern side of Te Kauwhata Road with a development timing of 10 to 30 years. The other 30ha is on the southern side of Te Kauwhata Road and is indicated for availability in the long term (30+ years).

1.5.2.6 Huntly (Future Proof Strategic Industrial Node) and Ohinewai

Many of the industrial sites within Huntly are occupied, however small areas of industrial land throughout the town are disused and could be available for future development (3.8ha). The disused industrial sites generally consist of vacant buildings clustered amongst or in close proximity to residential activity, therefore resulting in possible difficulties in providing for industrial activities within the disused sites. There are currently no greenfield Industrial Zoned sites available in Huntly.

Whilst the disused sites have the ability to connect to reticulated wastewater and water supply, the network capacity may not cater for further industry. A review of future infrastructure upgrades required is currently being undertaken.

The disused sites in Huntly have been significantly modified and face few constraints to development in regard to natural features.

The Proposed Waikato District Plan seeks additional industrial land within 309 Tregoweth Lane located on the southern outskirts of Huntly.

A rezoning request sought in Proposed Waikato District Plan includes a submission seeking rezoning of land parcels (74.6ha) located between State Highway 1 and Ralph Road (commonly known as the Shand Property) from Rural Zone to Industrial Zone.

The Draft Waikato 2070 identifies an additional 80ha north of Huntly as a future Business Park. Indicative development timing is for this is 3 to 10 years.

The Draft Waikato 2070 identifies approximately 200ha of future industrial land at Ohinewai east of State Highway 1 and north of Tahuna Rd for development within an indicative 3 to 10 years. This is more commonly known as the Sleepyhead site and zoning and land use provisions will be determined through the Proposed Waikato District Plan. To the north of this site approximately 365ha of future industrial land has been identified for release in the medium term (10 to 30 years) to support a business park. The future ability to service these areas is yet to be determined.

1.5.2.7 Ngaruawahia and Taupiri

There is currently no vacant industrial land available for development within Ngaruawahia.

The existing Industrial Zoned sites are connected to reticulated wastewater and water supply; however, the network may not have capacity to support further intensification of industrial activities. A review of future infrastructure upgrades required is currently being undertaken. The Proposed Waikato District Plan does not seek additional industrial land within Ngaruawahia beyond that which was provided for in the Operative District Plan.

The Draft Waikato 2070 identifies 75ha of future business park land north west Ngaruawahia between Great South Road and Old Taupiri Road with a development timing of 10 to 30 years.

At Taupiri, the Draft Waikato 2070 identifies approximately 165ha of future industrial land, comprising 110ha to the west of State Highway 1 with a development timing of 3 to 10 years and 55ha east of State Highway 1 for development in 10 to 30 years.

1.5.2.8 Horotiu (Future Proof Strategic Industrial Node)

Many of the industrial sites within Horotiu have been developed; however, there are parcels throughout Northgate Business Park that are vacant. The vacant industrial sites primarily consist of flat bare land which is only accessible by crossing an at level rail crossing. It is noted that the vacant industrial sites are provided for under the Operative Waikato District Plan – Waikato Section and are available for development in the short term and medium terms.

Whilst the vacant sites have the ability to connect to reticulated wastewater and water supply, the network may not have capacity to support further industry, particularly wet industry. A review of future infrastructure upgrades required is currently being undertaken.

Vacant sites in Horotiu are developer-ready and face few constraints to development in regard to natural features, with the exception of stream and drainage networks.

The Proposed Waikato District Plan does not seek additional industrial land within Horotiu beyond that which was provided for in Operative District Plan – Waikato Section.

A rezoning request sought in a submission to the Proposed Waikato District Plan submission includes rezoning approximately 48ha of 139 Onion Road, Horotiu from Rural Zone to Industrial Zone (therefore an extension of Horotiu).

Draft Waikato 2070 identifies approximately 200ha of additional industrial land at Horotiu including, the Onion Road site noted above, with a development timing of 3 to 10 years.

1.5.3 Waipa District

As at June 2019 there is a total of 358.2ha of vacant land across industrial nodes in the district. Approximately 60.1ha or 17 % of the vacant industrial land in the district is developer-ready, approximately 38.3ha comes on board in the short short term. A further 74.2ha is available in the medium term along with an additional 185.6ha in the long term.

196.1ha or 55% of the vacant industrial land is located at Hautapu (excluding the 35.4ha in the Bardowie block which is currently under construction). Vacant industrial land in Hautapu is comprised of 52.4ha of live zoned industrial land and 143.7ha. The Hamilton Airport precinct contains approximately 104.2ha or 29% of the district's vacant greenfield industrial land. The established industrial node of Carters Flat is fully developed while the Aotearoa Park area in Cambridge has approximately 8.9ha of infill capacity in small pockets. In Te Awamutu in the South of the district there are two relatively small areas of greenfield industrial land providing a total capacity of approximately 34.3ha. The existing industrial area around the Fonterra factory and along Station Road has small pockets of land that could be infill developed that provide a potential additional 4.7ha of land capacity.

For Waipa, since 2017, approximately 52 ha of land was taken up. This comprises of 35ha at Hautapu (including Bardowie), 7ha in Te Awamutu and 10ha at Hamilton Airport.

Table 8 provides a summary of the total vacant land in the Waipa District by township (industrial precinct), broken down by availability over short, medium and long term time periods.

Table 9 compares the supply data with the projected demand data from M.E. It shows whether or not the available land is sufficient to meet demand. Table 9 is broken down by ward rather than by industrial precinct due to the scale at which the M.E. data was available. This shows that for all wards there is sufficient land in the short, medium and long term to meet projected demand.

Table 8: Estimate of Total Available Industrial Land Capacity in Waipa District by town: developer ready and in pipeline (Years 1 to 3, 4 to 10 and 11 to 30)

Industrial Precinct	Developer ready (ha)	Available in Short Term (Years 1 to 3) – ha (cumulative)	Available in Medium Term (Years 1 to 10) – ha (cumulative)	Available in long term (Years 0 to 30) – ha (cumulative)	Total Vacant Land (ha) over short, medium and long term as @ June 2019
Hamilton Airport¹⁷	51.2	51.2	64.2	104.2	104.2
Hautapu¹⁷	0	29.9	69.5	196.1	196.1
Aotea Park (Leamington)	8.9	8.9	8.9	8.9	8.9
Te Awamutu	0	8.4	30.0	49.0	49.0
Total (cumulative)	60.1	98.4	172.6	358.2	358.2

¹⁷ Future Proof strategic industrial node

Table 9: Estimate of available Industrial land supply and projected Demand in the Waipa District across the short, medium and long-term

Ward	Developer ready (ha)	Available in Short Term (Years 1 to 3) - ha	Projected Short term demand (Year 0 ¹⁸ to 3) (ha)	Available in Medium Term (Years 4 to 10) - ha	Projected medium term demand (Year 0 ¹⁸ to 10) (ha)	Available in long term (Years 11 to 30) - ha	Projected long term demand (Year 0 ¹⁸ to 30) (ha)	Total Vacant Land (ha) over short, medium and long term as @ June 2019
Pirongia	51.2	0 Cumulative years 0-3 = 51.2	5.5 Including Margin: 6.6	13.0 Cumulative years 0-10 = 64.2	13.8 Including Margin: 16.6	40.0 Cumulative years 0-30 = 104.2	31.0 Including Margin: 35.7	104.2
Cambridge (includes Hautapu and Leamington)	8.9	29.9 Cumulative years 0-3 = 38.8 ha	8.9 Including Margin: 10.7	39.6 Cumulative years 0-10 = 78.4	26.5 Including Margin: 31.8	126.6 Cumulative years 0-30 = 205.0	71.9 Including Margin: 82.7	205.0
Te Awamutu	0	8.4 Cumulative years 0-3 = 8.4	5.4 Including Margin: 6.5	21.6 Cumulative years 0-10 = 30.0	12.0 Including Margin: 14.4	19.0 Cumulative years 0-30 = 49.0	27.5 Including Margin: 31.7	49.0
Rest of district ¹⁹	-	-	2.5 Including Margin: 3	-	6.4 Including Margin: 7.7	-	16.7 Including Margin: 19.2	-
Total	60.1	38.3 Cumulative years 0-3 = 98.4	22.3 Including Margin: 26.7	74.2 Cumulative years 0-10 = 172.6	58.6 Including Margin: 70.3	185.6 Cumulative years 0-30 = 358.2	147.2 Including Margin: 169.3	358.2

¹⁸ Year 0 demand commences 2016

¹⁹ No Waipa DC monitoring data is available for these wards which includes the township of Kihikihi and other rural villages or areas.

1.5.3.1 Hamilton Airport (Future Proof industrial Node)

The Waikato Regional Policy Statement allocates a total of 124ha of industrial land in this strategic industrial node. The vacant land at Hamilton Airport includes 13ha of land zoned Deferred Industrial Zone on the northern side of Raynes Road and a remaining 91.3ha of land zoned as Airport Business Zone. The Airport Business Zone forms part of a structure plan area. All land in this area faces servicing constraints as noted below which will limit the range of possible uses. The Airport Business Zone anticipates industrial as well as aviation related, transport, service stations, services, storage, commercial, and hospitality.

Of the Airport Business Zone land on the eastern and south western side of the Airport, 51.2ha is available in the short term (developer ready).

The 13ha of Deferred Industrial land is available in the medium term and will be activated by way of a structure plan and Council resolution.

Council servicing of this precinct is limited to reticulated water on the eastern side and the southern side, extending up to Ingram Road to the south west.

Furthermore, there no current plans to extend wastewater services to service this precinct.

Of the land on the north west of the Airport, 40ha is available in the long term. In addition to this, as indicated in the District Plan WRAL (Waikato Regional Airport Limited) have identified the potential for the long-term expansion of the northern precinct to extend northwards to the future Southern Links road designation. This potential future extension will depend on the rate of the future urban and industrial growth demand in and around greater Hamilton.

1.5.3.2 Hautapu

The Waikato Regional Policy Statement allocates a total of 96ha of industrial land in this strategic industrial node. Vacant industrial land at Hautapu comprises 196.1ha or 55% of the zoned land supply in the District (this excludes 35.4ha in the Bardowie block which is currently under construction). 69.5ha of vacant industrial land in this node is Industrial Zoned land is available in the short term and medium terms, and the remaining 22.5ha (northern parcel in Bardowie block) together with a further 104.1ha are available in the medium and long term respectively.

Since June 2019 further uptake has been occurred with the construction of the APL building within the Bardowie block now well underway.

The Hautapu precinct includes Industrial Zoned land that was were introduced through structure plans and subsequent plant changes; Hautapu, west of Victoria Road, and Bardowie, east of Victoria Road. There is also a remaining 39.6ha Deferred Zoned which fronts Hautapu and Peake Road and abuts the Industrial Zone on its eastern boundary.

New bulk water and wastewater services are being constructed and will service the area by 2020.

Hautapu is seen as Cambridge's premiere future growth industrial area, having immediate access to State Highway 1 and a possible future option of rail access.

With the exception of high-class soils, State Highway 1 and the rail corridor, there are few natural or physical constraints in the area which would limit further expansion of the zoned extent.

1.5.3.3 Carters Flat (Cambridge)

Carters Flat contains a mixture of industrial and commercial land uses and is generally fully developed. Of note this area is not identified as a strategic industrial node in the Waikato Regional Policy Statement.

It is zoned a mixture of Commercial and Deferred Commercial with the idea that it transitions over time to accommodate big box retail out of the Cambridge town centre to allow for retail and mixed-use retail and residential to grow in the town centre.

Council is giving consideration that under the new national planning standards there might be a more appropriate zone for at least parts of the area, to reflect the current mix of commercial and light/service industrial land-uses.

This area is fully serviced with reticulated water and wastewater.

1.5.3.4 Aotea Park (Leamington)

Located on the southern side of the Waikato River, Aotearoa Park is an established industrial area which is nearly fully developed with some opportunity for infill development. Vacant land here is developer-ready and totals 8.90ha in scattered separate parcels, being a 2% share of the Waipa District total. None of the sites are currently on the market. This area is not identified as a strategic industrial node in the Waikato Regional Policy Statement.

There was no registered uptake between June 2017 and June 2019.

There is limited opportunity for further industrial zoning in this location given established surrounding Residential Zoned to the east, Cambridge Road and further residential uses to the south and the Cambridge Wastewater Treatment Plan to west of the site.

1.5.3.5 Te Awamutu

There is currently 49ha of vacant industrial land at Te Awamutu. This includes 40ha of Industrial Zoned Land and 9ha of Deferred Zone Land. There is 4.7ha of industrial land in separate small pockets within the Fonterra Specialised Dairy area and along Station Road that could be infill developed. Te Awamutu is not identified as a Strategic Industrial Node in the Waikato Regional Policy Statement.

Overall at Te Awamutu 8.4ha is available in the short term, a further 21.6ha available in the medium term and 19ha will become available in the long term.

Vacant industrial land in Te Awamutu is restricted by servicing. Currently there is a mixture of serviced (water and wastewater) industrial zone and un-serviced deferred industrial zone. There is limited capacity for additional wet industry until work on upgrading the water supply capacity for Te Awamutu is completed by way of a new bulk supply main from Cambridge that is currently underway.

1.6 Conclusion

This report has provided a breakdown of the vacant industrial land in the Future Proof sub-region as captured by the monitoring data provided by the partner councils. This vacant supply has been shown alongside projected demand as established by Market Economics in the 2017 Business Development Capacity Assessment to establish whether there is sufficient feasible supply.

The total estimated industrial land supply across the sub-region over the long-term is approximately 1,283.4ha which excludes an estimated 1,500ha of land which is currently proposed through the Draft Waikato District Growth Strategy – Waikato 2070.

Sub-region:

Projected demand for the sub-region over a 30 period to 2047 has been indicated at 881ha. Accommodating margins this increased to 1,013.1ha. The total long-term supply of 1,283.4ha would provide a surplus of land through to 2047 totalling 270.3ha. As such, we can conclude that the overall supply of industrial land in the sub-region is sufficient to meet projected demand.

In the short-term demand is projected at 186.2ha inclusive of a 20% margin and supply available over that period is 430.2ha. The bulk of this of this is located in Hamilton City (297ha). Developer ready sites, being located in Hamilton City and the Waipa district, total 257.7ha and can cater for the short-term sub-regional demand.

In the medium-term demand across the sub-region is projected at 453.7ha which increases to 544.4ha with a 20% margin. Cumulative supply over the medium term (years 0 to 10) equates to 686.4ha which leaves a considerable sub-regional surplus. Waipa and Waikato Districts contribute significantly to this medium-term surplus.

District-level:

For Hamilton City, there is sufficient supply available now and in the short term (0-3 years). In the medium term, for years 3-10, there is sufficient supply to meet demand. Taking into account the 20% margin above demand, as required by the NPS-UDC, there is potentially around 2 ha additional land required to meet the total out of a total of 381 ha (there is 379 ha identified supply). There is around 70 hectare of vacant industrial/employment land in Rotokauri which may become available in the medium term (subject to infrastructure constraints, including stormwater constraints), which would more than offset this. M.E. also estimate there is around 10% of total supply available within the existing city, which would again offset any potential shortfall. This means that for the medium term, within the next ten years, HCC will need to closely monitor as to whether additional land needs to be brought forward. This potential shortfall or tightness of supply has already been identified by HCC and as a result, a plan change is currently being scoped for the Te Rapa North area. In the long term, there is sufficient land in the City already identified for industrial use, with at least 56ha more land available than is projected to be required, even allowing for 20%/15% additional margin as required by the NPS-UDC.

For the Waikato District, there is sufficient land available to meet the projected short-term demand with 34.69 ha available to meet a projected demand of 22.8ha (27.3 inclusive of 20% margin). In the medium-term there is sufficient supply with 135.04ha to meet a projected demand of 77.1 ha (92.5 inclusive of 20% margin). In the long-term there is sufficient supply with 265.8ha to meet demand of 209.4ha (240.8ha inclusive of 15% margin).

For the Waipa District, there is sufficient land available to meet the projected short-term demand with 98.5 ha to meet a projected demand of 22.3ha (26.7ha inclusive of 20% margin).

In the medium-term there is sufficient supply with 172.6 ha to meet a projected demand of 58.6 ha (70.3ha inclusive of 20% margin). In the long-term there is sufficient supply, with 358.2ha supply to meet the projected demand of 147.2 ha (169.3ha inclusive of 15% margin). For Waipa, in the M.E. work it was identified that there was a somewhat tight supply of industrial land. This has largely been remedied as a result of additional land coming forward, predominantly through the Bardowie site.

For all TLAs, the provision of infrastructure and appropriate zoning will be required in a timely manner to ensure that demand can be met over time.

Ward/precinct results:

For Hamilton City, there is sufficient land in each of the areas of Hamilton to meet the projected demand, including taking into account the margin, in all areas of the City except in Frankton and Rotokauri which are identified as having less supply than the required demand in the medium to long-term. For Rotokauri, this situation may be remedied in the future as and when infrastructure constraints to bringing forward land in Rotokauri are resolved. For existing areas of the city, such as Frankton, it will be important to ensure that land identified for industrial use is preserved for industrial use. Underutilised sites and redevelopment sites will also provide some further capacity, as identified by M.E. Additionally, it will be important to ensure that localised employment opportunities continue to be provided for, such as when planning new growth in areas of the City.

For the Waikato District, there is sufficient land in each of the wards/precincts for the short, medium and long term. The exceptions to this are in Tuakau and Huntly. In Tuakau, whilst the land is zoned, significant servicing constraints have been identified which will require capacity upgrades to support industrial land development. In Huntly, in the long-term, there is a need to identify around 6ha of land supply. This needs to be considered alongside additional industrial land which may be available in Rotowaro, which is part of the RPS Strategic Industrial node for Huntly. It is unclear why this is not currently considered as part of the long-term supply. M.E. note that in terms of demand for industrial space in the Waikato District, the available land provides ample sufficiency to meet short, medium and long term needs overall, with Huntly and Ngaruawahia wards requiring careful monitoring to ensure appropriate volumes of land are provided for in appropriate locations. M.E. note that in areas where growth is high, ample capacity has been provided.

For the Waipa District, there is sufficient land in each of the wards/precincts to meet projected demand, including the margin of 20% in the short and medium term and 15% in the long term.

1.7 Recommendations

Recommendation 1:

Whilst there is sufficient industrial land identified in the sub-region in the short, medium and long-term, based on the existing provision in district plans and the Strategic Industrial nodes in the Waikato Regional Policy Statement, for all TLAs, the provision of infrastructure and appropriate zoning will be required in a timely manner to ensure that demand can be met over time.

Recommendation 2:

The NPS-UDC mandates a sub-regional approach to planning for industrial land provision. Limited capital for infrastructure provision means that there is a need to make efficient use of our existing industrial land, and there is a need to prioritise the provision of new infrastructure. Local authority boundaries are not necessarily recognised when businesses are determining where to locate. As such, it is important to understand the wider sub-regional context when planning for industrial land supply. This also means that a shortfall in one area may not equate to an issue for the overall sub-regional market. This further emphasises the importance of sub-regional planning to ensure that existing and planned investment in infrastructure in sub-regional industrial nodes is not undermined by a lack of co-ordinated planning across the sub-region.

Recommendation 3:

Where there is insufficient supply at a ward/precinct level, due to a lack of servicing e.g. in Tuakau, options for bringing forward servicing can be examined. Whilst there is sufficient land to meet demand, there are some localised shortfalls in the short and medium term, as a result of servicing constraints. Policy PC4 of the NPS-UDC requires a local authority to consider all practicable options available to it to provide sufficient development capacity and enable development to meet demand in the short, medium and long term. There may be options for the Council to consider tools such as public/private partnerships, cost sharing between the developer and the council, or forward funding of infrastructure subject to recovery of costs from the developer. For the sub-region, demand can be met without the need to identify further new areas of land for growth.

Recommendation 4:

For the City, in the medium term, towards the end of the 10-year period, there may be a minor shortfall unless additional supply from the 'long-term' supply can be brought forward through the availability of zoning and infrastructure. In the context of planning for a 10-year timeframe, it is possible that this situation may change in that time period. This will require close monitoring of the uptake of industrial land in the interim. The City has already identified that industrial land in Te Rapa North may be required and a plan change is being scoped. Closer investigation and review of vacant land in Rotokauri may also reveal more vacancy to address demand. Funding of infrastructure will be part of the response to bringing industrial land forward. In the meantime, close monitoring of industrial land uptake will be required so as to ensure that industrial land is available when required. Alternative methods to bring forward industrial land in the medium term, such as by working with developers around servicing of industrial areas, will also form one of the available options. In existing areas of the city, such as Frankton, there is a need to monitor uptake from non-industrial uses to ensure there is sufficiency of supply for industrial land uses to cater for local demand.

Recommendation 5:

Further work is occurring as part of the Hamilton to Auckland corridor, the Metro Spatial Plan, the Waikato District Plan hearings and the Waikato 2070 growth strategy. It may be that these pieces of work identify the need for a refinement in the future planning for industrial land uses. These pieces of work should refer to this study to gain an understanding of the sufficiency of supply for industrial land. Any additional land being proposed should be cognisant of potential impacts on existing industrially-zoned land and sunk infrastructure costs. Reference should be made to Method 6.14.3 of the Waikato Regional Policy Statement which sets out criteria for alternative land release.

There is an opportunity through these pieces of work and Phase 2 of the Future Proof review, due to occur later in 2020, to draw these streams of work together and determine the sub-regional response to industrial land provision.

Recommendation 6:

Due to different approaches to monitoring uptake, such as the way in which 'vacant' land is defined in each TLA, there is some inconsistency in the monitoring results which has made it difficult to compare 'like with like' across the three TLAs. It is therefore important that in future there is consistency in the way in which the TLAs collect and report on industrial land data. In saying that, it is noted that as a result of the work done to collect information for this report, there is now a much more accurate dataset available from which to continue monitoring. It will also provide an invaluable input into the updated NPS-UDC business land assessment to occur later in 2020. As part of this future work, it is also recommended that precincts be defined around each town in Waikato and Waipa for monitoring purposes which will give more refined results than a ward-based approach.

M.E. also recommend a number of important monitoring actions at section 7.8 of their report (Business Development Capacity Assessment 2017, dated 16 July 2018) and reference should be made to these recommendations.

Appendix 1: Market monitoring and reporting

Commentator	CBRE NIA Harcourts	Bayleys	Colliers International	Telfer Young
Report Name	Marketview: Hamilton Industrial Occupancy Survey	MarketBeat Bayleys Research Newsletter Hamilton Commercial (office and retail) & Industrial Report	NZ Industrial Market Indicators report	Provincial Waikato Market Insight Hamilton Market Insight Industrial
Report release date:	December	'Spring' August	September	May
Availability	Subscriber via email	www.marketbeat.co.nz/	www.colliers.co.nz/find%20research/industrial/	https://telferyoung.com/news/
Content:				
Total Industrial Stock	Stock by Precinct & Grade (sqm) <ul style="list-style-type: none"> - Te Rapa north - Te Rapa South - Frankton - Total 	Annual leased and vacant by precinct: <ul style="list-style-type: none"> - Avalon - Frankton - Te Rapa - Te Rapa North 	No commentary provided	No commentary provided
Vacancy rates	Annual by Grade and Precinct: <ul style="list-style-type: none"> - Te Rapa north - Te Rapa South - Frankton - Total 	Annual by precinct: <ul style="list-style-type: none"> - Avalon - Frankton - Te Rapa - Te Rapa North - Hamilton overall 	No commentary with the exception that the 2016 report included ha of 'Zoned vacant land'	No commentary provided
Leasing Trends	No commentary provided	Quality: Prime & Secondary Rental Range: (\$/m2) General indication of last 12-month trend	Office and Warehouse – Primary and Secondary Rental Range (Low and High) per m2 Demand/Supply Outlook	No commentary provided
Investment trends <ul style="list-style-type: none"> - Yield - Land Value 	No commentary provided	<ul style="list-style-type: none"> - Yield % - Land Value per m2 - General indication of last 12-month trend - Demand/Supply Outlook 	<ul style="list-style-type: none"> - Yield % - Land Value per m2 - General indication of last 12-month trend - Demand/Supply Outlook 	Net Rents for: <ul style="list-style-type: none"> - Hamilton (Te Rapa, Frankton East, Frankton West, Riverlea) - Provincial Waikato (Morrinsville, Matamata, Cambridge, Te Awamutu, Net Yields)
Uptake/ Net Absorption	Annual by Grade and precinct	No commentary provided	No commentary provided	No commentary provided
Pipeline	List of projects	Some commentary provided on significant tenanted sites.	Some commentary on recent major transactions	No commentary provided
Building consent trends	No commentary provided	By retail, office and Industrial	No commentary provided	No commentary provided