Coversheet for Selwyn District Plan Committee decision on:

Preferred Option Report:
BS005 Capacity of existing business zones in Malvern and Ellesmere

On the 8th of August 2018 a Preferred Option Report was taken to the District Plan Committee Meeting for endorsement.

The Preferred Option Report recommended the following:

Leeston Commercial

- Option 2a: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Leeston Industrial

- No recommendation. Staff request direction from Council as evidence is finely balanced.

Darfield Commercial

- Option 2b: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Darfield Industrial

- Option 2b: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Castle Hill, Coalgate, Dunsandel and Southbridge Commercial and Industrial

- Option 4: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

As a result of the discussions during this committee meeting, the recommendations made in the Preferred Option Report were subject to amendments, which were subsequently endorsed.

The amendments to the recommended preferred option are as follows:

Leeston Industrial

Option 1 (a) Leeston: Investigate incorporating rezoning proposal as part of the notified Proposed District Plan

Final Recommendation:

"That the Committee endorses the Preferred Options for 'Business: Ellesmere & Malvern capacity' and provides direction on Leeston Industrial Zoning, for further development and engagement with the exception of a further detailed report making an assessment for the proactive industrial zoning of land in Leeston.

PREFERRED OPTION REPORT TO DISTRICT PLAN COMMITTEE

DATE: 8th August 2018
ISSUE: Capacity of existing business zones in Malvern and Ellesmere
PREPARED BY: Jessica Tuilaepa – Senior Strategy and Policy Planner

EXECUTIVE SUMMARY

The Ellesmere and Malvern Area Plans, which were adopted in September 2016, acknowledged that towns in these areas have capacity to meet growth projections through existing zoned land (i.e. developable land or 'plan-enabled' land). This existing capacity included zoned but undeveloped land and developed land with further development potential (e.g. infill). Since then, Council has also developed and endorsed the Selwyn Capacity for Growth Model (SCGM), which again indicates that there is sufficient capacity, although this is tight in some townships with some reliance on more efficient use of existing zoned land. Additional research has also been carried out by FordBaker (**Appendix A**) to test the SCGM findings (**Appendix C**) for both Leeston and Darfield, to further analyse and determine if additional land is required for commercial and industrial purposes.
For the Urban Development Strategy (UDS) Area, or Greater Christchurch Area, business zone capacity and the need to rezone more land is being considered through the National Policy Statement for Urban Development Capacity (NPS-UDC) workstream. There is also presently little mandate for rezoning given the strong direction of chapter 6 of the Regional Policy Statement (RPS) in controlling and directing greenfield expansion.

This report is focused on the Ellesmere and Malvern Areas and seeks direction from the DPC on whether Council should proactively rezone sites (outside the current township boundaries) in Leeston, Darfield, Southbridge, Dunsandel, Castle Hill and Coalgate[1] for either commercial or industrial purposes or if this should be a landholder led approach, where those who desire their land to be rezoned to Business to undertake the investigative and evaluative work in determining appropriateness of zoning as part of a submission on the DPR.

If the decision is for Council to lead the investigations, Council would also bear the costs. The approximate cost to undertake the above investigations for <u>one site</u> development is estimated to be between <u>$80,000 and $120,000</u>[2]. The size, scale and nature of any particular development would alter this cost but this provides an 'average' indication of costs.

[1] Those towns in the Ellesmere and Malvern Areas that have business zones. Other towns in these areas are subject to other work streams that have already been up in front of DPC. These include the Business zone framework and the Business topic for small settlements without business zones (July 25 2018).

[2] Based on discussions with Planz Consultants and Baseline Planning Group

Aside from the initial s32 information and investigation costs any rezoning proposal will also need to consider the costs on, and supply of, infrastructure (e.g. from the 5 waters and roading, community services etc). The Area Plans identified constraints to development in each town. Many of these constraints require a commitment from Council and the wider community around capital works upgrades, which are potentially significant in scale (e.g. community funding reticulated wastewater in Darfield, Leeston stormwater (underway) and wastewater infrastructure etc.). The DPR provides an opportunity for Council to take a lead and proactively zone additional sites where capacity issues have been identified. While this may go some way to meeting community expectations arising out of the Area Plan process, there is also a significant cost involved in the investigations, removing constraints to development and providing and funding infrastructure.

Taking a landowner led approach to zoning additional sites may not meet community expectations on delivery of the Area Plans, albeit that the Area Plans anticipated that rezoning of a 'preferred future development area' could occur through a private plan change process, but it does remove the burden of Section 32 costs and potential inefficiencies from Council. Plan Change 54, which seeks to rezone land in Springfield from Rural Outer Plains to Living 2 is an example of a private plan change being initiated following the site being identified in the Malvern Area Plan as a 'preferred future development area' for Springfield. The cost and risk is effectively left to the market to respond to opportunities and demand. This would give more surety that any proposal for rezoning is feasible as it is driven and paid for by the market, more so than Council leading in response to community expectation.

Summary of Staff Recommendations	**Leeston Commercial** Option 2a: Opportunity for rezoning proposal through a submission on the notified District Plan. **Leeston Industrial** No recommendation. Staff request direction from Council as evidence is finely balanced. **Darfield Commercial** Option 2b: Opportunity for rezoning proposal through a submission on the notified District Plan. **Darfield Industrial** Option 2b: Opportunity for rezoning proposal through a submission on the notified District Plan. **Castle Hill, Coalgate, Dunsandel and Southbridge Commercial and Industrial** Option 4: Opportunity for rezoning proposal through a submission on the notified District Plan.
DPC Decision	

1.0 Introduction

1.1 The Ellesmere and Malvern Area Plans acknowledged that towns in these areas have capacity to meet growth projections through existing zoned land (i.e. developable land or 'plan-enabled' land). This existing capacity included zoned but undeveloped land and developed land with further development potential (e.g. infill). The Area Plans went so far as to indicate additional areas of 'preferred growth in Leeston and Darfield (LEE3 and DAR8), but concluded that should additional business land be required that this could be dealt with either by investigating the appropriateness of additional locations through the District Plan Review (DPR), Town Centre studies or private plan change initiatives. The DPR is the first process to come around to consider the issue of rezoning additional land for business purposes. Town Centre Studies are on the future work program but will be considered and developed following the DPR notification. No private plan changes have been lodged for new business zones although there has been a pre application discussion for one in Darfield. Since the Area Plans were developed, Council has developed and endorsed the Selwyn Capacity for Growth Model (SCGM). This has indicated that there is sufficient capacity, although it is tight in some townships with some reliance on the more efficient use of existing zoned land. Additional research has also been carried out to test the SCGM findings for both Leeston and Darfield to further analyse and determine if additional land is required for commercial and industrial Purposes.

1.2 If Council selects to investigate and evaluate the appropriateness of zoning additional sites, any rezoning that arises out of the s32 evaluation would be notified as extensions of existing business areas through the DPR. This would be a Council-led approach in a similar way to Plan Change 10 (PC10) or LURP Action 27, which extended the B2A Zone in Rolleston. It is noted that LURP Action 27 was developed under different circumstances as it was required under the CER Act, but PC10 followed the prescribed plan change process. The level of detail required for a plan change (rezoning) was not undertaken through the Area Plan process, rather this considered high level desktop information to provide consideration of growth direction where required.

1.3 This report seeks a direction from the DPC on whether Council should proactively expand the existing Business zones in Darfield, Leeston, Southbridge, Dunsandel, Coalgate and Castle Hill through the District Plan Review (DPR), or leave consideration of zoning additional sites to the submission and hearing process. Doyleston is covered by the Business in Small Settlements work stream BS001/201.

1.4 A Council-led approach would involve Council absorbing the cost and taking on the risk of funding investigations, removing constraints to development and providing the infrastructure servicing required for development. The Council would also need to fund the progression of any rezoning proposal through the submission, hearing and appeal stages of the DPR, if it chose to continue with the proposals. This type of option is discussed in more detail in Section 7 below.

1.5 Alternatively, landholders who desire their land to be zoned to Business could undertake the investigative and evaluative work in determining appropriateness of zoning themselves, providing the information as part of a submission on the DPR. In this option Council would not be notifying any additional sites but would leave consideration of this through its response to any submissions. This would be a landowner-led approach and is very much akin to the Private Plan Change process. If Council decide to take this approach then strong direction on the level of information required for a submission seeking rezoning will have to be provided early to enable landowner's sufficient time to get the information together.

1.6 A landowner-led approach would involve the submitters absorbing the cost and taking on the risk of funding investigations and removing constraints to development. Council would have to take on costs of reviewing information provided in a submission to enable a recommendation to accept or reject the proposal. If Council accepts the submission and is approved then the land would be rezoned as part of the DPR process.

1.7 This report has taken the approach of considering options based on the township hierarchy developed as part of Selwyn 2031. Firstly looking at the options for Leeston and Darfield, which are recognized as Service Township and also Key Activity Centres (KACs) with regard to the Business 1 (town centre) areas. A separate report has been prepared by FordBaker to specifically consider the future business land requirements in Leeston and Darfield (**Appendix A**). Due to the low response rate of the survey undertaken by Fordbaker in relation to land supply in Leeston additional letters and emails were provided by Ellesmere Ward Councillors to provide additional feedback from business and land owners in Leeston.

1.8 The second set of options looks at the remaining towns in Ellesmere and Malvern, which currently have Business zones – Castle Hill, Coalgate, Dunsandel and Southbridge. Although this report should technically include Doyleston which has two areas of Industrial B2 Spot zoning, but no B1 Commercial zoning, please refer to Business in Small Settlements (BS201) preferred option report to see how Doyleston and townships without business zones are being dealt with.

2.0 Strategic Context

2.1 Selwyn 2031 provides an overarching strategic framework for achieving sustainable growth across the district to 2031. Selwyn 2031 emphasizes the importance of adopting and implementing a strategic approach to managing urban growth as a means of strengthening the district's self-sufficiency and to ensure that it continues to be a great place to live, work and play.

2.2 Another key aspect of Selwyn 2031 is the Township Network[3], which provides the framework for managing the scale, character and intensity of urban growth across the whole district. This enables investment decisions by the Council to be made within an appropriate context and ensure that the infrastructure provided supports the population base of the township, having regard to its scale and relationship to the wider area. It will also present residents and businesses with an opportunity to achieve better living environments and greater economic growth by focusing on those investment decisions that will be of most benefit to each individual community. The township network provides the context for managing urban growth and a platform for strategic planning by:

- identifying the role of each township;
- ensuring that the Council, community and other stakeholders have a clear understanding of where each township sits within the network and the reasons why;

[3] Pg 33, Selwyn 2031 District Development Strategy

- ensuring that the community's expectations of the level of service received from the Council is commensurate to the role that each township will play in accommodating urban growth within the district;

- enables the costs and benefits of providing infrastructure to be assessed at an appropriate context and scale.

2.3 The township network is important in the context of a zoning conversation as it will help guide decision making around proactively rezoning, if that's Council's direction, and/or responding to submissions for new zoning proposals.

2.4 The Township network is outlined below in Table 1:

Table 1: Township Network

District Centre - Rolleston	Functions as the primary population, commercial and industrial base of the district.
Sub-District Centre - Lincoln	Functions independently with a range of residential, commercial and industrial activities while providing support to surrounding Service and Rural Townships.
Service Townships - West Melton, Prebbleton, Darfield and Leeston	Function is based on providing a high amenity residential environment and primary services to Rural Townships and surrounding rural area.
Rural Townships - Arthur's Pass, Castle Hill, Coalgate, Doyleston, Dunsandel, Glentunnel, Hororata, Kirwee, Lake Coleridge, Sheffield, Southbridge, Springfield, Springston, Tai Tapu, Waddington, Whitecliffs	Function is based on village characteristics with some services offered to the surrounding rural area.

3.0 Role of Ellesmere and Malvern Area Plans

3.1 The Area Plans were adopted in September 2016. Their primary purpose is to serve as a high-level planning direction to guide growth and sustainable management of Malvern and Ellesmere townships through to 2031. The Area Plans introduced a range of issues and opportunities to inform the ongoing strategic planning and management of township growth. Although non-statutory they are intended to help inform:

- The District Plan Review and other statutory planning processes;
- Long Term Plan and Activity Management Plans;
- Other Council, community and privately initiated projects and capital investment decisions.

3.2 With regard to business growth the Area Plans acknowledge that each town has capacity to meet growth projections through existing zoned land (i.e. developable land or 'plan-enabled' land). This existing capacity included zoned but undeveloped land and developed land with further development potential (e.g. infill). Areas of preferred development for future business growth were indicated in the Area Plans for Leeston (LEE3) and Darfield (DAR8). The Malvern Area Plan concluded that no new areas for business or industrial purposes have been identified as being necessary to be proactively zoned by Council in response to projected growth within Darfield over the Malvern 2031 planning horizon. The Ellesmere Area Plan concluded that projected industrial growth could also be accommodated within the existing industrial area. However rather than stating it was not necessary to proactivity rezone, as in Darfield, the Ellesmere Area Plan stated that there was scope to investigate the need for additional Business 2 zoned for Leeston. This was to be considered through the DPR, a Town Centre Study or private plan change requests. Given the timing of the DPR it is the first process to investigate this issue.

3.3 The Area Plans also recognise that the substantive merits of zoning land must be determined through the statutory process set out in the Resource Management Act (the Act), which could include the DPR (including via the submission process), a Council plan change or a privately-initiated request. The Area Plans are clear that the DPR could be a mechanism, among others, such as the Town Centre Study, for implementing the Area Plans growth area.

4.0 Selwyn Capacity for Growth Model

4.1 The SCGM is a spreadsheet based model made up of a number of different pages, each presenting different background information and results. It allows sensitivity and scenario testing through the ability to change controls that alter the final outputs of the SCGM. At the DPC meeting on 6 December 2017 the development, structure and function of the SCGM was presented. The SCGM received endorsement for use in the DPR with particular control settings being applied. This enabled staff to progress analysis of township capacity and forecasted demand with some certainty.

4.2 The SCGM allocates land/floorspace demand for the business zones using the two methods, population driven for Commercial/Business 1 land and modified revealed preferences for Industrial land/Business 2.

4.3 The SCGM forecasts development of commercial land/floorspace (Business 1) according to the relative growth in the local community, referred to as ‘population driven’ growth. Predominantly, the demand for centres zones (Business 1 zones) is driven by the local community’s needs. Therefore, the SCGM assumes that the growth in floorspace in the Business 1 zones will broadly correspond to the scale and location of the growth in the community (as estimated by the dwelling development).

4.4 For example, in the SCGM the town of Rolleston (and surrounds) is estimated to capture around one third of the growth in dwellings in the District, it then follows that one-third of the floorspace demanded for Business 1 zones will be located in the area.

4.5 The SCGM forecasts development of industrial land/floorspace (Business 2) according to the observed market preferences and capacity available, referred to as ‘modified revealed preferences’ growth.

4.6 Primarily the demand for industrial land is less spatially dependent on the local community than the commercial zones. Also the nature of land in industrial zones is less variable than commercial zones. For the most part land in industrial zones tends to be flat with good connections to transport infrastructure and uniform costs (rent/buy price). These two characteristics of industrial land means that businesses are able/willing to operate in a range of locations and the choice of premises tends to be undertaken at a more district wide or regional level rather than a local level.

4.7 In summary, businesses that demand industrial zoned land can easily operate in any number of different locations. So the demand for industrial zones is driven by both the needs and demands of businesses in conjunction with the range of potential alternative options that are available.

SCGM Results

4.8 The SCGM results for business are discussed below. These outputs are based off an assumption of medium population growth rate for the Malvern and Ellesmere Areas (as agreed at DPC meeting in December 2017) and using medium setting for the other SCGM controls.

4.9 In analysing the business results it is important to note that the SCGM capacity analysis includes both 'vacant' land[4] as well as 'vacant potential' land[5]. Two versions of the SCGM results have been provided at **Appendix C**. **Appendix C(i)** shows the calculated capacity as a whole while **Appendix C(ii)** separates out 'Vacant' capacity and 'Vacant Potential' capacity. This second version assumes that redevelopment of existing sites will occur after 10 years and in the meantime only vacant sites will develop. This is a reasonably significant assumption but does allow the user to clearly see what the difference is between the two types of capacity, which in turn provides for more robust analyses of capacity.

4.10 The results from the SCGM, outlined in **Appendix C(i),** suggest that there are no capacity constraints in the Business 1 or Business 2 Zones for the Ellesmere and Malvern Townships, where all potential capacity is taken into account. However as mentioned above the SCGM factors in what is 'vacant' or 'vacant potential' in terms of capacity. **Appendix C(ii)** removes the 'vacant potential' land from consideration for 10 years. Although this was done for all townships the primary reason for analysing this was for new developments (e.g. Rolleston Town Centre and Izone) as the redevelopment of newly established sites was considered less likely. Although this could still be the case for other centres the possibility of redevelopment of sites in these centres could be more commercially feasible given the age of the building stock. In any event if the 'vacant potential' is not considered at all, or the assumption that it becomes more viable in 10 years is taken, then each township loses a relatively significant amount of capacity.

4.11 With this assumption in place the SCGM calculations identify a few capacity short falls over the next 10 years (before the 'vacant potential' land is considered) for the Southbridge and Dunsandel Business 1 (commercial) areas and the Doyleston and Dunsandel Business 2 (Industrial) areas.

4.12 Although there is a shortfall in Southbridge and Dunsandel Business 1 areas this is only in relation to vacant land supply, there is sufficient capacity in the land overall when the 'vacant potential' land is considered. The need, or otherwise, for additional land supply needs to considered in terms

[4] The SCGM calculates 'vacant' land as land with no building or a building taking up less than 5% of the site.

[5] The SCGM calculates 'vacant potential' as land that is currently utilised but has capacity for further development. However requirements like the need to supply carparking, storage, manoeuvring areas setbacks etc are taken into account when considering what is 'vacant potential'. So not all land has the capacity to be developed further or rather to be used in a more efficient manner.

of a cost benefit analysis particularly given their roles in the Activity Centre Network (discussed in section 2.0) and the significant financial cost in rezoning (discussed in section 6.0). It should also be noted that Doyleston, which currently does not have a B1 zone, will likely have a 'settlement zone' to replace the current L1 zoning, which is likely to be more permissive in terms of the types of non-residential activities which are able to establish (as previously discussed in Preferred Option Report for Business in Small Settlements).

4.13 It should be noted that the Doyleston and Dunsandel Business 2 areas are spot zones for existing businesses rather than any being industrial areas that provide for multiple business and services, as is the case for the Leeston Business 2 zone. In these instances they provide for specific existing activities and have not been put in place to service a wider market. Industrial land supply for a wider market would ideally be located at the Key Activity Centres (e.g. Leeston, Rolleston). Again the same considerations, around role, function and cost, as mentioned in the paragraph above should be taken into account when considering Business 2 land supply for Doyleston and Dunsandel.

4.14 The other area of note, given its role in the Township and Activity Centres Network, is the relatively low amount of 'vacant capacity' in the Leeston Industrial area. Leeston is a Service Township and in comparison to Darfield (as discussed in Section 7.0), which has a similar function for the district, the amount of 'vacant' capacity is low. However it also has a significant amount of 'vacant potential' land that can be made available should landowners be willing.

4.15 Overall the SCGM outlines that there is capacity in land supply in each of the Malvern & Ellesmere townships although it is acknowledged this is a mix of 'vacant' and 'vacant potential' land supply. The SCGM can also not accurately factor in realities such as landowner willingness to develop. However, as mentioned, not taking account of 'vacant potential' land, or assuming it's only viable in 10 years, is a significant assumption. In terms of this report, the need for more land supply should be balanced against a number of factors including the capacity outlined in the SCGM but also the roles and functions of centres (Township and Activity Centre Networks), infrastructure capacity and the overall cost and benefit of zoning land for the community.

5.0 Overview of Section 32 information requirements for rezoning

5.1 District Plans that are developed using sound evidence and rigorous policy analysis lead to more robust, enduring provisions, and can mean issues are resolved early on in plan-making, reducing opposition during hearings or at appeal. As outlined in the Area Plans and mentioned above the substantive merit of zoning any site, including any 'preferred development area' ('PFD Area') must be determined through the statutory process set out in the Act. To determine the substantive merits of these areas investigations will be required which will include the commissioning of detailed technical reports. The purpose and requirement to do this work is to help inform section

32[6] evaluation reports to demonstrate that the zoning has been well tested against the purpose of the Act and that the anticipated benefits outweigh costs and risks. In short, the evaluation must examine whether the objectives of the proposal (new zoning) are the most appropriate way to achieve the purpose of the Act.

5.2 To evaluate the efficiency and effectiveness of the proposal it is necessary to identify, quantify and assess the benefits and costs and to assess the risk of acting or not acting. To inform this evaluation key technical assessments are likely to be required to support any rezoning request, including:

- Geotech
- Contamination
- Transport
- Infrastructure
- Landscape
- Economic
- Planning
- Urban design – ODP design

5.3 The approximate cost to undertake the above investigations for *one site* development is estimated to be between *$80,000 and $120,000*[7]. The level of information or the number of technical reports required would have some impact on this cost but this provides an 'average' indication of cost. All things being equal there is also little in the way of economies of scale in the cost of a plan change[8].

6.0 Infrastructure provision, cost and programming

6.1 Aside from the initial s32 information and investigation costs any rezoning proposal will also need to consider the costs on, and supply of, infrastructure (e.g. from the 5 waters and roading, community services etc). The Area Plans identified constraints to development in each town, many of these constraints require a commitment from Council and the wider community around capital works upgrades, which are potentially significant in scale (e.g. community funding reticulated wastewater in Darfield, Leeston wastewater infrastructure etc.).

6.2 If Council proactively zones (i.e. Option 1) then the cost of meeting the infrastructure needs has to be planned and financed for by Council. The infrastructure needs could be a transparent trigger for a deferred zoning but there will need to be commitment from Council (i.e. Long Term Plan) to provide it at a nominated time in the future.

6.3 A significant aspect to the s32 evaluation will be the quantification of benefits and costs. The financial cost of having to provide and service finance on infrastructure will be significant in many cases. The financial benefit to the wider community of any Council-led rezoning may be quite limited in low growth areas (i.e. to the individual landowner, jobs through construction phase, employment in subsequent businesses etc.). There may be social benefits to providing more

[6] Section 32 (s32) is integral to ensuring transparent, robust decision-making in Resource Management Act (RMA) plans, plan changes and policy statements S32 requires new proposals to be examined for their appropriateness in achieving the purpose of the RMA, and the policies and methods of those proposals to be examined for their efficiency, effectiveness and risk.
[7] Obtained through discussions with Planz Consultants and Baseline Group
[8] John Ferguson, Planning Director, Baseline Group.

opportunities for growth but it is important to ensure this is not overridden by a financial burden for a community in servicing infrastructure that is not taken up. In short, the financial costs may outweigh the quantification of benefits.

6.4 In financing any new infrastructure or upgrades Council takes on debt and obligations of servicing a loan and/or recouping its own investment. This is normally recouped through Development Contributions (DC). In areas of low growth there is a risk to Council that the amount of DC's recouped each year is not sufficient to service a loan. Alternatively, to reduce this risk, the DC may have to be so high that developments in low growth areas are not commercially feasible. In a scenario where a private developer promotes a zone change (through a submission on the new District Plan or through a private plan change) the infrastructure provision (including any upgrades) and cost of this falls on the developer, not Council.

6.5 As well as servicing any financing Council will also need to ensure that infrastructure requirements are programed into the Long Term Plan (LTP) to provide services to zoned land or to uplift any deferrals. This provides some certainty to the community and the developers that the land is developable and when and how it will be available for serviced development as with the finance servicing issue there is a risk that Council's forward programming of infrastructure and community facilities, based on zoned land, and is not required due to continued low growth. This may impinge on budget and planning for other infrastructure that may become more pressing.

6.6 Overall there is a cost risk to Council in proactively zoning areas of land and addressing infrastructure constraints. This is particularly the case in towns where there is already land available to meet growth projections and business needs. Going beyond what is needed or feasible in infrastructure capacity puts Council at risk of not being able service funding and/or increases community expectations around the provision of other facilities that is (potentially) inconsistent with the Township Network set out in Selwyn 2031.

7.0 Option 1: Leeston and Darfield

Option 1 (a) Leeston: Investigate incorporating rezoning proposal as part of the notified Proposed District Plan

Option 1 (b) Darfield: Investigate incorporating rezoning proposal as part of the notified Proposed District Plan

7.1 Option 1 (a) involves Council undertaking the work to potentially zone additional business land in Leeston and to notify any rezoning proposal through the DPR process. It should be noted that although the Ellesmere Area Plan concluded that towns in Ellesmere have capacity to meet growth projections through existing zoned land (i.e. developable land or 'plan-enabled' land), which includes zoned but undeveloped land and developed land with further development potential (e.g. infill), 'Area LEE 3' was identified as a potential future growth area for Industrial land in Leeston and specified an 'implementation step' suggesting in the future a Town Centre Study be undertaken in Leeston which could identify the location and quantum of additional Business 1 and Business 2 land required to provide for Leeston's future retail, commercial and industrial requirements out to 2031.

7.2 Option 1 (a) appears to be inconsistent with the Area Plan, SCGM and the more recent report prepared by FordBaker (Appendix A) which indicated that there is no shortfall of business zoned land in either township in the next 10 years. However as discussed in Section 4.0 of this report, the SCGM figures indicate that in Leeston, although there is capacity overall, there is a low amount of 'vacant' capacity.

7.3 Anecdotal evidence from land and business owners (**Appendix B**), both within and outside of Leeston township boundaries, indicates an apparent shortage in industrial land supply over and above what was discussed in the Fordbaker report (Appendix A). This demonstrates concerns raised in Section 4.0 about unwillingness of landowners to develop existing business zoned land impacting on supply.

7.4 On a per capita basis, Leeston as a Service Township (*see Table 1: Township Network*) has significantly less 'vacant' and 'vacant potential' industrial business land supply when compared to Darfield, which is also a Service Township and for the District.

7.5 Option 1 (b) involves Council undertaking the work to potentially zone new sites in Darfield and to notify any rezoning proposal through the DPR process. One 'Future development area' for Business purposes, was identified in the Malvern Area Plan in Darfield - DAR 8. The Malvern Area Plan concluded that based on projected growth within Darfield over the Malvern 2031 planning horizon, no new areas for business or industrial purposes are currently necessary.

7.6 Option 1 (b) is inconsistent with the Malvern Area Plan, SGCM figures, and the more recent report prepared by FordBaker (Appendix A) which indicated that there is no shortfall of business zoned land in either Darfield in the next 10 years.

7.7 Given the evaluative nature of the s32 process that is required to determine the costs and benefits (and overall merit) of a rezoning proposal there is a risk that even after completing the site specific investigations, the s32 evaluations may not support rezoning (e.g. the costs outweigh the benefits). If Council proceeds with zoning then consideration will be required around whether it continues to fund the progression of any rezoning proposal and defend its inclusion through the submission, hearing and appeal stages of the DPR.

7.8 As well as taking on the evaluation costs and the costs of progressing through the DPR process Council will also be financing the development/upgrade of servicing infrastructure. Although infrastructure provision is one of Councils core roles it is often provided in response to demand or a private plan change, where costs can be recouped with some confidence or met by a developer. If Council is to proactively zone then it will need to prudent in its assessment of the demand for development of a 'business land' proposal to ensure that the cost of improving or developing new infrastructure can be recouped.

7.9 Further to the above if any proactive zoning is promoted by Council then this is likely to generate submissions on the notified District Plan from other landowners not identified as having preferred sites for rezoning. The evaluation of these alternative submission sites (which are inevitable and which may also be potentially suitable for development) comes with substantial further costs in reviewing technical assessments and reporting on submissions. It is recognized that evaluating and responding to submissions will also be required in Option 2(a or b) (outlined below). However in Option 2 Council will not have already undertaken the cost and time of promoting new business sites, as well as assessing others.

7.10 Overall s32 of the RMA requires a significant level of information to support a business rezoning and the cost implications around Council proactively rezoning new business sites Option 1 (a or b) needs to be considered.

8.0 Option 2: Leeston and Darfield

Option 2(a) Leeston: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan

Option 2 (b) Darfield: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan

8.1 Option 2 (a or b) does not *notify* any new 'business' areas in Darfield or Leeston through the DPR. Once the District Plan is notified all landowners will have an opportunity to lodge a submission on the District Plan seeking that their land be rezoned. The submission will need to be supported by a s32 evaluation, including all necessary technical assessments.

8.2 This approach is consistent with the SCGM and the more recent report prepared by FordBaker (Appendix A) which indicated that there is no shortfall of business zoned land in either township in the next 10 years.

8.3 In this option the investigation costs and s32 evaluation will be borne and undertaken by the submitter to support their submission for rezoning. Council's cost will be limited to reviewing the information and making a recommendation to accept or reject the submission, which are costs that will be inevitable regardless of the option selected. Option 2 is very similar to a private plan change process. This option leaves the cost to the market, which if taken up would indicate a demand and/or opportunity for growth, more so than Council proactively rezoning ahead of any substantial land capacity requirements.

8.4 If Council accepts and then approves sites promoted through submissions then infrastructure will either need to be available with capacity, or if infrastructures is not available, or does not have capacity, then a zone may be accepted and approved with a deferral for infrastructure provision as a trigger. This enables Council time to plan for infrastructure and to ensure that the DC's can be put in place to pay for it. There is still a potential risk in the ability to service a loan, however this should be reduced with the quantitative analysis for cost and benefits. Risk should also be further reduced by the fact that the rezoning has been promoted by the market, where an assumption could be drawn that there is demand and willingness to develop (i.e. is commercially feasibility).

8.5 The purpose of the Area Plans is to provide a Council led strategic approach to development. In Option 2 (a and b) the identification of potential growth areas in Leeston and Darfield provide some clarity and direction but ultimately development and associated costs is driven and absorbed by the market and where the market can sustain it. In short landholders/developers are taking the risk and funding a proposal rather than Council and the community. This gives Council and the community further assurance that any development promoted is feasible and has merit.

9.0 Option 3: Castle Hill, Coalgate, Dunsandel and Southbridge

Option 3: Castle Hill, Coalgate, Dunsandel and Southbridge: Opportunity for rezoning proposal as part of the notified Proposed District Plan

9.1 Option 3 involves Council undertaking the work to potentially zone new sites in Castle Hill, Coalgate, Dunsandel and Southbridge, and to notify any rezoning proposal through the DPR process.

9.2 'Preferred future development areas' were not identified in the Ellesmere Area Plan, for Dunsandel and Southbridge. Although, in the Malvern Area Plan Area 'CG5' in Coalgate represents a site where a shortfall in business land in Coalgate could be accommodated in the future if required. However, both Area Plans concluded that no new areas are required for commercial or industrial purposes to accommodate projected business growth within Castle Hill, Coalgate, Dunsandel or Southbridge before 2031.

9.3 For the above reasons Option 3 is inconsistent with the Area Plans and SGCM figures as discussed in Section 3.0.

9.4 As noted previously, given the evaluative nature of the s32 process that is required to determine the costs and benefits (and overall merit) of a rezoning proposal there is a risk that even after completing the site specific investigations, the s32 evaluations may not support rezoning (e.g. the costs outweigh the benefits). If Council decides to proceed with zoning, after identifying potential sites, consideration will then be required around whether it continues to fund the progression of any rezoning proposal and defend its inclusion through the submission, hearing and appeal stages of the DPR.

9.5 As well taking on the evaluation costs and the costs of progressing through the DPR process Council will also be financing the development/upgrade of servicing infrastructure. Although infrastructure provision is one of Councils core roles it is often provided in response to demand or a private plan change, where costs can be recouped with some confidence or met by a developer. If Council is to proactively zone then it will need to prudent in its assessment of the demand for development of a 'business land' proposal to ensure that the cost of improving or developing new infrastructure can be recouped.

9.6 Further to the above if any proactive zoning is promoted by Council then this will be bound to generate submissions on the notified District Plan from other landowners not identified as having preferred sites for rezoning. The evaluation of these alternative submission sites (which are inevitable and which may also be potentially suitable for development) comes with substantial further costs in reviewing technical assessments and reporting on submissions. It is recognized that evaluating and responding to submissions will also be required in Option 4 (outlined below). However in Option 4 Council will not have already undertaken the cost and time of promoting new business sites, as well as assessing others.

9.7 Overall s32 requires a significant level of information to support a business rezoning and the cost implications around Council proactively rezoning new business sites Option 3) needs to be considered.

10.0 Option 4: Castle Hill, Coalgate, Dunsandel and Southbridge

Option 4: Castle Hill, Coalgate, Dunsandel and Southbridge: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan

10.1 Option 4 does not *notify* any new 'business' areas through the DPR. To put this another way the township boundaries will remain as they are at the time of notification. Once the District Plan is notified all landowners will have an opportunity to lodge a submission on the District Plan seeking that their land be rezoned. The submission will need to be supported by a s32 evaluation, including all necessary technical assessments. This approach is consistent with the SCGM and the Area Plans, which indicate that there is sufficient business land available in these townships.

10.2 In this option the investigation costs and s32 evaluation will be borne and undertaken by the submitter to support their submission for rezoning. Councils cost will be limited to reviewing the information and making a recommendation to accept or reject the submission, which are costs that will be inevitable regardless of the option selected. Option 4 is very similar to private plan change process. This option leaves the cost to the market, which if taken up would indicate a demand and/or opportunity for growth, more so than Council proactively rezoning ahead of any substantial land capacity requirements.

10.3 If Council accepts and then approves sites promoted through submissions then infrastructure will either need to be available with capacity. If infrastructures is not available, or does not have capacity, then a zone may be accepted and approved with a deferral for infrastructure provision as a trigger. This enables Council time to plan for infrastructure and to ensure that the DC's can be put in place to pay for it. There is still a potential risk in the ability to service a loan, however this should be reduced with the quantitative analysis for cost and benefits. Risk should also be further reduced by the fact that the rezoning has been promoted by the market, where an assumption could be drawn that there is demand and willingness to develop.

10.4 Please note that Doyleston has been excluded from Options 3 and 4 as future business growth in Doyleston is anticipated to be managed by the 'Business in Small Settlement' overlay and the proposed underlying 'Settlement' zoning, which is intended to enable businesses to expand and/or establish in small townships without specific Commercial and/or Industrial zones more easily.

11.0 Conclusion

11.1 Selwyn 2031 and the Area Plans provide direction for strategic planning and management of township growth and outline opportunities and constraints for business development.

11.2 The DPR provides an opportunity for Council to take a lead and proactively zone additional sites where a shortfall in business capacity exists. This may go some way to meeting community expectation on what the intent of the Area Plans were, however there is also a significant cost involved in the investigations, removing constraints to development and providing and funding infrastructure.

11.3 Taking a landowner led approach to zoning additional sites may not meet community expectations on delivery of the Area Plans, albeit that the Area Plans anticipated that rezoning of a 'preferred future development area' could occur through a private plan change process, but it does remove the burden of Section 32 costs and potential inefficiencies from Council. The cost and risk is effectively left to the market to respond to opportunities and demand. This would give more surety that any proposal for rezoning is feasible as it is driven and paid for by the market, more so than Council leading in response to community expectation.

12.0 Staff Recommendations

12.1 Based on the preceding assessment, the Project Team recommends that:

Leeston Commercial

- Option 2a: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Leeston Industrial

- No recommendation. Staff request direction from Council as evidence is finely balanced.

Darfield Commercial

- Option 2b: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Darfield Industrial

- Option 2b: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

Castle Hill, Coalgate, Dunsandel and Southbridge Commercial and Industrial

- Option 4: Opportunity for rezoning proposal through a submission on the notified Proposed District Plan.

13.0 Next steps

13.1 If direction of DPC is to proactively rezone as part of the notified Proposed District Plan (Option 1, 3 or 5) then a further discussion will be required to be determine the scope of this work, impact on the DPR budget and timeframe for notification of the Proposed District Plan.

13.2 Alternatively, if it is decided that any rezoning proposals will be considered as part of the DPR process through submissions (Option 2 or 4), staff can develop an engagement plan to advise landowners of the opportunity to lodge a submission on the Proposed District Plan (and the associated information requirements).

Appendix A – Business Land Supply and Demand in Leeston Darfield Report – prepared by FordBaker

Property Valuers and Advisors

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26 June 2018

Senior Strategy and Policy Planner
Selwyn District Council
PO Box 90
ROLLESTON 7643

ATTENTION: JESSICA TUILAEPA

Dear Madam

RE: DRAFT BUSINESS LAND SUPPLY AND DEMAND IN LEESTON AND DARFIELD

This report has been prepared by Simon Newberry, William Grant and Anna Radovonich.

Simon Eric John Newberry, B Com (VPM), FPINZ, FNZIV, Registered Public Valuer, William Lewis Gerard Grant, B Com (VPM), GradCert BusSust, Registered Valuer, and Anna Radovonich, BLPM, work as valuers and property advisors in the Canterbury Province.

We refer to your instructions to provide consultancy advice in relation to the Business Land Supply and Demand in Leeston and Darfield.

DOCUMENTATION

We have been provided with the following documents:

- Malvern Area Plans Assessment – Draft – dated July 2015 – m.e Spatial
- Ellesmere Area Plans Assessment – Draft – dated July 2015 – m.e Spatial
- Malvern Area Plan – adopted September 2016 – Selwyn District Council
- Ellesmere Area Plan – adopted September 2016 – Selwyn District Council
- Property Economics – dated November 2017
- Selwyn – Review of Demographics (Part A) February 2017 – Natalie Jackson Demographics
- Selwyn – Review of Demographics (Part B) March 2017 – Natalie Jackson Demographics
- Selwyn District Growth Model 2017 – Technical Report March 2018 – working draft – m.e Consulting

In addition to the above, we have used and relied on the following sources of information:

- FordBaker Valuation Limited database and internal sources
- Valbiz
- Google Maps (www.google.co.nz/maps)
- Google Earth (https://www.google.com/earth)
- Results from the 'Business Land Supply in Leeston and Darfield' survey conducted by the Selwyn District Council
- Education Counts (http://www.educationcounts.govt.nz/data-services/directories/list-of-nz-schools)
- Stats NZ (www.stats.govt.nz)
- Selwyn District Plan (http://eplan.selwyn.govt.nz)
- Valbiz
- Population City (http://population.city/new-zealand/)

INSTRUCTION/PROJECT SCOPE

Our Deliverables and Outputs, instructed by the Selwyn District Council, are as follows:

1. The consultant shall familiarise themselves with the findings of the new Selwyn Growth Model in respect of business land requirements for Leeston and Darfield.
2. The consultant shall undertake a further assessment of the business land requirements in Leeston and Darfield having regard to localised factors that may be influencing supply and demand. This is effectively "ground-truthing" the Growth Model at a local level and the assessment should include consideration of:
    - Local market conditions that are influencing the uptake of existing zoned land;
    - Landowner/business owner aspirations; and
    - The ability of existing zoned land and the existing building stock to meet business needs (i.e. location of land, vacancy rate, shape and viability of land parcels, age and general condition of buildings).
3. The consultant shall prepare a report on the assessment process, clearly identifying any assumptions that have been made, recording the outcomes of engagement with business and business zoned land owners and the findings of the assessment. The report shall provide recommendations on the need for additional zoned land and the type of zoning that may be required to accommodate future business activity.

EXTENT OF INVESTIGATIONS

- Visual Inspection of B1 and B2 zoned land in Leeston and Darfield on 17 April 2018
- Reviewed Documentation
- Sales Evidence from 2010 to the current date
- Reviewed Selwyn District Council website and District Plan
- Business zoned land availability
- Selwyn District Council Survey Results
- Interaction with business owner

OBSERVATIONS

- Business land development is driven by demand, not supply
- Rural service towns such as Leeston and Darfield require several basic services and amenities. The most important of which (in no particular order) are:
    - Supermarket
    - Motor Vehicle Mechanic
    - Primary School
    - Hardware Store
    - Rural Supply Store(s) – i.e. Farmlands, PGG Wrightson, RD1
    - Medical Centre
    - Veterinary Practice
    - Recreation Grounds and Facilities
- The proximity of a rural service township to the nearest large township and/or State Highway impact on the demand for businesses and business expansion
- Demographics such as age impact demand and service need requirements

LOCATION - LEESTON

Leeston township is located on the Canterbury Plains near Lake Ellesmere and the Rakaia River. Accordingly, it is within the rural area of Ellesmere and is the main service township. Leeston is situated approximately 46 kilometres by road southwest of Christchurch's central city, 26 kilometres by road southwest of Rolleston, 22 kilometres by road southwest of Lincoln, and 55 kilometres northeast of Ashburton.

Leeston is the largest employment area in Ellesmere and employs nearly a quarter of the Ellesmere township-based workforce. Half of the township-based retail and commercial employment for the Ellesmere area is within Leeston, with the township also containing 28% of the total number of employees in the urban based industrial sector. 730 people are employed in Leeston and the population as at 2015 was 2,275 people. The population is projected to grow to 3,402 people by 2031 representing a 49% increase (Source: *Ellesmere Area Plan)*.

According to the Ellesmere Area Plan, there are currently 17 hectares of Business 1 zoned land in Leeston, most of which is contained within the town centre. This Business 1 zoned land is made up of approximately 70 sections. There are 19.3 hectares of Business 2 zoned land in the Ellesmere area, 10.6 hectares of which is in Leeston. This 10.6 hectares is made up of approximately 24 sections and is effectively located to the southeast side of Station Street (Source: *Ellesmere Area Plan)*.

The location of Leeston is indicated on the following map:

Source: www.google.co.nz/maps

fordbaker valuation

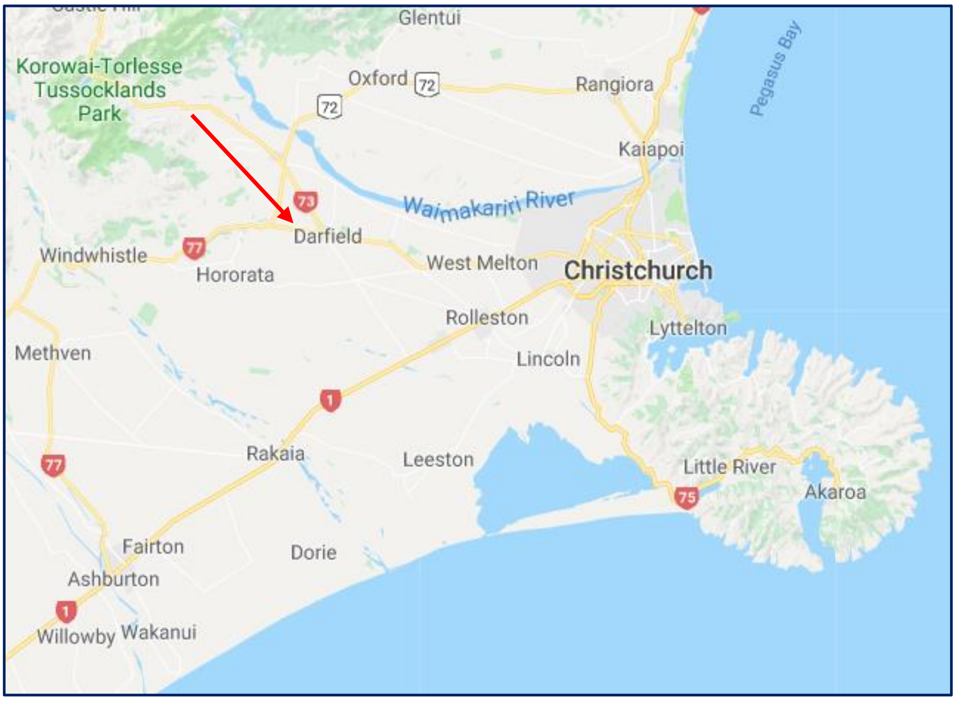
LOCATION – DARFIELD

Darfield township is located approximately 40 kilometres by road west of Christchurch on State Highway 73, being some 27 kilometres by road northwest of Rolleston. Darfield is the main settlement and service town in the Malvern Area.

Darfield is the largest township employment area in Malvern, it is also the largest retail and commercial centre, representing 41% of Malvern Township based employment in that sector. Darfield also has the most industrial based employment, representing 60% of all Malvern areas township based industrial employment. The 2015 population of Darfield was 2,909 people, with this population projected to grow to 4,141 people by 2031. This represents the largest estimated population growth in the Malvern area (Source: *Malvern Area Plan)*.

According to the Malvern Area Plan, there are currently 18.8 hectares of Business 1 zoned land in Darfield which is located in a single block along both sides of State Highway 73 through the town. There are three separate Business 2 zoned areas in Darfield, totalling 59.3 hectares that accommodate industrial based activities.

The location of Darfield is indicated on the following map:

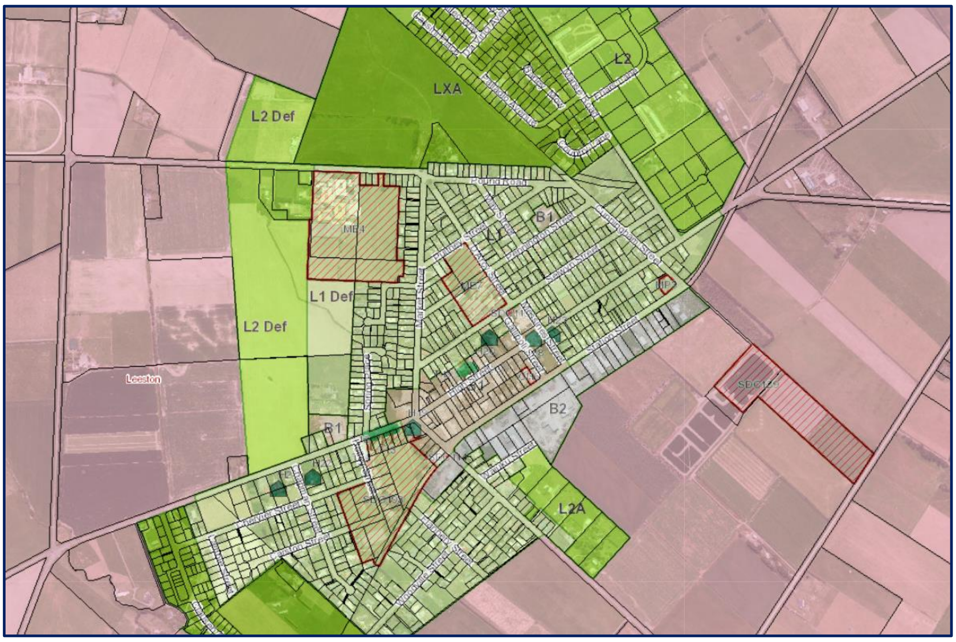


Source: www.google.co.nz/maps

CURRENT LAND ZONING AND INTENSITY OF DEVELOPMENT

Below are maps which indicate current land zoning in Leeston and Darfield. The aerial photographs show the intensity of development and available land for future development.

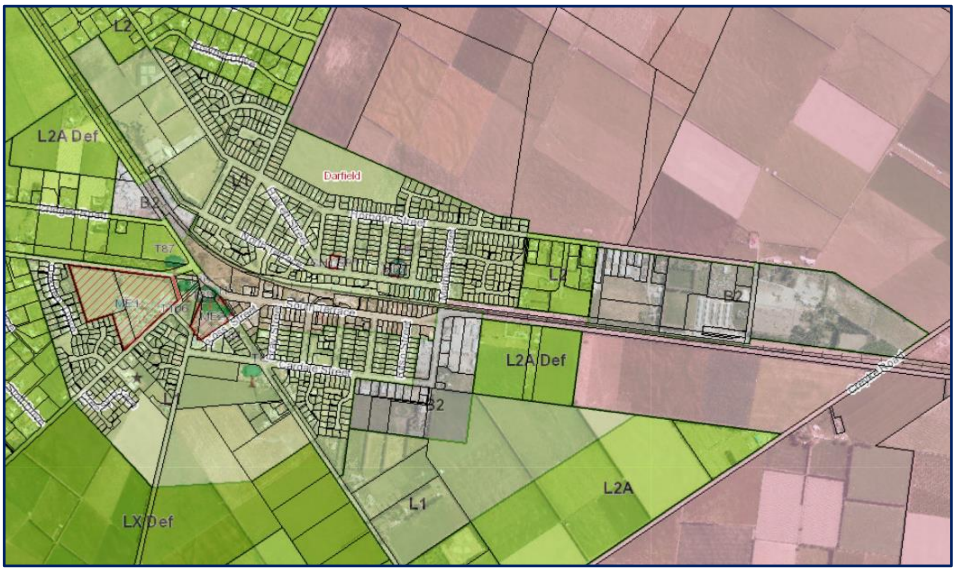
LEESTON:



Source: eplan.selwyn.govt.nz

Leeston appears to have less available vacant commercially zoned land compared with Darfield, however expectations are that there will be less of a requirement for commercial growth given its size, location, and proximity to alternative towns such as Rolleston, Lincoln, Christchurch and Ashburton.

DARFIELD:



Source: eplan.selwyn.govt.nz

It appears that there are still significant areas of undeveloped land in Darfield suitable for commercial development in Business 2 but only limited supply in the Business 1 zoned area.

TOWNSHIP SERVICE NEEDS

Township service/amenity requirements vary depending on several factors including:

- Population
- Populous demographics
- Wider area use (type and scale of agricultural enterprise)
- Proximity to larger towns and cities
- Relationship to State Highway; what does that State Highway service

Service townships generally require/provide at a minimum the following:

- Motor mechanic
- Hardware Store
- Rural Supply Stores
- Supermarket
- Primary School
- Medical Centre
- Veterinary Clinic
- Recreation Grounds and Facilities

Larger service townships, or townships which are positioned on well-used State Highways often provide more comprehensive services in addition to the above basic services.

These services typically include but are not limited to:

- Strip Retail – i.e. Butchery, Bakery, Pharmacy, Bank or ATM, Post Shop, Takeaways etc.
- Cafés, Pubs, Restaurants, Tea rooms, Taverns etc.
- High School
- Accommodation – i.e. Backpackers, Bed and Breakfasts, Motels
- Dairy(s)
- District Council Service Centres and Public Libraries

Below are summary tables of similar sized South Island townships indicating their populations, proximity to larger towns/city's, the current services and amenities that they provide, and other factors. For these tables, to ensure consistency, we have used population statistics from the 2013 Census held by StatsNZ.

RENWICK – MARLBOROUGH

Population (2013 Census):	2,118
Median Age (2013 Census):	38.4 years
Proximity to Nearest Major Town/City:	Blenheim is 12 kilometres away, a 15-minute drive
Current Services and Amenities:	➢ Petrol Station ➢ SuperValue supermarket ➢ Tractors, mechanics, car restorations ➢ Accommodation – Backpackers, B&B, motels ➢ Strip retail – Post shop, pharmacy, hairdresser, retail ➢ Pubs ➢ Dairy, takeaways ➢ Tea rooms, cafes ➢ Butcher ➢ Medical Centre ➢ Renwick School – Years 1 - 8 (545 Roll) ➢ Giesen Sports & Events Centre ➢ Renwick Transport Limited
Other Comments:	➢ State Highway 6 travels through Renwick linking Blenheim and Nelson, with State Highway 63 linking Renwick from SH6 to St Arnaud and Kawatiri-Murchison Highway (SH6).

MAPUA – TASMAN

Population (2013 Census):	2,013
Median Age (2013 Census):	48.3 years
Proximity to Nearest Major Town/City:	Richmond is 19 kilometres away, an 18-minute drive, while Motueka is 20 kilometres away, a 16-minute drive
Current Services and Amenities:	➢ Petrol Station ➢ Four Square Supermarket ➢ Mechanics ➢ Accommodation – Camping, B&B, motels ➢ Village Mall – Bakery, boutique retail, pharmacy, hair dresser ➢ Strip retail and restaurants on the Wharf – Homeware, hat shop, galleries, fish and chips, Harcourts, restaurants, cafes ➢ Pubs ➢ Smokehouse ➢ Medical Centre, Dentist, Podiatrist, Physio ➢ Mapua School – Years 1 - 8 (274 Roll) ➢ Community Centre
Other Comments:	➢ Popular tourist town located between the Abel Tasman and Nelson. The turnoff to Mapua is off the Coastal Highway (State Highway 60 linking Nelson to Takaka).

WAKEFIELD – TASMAN

Population (2013 Census):	2,106
Median Age (2013 Census):	38.3 years
Proximity to Nearest Major Town/City:	Richmond is 14 kilometres away, a 15-minute drive
Current Services and Amenities:	➢ Petrol Stations (2) ➢ Four Square Supermarket ➢ Mechanics, yards ➢ Accommodation – Backpackers, B&B, motels, ➢ Strip and standalone retail – Pharmacy, hair dresser, retail ➢ Pubs, Tearooms, cafes ➢ Takeaways, bakery, dairy ➢ Medical centre, vets ➢ Wakefield Primary (NZ's Oldest School) – Years 1 - 6 (245 Roll) ➢ Rest home ➢ Reserve, Bowling Club ➢ Library, toy library
Other Comments:	➢ State Highway 6 travels through Wakefield (linking Nelson to the West Coast and providing an inland route to Canterbury).

AMBERLEY – CANTERBURY

Population (2013 Census):	1,575
Median Age (2013 Census):	50.6 years
Proximity to Nearest Major Town/City:	Rangiora is 30 kilometres away, a 24-minute drive
Current Services and Amenities:	➢ Petrol Stations (3) ➢ Countdown and Four Square Supermarkets ➢ Mechanics, tractor and farm servicing shops ➢ Accommodation – Camping grounds, B&B, motels ➢ Commercial development – Pharmacy, liquor store, food outlets ➢ Significant retail along main street – Post shops, banks, retail ➢ Pubs, tearooms, cafes, restaurants ➢ Takeaways, dairy, bakery ➢ Medical centre, dentist, physio, vets ➢ Amberly School – Years 1 - 8 (209 Roll) ➢ Rest homes ➢ Hurunui District Council and library ➢ Farmlands, PGG Wrightson ➢ Gym, Domain
Other Comments:	➢ State Highway 1 travels through Amberley.

WAIMATE – CANTERBURY

Population (2013 Census):	2,778
Median Age (2013 Census):	55.6 years
Proximity to Nearest Major Town/City:	Timaru is 44 kilometres away, a 33-minute drive and Oamaru is 47 kilometres away, a 38-minute drive
Current Services and Amenities:	➢ Petrol Stations (2) ➢ Supermarket – New World ➢ Mechanics ➢ Accommodation – B&B and motels ➢ Strip retail along the main street – Post shop, banks, hardware stores, retail, lawyers ➢ Pubs, cafes, restaurants ➢ Takeaways, dairy ➢ Medical centres, Bay Audiology hearing clinic, vets ➢ Waimate High School – Years 7 - 13 (267 Roll) ➢ Waimate Main School – Years 1 - 6 (68 Roll) ➢ Waimate Centennial School – Years 1 - 6 (144 Roll) ➢ St Patrick's School – Years 1 - 8 (40 Roll) ➢ Rest home ➢ Waimate District Council ➢ Farmlands, RD1 ➢ Race course, Gym, Events Centre
Other Comments:	➢ State Highway 1 travels through the Waimate region whilst State Highway 82 travels through the Waimate town centre.

GERALDINE – CANTERBURY

Population (2013 Census):	2,301
Median Age (2013 Census):	50.2 years
Proximity to Nearest Major Town/City:	Temuka is 18 kilometres away, a 16-minute drive, while Timaru is 36 kilometres away, a 35-minute drive
Current Services and Amenities:	➢ Petrol Station ➢ Supermarket – Fresh Choice ➢ Mechanics and restoration services ➢ Accommodation – Holiday Park, B&B, motels ➢ Strip retail along the main street – Banks, hardware shops, post shop, pharmacy, retail ➢ Pubs, cafes, restaurants ➢ Takeaways, dairy, bakery ➢ Medical Centres, vets ➢ Geraldine Primary School – Years 1 - 6 (289 Roll) ➢ Geraldine High School – Years 7 - 13 (563 Roll) ➢ Rest homes /Retirement Villages ➢ PGG Wrightson ➢ Movie Theatre, Museum ➢ Recreational Reserve, Swimming Facilities, Gym
Other Comments:	➢ State Highway 79 travels through Geraldine (linking Canterbury to the Mackenzie Country and Central Otago).

MILTON – OTAGO

Population (2013 Census):	1,926
Median Age (2013 Census):	41.7 years
Proximity to Nearest Major Town/City:	Balclutha is 25 kilometres away, a 21-minute drive, and Dunedin is 54 kilometres away, a 40-minute drive
Current Services and Amenities:	➢ Petrol Stations (3) ➢ Supermarkets – Four Square and Super Value ➢ Mechanics and tractor servicing shops ➢ Accommodation – Backpackers, B&B, motels ➢ Strip retail along the main street – Post shop, banks, pharmacy, farming/hunting/fishing suppliers, hardware stores, retail ➢ Pubs ➢ Cafes, restaurants ➢ Takeaways, dairy ➢ Medical Centre, vet ➢ Tokomairiro High School – Years 7 - 13 (267 Roll) ➢ Milton Primary School – Years 1 - 6 (175 Roll) ➢ St Mary's School – Years 1 - 6 (75 Roll) ➢ Rest home ➢ PGG Wrightson ➢ Museum ➢ Millstream Lumber ➢ Golf Club, Bowling Club, Country Club
Other Comments:	➢ State Highway 1 travels through Milton while State Highway 8 connects to the townships in South Otago (Alexandra and Cromwell) and continues through the Mackenzie District to Timaru.

TEMUKA – SOUTH CANTERBURY

Population (2013 Census):	4,047
Median Age (2013 Census):	45.9 years
Proximity to Nearest Major Town/City:	Timaru is 18 kilometres away, a 20 minute drive
Current Services and Amenities:	➢ Cloverleaf Orchard & Nursery ➢ Churches ➢ New World Supermarket ➢ Strip retail ➢ Petrol Stations & Mechanic Workshops ➢ Temuka RSA Club ➢ Temuka Transport ➢ NZ Post & Kiwibank ➢ Temuka Co-op Saleyards ➢ Various takeaways, cafes and restaurants ➢ Library, Service & Information Centre ➢ Vet, Medical Centre & Pharmacy ➢ Budge Buses & Shuttles ➢ Visy Industrial Packaging ➢ Temuka Seed ➢ Prattley Industries ➢ NZAgBiz ➢ Milfos Innovative Dairy Solutions ➢ RD1 ➢ Arowhenua Maori Primary School (51 Roll) ➢ Preschool ➢ Primary School (233 Roll) ➢ Opihi College – Years 7 – 13 (289 Roll) ➢ Central South Island Fish & Game ➢ Recreation Reserve ➢ Wallingford Rest Home ➢ Various motels and accommodation providers ➢ New Zealand Insulators ➢ Cattery & Kennels ➢ Temuka Driving School
Other Comments:	➢ State Highway 1 travels through Temuka but bypasses the commercial town centre, as does the railway line

LINCOLN – CANTERBURY

Population (2013 Census):	3,924
Median Age (2013 Census):	33.1 years
Proximity to Nearest Major Town/City:	Christchurch central is 22 kilometres away, a 30 minute drive, and Rolleston is 11 kilometres away, a 13 minute drive
Current Services and Amenities:	➢ Two taverns, cafes and takeaway shops ➢ Selwyn service centre and library ➢ New World Supermarket ➢ Medical Centre, Vet and Pharmacy ➢ Strip Retail ➢ Banks and post shop including Kiwibank ➢ University ➢ Preschools ➢ Primary School (Roll 603) ➢ High School – Year 9-13 (Roll 1581) ➢ AgResearch (Lincoln Research Centre) ➢ Plant & Food Research ➢ Landcare Research ➢ Motel ➢ Petrol Station and Mechanic Workshops ➢ Lincoln Events Centre ➢ Sports Fields ➢ Churches
Other Comments:	➢ Second largest town in Selwyn District within easy commuting distance of Christchurch and Rolleston

CURRENT LEESTON SERVICES

Leeston is the main service township in the Ellesmere area. The rural area is predominantly agriculture based.

Population (2013 Census):	1,506
Median Age (2013 Census):	41.2 years
Population 2015 (Selwyn District Council – 2016 Ellesmere Area Plan):	2,275
Projected Population 2031 (Selwyn District Council – 2016 Ellesmere 2031- Ellesmere Area Plan):	3,402
Proximity to Nearest Major Town/City:	Rolleston is 24 kilometres away, a 22-minute drive and Lincoln is 22 kilometres away, a 19-minute drive
Current Services and Amenities:	➢ Petrol Station ➢ Supermarket – Fresh Choice ➢ Mechanics and tractor servicing shops ➢ Accommodation – B&B, motels ➢ Strip retail along the main street – Post shop, banks, pharmacy, homeware stores, hardware stores, hair dresser, electrical shop, liquor shop, retail ➢ Pubs ➢ Cafes, restaurants, bakery ➢ Takeaways, dairy ➢ Medical centre, community hospital, physio, vet ➢ Ellesmere College – Years 7 - 13 (581 Roll) ➢ Leeston Consolidated School – Years 1 - 6 (332 Roll) ➢ Respite Care in Ellesmere Community Hospital ➢ PGG Wrightson, Farmlands, RD1 ➢ Ellesmere Transport ➢ Bowling Club, Football Club ➢ Library and Service Centre
Other Comments:	➢ Leeston is positioned off the main State Highways

fordbaker valuation

CURRENT DARFIELD SERVICES

Darfield is the main service township in the Malvern area. The rural area is predominantly agriculture based.

Population (2013 Census):	1,935
Median Age (2013 Census):	43.3 years
Population (Selwyn District Council – 2016 Malvern Area Plan):	2,909
Projected Population 2031 (Selwyn District Council – 2016 Malvern 2031 – Malvern Area Plan):	4,141
Proximity to Nearest Major Town/City:	Rolleston is 27 kilometres away, a 21-minute drive
Current Services and Amenities:	➢ Petrol Stations (2) ➢ Supermarket – Four Square ➢ Mechanics and tractor servicing shops ➢ Accommodation – Hostel, B&B, motels ➢ Strip retail along the main road – Post shop, banks, hair dresser, ski shop, homeware shop, liquor store, retail ➢ Pubs ➢ Cafes, restaurants, bakery ➢ Takeaways, dairy ➢ Medical centre, hospital, physio, dentist, vet ➢ Darfield High School – Years 7 - 13 (850 Roll) ➢ Darfield Primary School – Years 1 - 6 (203 Roll) ➢ Rest home ➢ Farmlands, PGG Wrightson ➢ Lawyers ➢ Domain, Recreation and Community Centre ➢ Gym, Bowling Club ➢ Library and Service Centre
Other Comments:	➢ State Highway 73 (West Coast Road) travels through Darfield and State Highway 77 links Darfield to Methven and concluding at Ashburton.

The services and amenities provided to each of the comparable townships listed above are relatively similar to those provided in Leeston and Darfield. Population, demographics and proximity to adjacent major towns and/or State Highways impact directly on the demand for services in these smaller townships.

Typically, commercial development is driven by investment returns and therefore rental rates and rates of return are critical and saleability, yields and demand levels are improved in the major townships. Investors require a level of confidence, which is afforded to them in large centres, that their property is readily able to be leased or sold.

POPULATION DEMOGRAPHICS

The reports provided to us by the Selwyn District Council indicate a range of estimates for both the current and future projected population within the Leeston and Darfield Townships. These are outlined below:

LEESTON:

Ellesmere Area Plans Assessment – Draft and as predicted by the Selwyn District Council's in-house Population Projections

- 2016 Population: 2,250
- 2031 Population: 3,250 (44.4% Increase)

Ellesmere Area Plan and as predicted by the Selwyn Growth Model

- 2015 Population: 2,275
- 2031 Population: 3,402 (49.5% Increase)

Selwyn – Review of Demographics (Part B) and as predicted by Statistics New Zealand Area Units

- 2016 Population: 1,810
- 2043 Population: 1,910 (5.5% Increase)

DARFIELD:

Malvern Area Plans Assessment – Draft and as predicted by the Selwyn District Council's in-house Population Projections

- 2016 Population: 2,960
- 2031 Population: 3,960 (33.8% Increase)

Malvern Area Plan and as predicted by the Selwyn Growth Model

- 2015 Population: 2,909
- 2031 Population: 4,141 (42.35% Increase)

Selwyn – Review of Demographics (Part B) and as predicted by Statistics New Zealand Area Units

- 2016 Population: 2,140
- 2043 Population: 2,180 (1.9% Increase)

These projections indicate a vast range of population predictions. The '*Selwyn – Review of Demographics (Part B)*' report suggests the discrepancy is likely due to the Statistics NZ Area Unit Projections not yet taking into account the increased migration New Zealand has experienced over the past three years. The report also identifies that Darfield is already experiencing a zero-natural increase and this will likely become a natural decrease around 2033.

AGE DEMOGRAPHICS

The '*Selwyn – Review of Demographics (Part B)*' report looks specifically at the age structure of Leeston and Darfield. The two townships comprise the two "oldest" areas in the Selwyn District with substantially older age structures than average. In 2016, Leeston and Darfield had 17.7% and 21.0% of residents aged 65+ years respectively. This is significantly greater than the overall Selwyn District which had 11.40% of people within this age group. Since 1996 Leeston has had a 2.1% increase in residents aged 65+ years and Darfield, a 19.3% increase, and this trend is expected to continue. An aging population would suggest that further development of Retirement Villages should be considered and whilst not necessarily requiring business zoned land, they ultimately are a commercial activity.

SURVEY RESULTS

Selwyn District Council (SDC) undertook the 'Leeston and Darfield Business Project/Survey' between 2 May 2018 to 13 May 2018. SDC targeted 108 business landowners in Leeston and Darfield, 65 via letter and 43 via email. There were 40 visits to the webpage and nine participants engaged in the survey, a response rate of 8.33%.

Of the nine respondents, six were for Leeston and three were for Darfield.

One of the six Leeston respondents appears to own residential land. It is unclear to us as to why this person was included in the initial survey. With the removal of this respondent, the total targeted landowners in the survey reduces to 107, with the responses reducing to eight, being a rate of 7.47%. We can also remove the St David's Church (Leeston) response from the survey as they are very unlikely to explore business expansion. This reduces the targeted landowners to 106 and the responses to seven, being a rate of 6.60%.

Due to the low response rates, we consider the survey to be relatively inconclusive. The Selwyn District Council has cited 'surveygizmo' which states that the average response rate to surveys distributed to external audiences is 10-15%.

The council has also cited 'SurveyAnyplace' which outlines the importance of response rates in surveys. This source states that *'a low response rate can give rise to sampling bias if the nonresponse is unequal among the participants regarding the outcome'*. SurveyAnyplace then states that recent studies have shown that surveys with lower response rates (near 20%) had more accurate measurements compared to surveys with higher response rates (near 60 or 70%). The main issue with low response rates, however, is that the missing data is random. Generally speaking, higher response rates are preferred.

We now outline the survey results and responses for each township.

LEESTON:

<u>72-74, 76-78, 80 High Street, and 25 Station Street</u>

This response is from a longstanding property owner (>10 years).

Question 7: This survey is for landowners with vacant or partially vacant land. However, do you have any general comments to make about business land supply and demand in Darfield and/or Leeston?

'There is continuing demand for sites already zoned B1 in High Street, Leeston and in particular a lack of parking. No B1 sites in High Street currently used for residential purposes are available to relieve parking issues or settle potential business expansion. Extreme roadside congestion in the High St is common from Super Liquor (#68) to approx. #100. Prime targets for additional parking would be the residences adjacent to Clausens Sadderley building, and between the butcher and the café on the NW side of the street. An urgent review of Leeston's business zoning, layout, and parking requirements, with provisions covering changes of use to existing buildings and properties and potential associated parking facilities, is well overdue and has been requested in the past. This needs to take place in conjunction with "local knowledge" and not be imposed in generic form.'

This response indicates two key issues. That the respondent believes there is a lack of vacant land sites on High Street suitable for retail development, and that there is, at times, a lack of available parking in a certain area. Again, we refer to our previous comments about business development being driven by demand, not supply. We believe that when demand for business expansion is sufficient, that the residential properties which are zoned B1 will, over time, be converted/redeveloped for commercial use. The parking issues that this respondent has alluded to fall outside of our scope of works. However, we suggest that any carpark should be positioned fronting Station Street with a laneway to High Street, rather than on High Street to prevent fragmentation.

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61 High Street

This response is from a longstanding landowner (>10 years).

Question 7: This survey is for landowners with vacant or partially vacant land. However, do you have any general comments to make about business land supply and demand in Darfield and/or Leeston?

'Please do not allow any more Liquor supply business in Leeston as it impacts our property with noise, rubbish, trespass. We have had problem with flooding and when the gutters are cleared the do not clear out the drains which are blocked so I don't think current contract is being done correctly'.

This response is unrelated to business zoned land supply or demand.

Church next to Butcher. High Street

This survey response relates to St David's Church. All land is being used and the property has been owned for a long period of time (>10 years). There are no comments within this response which relate to business land supply or demand.

DARFIELD:

1B Cardale Street

According to aerial images, this parcel of land is mostly vacant.

Question 10: What are your plans for your land over the next 10 years?

'We would like to subdivide to utilise for businesses. We investigated the option of building a rest home/dementia care facility as it appears the area needs one but the cost was prohibitive.'

This response indicates that demand for a rest home/dementia care facility is not yet at a point where development is feasible. This does not suggest that there is a shortage of business zoned land in Darfield nor does analysis suggest when the right time to develop a care facility should commence. However, the future demographic predictions would suggest it should be contemplated in the short term.

Cardale Street

The survey respondent has indicated that this parcel of land is fully vacant. As we do not have a specific property address, we cannot confirm this with aerial imagery.

Question 27: Do you have any general comments to make about business land supply and demand in Darfield and/or Leeston?

'Seems to be enough business zoned land in Darfield. We are waiting for population to grow and then demand.'

This response indicates that the land owner may consider development in the future once demand has increased.

SUMMARY:

We have reviewed and considered the responses to the survey. Due to the low response rate, the data gathered is limited and may not show an accurate representation of the townships.

Selwyn District Council Intentions for Their Land Supply

In addition to the public survey responses, we have undergone discussions with the Selwyn District Council and summarised below is a list of business zoned land currently in Council ownership within Darfield and Leeston. Included with each property is an indication of the current and forecasted future use.

Address	Current Use	Future Use
Darfield Depot/SICON Offices/Darfield Library Land	Depot, Offices and Library	Brownfield Development Site – Options are being investigated
Westview Park in Darfield	Developed as Community Park	Some land was sold for adjoining supermarket with the balance retained for the park. No plans to change use.
South Terrace (North Side – 2 Parcels)	Rest Area, Toilets and Jail	No plans to change use
27-29 South Terrace (South Side)	Tussock Square amenity park	No plans to change use
Carrodus Land in Leeston (Leeston-Lake Road)	Purchased as an extension to Leeston Park	No plans to change use
Part of Leeston Park on High Street	Skate Park	No plans to change use
Leeston Library/Medical Centre/Service Centre Land	Library/Medical Centre/Service Centre Land	No plans to change use
Anderson Square (Gallipoli/Messines Street)	Reserve	No plans to change use

ENGAGEMENT WITH BUSINESSES AND BUSINESS ZONED LAND OWNERS

As per our instructions in the Scope of Works, the engagement with landowners and business owners was to be led by the Technical Contact. Additionally, following a recommendation from Council staff we contacted Paul Johnston of Johnston Civil . No other contacts were suggested.

Paul Johnston is the Managing Director of Johnston Civil, a rural engineering firm based outside of Leeston which employs over 50 people. We called Mr Johnston and he advised us that some 3-4 years ago, he, on behalf of Johnston Civil, investigated the purchase and development of a parcel of land on the corner of Volckman Road and Station Street at the north-eastern periphery of Leeston. He stated that there was little available industrial land in Leeston for a development of the scale he required, that the site he was interested in was not zoned for his proposed development, and that the site was low lying and may have had issues with drainage, potentially requiring significant fill prior to any construction being undertaken. We have not independently verified this information.

Mr Johnston stated that he investigated applying for consent from the Selwyn District Council to develop approximately 15 industrial sites along the road frontage.

Johnston Civil is currently based south of Leeston, however given the nature of the business, most of the work is conducted off site. Mr Johnston indicated that he was considering moving or expanding the business to either Rolleston (presumably Izone) or Hornby. He also mentioned how critical the dairy industry was to the commercial area in Leeston, given the vast majority of the surrounding rural land is used in this regard.

RECENT LAND SALES AND AVAILABLE LAND

FordBaker Valuation have identified the following available land and recent land sales within Leeston and Darfield:

Business 1 Zoned Land:

LEESTON					
Land Sales					**Land value rate**
97 High Street	Oct-12	$38,000	172	m²	$221 /m²
Available Land					
97 High Street			172	m²	
Total			**172**	**m²**	
Business 1 zoned land currently used for residential purposes					
61 High Street			2,003	m²	
65 High Street			1,816	m²	
82 High Street			675	m²	
83 High Street			640	m²	
85 High Street			455	m²	
100 High Street			1,011	m²	
9 Station Street			1,011	m²	
19 Station Street			1,012	m²	
21 Station Street			1,012	m²	
23 Station Street			1,011	m²	
25 Station Street			1,011	m²	
27 Station Street			1,012	m²	
29 Station Street			1,012	m²	
Total			**13,681**	**m²**	
DARFIELD					
Land Sales	**Sale date**	**Sale price**	**Area**		**Land value rate**
1 Clinton Street	Mar-10	$150,000	1,012	m²	$148 /m²
2 Ross Street	Mar-10	$130,000	1,012	m²	$128 /m²
23 South Terrace	Aug-11	$300,000	1,146	m²	$262 /m²
1 McMillan Street	Jan-12	$1,279,930	7,529	m²	$170 /m²
Available Land					
23 South Terrace			1,146	m²	
30 South Terrace			1,497	m²	
2 Ross Street			1,012	m²	
1 Clinton Street			1,012	m²	
2 Clinton Street			1,012	m²	
4 Clinton Street			1,012	m²	
1 McMillan Street	(Supermarket Purchase)		7,529	m²	
Total			**14,220**	**m²**	

Business 2 Zoned Land:

LEESTON					
Land Sales			**nil**		
Available Land					
16 Station Street			1,750	m²	
24 Station Street			2,411	m²	
38 Station Street			8,011	m²	
Total			**12,172**	**m²**	

DARFIELD					
Land Sales	**Sale date**	**Sale price**	**Area**		**Land value rate**
67 Horndon Street	Nov-17	$775,000	37,565	m²	$21 /m²
Creyke Road	Aug-17	$1,000,000	13,330	m²	$75 /m²
Available Land					
Cardale St (part Ascot Park Ltd site)			35,526	m²	
1B Cardale Street			19,524	m²	
1C Cardale Street			12,031	m²	
3-5 Cardale Street			2,031	m²	
4 Mathias Street			10,959	m²	
Creyke Road			13,330	m²	
31 Horndon Street			5,108	m²	
51 Horndon Street			15,160	m²	
67 Horndon Street			37,565	m²	
75 Horndon Street			25,283	m²	
77 Horndon Street			20,000	m²	
Total			**196,517**	**m²**	

RECENT IMPROVED BUSINESS ZONED SALES

FordBaker Valuation have identified the following recent improved Business 1 zoned sales within Leeston and Darfield:

Leeston - Improved Business 1 Zoned Sales					
Address	**Sale Date**	**Sale Price**	**Land Area**	**Floor Area**	**Use**
89 HIGH STREET	Jan-17	$300,000	1298 m^2	130 m^2	Commercial
65 HIGH STREET	Dec-16	$590,000	1816 m^2	310 m^2	Residential
102 HIGH STREET	Oct-15	$741,000	2023 m^2	400 m^2	Commercial
90 HIGH STREET	Aug-15	$170,000	505 m^2	110 m^2	Commercial
88 HIGH STREET	Jun-15	$159,000	505 m^2	240 m^2	Commercial
23 STATION STREET	Mar-15	$380,000	1012 m^2	130 m^2	Residential
68 HIGH STREET	Nov-14	$325,000	1012 m^2	460 m^2	Commercial
100 HIGH STREET	Jun-14	$205,000	1011 m^2	100 m^2	Commercial
21 STATION STREET	Apr-14	$315,000	1012 m^2	120 m^2	Residential
85 HIGH STREET	Jun-13	$300,000	455 m^2	140 m^2	Residential
65 HIGH STREET	Jun-13	$595,000	1816 m^2	310 m^2	Residential
80 HIGH STREET	Mar-13	$420,000	1006 m^2	510 m^2	Commercial
100 HIGH STREET	Nov-12	$180,000	1011 m^2	110 m^2	Commercial
25 STATION STREET	Jul-12	$195,000	1012 m^2	110 m^2	Residential
3 MARKET STREET	Jul-12	$460,000	7393 m^2	100 m^2	Commercial
108 HIGH STREET	Apr-11	$285,000	2111 m^2	1150 m^2	Commercial
89 HIGH STREET	Jan-11	$200,000	1298 m^2	130 m^2	Commercial
27 STATION STREET	Dec-10	$180,000	1012 m^2	100 m^2	Residential
23 STATION STREET	Feb-10	$245,000	1012 m^2	130 m^2	Residential

Darfield - Improved Business 1 Zoned Sales					
Address	**Sale Date**	**Sale Price**	**Land Area**	**Floor Area**	**Use**
51 SOUTH TERRACE	Mar-18	$660,000	986 m^2	200 m^2	Commercial
16 SOUTH TERRACE	Dec-16	$710,420	1012 m^2	230 m^2	Commercial
3 CLINTON STREET	Jul-15	$375,000	1012 m^2	110 m^2	Residential
33 SOUTH TERRACE	Mar-15	$950,000	3393 m^2	990 m^2	Commercial
3 BRAY STREET	Oct-14	$380,000	1012 m^2	140 m^2	Residential
13 SOUTH TERRACE	Aug-14	$450,000	3035 m^2	340 m^2	Commercial
1 BRAY STREET	Jul-14	$340,000	1012 m^2	110 m^2	Residential
41 43 SOUTH TERRACE	Jul-14	$1,150,000	3031 m^2	490 m^2	Commercial
2 MCMILLAN STREET	Jun-14	$328,000	1348 m^2	380 m^2	Commercial
2 THORNTON STREET	Aug-13	$374,000	857 m^2	140 m^2	Residential
7 SOUTH TERRACE	Dec-11	$300,000	1012 m^2	140 m^2	Residential
4 BRAY STREET	Jul-11	$210,000	1401 m^2	180 m^2	Commercial
3 BRAY STREET	Sep-10	$200,000	1012 m^2	140 m^2	Residential
16 SOUTH TERRACE	Jun-10	$630,000	2024 m^2	280 m^2	Commercial
9 SOUTH TERRACE	Apr-10	$320,000	1012 m^2	130 m^2	Residential
26 SOUTH TERRACE	Mar-10	$400,000	2139 m^2	140 m^2	Residential
51 SOUTH TERRACE	Mar-10	$412,500	986 m^2	200 m^2	Commercial

Many of the above sales are still used for residential purposes and appear to have transacted on that basis. We have not 'ground truthed' these sales to confirm that they comprise residential properties and have relied on aerial imagery to make this assumption.

This is a further indication that demand for retail/commercial space in both Leeston and Darfield remains relatively low.

SWOT ANALYSIS ON FUTURE DEVELOPMENT/EXPANSION – LEESTON

Strengths:

- Affordability of business zoned land
- Services a relatively wide area of rural land

Weaknesses:

- Rolleston and Lincoln are close by, with Ashburton also within proximity, all being alternatives for business development
- Cost to develop is likely higher compared with alternative towns such as Rolleston
- Rural area is unlikely to become significantly more intensive in terms of agriculture productivity, therefore little need to intensify/expand the existing essential services within Leeston township
- Away from State Highway i.e.; only services local communities

Opportunities:

- To encourage sustainable and efficient development within the current urban zoned land
- Capitalise on localised needs, and demand (dairying, arable etc).

Threats:

- Businesses operators opting to relocate or establish themselves in larger and more appropriately developed townships such as Rolleston, Ashburton, or Christchurch
- Expansion of the township outside the existing urban zoning

SWOT ANALYSIS ON FUTURE DEVELOPMENT/EXPANSION - DARFIELD

Strengths:

- Affordability of business zoned land
- Services a relatively wide area of rural land with few alternatives to the north, south and west
- Located on State Highways 73 and 77
- Good through traffic including tourist and recreational travellers

Weaknesses:

- Rolleston is nearby
- Cost to develop is likely higher compared with alternative towns such as Rolleston
- Lack of sewer infrastructure
- Rural area is unlikely to become significantly more intensive in terms of agriculture productivity, therefore little need to intensify/expand the existing essential services within Darfield township

Opportunities:

- To encourage sustainable and efficient development
- Significant area of available industrial land currently exists
- Capitalise on localised needs and demand

Threats:

- Businesses operators opting to relocate or establish themselves in larger townships such as Rolleston, Ashburton, or Christchurch

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ALTERNATIVES FOR BUSINESSES

While the townships of Leeston and Darfield are considered "Key Activity Centres" and "Rural Service Towns", there are nearby alternatives for businesses. Aside from Christchurch, Rolleston is the key alternative township, with Ashburton being an additional alternative to Leeston, although to a lesser degree.

ROLLESTON

Rolleston is the largest town in the Selwyn District and is located approximately 26 kilometres by road from Leeston and 27 kilometres by road from Darfield. State Highway 1 travels through Rolleston and it is located some 25 kilometres from Christchurch's central city.

According to the Selwyn District Council, Rolleston's estimated population for 2018/2019 is 17,348 people and expected to increase to 27,927 by 2031. Rolleston acts as a commercial centre for the District and provides a full-service role to surrounding areas. Facilities and services within Rolleston include the head office/Council Chambers for the Selwyn District Council, two supermarkets (New World and Countdown), The Warehouse, the Selwyn Aquatic Centre, an array of food retail and dining options, gyms, medical centres, shopping amenities, service stations and the Industrial Hubs as outlined below. Rolleston also contains five Primary Schools, one Specialist School and one High School. Rolleston College is the High School, it opened for year nine students in 2017 and currently has a roll of 433 students with the projected roll to increase to 1,800 year nine to 13 students by 2023.

Rolleston boasts two significant industrial business parks, the Izone Business Park and the undeveloped Industrial IPort Business Park. Many businesses have opted to locate themselves within Rolleston due to its strategic location, availability of land, and affordable development costs.

The Izone Business Park currently has approximately 34.9 hectares of available business zoned land, while the IPort Business Park has approximately 4.1 hectares. Additional land is yet to be developed.

Key businesses located within Izone Business Park and IPort Business Park include:

- PGG Wrightson Seeds
- Global Bus Ventures
- Westland Milk Products
- Drummond and Etheridge
- CRONZ
- Pegasus Engineering
- Asmuss Engineering
- The Warehouse
- Inkwise
- Hilton Haulage
- Farmlands Nutrition
- Lanocorp
- Concision Panelised Technology
- Firth
- Lyttelton Port Company
- Move Logistics

Benefits of businesses being located in either of the Rolleston Business Parks include:

- Purpose built, modern industrial subdivisions offering a range of section sizes
- Well located within very close proximity to State Highway 1
- Ease of access
- Critical Mass
- Christchurch Southern Motorway scheduled for completion in 2020. Once operational, this will improve access to Lyttelton Port and Christchurch city
- No development contributions
- Good subsoil conditions
- Large allotments of land available to suit potential business expansion
- Proximity to Christchurch International Airport
- Railway line travels through Rolleston
- Full range of services and amenities available within Rolleston

ASHBURTON

Ashburton provides the third largest urban area in the Canterbury Region following Christchurch and Timaru. Ashburton is the heart of the Ashburton District and is located approximately 55 kilometres by road from Leeston and some 72 kilometres from Darfield. State Highway 1 bisects the town centre and it is located approximately 89 kilometres from Christchurch's central city.

The Ashburton Township comprises a population of 19,600 people (Source: http://population.city/new-zealand/ashburton/). Ashburton has an established commercial centre and provides a full-service role to surrounding areas. Facilities and services within Ashburton include three supermarkets (New World, Countdown and a Four Square), The Warehouse and various hardware stores, a wide range of recreational facilities, an array of food retail and dining options, gyms, medical centres, a hospital, extensive shopping amenities, service stations, the Ashburton District Council and the Industrial Hub as outlined below. Ashburton also contains six Primary Schools, an Intermediate School, a Composite School and a High School. Ashburton Christian School is the composite school taking students from years one to 13. It currently has a roll of 113 students. Ashburton College currently has a roll of 1,180 students catering for students in years nine to 13.

Ashburton features one fully serviced, 80 hectare, commercial and industrial business park, the Ashburton Business Estate. This business park is located at the north-eastern periphery of the Ashburton town boundary and attracts businesses due to its strategic location, accessibility and proximity to State Highway 1, availability and affordability of land, and flexible ownership options.

The Ashburton Business Estate has approximately 10.5 hectares of available business zoned land, with future stages yet to be released to the market.

Key businesses located within Ashburton Business Estate include:

- EA Networks
- Canterbury Long Run Roofing
- Midlands Apiaries
- McIntosh Group
- Mainland Coachwork Limited
- Kaipak Limited
- NZ Dairy Collaborative

Benefits of businesses being located in the Ashburton Business Estate include:

- Positioned alongside State Highway 1
- Ease of access with two intersections connecting to State Highway 1
- Emissions controls (noise, odour, dust and smoke), on-site storage and screening, and infrastructure and energy efficiencies to allow future proofing against rising environmental costs
- Varying sized allotments of land available including larger sites to suit potential business expansion
- Flexible ownership options including ownership or lease back
- Low water and rates costs
- Full range of services and amenities available within Ashburton

DEMAND PREDICTIONS FROM SELWYN DISTRICT COUNCIL REPORTS

The report titled '*Property Economics'*, dated November 2017, identifies the role of both Leeston and Darfield within the wider Selwyn District. It notes that Leeston and Darfield have a range of retail and commercial services however play a secondary role to the Lincoln and Rolleston Town Centre activity centres. The focus of Leeston and Darfield is to be rural centric, providing for large rural areas and small townships interspersed within the surrounding areas.

LEESTON:

Ellesmere Area Plans Assessment – Draft

This report identifies the impacts of Christchurch and Rolleston on Leeston. Given the close proximity of these two centres, Leeston has not fully developed its commercial and retail sectors to provide a full service role. A large proportion of resident spending occurs within Christchurch and subsequently the role of Ellesmere's retail and services has recently declined.

Ellesmere Area Plan

The Plan examines and estimates the likely population growth, together with the anticipated projected retail, commercial and industrial premises necessary to service Leeston through to 2031. In regard to Business 1 zoned land, currently existing is 12.6 hectares within Leeston (Source: *Ellesmere Area Plans Assessment),* comprising approximately 70 sections. A shortfall of 8,000m^2 has been identified. It has however been identified as manageable with this growth potentially catered for within existing Business 1 zoned land holdings and premises as some of this Business 1 zoned land is used for residential purposes while other retail sites are undercapitalised.

Business 2 land comprises 10.6 hectares within Leeston separated into 24 sections averaging 4,060m^2. This report identifies a number of vacant or underutilised lots which could accommodate the additional 2.8 hectares of Business 2 zoned land required. We refute that this volume of land would be available as much of the underutilised land would be occupied by Ellesmere Transport Co Limited and Leeston Seeds Limited which by their inherent nature do not require intensive development.

Issues currently exist relating to storm water and flooding vulnerability. Regarding expansion it has been noted that growth to the east should be precluded to avoid any adverse reverse sensitivity effects on the Leeston Wastewater Treatment Plant and Leeston Gun Club. Growth the north-west should also be excluded to avoid any further storm water discharges entering Leeston Creek. Furthermore, there are areas of potentially contaminated land in this direction.

This report identifies similar findings to the *Ellesmere Area Plans Assessment – Draft* in that a small amount of Business 1 and Business 2 zoned land may be required. Additional land would provide more flexibility for development but it does not appear necessary in the short to medium term. Growth of Business 2 zoned land could be positioned to the south-eastern side of the Business 2 zoning on Selwyn District Council's Beethams Road farm.

DARFIELD:

Malvern Area Plans Assessment – Draft

This report identifies the impacts of Christchurch and Rolleston on Darfield. Given the close proximity of these two centres, Darfield has not fully developed commercial and retail sectors to provide a full-service role. A large proportion of resident spending occurs within Christchurch with only a minority of spend from each of the Malvern's towns are directed to Darfield.

Malvern Area Plan

The Plan examines and estimates the likely population growth, together with the anticipated projected retail, commercial and industrial premises required to service Darfield through to 2031. In regard to Business 1 zoned land, currently existing is 18.8 hectares. A shortfall of 3.2 hectares has been identified, although some of this could be supported in existing businesses, leaving a shortfall of less than 2 hectares. It is unlikely this land will be utilised until the 2020's.

Business 2 zoned land is spread across three different areas within Darfield and comprises 59.3 hectares. This report identifies nearly 23 hectares of available industrial land including vacant and underutilised lots. This land will sufficiently cater for the predicted 10 hectares of Business 2 zoned land required by 2031.

This report identifies similar findings to the *Malvern Area Plans Assessment - Draft – dated July 2015* in that a small amount of Business 1 zoned land may be required before 2031. There is in fact an excess of Business 2 zoned land.

CONCLUSIONS

The townships of Leeston and Darfield currently supply the essential services which are required to facilitate the surrounding rural area, as well as the residents within each town. Although the populations of both Leeston and Darfield are projected to increase to year 2031, the rural area surrounding these towns is unlikely to further intensify their agricultural productivity. Therefore, we would not expect the essential services usually associated with townships of this size to require expansion to the level that would necessitate increases to the existing supply of commercial and industrial land.

In both Leeston and Darfield there is available land zoned for retail, commercial and industrial use which is suitable for development. There are also a number of sites which are not used to their full potential, with future redevelopment likely to occur when and if demand makes these potential ventures feasible. Some sites comprise vacant buildings or houses that are used for residential purposes.

We have analysed towns with comparable current and projected characteristics to Leeston and Darfield from within the South Island. We compiled a list of the services that these towns provide and considered their proximity to the nearest major towns where there are more comprehensive commercial, retail and industrial facilities. As expected, there tends to be more retail and hospitality services in towns which are on State Highways. By looking at a range of towns which have similar or potentially similar characteristics, we can confirm that the townships of Darfield and Leeston currently provide the necessary key services.

The survey results from the "Leeston and Darfield Business Project/Survey" conducted by the Selwyn District Council were inconclusive due to the low numbers of responses. The general consensus amongst survey participants is that demand is not yet at a point where the return from development is feasible and our conversation with Mr Johnston of Johnston Civil reinforced this.

FordBaker Valuation have searched for land sales, land available for development, and improved commercially zoned sales. Our findings conclude that there is limited vacant Business 1 zoned land readily available in Leeston and Darfield, however many of the Business 1 zoned properties are not currently being utilised for Business 1 type activities.

Our research of improved Business 1 zoned sales revealed that since the beginning of 2010 there have been 19 transactions in Leeston and 17 transactions in Darfield. This indicates that Business 1 zoned properties are frequently available to the market, however we note that many of these sales comprise residential properties which presently remains their highest and best use.

Business 2 zoned land comprises industrial land and whilst Darfield has approximately 19.7 hectares available for development, it is somewhat more limited in Leeston where there is approximately 1.2 hectares. It would be difficult for sites in Leeston or Darfield to compete on an even footing with Rolleston. The major difference would be land cost (together with servicing costs in Darfield) however build costs will be relatively comparable. The availability of labour/staff at Rolleston is more plentiful and is likely to improve with continued expansion and with the completion of the Southern Motorway. Industrial development in Leeston and Darfield will likely remain limited to those enterprises servicing the surrounding rural community. This is supported by our analysis of townships with larger populations, for example industrial land available for development in Washdyke (Timaru) has reduced the demand and need for further industrial development in neighbouring Temuka.

The essential service needs of Darfield and Leeston are currently being met without the need for further rezoning. Nearby major towns of Rolleston, Ashburton and Christchurch have significant tracts of available business zoned land and therefore provide for a more diverse range of development options. These alternatives generally have significant locational and synergetic advantages compared with Leeston and Darfield; clearly the scale remains at the main centres. We are of the opinion that there is no requirement for any additional business zoned land, either retail, commercial or industrial, to be made available at either centre now or by year 2031 based on the current population, population projections, and our analysis of the services provided in comparable townships.

We trust this report is satisfactory for your purposes, however should you wish to discuss it or require any further information, please do not hesitate to contact the writer.

Yours faithfully
FORDBAKER VALUATION LIMITED

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ANNA RADOVONICH – BLPM
GRADUATE VALUER

Appendix B – Letters/Emails from Leeston land and business owners.

Cr Pat McEvedy
C/- 2 Norman Kirk Drive
Rolleston 7643

Sent via email to: *pat.mcevedy@selwyn.govt.nz*

2 August 2018

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BASELINE GROUP
CHRISTCHURCH

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Dear Pat

Availability of Commercial and Industrial Land in Leeston

Thank you for your time on the phone earlier today, discussing the availability (or lack of) commercially zoned land in Leeston. As I am sure you are aware, there is a very limited supply of commercial property (Business 1) available in the township, and much of it is occupied by residential buildings. The industrial area (Business 2) is located on Station Street, which is interspersed with retail and service activities as well as industrial workshops. There is an extremely limited area of Business 1 and 2 zoning, and for the large part, it is built on.

Over the years, our office has had several enquiries about establishing an industrial business in Leeston. The general instruction from our clients has been for us to prepare a resource consent application that allows the business to establish on a Rural site, which is seen as the only option given the unavailability of appropriately zoned land in the township. In fact, our company currently has a resource consent lodged with Council requesting a resource consent for that very thing.

New Zealand Census figures show that in the 10 years between 1996 and 2006 the population of Leeston decreased slightly and then increased from 2001, resulting in a net increase of 140 people. The 2013 census showed an increase of 207 people, or 15.9 percent, since the 2006 census. We are now awaiting the results from the 2018 census, and so no information is available from Statistics NZ on Leeston's current population. However, when I provided my census information in 2013 while living in the Monticello development in Leeston, there were very few other occupied dwellings in the area. Since 2013, the Monticello subdivision has completely filled up, as well as the Millbridge and Birdling Brook developments. In my opinion, there has been significant and unprecedented growth in the Leeston township.

Council states in the Ellesmere Area plan that the 2015 population of Leeston was 2,275 people (813 households), with this population projected to grow to a 2031 population of 3,402 people (1,215 households). This represents an estimated increase of 1,127 people (402 households) from 2015 to 2031. I note that this is a projected growth of 276% for the period 1996 - 2031.

Bearing this in mind, as well as the Stats NZ information and my own observations (personally and professionally), I was quite staggered when you informed me this morning that Council had obtained a report that states that there is no need to provide any additional industrial or commercial land. I recall reading a report dated in the early 2000's that Council commissioned, which said that Leeston would experience negative growth into the future, and this was touted as the reason that Council needed to move their chambers away from the town. It is fairly evident that that report was wrong. Council had this sort of "there will be no need for new land" attitude this with the draft Ellesmere Area Plan too, and I think that the public was very successful in proving to Council that this was simply incorrect. The only conclusion I can draw from these examples is that Council regularly underestimates the township's propensity to want to grow, and that in the face of overwhelming evidence of population growth, Council would rather spend money on reports to prove that they don't need to spend money on rezoning.

In the absence of having access to this report, I suspect that one of the reasons that this report generated a "no new land needed" opinion was due to the large overall area of land that currently is zoned Business 1 and 2. But perhaps the report did not take into account that there are long established large footprint buildings on many of the sites, as well as a playground and carpark on one of the others. The land is perhaps not well utilised, but that's because the area doesn't just knock buildings over and redevelop sites like you can do in major centres. Perhaps some useful information could be gleaned by asking all owners of recently consented commercial activities in a rural zone why they chose to locate in a zone where they needed resource consent? From my experience talking to Leeston locals, they are likely to respond that there was no appropriate zoned land for them to move to in Leeston.

In summary, it is my opinion that more Business 2 zoned land needs to be allowed for on Station Street, perhaps opposite the intersection of Cunningham and Station Streets. This is the area shown in the Ellesmere Area Plan as LEE A3 and it could accommodate a further 5 hectares of industrial development. While this isn't the only area that should be considered, it is at least the first steps towards accommodating the 276% population growth that has been forecast between 1996 and 2031.

Please feel free to contact the writer on 03 339 0401 or via email *john@blg.nz* if you have any questions.

Yours faithfully,
Baseline Group Ltd

John Ferguson
Director

From:	Cr Pat McEvedy
To:	Benjamin Rhodes
Cc:	Jessica Tuilaepa; Tim Harris; Cr Murray Lemon
Subject:	Fwd: Leeston Industrial/Commercial land
Date:	Thursday, 2 August 2018 6:03:41 PM

Hi Ben,

FYI,

Regards Pat

Sent from my iPad

Begin forwarded message:

From: Lloyd Clausen <Lloyd.Clausen@oriongroup.co.nz>
Date: 2 August 2018 at 3:59:30 PM NZST
To: "Pat McEvedy " <pat.mcevedy@selwyn.govt.nz>
Cc: "Helen Crowhen " <helenrcrowhen@gmail.com>
Subject: Leeston Industrial/Commercial land

Hi Pat
After talking to you regarding the Industrial/ Commercial zoned land in Leeston these are my comments.
The committee for years has been trying to get more land for this, Station St is fully utilised except for one section which is in a sale process now.
While the houses on the north side of Station St are zoned Business they have in some cases been renovated after earthquake damage and are also unsuitable for the light industrial demand which is most evident in the Leeston/ Ellesmere community.
Unless we provide land for business the town will stagnate and will lose its community.
Previously the Bell land between Station St and Beethams Rd has been looked at because of the easy access off both roads also we need secure land next to The Ellesmere Waste Water treatment plant for when we next need to extend our consent and to stop any reverse sensitivity submissions.
The town needs these businesses to provide viable employment opportunities for our community to keep our town vibrant and a great place to live.
Regards
Lloyd

Lloyd B Clausen
Chairman
Leeston Community Committee

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Mob: 0274 360 137
lloyd.clausen@oriongroup.co.nz

****

COCHRANES
your farm machinery specialist

CASE AGRICULTURE

2 August 2018

Dear Sir/Madam

Shortage of Industrial Zoned land – Leeston Township

In discussion with Councillor Pat McEvedy, I advised him that over the last 10-12 years I have been approached by business owners wanting to invest in the town and I have noticed that there were problems with the lack of available industrial-zoned sites in the township.

This has resulted in lost business opportunities in Leeston – which has effectively stalled the growth of Leeston township.

It has now come to a head in my view – there is effectively no appropriate industrial zoned land in Leeston.
This in turn has exacerbated the transportation issues – resulting in more vehicles on the road in and out of Leeston.

I believe there are current opportunities available to purchase land and zone it industrial, please do not let these business opportunities be wasted and not come to fruitition.

It is also my firm belief if there were more business opportunities in Leeston – this would create more employment in the town – and in turn this would also relieve the transportation issues we are currently experiencing.

I feel that it is imperative to have new industrial zoned areas provided within the new town plan. Selwyn District Council needs to future-proof the Leeston township and surrounding area.

Kind Regards

BJ Cochrane

Bruce Cochrane

Cochranes of Canterbury Ltd
www.cochranes.net.nz

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Phone 03 314 9055
Fax 03 314 9511
59 Carters Road

Timaru
Phone 03 688 2179
Fax 03 688 2756
PO Box 2053

From: Cr Murray Lemon
To: Benjamin Rhodes; Tim Harris; Jessica Tuilaepa; Cr Pat McEvedy
Subject: Business zoned land
Date: Thursday, 2 August 2018 6:24:39 PM

Hi Ben
I had a chat today to Gary Roxburgh and Brad Beswick who are Directors of the Leeston based Business Nairn Electrical who employ over 50 people from their Leeston and Rangiora bases They work predominantly in the Rural sphere but are also the Electrical Contractors of choice for SDC and Waimakariri DC.
Gary is of the option that the demand for more Industrial / Commercial land supply to support growth in Leeston will be necessary and that what was known as the Watson block

is the logical site as well as providing potential growth for the current Waste water site.
Gary also owns the building on Station Street formerly occupied by Itm now leased by Build link. He stated that the interest from the Market to this site being vacant meant that he could have rented it several times over.
Hope this helps inform the debate.
Regards Murray Lemon

Sent from my Sony Xperia™ smartphone

MATSON & ALLAN
REAL ESTATE LIMITED

2/8/2018

Mr P McEvedey
c/o Selwyn District Council
Rolleston

Dear Pat,

Thanks for your time today and the opportunity to discuss the availability of light industrial land in and around the Leeston township.

It has been a subject we discuss from time to time within our office and the consensus is there is a definite need for some more industrial zoned land on the fringe of the Leeston township.

As you are aware we have the suitably zoned Station Street which is largely occupied. There are several vacant sections there and we have approached the owners of those sections on several occasions as we have had genuine purchasers looking to locate a business in the Leeston area. The owners of those sections have had no appetite for selling to date.

I am of the firm belief that Leeston is very much ready for some industrial land opportunities and believe a rezoning or development into suitably sized serviced parcels would be very well received.

Should you require any further information or want to arrange a meeting to discuss please do not hesitate to contact me.

Kind Regards
Stephan Knowler AREINZ
Matson and Allan Real Estate Ltd REAA 2008

Matson & Allan Real Estate Limited, Licensed under the REA Act 2008
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Murray & Bev Bell,
C/- M&B Bell Family Trust,
102 Opihi Gorge Rd
Fairlie

Pat McEvedy,
C/- Selwyn District Council,
Rolleston

To Whom it May Concern :

Re: 483 Volckman Road, Leeston

As owners of the property at 483 Volckman Rd, Leeston, which boundaries Station Street on the west side, we have had a number of enquiries from various businesses, - from engineering, to civil engineering, to building, to a drilling company – all seeking land in which they could base themselves adjacent to Leeston.

We see this as a natural extension to the existing commercially zoned land on Station Street. Unfortunately we have been unable to meet this demand, as the zoning of the existing land is zoned Outer Plains. If the land is re-zoned, we see this as very advantageous for the future economic health of Leeston and its workforce.

We have previously submitted to the Leeston town planning, raising these issues. We see this as a pressing community need to enhance the future viability for this being a vibrant service town to the surrounding areas. (We ourselves have had two of our children and families shift to Leeston and make that their base for their building businesses.)

Many thanks

Murray and Bev Bell
Ph 027 2739797

Appendix C – Selwyn Capacity for Growth Model – Ellesmere and Malvern Township Results

C(i) Full Capacity Analysis - IncludingVancant and Vancat Potential Capcity

Floor space Required (m2)

Business 1

	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Darfield	28,487	28,487	28,487	28,487	28,487	28,487	28,487	314	1,202	2,031	2,532	3,001	3,482	4,023	28,173	27,285	26,456	25,955	25,486	25,005	24,464
Leeston	20,340	20,340	20,340	20,340	20,340	20,340	20,340	232	888	1,500	1,870	2,217	2,572	2,971	20,108	19,452	18,839	18,469	18,123	17,768	17,368
Southbridge	5,905	5,905	5,905	5,905	5,905	5,905	5,905	219	836	1,414	1,763	2,089	2,424	2,800	5,686	5,069	4,491	4,142	3,816	3,481	3,105
Dunsandel	2,616	2,616	2,616	2,616	2,616	2,616	2,616	45	172	290	362	429	497	575	2,571	2,445	2,326	2,255	2,188	2,119	2,042
Coalgate/Castle Hill	36,793	36,793	36,793	36,793	36,793	36,793	36,793	1,152	4,411	7,455	9,295	11,017	12,781	14,766	35,640	32,382	29,338	27,498	25,776	24,012	22,027

Business 2

	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Darfield	172,791	172,791	172,791	172,791	172,791	172,791	172,791	6,964	12,961	6,796	8,061	9,270	9,003	10,334	165,827	159,830	165,995	164,730	163,521	163,787	162,457
Leeston	23,862	23,862	23,862	23,862	23,862	23,862	23,862	1,588	2,955	1,549	1,838	2,113	2,807	3,221	22,275	20,907	22,313	22,024	21,749	21,055	20,641
Southbridge	12,327	12,327	12,327	12,327	12,327	12,327	12,327	938	1,747	916	1,086	1,249	1,496	1,716	11,389	10,581	11,411	11,241	11,078	10,832	10,611
Doyleston	2,324	2,324	2,324	2,324	2,324	2,324	2,324	254	473	248	294	338	440	505	2,070	1,851	2,076	2,030	1,986	1,884	1,819
Dunsandel	5,373	5,373	5,373	5,373	5,373	5,373	5,373	137	255	134	159	183	334	384	5,236	5,117	5,239	5,214	5,190	5,038	4,989
Coalgate/Castle Hill	23,123	23,123	23,123	23,123	23,123	23,123	23,123	515	958	502	596	685	861	988	22,608	22,165	22,621	22,527	22,438	22,262	22,135

Land Area required (ha)

Business 1

	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Darfield	5.50	5.50	5.50	5.50	5.50	5.50	5.50	0.06	0.23	0.39	0.49	0.58	0.67	0.78	5.44	5.27	5.11	5.01	4.92	4.83	4.72
Leeston	3.93	3.93	3.93	3.93	3.93	3.93	3.93	0.04	0.17	0.29	0.36	0.43	0.50	0.57	3.88	3.75	3.64	3.56	3.50	3.43	3.35
Southbridge	1.14	1.14	1.14	1.14	1.14	1.14	1.14	0.04	0.16	0.27	0.34	0.40	0.47	0.54	1.10	0.98	0.87	0.80	0.74	0.67	0.60
Dunsandel	0.51	0.51	0.51	0.51	0.51	0.51	0.51	0.01	0.03	0.06	0.07	0.08	0.10	0.11	0.50	0.47	0.45	0.44	0.42	0.41	0.39
Coalgate/Castle Hill	7.10	7.10	7.10	7.10	7.10	7.10	7.10	0.22	0.85	1.44	1.79	2.13	2.47	2.85	6.88	6.25	5.66	5.31	4.98	4.63	4.25

Business 2

	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Darfield	38.77	38.77	38.77	38.77	38.77	38.77	38.77	1.56	2.91	1.52	1.81	2.08	2.02	2.32	37.20	35.86	37.24	36.96	36.69	36.75	31.36
Leeston	5.35	5.35	5.35	5.35	5.35	5.35	5.35	0.36	0.66	0.35	0.41	0.47	0.63	0.72	5.00	4.69	5.01	4.94	4.88	4.72	3.98
Southbridge	2.77	2.77	2.77	2.77	2.77	2.77	2.77	0.21	0.39	0.21	0.24	0.28	0.34	0.39	2.56	2.37	2.56	2.52	2.49	2.43	2.05
Doyleston	0.52	0.52	0.52	0.52	0.52	0.52	0.52	0.06	0.11	0.06	0.07	0.08	0.10	0.11	0.46	0.42	0.47	0.46	0.45	0.42	0.35
Dunsandel	1.21	1.21	1.21	1.21	1.21	1.21	1.21	0.03	0.06	0.03	0.04	0.04	0.08	0.09	1.17	1.15	1.18	1.17	1.16	1.13	0.96
Coalgate/Castle Hill	5.19	5.19	5.19	5.19	5.19	5.19	5.19	0.12	0.21	0.11	0.13	0.15	0.19	0.22	5.07	4.97	5.07	5.05	5.03	4.99	4.27

C(ii) Vacant Capacity Analysis - Vancat Potential Capcity included after 10 years

Floor space Required (m2)	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Business 1																					
Darfield	16,386	16,386	28,487	28,487	28,487	28,487	28,487	314	1,202	2,031	2,532	3,001	3,482	4,023	16,072	15,184	26,456	25,955	25,486	25,005	24,464
Leeston	2,915	2,915	20,340	20,340	20,340	20,340	20,340	232	888	1,500	1,870	2,217	2,572	2,971	2,683	2,027	18,839	18,469	18,123	17,768	17,368
Southbridge	521	521	5,905	5,905	5,905	5,905	5,905	219	836	1,414	1,763	2,089	2,424	2,800	302	0	4,491	4,142	3,816	3,481	3,105
Dunsandel	138	138	2,616	2,616	2,616	2,616	2,616	45	172	290	362	429	497	575	93	0	2,326	2,255	2,188	2,119	2,042
Coalgate/Castle Hill	32,276	32,276	36,793	36,793	36,793	36,793	36,793	1,152	4,411	7,455	9,295	11,017	12,781	14,766	31,124	27,865	29,338	27,498	25,776	24,012	22,027
Business 2																					
Darfield	137,154	137,154	172,791	172,791	172,791	172,791	172,791	6,964	12,961	6,796	8,061	9,270	9,003	10,334	130,190	124,193	165,995	164,730	163,521	163,787	162,457
Leeston	3,994	3,994	23,862	23,862	23,862	23,862	23,862	1,588	2,955	1,549	1,838	2,113	2,807	3,221	2,407	1,040	22,313	22,024	21,749	21,055	20,641
Southbridge	5,336	5,336	12,327	12,327	12,327	12,327	12,327	938	1,747	916	1,086	1,249	1,496	1,716	4,398	3,589	11,411	11,241	11,078	10,832	10,611
Doyleston	0	0	2,324	2,324	2,324	2,324	2,324	254	473	248	294	338	440	505	0	0	2,076	2,030	1,986	1,884	1,819
Dunsandel	0	0	5,373	5,373	5,373	5,373	5,373	137	255	134	159	183	334	384	0	0	5,239	5,214	5,190	5,038	4,989
Coalgate/Castle Hill	11,282	11,282	23,123	23,123	23,123	23,123	23,123	515	958	502	596	685	861	988	10,768	10,325	22,621	22,527	22,438	22,262	22,135

vacant potential comes on baord

vacant potential comes on baord

Land Area required (ha)	Capacity							Forcast Demand							Capacity Remaining						
	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048	2018	2023	2028	2033	2038	2043	2048
Business 1																					
Darfield	3.16	3.16	5.50	5.50	5.50	5.50	5.50	0.06	0.23	0.39	0.49	0.58	0.67	0.78	3.10	2.93	5.11	5.01	4.92	4.83	4.72
Leeston	0.56	0.56	3.93	3.93	3.93	3.93	3.93	0.04	0.17	0.29	0.36	0.43	0.50	0.57	0.52	0.39	3.64	3.56	3.50	3.43	3.35
Southbridge	0.10	0.10	1.14	1.14	1.14	1.14	1.14	0.04	0.16	0.27	0.34	0.40	0.47	0.54	0.06	0.00	0.87	0.80	0.74	0.67	0.60
Dunsandel	0.03	0.03	0.51	0.51	0.51	0.51	0.51	0.01	0.03	0.06	0.07	0.08	0.10	0.11	0.02	0.00	0.45	0.44	0.42	0.41	0.39
Coalgate/Castle Hill	6.23	6.23	7.10	7.10	7.10	7.10	7.10	0.22	0.85	1.44	1.79	2.13	2.47	2.85	6.01	5.38	5.66	5.31	4.98	4.63	4.25
Business 2																					
Darfield	30.77	30.77	38.77	38.77	38.77	38.77	38.77	1.56	2.91	1.52	1.81	2.08	2.02	2.32	29.21	27.86	37.24	36.96	36.69	36.75	31.36
Leeston	0.90	0.90	5.35	5.35	5.35	5.35	5.35	0.36	0.66	0.35	0.41	0.47	0.63	0.72	0.54	0.23	5.01	4.94	4.88	4.72	3.98
Southbridge	1.20	1.20	2.77	2.77	2.77	2.77	2.77	0.21	0.39	0.21	0.24	0.28	0.34	0.39	0.99	0.81	2.56	2.52	2.49	2.43	2.05
Doyleston	0.00	0.00	0.52	0.52	0.52	0.52	0.52	0.06	0.11	0.06	0.07	0.08	0.10	0.11	0.00	0.00	0.47	0.46	0.45	0.42	0.35
Dunsandel	0.00	0.00	1.21	1.21	1.21	1.21	1.21	0.03	0.06	0.03	0.04	0.04	0.08	0.09	0.00	0.00	1.18	1.17	1.16	1.13	0.96
Coalgate/Castle Hill	2.53	2.53	5.19	5.19	5.19	5.19	5.19	0.12	0.21	0.11	0.13	0.15	0.19	0.22	2.42	2.32	5.07	5.05	5.03	4.99	4.27

vacant potential comes on baord

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